



Cisco Commerce



Deals and Quotes

User Guide

Cisco Proprietary

Note: This document is no longer being actively updated as of August 2019. Please contact crc-training@cisco.com if an update is requested.

*** Includes updates through March 2019. ***

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1 Conventions Used in this Document

Keyboard sequences you press are shown in bold. Example: “Press **Tab** to move to the next field.”

Menu or sub-menu paths are separated by a “>”. Example: “**Select Intended Use > Managed Service.**”

Tabs you click have no special formatting. Example: “Click the **Items** tab.”

Buttons you click on the screen are shown in bold. Example: “Click **Continue.**”

The labels on radio buttons, drop-down menus, checkboxes, and fields that correspond have no special formatting. Examples: “Click the **Yes radio button.**” “Click the **Service Program drop-down** menu.”

When there are multiple ways of accomplishing a specific task, preferred methods are highlighted as follows:



The blue circle around a lower case “i” means *reader take note*. Notes contain helpful suggestions or reference to material not covered in the manual.

For example:



Best Practice: Search for an address before creating a new one. Add a shipping address only if the address is not found.

Active hyperlinks to other documents or within the same document are shown in blue (RGB: 0, 0, 255) and underlined. Example: “Additional information is available in the [Getting Started with Cisco Commerce User Guide](#).” or “See [Creating a Deal](#) for more details.”

In sections describing a process that starts from somewhere other than the Cisco Commerce homepage, a process flow indicates how to get there. For example, you add products to a quote in the Quote tab, which means you would have already created the quote through the Deals & Quotes header tab. The following illustration would therefore display at the beginning of the Add Products to a Quote section.



2 Cisco Commerce Deals and Quotes Workflow

To understand how the deals and quotes functionality fits within Cisco Commerce and the Cisco sales structure, see the [Getting Started with Cisco Commerce User Guide](#).

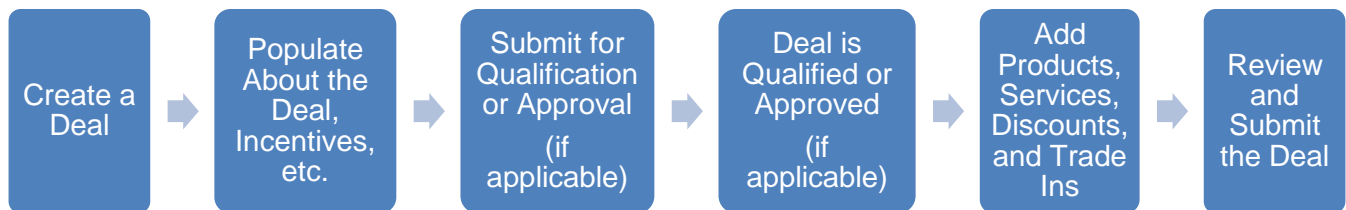
In Cisco terms, deal is the overall agreement between you and Cisco that enables you to purchase goods or services at a discounted price. The quote is the “output” (the compilation of configured

products and services with applicable discounts and incentives, which include programs and promotions) that you can convert to an order for purchase.



Best Practice: Register deals to take advantage of Cisco’s pricing model with stackable, incremental discounts that allow multiple incentives (programs and promotions) on a single deal, and reduce your dependency on non-standard transactions.

Create a deal when you need to apply incentives that require additional approval

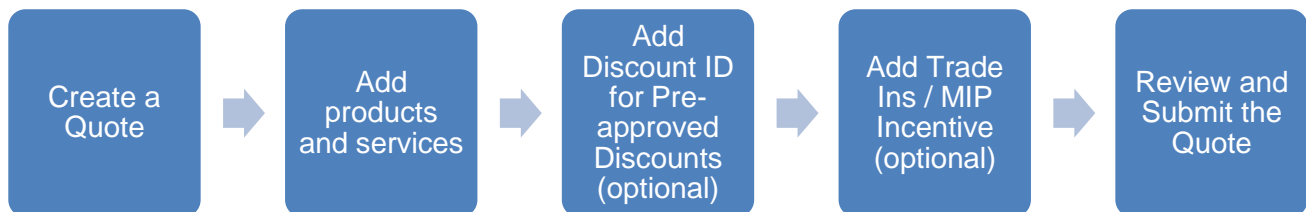


Deals Workflow



Note: You can get the best price for Cisco solutions by stacking multiple eligible incentives.

Create a quote for standard discounts or pre-approved promotions (requiring no additional approval). In this case, quote will be automatically approved



Quotes Workflow



Note: Despite this distinction, you can create deals with or without incentives and, incentives may or may not require qualification.

2.1 Using Options on the Deals & Quotes Tab

In Cisco Commerce, the Deals & Quotes tab allows you to:

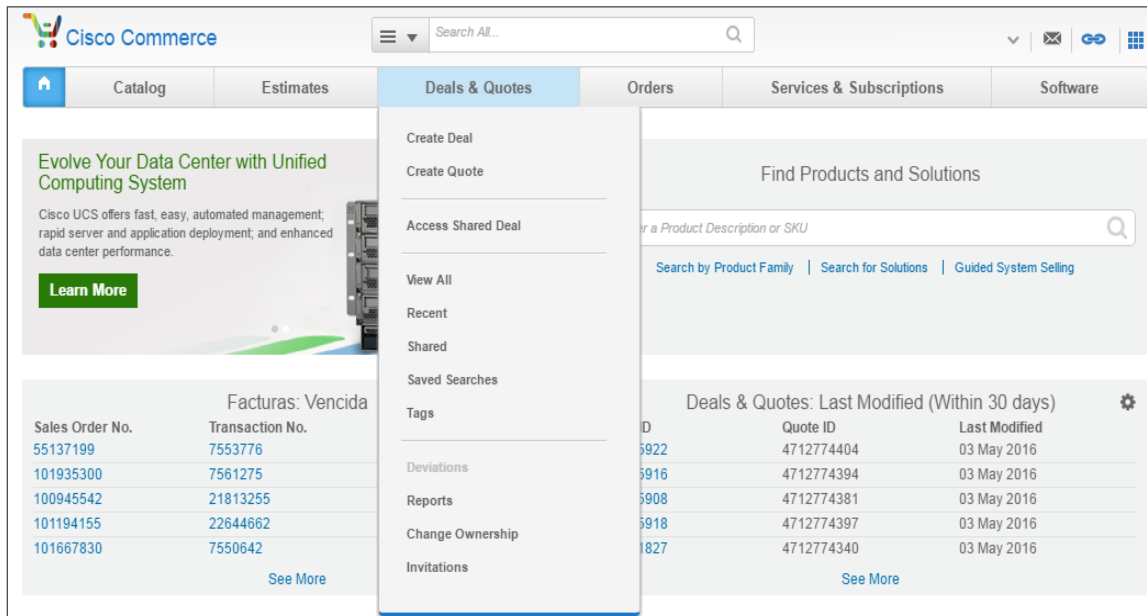
Create and manage deals and quotes

Access shared deal

View all or specific deals and quotes

Tag deals and quotes

Manage reports



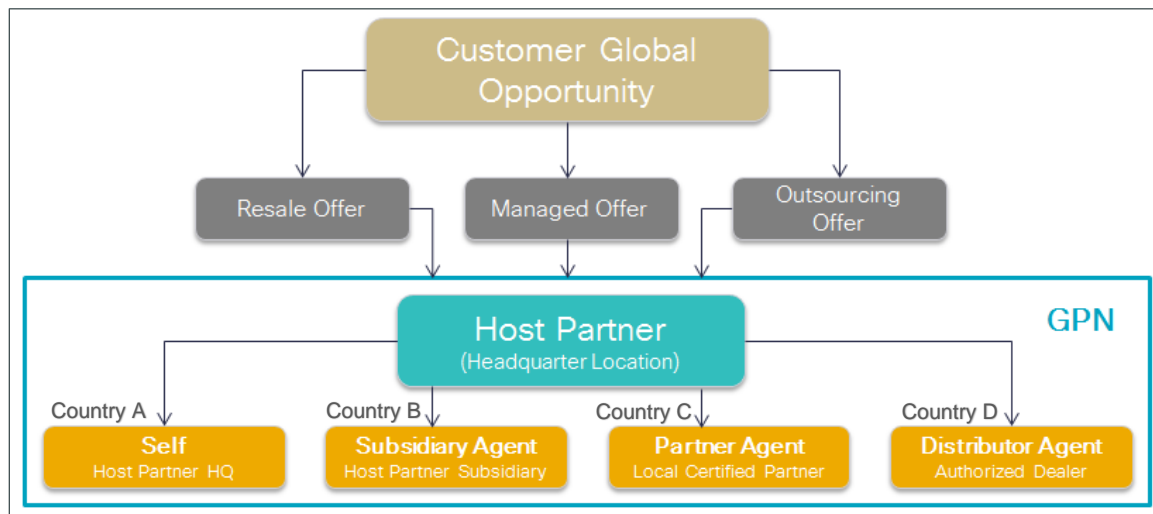
Options on the Deals & Quotes Tab

2.2 Global Partner Network

The Global Partner Network (GPN) enables you to fulfill key customers' global opportunities by leveraging the capabilities of other Cisco partners and distributors to serve locations that you do not normally serve.

Host partners (you) can determine how best to use GPN to serve opportunities for resale, managed, or outsourcing offers in multiple countries.

Host partners select an agent partner (self, subsidiary agent, partner agent, or distributor agent) for each landing country. Through GPN, host partners are able to drive the end-to-end deal process using the global deal framework that enables the creation of related local deals.



Global Partner Network Overview

The GPN helps the host Partner fill customer needs across multiple countries all over the world.

The global deal framework is used to manage the related local deal components. The global deal ID is not an orderable ID. The local deal provides the orderable ID for a particular landing country customer site. Refer to the [Global Partner Network](#) page for more details.

See [Creating a Global Deal](#) to create a global deal.

3 Creating a Deal

You can create deals with or without incentives (programs and promotions). Incentives may or may not require qualification. Deals can have trade-ins, which will display as Migration Incentive Program (MIP) discounts, and if eligible, you can opt for Try and Buy.

To use an incentive, follow the steps for creating a deal. Create a quote when only pre-approved programs and promotions will be applied (see [Creating a Quote](#)).

To create a deal, complete the following steps:

1. From the Deals & Quotes tab on Cisco Commerce homepage, click **Create Deal**. The Create a Deal page displays.
2. Click on the **Deal Name** field and enter a deal name.
3. If the deal involves an end customer buying in multiple countries or is being fulfilled by multiple partner types, check the appropriate **checkbox**. Global deals must be created and qualified/approved prior to creating local deals. See [Creating a Global Deal](#).
4. Populate **Partner**, **End Customer**, and **Cisco Channel Account Manager (CAM)** information.

5. Click **Create Deal**.

Create a Deal * Required Field

⚠️ If your deal involves an End Customer buying in multiple countries, or being fulfilled by multiple Partner types (Self, Subsidiary, Agent or Distri as Agent) in a country, check the applicable box below and refer to this [Global Deal Training Guide](#).
If you are not creating a Global Deal, simply click the "Create Deal" button to continue. (Note: Not applicable for Outsourcing deals).

Please click if you want to create : Sw-Referral Deal ⓘ

Deal Name * 2 Create this Deal with Lead

Check this box to create and register a Global Deal 3
 Create a Local Component of your Global Deal 4

Note: Global Deal needs to be created and Qualified/Approved prior to creating Local Deals.

Cisco Channel Account Manager (CAM)* 4 | Cisco Account Manager (AM) (To be assigned by Cisco.) | Buying on behalf of ⓘ

Find your CAM with the CAM Locator.

Suggested Account Manager
Email @cisco.com

Please suggest if you are already working with AM for this Deal

CONTACT & ADDRESSES

End Customer * 5

Partner * ALEXANDER OPEN SYSTEMS, INC

+ Select an End Customer
English | Chinese | Japanese | Korean
NEW Faster Search (English Only)

First Name Last Name *
 Title *
 Phone Number *
 Email Address *
 Company Website *

Note: If the deal being created is not global, click **Create Deal** without checking either checkbox available under step 3.

- The Deals and Quotes page displays. The **Quote Name**, **Deal ID** and **Quote Number** detail displays on the page. The details added under Create Deal page are populated under Who's Involved tab.
- Continue to [Selecting the Deal Options](#).

QUOTE NAME Test_Ranjan Global Price List in US Dollars (USD)				
DEAL ID 139358434	QUOTE NUMBER ⓘ 4719719033	QUOTE STATUS NOT SUBMITTED Incentive(s) Status	SMART ACCOUNT ASSIGNMENT Assign Smart Account	EXPIRY DATE N/A
<div style="display: flex; justify-content: space-between;"> Deal Quote Review Approvals Order </div>				
Who's Involved About the Deal Incentives Questionnaire				<input type="button" value="Save"/> <input type="button" value="Save and Continue >"/>

* Required Field

Deals and Quotes Page

3.1 Populating Who's Involved



On the Create a Deal page, populate partner, end customer, and Cisco CAM information. The information populated here will display on the Deals and Quotes page: Who's Involved tab.

Create a Deal Page

Note: Be aware that there are different parameters for setting end customer address and install site depending on region.



For example, in Canada, the end customer and install site addresses cannot be a P.O. box. In the US, the end customer address should be the company headquarters address, which could be a P.O. box; however, the install site should be the actual address.

3.1.1 Populating the Partner Section

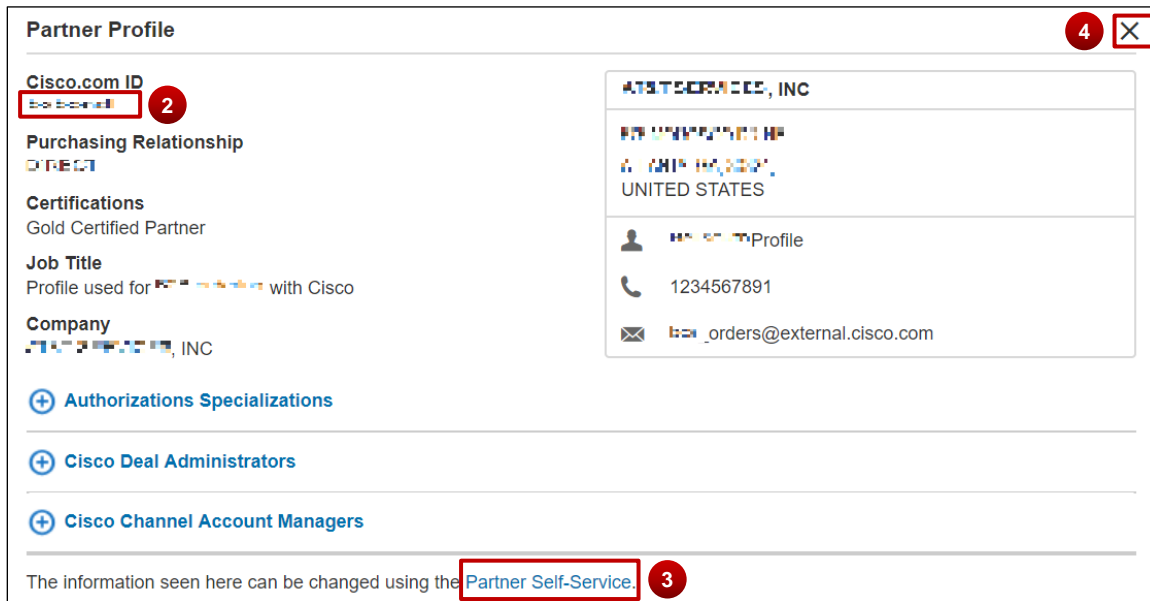
3.1.1.1 Viewing and Changing the Partner Profile

The partner name and address are populated by the system.

- To view or edit the partner information, click **View Partner Profile**. The Partner Profile dialog box displays.

Partner Section

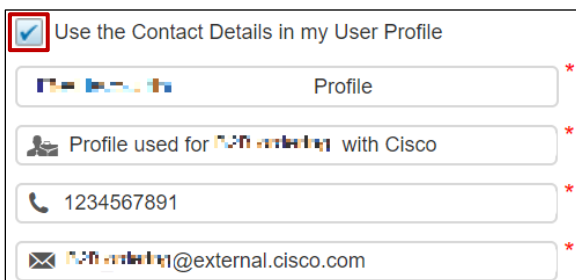
2. In addition to the information shown in this figure, the **Partner Profile** dialog box also displays the Contact names and e-mail addresses for the Cisco Deal Administrator and the Cisco Channel Account Managers.
3. To edit profile information, click **Partner Self-Service** at the bottom of the dialog box. The Partner Self-Service Tool displays in a new browser window.
4. Alternatively, click close 'X' to close the dialog box and return to the Create a Deal page.



Partner Profile Dialog Box

3.1.1.2 Viewing and Adding the Partner Contact

To automatically populate the Partner Contact section, check the **Use the Contact Details in my User Profile** checkbox.



Partner Contact Section

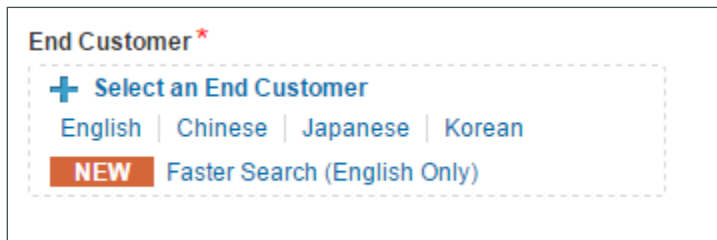
Alternatively, click each field and enter the appropriate information.

3.1.2 Populating the End Customer Section

3.1.2.1 Adding an End Customer

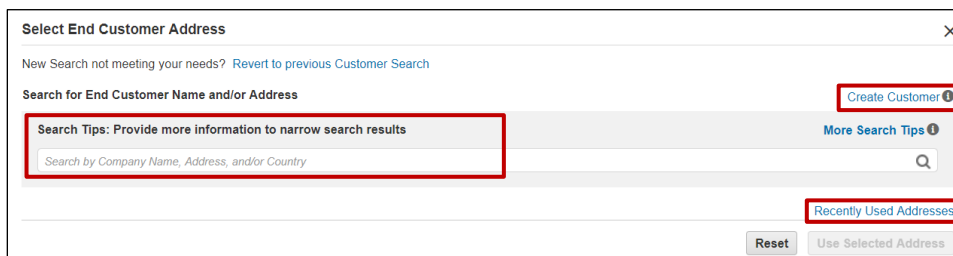
You can add an end customer in the following ways:

- Select from the Cisco Directory in preferred language, that is English, Chinese, Japanese, or Korean
- Click **Select an End Customer** to view and select from the recent end customers list



End Customer Section

- Alternatively, select **Faster Search (English Only)** to search, create or select recently used address



Faster Search Dialog Box

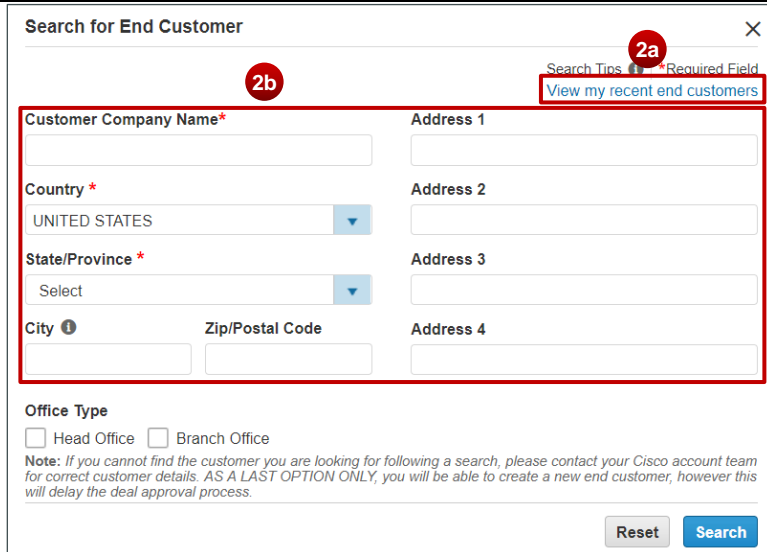
To add an end customer, complete the following steps:

1. From the End Customer section on Create a Deal page, click **English**, **Chinese**, **Japanese**, or **Korean** to search the Cisco directory in the respective language.
2. If you select Chinese, the system will translate addresses entered in Chinese to English and you will have to confirm or modify the translation. The Search for End Customer dialog box displays with search fields. There are two options for finding an existing end customer.
 - a) **View my recent end customers** link
 - b) Search by customer company name, country, city (optional), and state or province

Note: The billing country automatically populates in the Country drop-down menu.



If the desired address does not display as a result of a search, the option to create a new address displays on the Search for End Customer dialog box. See [Creating a New Customer Address](#).



Search End Customer Dialog Box

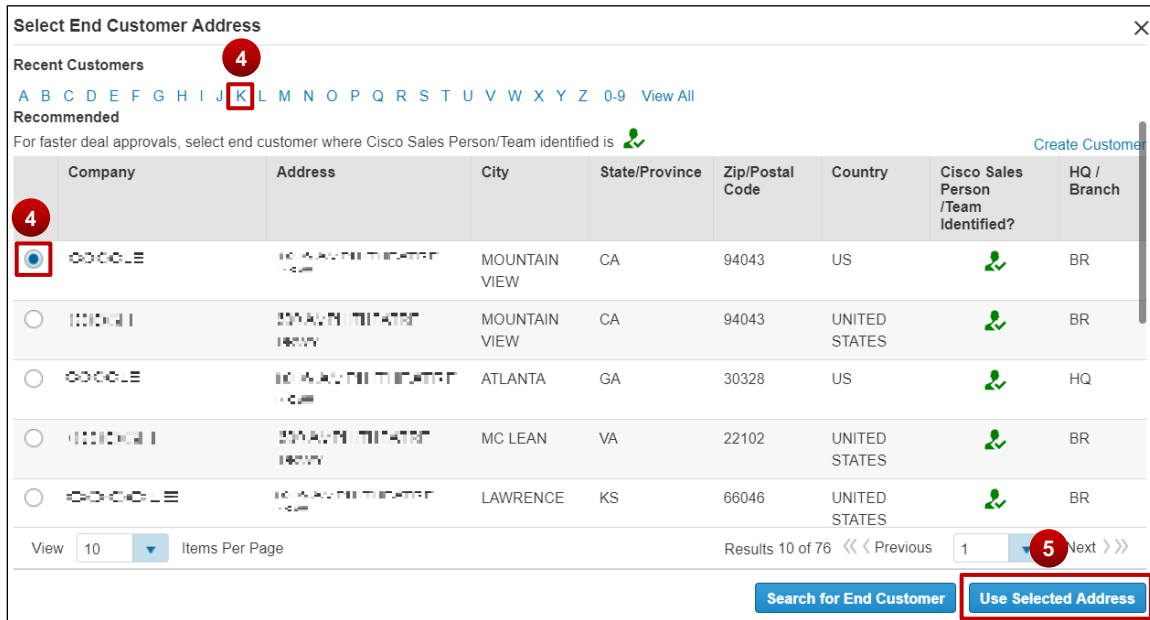
- To populate the fields using end customer information recently used in Cisco Commerce Deals & Quotes tab, click **View my recent end customers** (2a). Use this link if the end customer has been used before on a deal or a quote. The Select End Customer Address dialog box displays. The end customers will be sorted based on whether a Cisco Sales Person or Team has been identified.
- Click the appropriate **radio button**. The list can be narrowed by clicking the letter link that corresponds to the first letter of the company name.



Best Practice: Selecting an end customer entry with a green icon in the Cisco Sales Person/Team Identified? Column will route the deal directly to the identified Account Manager (AM), improving deal cycle time.

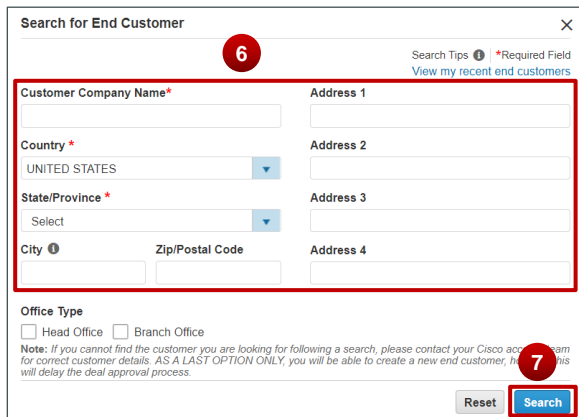
5. Click **Use Selected Address**.

The address populates in the End Customer section.



Select End Customer Address Dialog Box

6. Alternately, fill the appropriate parameters in the Search for End Customer dialog box, such as customer company name, country, city (optional), and state or province.
7. Click **Search**. The Select End Customer Address dialog box displays.



8. Click the **radio button** next to the appropriate customer.
9. Click **Use Selected Address**. The address populates in the End Customer section.



Note: The City field is optional. Click the City field and begin typing the name of the city; this field will present options in a drop-down menu after at least three characters are entered. Click the correct option.

3.1.2.1.1 Creating a New Customer Address

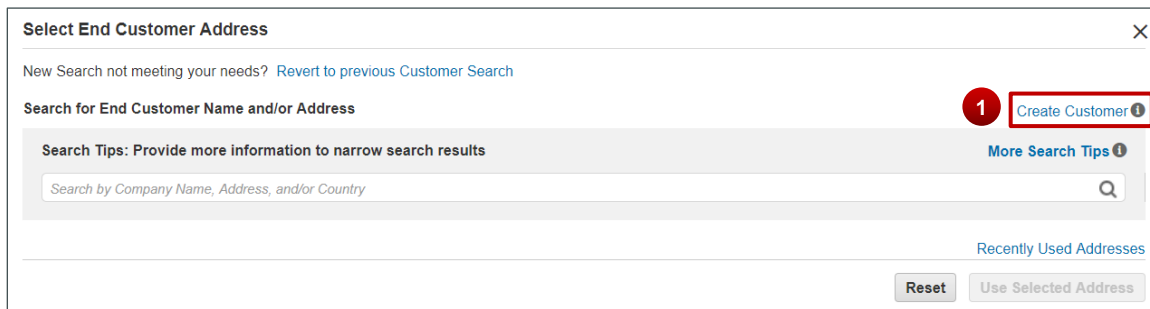
If the search for a customer address does not return the desired results, you can create a new customer address.



Note: Create a customer address only after verifying that the customer address does not already exist in the database. Use this only as a last option as this will delay the deal approval process.

To create a new customer address, complete the following steps:

1. Click **Faster Search (English only)**, and from the Select End Customer Address dialog box that displays, click **Create Customer**.



Search for End Customer: Create Customer

2. The **Create a New Address** dialog box displays.
3. Populate the appropriate information in the fields. Some of the fields are automatically populated from the original search. Click the appropriate fields and make changes if applicable.

- Click **Create Customer**. The Select End Customer Address dialog box displays. Cisco Commerce may generate a recommended address based on the information provided by you.

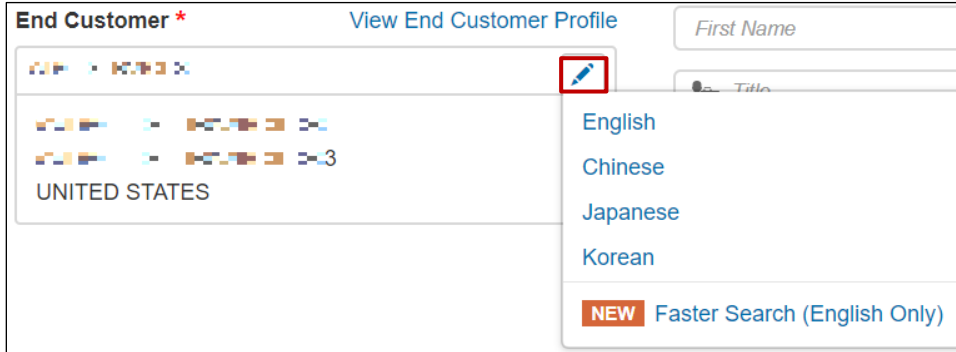
Create a New Address in the Cisco Directory Dialog Box

- Click the **radio button** to use the original information or the information provided by the system.
- Click **Use Selected Address**.

Select End Customer Address

3.1.2.2 Selecting a Different End Customer

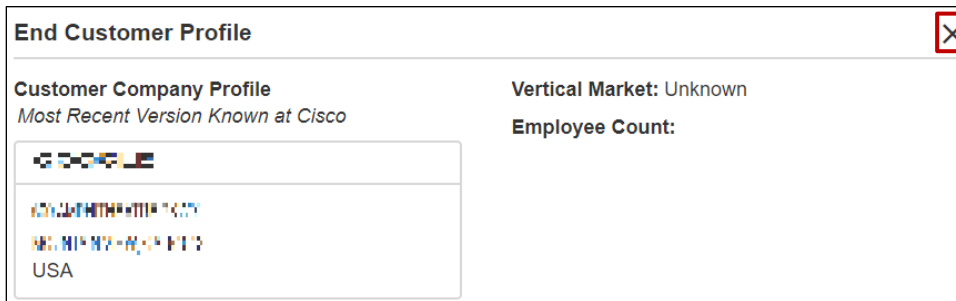
If the end customer address needs to be changed once it is populated, click the **edit icon** in the End Customer section and use the steps from [Adding an End Customer](#).



End Customer Section

3.1.2.3 Viewing the End Customer Profile

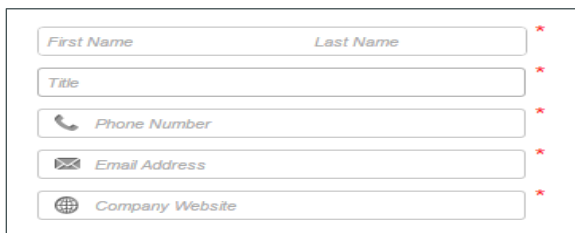
To view the end customer profile, click **View End Customer Profile**. The End Customer Profile dialog box displays. Click 'X' mark to close the dialog box and return to the Create a Deal page.



Company Profile Dialog Box

3.1.2.4 Adding an End Customer Contact

Under the 'Customer Contact', click each field and enter the appropriate information for the customer. All the required information is indicated by the red asterisk (*). This is not a search function; populate all the fields completely and accurately.



The form contains the following fields, each with a red asterisk (*) indicating it is required:

- First Name
- Last Name
- Title
- Phone Number
- Email Address
- Company Website

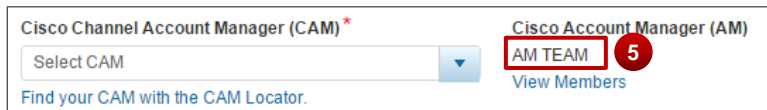
Customer Contact

3.1.3 Populating the Cisco Section: CAM

If the deal needs to be approved, an e-mail will be sent to the CAM.

There are several ways to add the CAM.

1. If the CAM is known and displays in the drop-down menu, click the **Cisco Channel Account Manager (CAM) drop-down arrow** and select the appropriate option.
2. Alternatively, click **Find your CAM with the CAM Locator**. A new window opens displaying the CAM locator. Complete the information to identify the appropriate CAM.
3. If the CAM is known, but not listed in the drop-down menu, select **Other** from the drop-down menu.
4. The Cisco Channel Account Manager (CAM) Email ID field displays. Enter the Cisco user name for the CAM.
5. Once an end customer is selected, the AM or Team name displays on this page. Click **View Members** to review the names.



Cisco Section

6. Once all fields are populated on Create a Deal page, click **Create Deal**. The About the Deal tab displays.

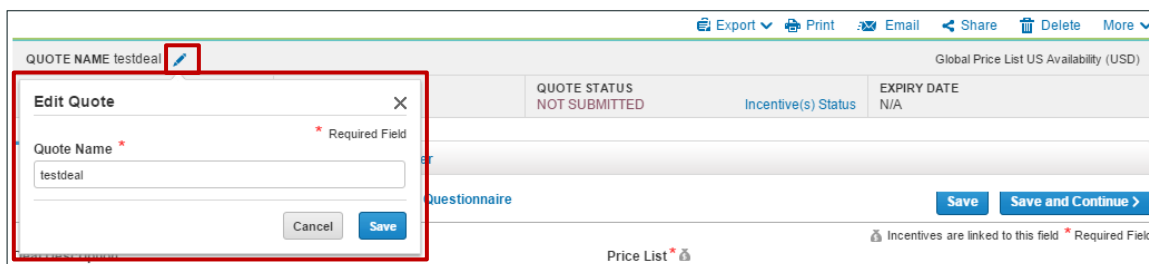
3.2 Selecting the Deal Options



3.2.1 Changing the Deal Name

To change the quote name, complete the following steps:

1. Click the **Pencil** icon. The Edit Quote dialog box displays.

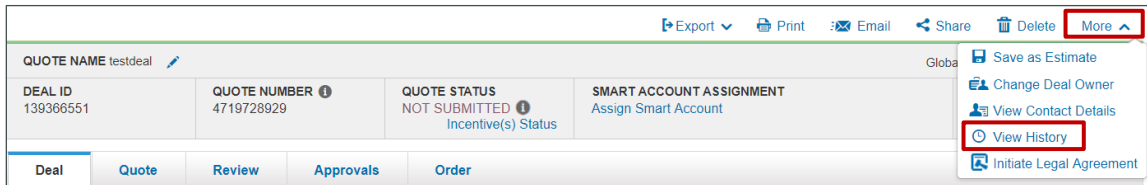


Change Deal Name Dialog Box

2. Click into the **Quote Name** field and enter the new quote name.
3. Click **Save**. The dialog box closes.

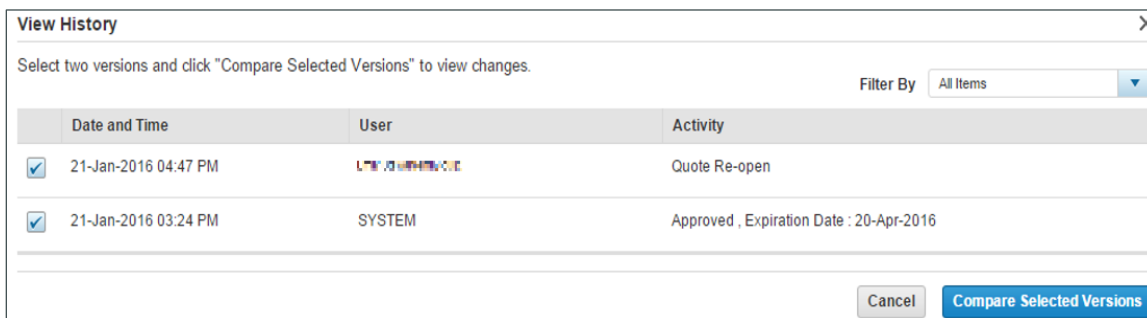
3.2.2 Viewing the Quote History

To view the quote history, click the **More** drop-down menu, then click **View History**.



Deals and Quotes Page

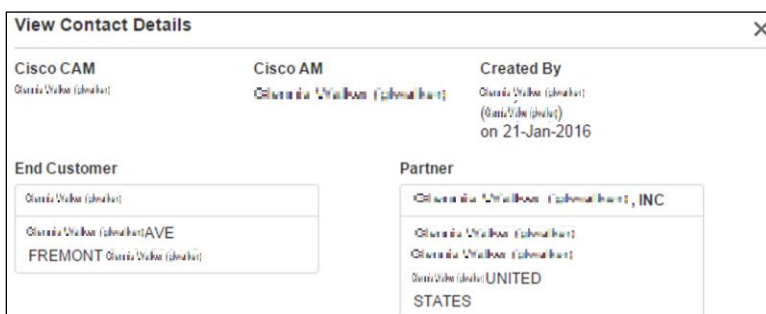
The Quote History dialog box displays the date and time, the user, and the activity for the quote. From the Quote History dialog box, you can opt to compare versions of the quote. Click **More** to expand the drop-down menu and then click **View History**. To compare two versions, click the checkbox for two of the versions and click **Compare Selected Versions**. The changes display.



Quote History Dialog Box

3.2.3 Viewing Contact Details

To view the contact details, click **More** to expand the drop-down menu and then click **View Contact Details**. The View Contact Details dialog box displays the end customer, partner, Cisco Channel Account Manager (CAM), Cisco Account Manager (AM), and created by information as applicable.



Deals and Quotes Page: View Contact Details



Note: The CAM can also be referred to as the Partner Account Manager (PAM) or Partner Business Manager (PBM). If the quote needs to be approved, an e-mail will be sent to the CAM.

3.3 Populating Information About the Deal



Populate the information on the About the Deal sub-tab.

Follow the descriptions below to populate the fields on this sub-tab:



Note: A red asterisk indicates mandatory fields (*). Remaining fields are optional, but are a good practice to complete.

4. Deal Description: Click the **Deal Description field** and enter additional information.
5. Intended Use*: Click **Intended Use drop-down** arrow and click the appropriate option.
Incentives are offered for certain Intended Use deals, so list the appropriate use.
Hover over the more information icon to see definitions for Intended Use. Information on how the associated SKUs will be used for different options is shown.
6. Deal Category*: Click the **Deal Category drop-down** arrow and click the appropriate option.
Hover over the more information icon to see explanations for each of the options, which indicate how the order will be deployed. See [Managing the Managed Service Provider Option](#) if you select Managed Service.
7. Deal Source: Click the **Deal Source drop-down** arrow and click the appropriate option.
8. Deal Type: Click the **Deal Type drop-down** arrow and click Purchase or Lease.

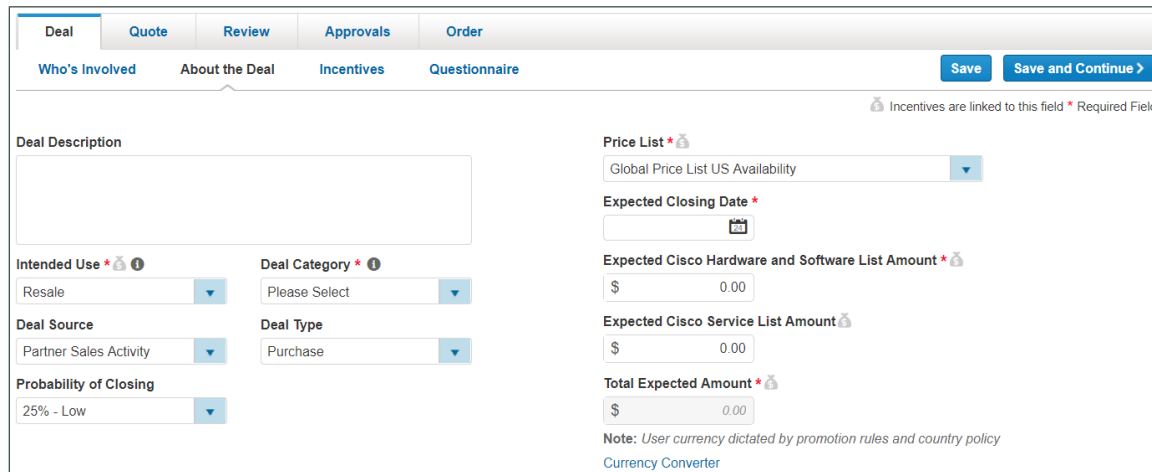


Note: If you are a 1-tier partner placing product lease orders, select Lease and enter or select the Cisco Capital bill-to address and contact on the Quote tab. Product and service lease order capabilities are available (see [Using Financing Options \(For US and Canada only\)](#)).

9. Probability of Closing: Click the **Probability of Closing drop-down** arrow and click the appropriate option.
Cisco AMs, along with you, formulate forecasting numbers for both revenue and shipments. The expected closing date and probability of closing percent data contribute to forecast reporting. The following three fields, for hardware and software list amounts, are also reported.

10. Price List*: Select the appropriate **price list**. Some of the incentives can be region and price list specific.
11. Expected Closing Date*: Click the **Expected Closing Date** calendar icon and click the appropriate date from the calendar.
12. Expected Cisco Hardware and Software List Amount*: Click the **Expected Cisco Hardware and Software List Amount** field and enter the estimated value.
13. Expected Cisco Service List Amount: Click the **Expected Cisco Service List Amount** field and enter the estimated value.
14. Total Expected Amount*: The Total Expected Amount field populates automatically when the above values are entered. The currency is dictated by promotion rules and country policy.
15. For information on the conversion of Currency, see

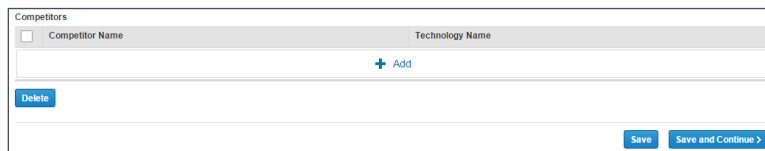
16. [Currency Converter](#).



Deal Tab: About the Deal Sub-Tab

17. Competitors: To manage competitor information, complete the following steps:

- a. Click **+ Add**.
- b. Click the **Competitor Name drop-down** arrow and select the appropriate option.
- c. Click the **Technology Name drop-down** arrow and select the appropriate option.
- d. To add additional competitors, repeat steps above.
- e. To remove an added competitor, check the appropriate competitor checkbox and click **Delete**.



About the Deal Sub-Tab: Competitors

3.3.1 Managing the Managed Service Provider Option

You can select Managed Service from Intended Use or Deal Category drop-down menus. When Managed Service is selected, the option to add a Managed Service Contractual Provider displays.

The Managed Service Contractual Provider is the entity that provides the proactive monitoring of the customer's deployment. If this is also the party placing the order, select self, if not, then provide the name of the provider that provides the management of the service.

To learn more about the Managed Service Contractual Provider, click **What's this?**

To select a provider, complete the following steps:

1. Click on the **radio button** to select service provider name defaulted by the system or Click **Change Provider**. The Select Managed Service List Contractual Provider dialog box displays.

Intended Use * ⓘ

Managed Service

Deal Category * ⓘ

Managed Service

Managed Service Contractual Provider* ⓘ

ⓘ

ⓘ

Managed Service Option

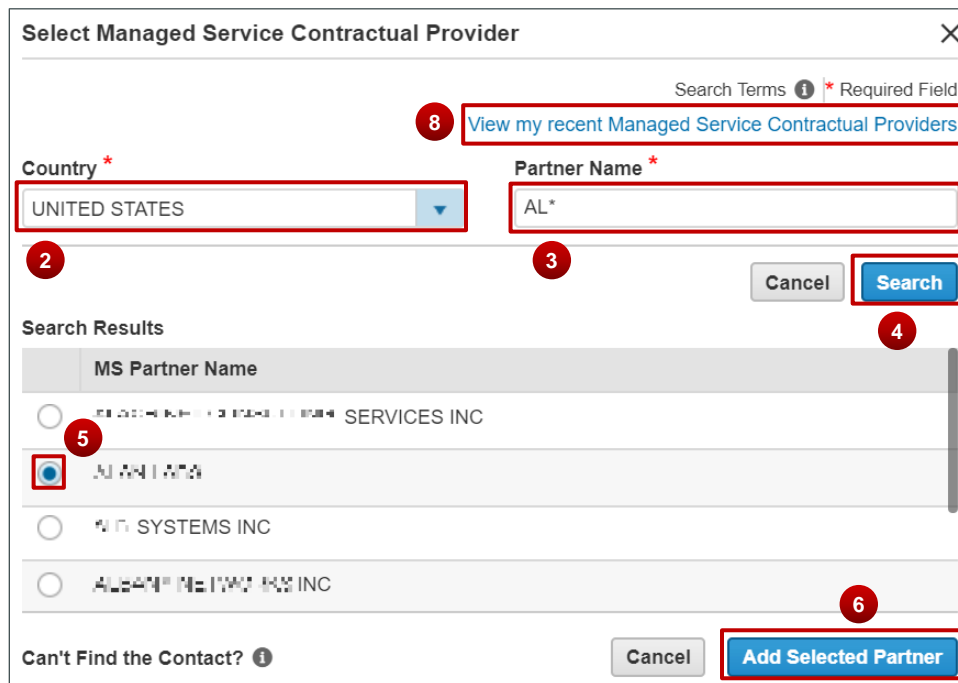
2. Click the **Country drop-down** arrow and select the appropriate country. This is not a mandatory field, but if the selected partner operates in multiple regions, it is recommended that you indicate the country.
3. Click into the **Partner Name field** and enter the provider name. This is a search field so complete information is not required.

To search using a wild card, enter a few letters of the partner name followed by an asterisk (for example, AB*). All partners with a name that begin with AB will display in the Search Results section.

4. Click **Search**. The search results display under the Search Results section.



Note: The selection in the quote automatically defaults into an order when a quote is converted to an order. However, you can change the provider as appropriate on the order.



Select Managed Service Contractual Provider

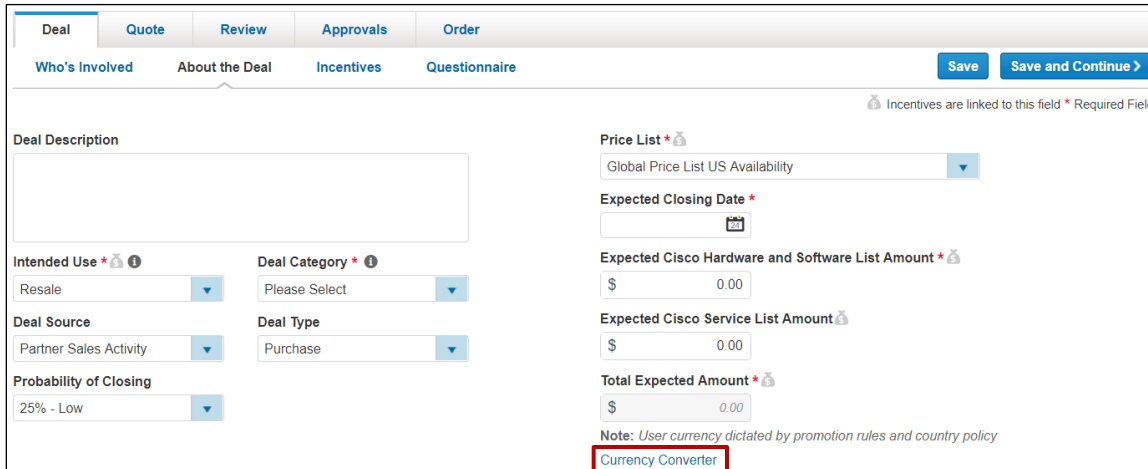
5. Click the appropriate **radio button**.
6. Click **Add Selected Partner**.

The deal details are updated to reflect the Managed Service Contractual Provider. The About the Deal page refreshes.

7. To change the indicated provider, select the appropriate radio button. If you need to add another provider, repeat steps 1–6 of this process.
8. Alternatively, from the Select Managed Service Contractual Provider dialog box, click **View my recent Managed Service Contractual Providers** to select a recent provider.
9. Click **Save** to save the information and remain on the About the Deal sub-tab.
10. Click **Save and Continue** to advance to the Incentives sub-tab.

3.3.2 Currency Converter

On the About the Deal sub-tab, use the Currency Converter link if needed. Currency conversions are for reference only and do not populate anywhere else in the deal.



The screenshot shows the 'About the Deal' sub-tab with the following fields and options:

- Deal Description:** A large text area.
- Intended Use:** Resale (dropdown)
- Deal Category:** Please Select (dropdown)
- Deal Source:** Partner Sales Activity (dropdown)
- Deal Type:** Purchase (dropdown)
- Probability of Closing:** 25% - Low (dropdown)
- Price List:** Global Price List US Availability (dropdown)
- Expected Closing Date:** (calendar icon)
- Expected Cisco Hardware and Software List Amount:** \$ 0.00
- Expected Cisco Service List Amount:** \$ 0.00
- Total Expected Amount:** \$ 0.00

A note at the bottom states: "Note: User currency dictated by promotion rules and country policy". A red box highlights the "Currency Converter" link below the note.

Deal Tab: About the Deal Sub-Tab

Once all sections of the About the Deal tab have been completed, click **Save and Continue**. The Incentives sub-tab displays.

3.4 Viewing and Selecting Applicable Incentives



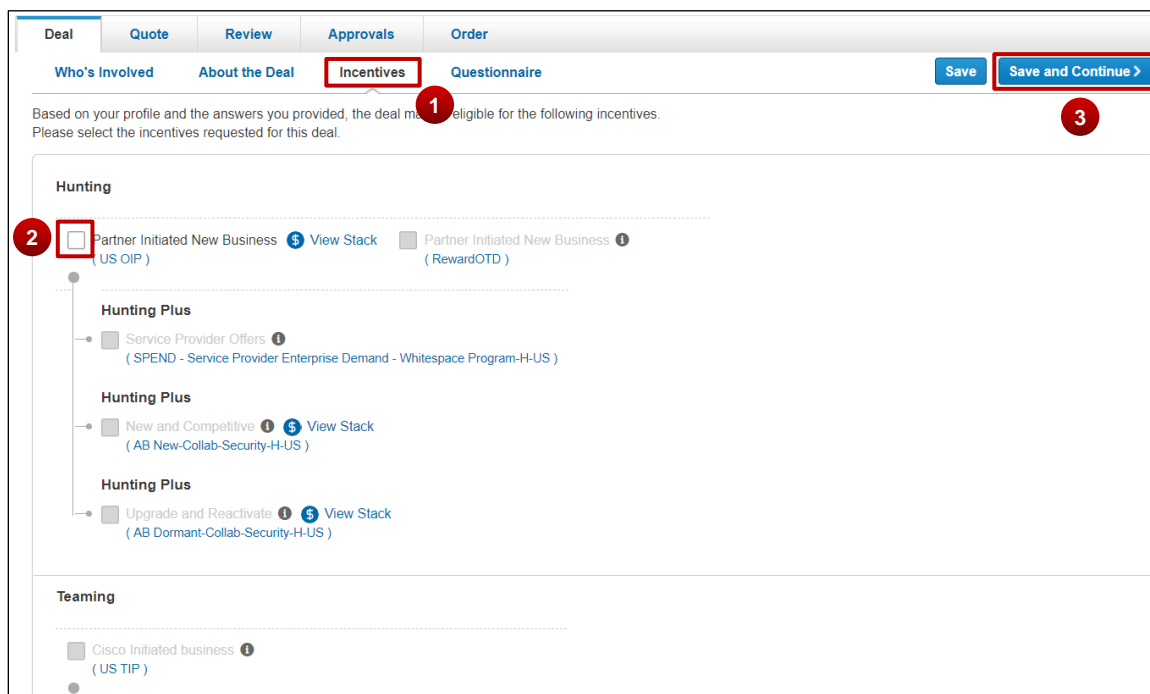
By registering your deals with Cisco Commerce, you can take the advantage of Cisco's stackable discounts and incentives. Not all incentives (programs or promotions) are available to all users, and some may require qualification. You can register a deal without adding the items to the quote, for example, to qualify a deal before the incentive expires.



Note: You can get the best price for Cisco solutions by stacking multiple eligible incentives.

To view and select applicable incentive(s), complete the following steps:

1. From the Deal tab: Incentives sub-tab, scroll down to view the available incentives.
2. Select appropriate incentive(s) under the given categories. Incentives that you are not eligible for will display but are not selectable. Hover over the information icon to learn why you are not eligible for that specific incentive. Additional incentive details can be found by clicking the hyperlink next to a given incentive.



Deal Tab: Incentives Sub-Tab

The incentives available to you are based on your region, price list, and deal characteristics. The incentives you select can be interdependent and guide your eligibility criteria.



Best Practice: With Cisco’s pricing model, base discounts provide market-relevant prices. When you register deals with Cisco Commerce, you can select multiple incentives to grow business and also participate in Cisco-initiated opportunities.

3. Click **Save and Continue**. The Questionnaire sub-tab displays.

3.5 Filling In the Questionnaire

Based on the incentive(s) selected, the Questionnaire sub-tab displays information to be filled in for initial validation.



Note: A red exclamation point will display if your answer to a question does not meet the criteria for a given incentive.

Deal
Quote
Review
Approvals
Order

Who's Involved
About the Deal
Incentives
Questionnaire
Save
Save and Continue >

*Required Field

2 If you intend to claim Try and Buy on this Deal, please remove the Incentives/Tracks that are ineligible for Try & Buy

- Hunting

Track	Program	Reward Code	Reward Name	Try and Buy Eligible
Partner Initiated New Business	OIP Americas	BR-OIPU-150725-23444	US OIP	Yes

By submitting a new deal registration, you are confirming the accuracy of the information provided, that you are authorized to bind your company to the Terms and Conditions of the selected program, and that you do so bind your company.

Please refer to the US OIP website for complete policies and terms and conditions:
<http://www.cisco.com/web/partners/pr11/incentive/oip.html>

1. Has an RFP/RFQ/RFI been issued for this opportunity? NO YES

* If you answered "Yes" to RFT/RFQ/RFI Question, is the RFP/RFQ/RFI part of an E-Rate Form 470? *

* OIP registrations post RfX are only available as part of an E-Rate Form 470 that has been released after March 7, 2016. Please contact the Cisco Account Manager prior to submitting this request.

2. Have you completed an in person or phone meeting with the customer for this opportunity? * YES NO

Deal Tab: Questionnaire Sub-Tab – A Sample

Complete the following steps to fill in the questionnaire:

1. Answer the questions listed for each incentive. Select Yes or No, or fill the text fields as required.
2. If you have selected multiple incentives, click to expand the questions for each incentive type.
3. To provide the Expected Technology Mix, click **+ Add**.
4. Click the Technology Name drop-down arrow and click the appropriate option.
5. Click the **% of Technology Mix** field and enter an appropriate value.
6. To add other technologies, repeat steps above.
7. To remove an added technology, check the appropriate checkbox and click **delete icon**.

Regardless of the number of technologies, the total percentage must equal 100%.

Expected Technology Mix * i

Remove Selected Items

Technology Name	% of Technology Mix
<input type="checkbox"/> COLLABORATION-Conferencing	<input type="text" value="50"/> 7
<input type="checkbox"/> Select 4	<input type="text"/>

3 + Add

5 50 🗑️

Save Save and Continue >

Deal Tab: Questionnaire Sub-Tab – Expected Technology Mix

If an incentive requires product family, the Product Families section will display on the questionnaire sub-tab.



Note: Deals can be qualified at the Product Family level, however a SKU level BOM will still be required for deal approval.

Once the deal is qualified, you will be able to see the actual discount percentage.

Product Families

Discounts displayed here are only indicative discounts for Product Families selected. Accelerators, Promotions and SKU level specific Discounts have not been considered. For final Discount, please upload a SKU level BOM in the Quote tab.

Family Name	Expected Buy Method(s) *	Expected List Amount *	Discount %
<input type="checkbox"/> Cisco R Series Racks	<input type="text" value="Choose one of the options"/>	<input type="text" value="100000"/>	-

8 + Add Product Families

Enter Part Number or item Description i

Apply Selection

- Cisco Information Center Products - CIC
- Cisco R Series Racks
- Cisco CVA120 Series Products
- Cisco DCM MPEG Processor Series

Active Price List: Global Price List US Availability
Product Families Total 100000

Save Save and Continue >

Questionnaire Sub-Tab: Product Families

8. To add a product family, click **+ Add Product Family**.
9. Enter a Part Number or item description and select the appropriate option(s) from the results.
10. Click **Apply Selections**. The Product Families selected are populated on the page.
11. Select the **Buy Method**. Once the deal is qualified, Buy Method cannot be changed.



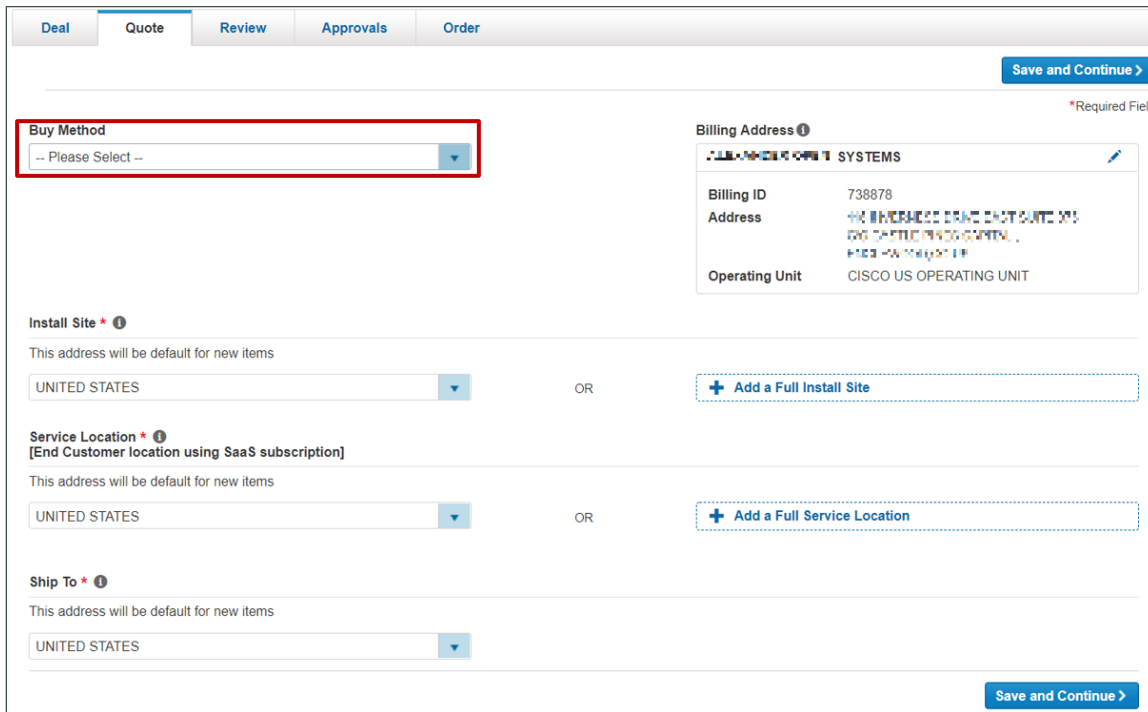
Note: The Product Family option is available for Public Sector incentives in EMEAR only.

12. Enter Expected List Amount.

13. Once all the information has been entered, click **Save and Continue**. The Quote tab displays.

3.6 Providing Buy Method and Install Site

There are three sections on the Quote tab: Billing Information, Buy Method, and Install Information. Specify the Service Location information if you are transacting SaaS Subscriptions.



The screenshot shows the 'Quote' tab interface with the following sections:

- Buy Method:** A dropdown menu with the text "-- Please Select --" is highlighted with a red box.
- Billing Address:** A section titled "Billing Address" with a "Required Field" indicator. It displays:
 - Billing ID: 738878
 - Address: 100 WILMINGTON ROAD, SUITE 200, WILMINGTON, NC 28403
 - Operating Unit: CISCO US OPERATING UNIT
- Install Site:** A section titled "Install Site" with a "Required Field" indicator. It includes a dropdown menu set to "UNITED STATES" and a button "+ Add a Full Install Site".
- Service Location:** A section titled "Service Location" with a "Required Field" indicator and a note "[End Customer location using SaaS subscription]". It includes a dropdown menu set to "UNITED STATES" and a button "+ Add a Full Service Location".
- Ship To:** A section titled "Ship To" with a "Required Field" indicator. It includes a dropdown menu set to "UNITED STATES".

Deals and Quotes Page: Quote Tab



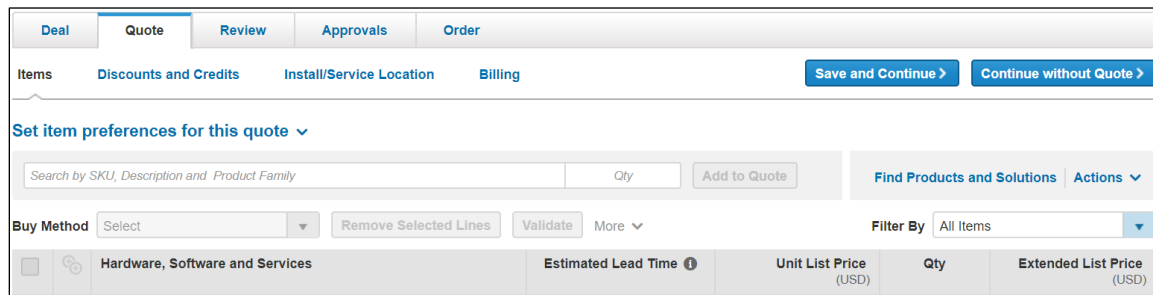
Best Practice: The billing address must be accurate to quote services correctly. If full address information is not known, the country information must be valid. Adding a full install site enables validations and pricing. It is mandatory to add a full install site if services are added.

Refer to the table below for quote tab options.

Section	Action
Billing Information	<p>The billing information is already populated and does not require updating on this page. To change the billing information, click the edit icon. The Select a Billing Address dialog box displays. Click the appropriate radio button and click Continue.</p> <p>Note: Tier-1 partners placing product lease orders should enter or select the Cisco Capital bill-to address and contact. Product and service lease order capabilities are available (see Using Financing Options (For US and Canada only)).</p>
Buy Method	<p>From the Buy Method drop-down menu, select the appropriate option.</p> <p>Note: If the buy method is a distributor and the distributor BID and the install site ID of a quote line belong to different country pricelists, Multi-National Quoting (MNQ) discounts are applicable for the country pricelist of the install site country. The MNQ discount is applied systematically when the pricing is evoked on the quote so there is no manual process needed.</p>
Install Site Information	<p>Specify an install site. A full install site is optional at this stage; however, the minimum of a country is required. The billing country automatically populates in the Country field. The default install site for new items can be changed at any time.</p> <p>If applicable, click the Country drop-down arrow and click the appropriate country.</p> <p>To enter a full install site, click Add a Full Install Site. The Search for Install Site dialog box displays. See Populating the End Customer Section; the functionality for adding a full install site and creating a new customer address are the same.</p>
Service Location Information	<p>Specify the Service Location country if you are transacting SaaS Subscriptions. By default, the Service Location country will be the end customer country.</p> <p>If applicable, click the Country drop-down arrow and click the appropriate country. To enter a full service location, click Add a Full Service Location. The Search for Service Location dialog box displays. See Changing the Service Location Country.</p>

1. Click **Save and Continue**. The Quote tab refreshes with four sub-tabs: Items, Discounts & Credits, Install/Service Location, and Billing.
2. The Quote tab displays the 'Items' sub-tab by default. From this sub-tab, you can:
 - Add products (see

- [Adding Items](#))
 - Add previously purchased products for service only orders (see [Creating a Quote for Service-only Order](#))
 - Add services (see [Adding Services](#))
 - Renew software subscriptions (see [Remove Product & Reassign Services to Existing Inventory](#))
 - Add trade-in items (see [Adding Trade-in Items](#))
3. From the remaining sub-tabs on the Quote tab, you can:
- Review discounts and credits (see [Reviewing Discounts and Credits](#))
 - Opt to review or edit the install/Service site (see [Reviewing or Editing the Install Site Information](#))
 - Opt to review or edit the billing information (see [Reviewing or Editing Billing Information](#))



Quote Tab: Items Sub-Tab

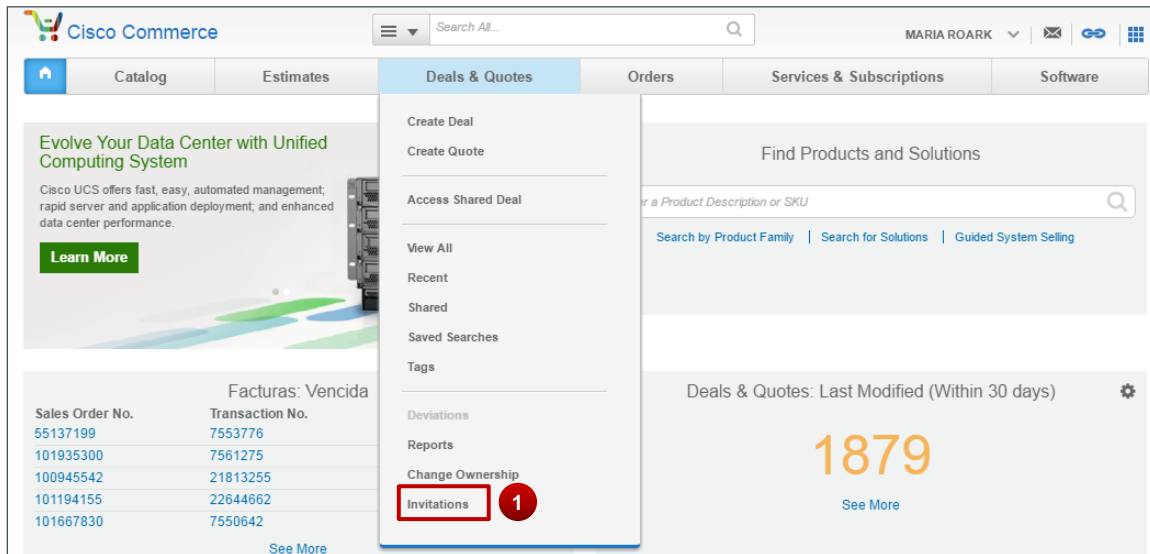
3.7 Adding Products and Services to the Deal

You can add products and services to the deal on the Items sub-tab on Quote tab. See [Building a Deal](#).

3.8 Deal Invitations

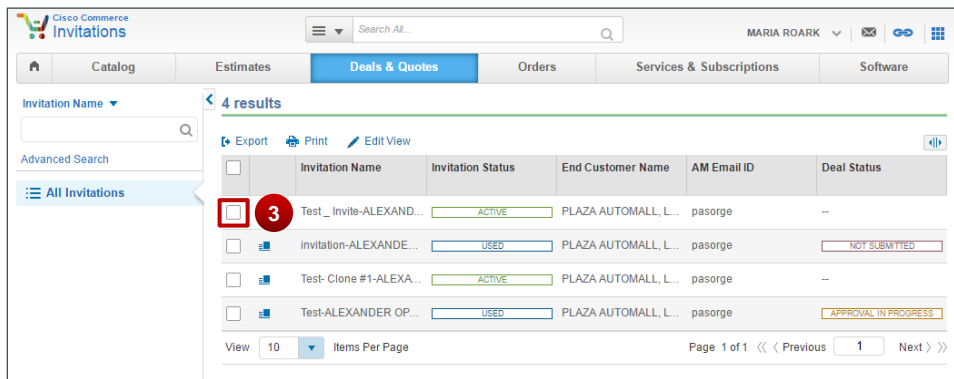
Cisco Partners have the ability to add incentives to a Cisco-initiated deal. Partners will receive an invitation, from which a deal can be created and incentives added. Follow the steps below to create a deal from an invitation.

1. From the Cisco Commerce Deals & Quotes tab, select **Invitations**. The Invitations records page displays.

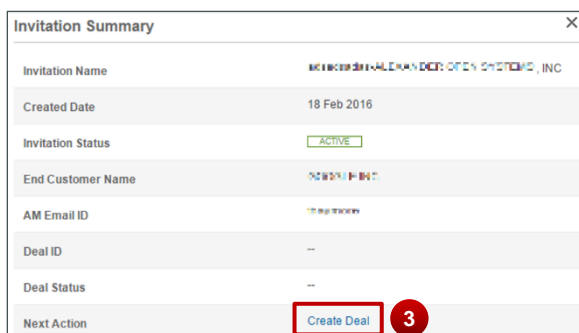


Deals & Quotes Tab: Invitations

2. Navigate to the appropriate invitation and click **Create Deal**.
3. Alternately, click the detail icon to view the Invitation Summary and then click **Create Deal**.



Invitations Records Page



Invitation Summary



Note: If the Next Action column is not displayed on the Invitations records page, click **Edit View** and add the Next Action column.

You can also search for an invitation by Invitation Name, AM Email ID, End Customer Name, and Invitation Status.

4. The Who's Involved Page displays. Complete the deal registration process, beginning with [Populating Who's Involved](#).



Note: You will not be able to change the Cisco AM or End Customer on the deal.

4 Building a Deal



Best Practice: While working through the multiple sections of the Items sub-tab of the Quote tab, click **Save** periodically to ensure that work is saved. The work saves, and you remain on the current page.

Under the Quote tab, you can add items (products and services), add trade in items, review or edit the install site and billing information.

To add items, see

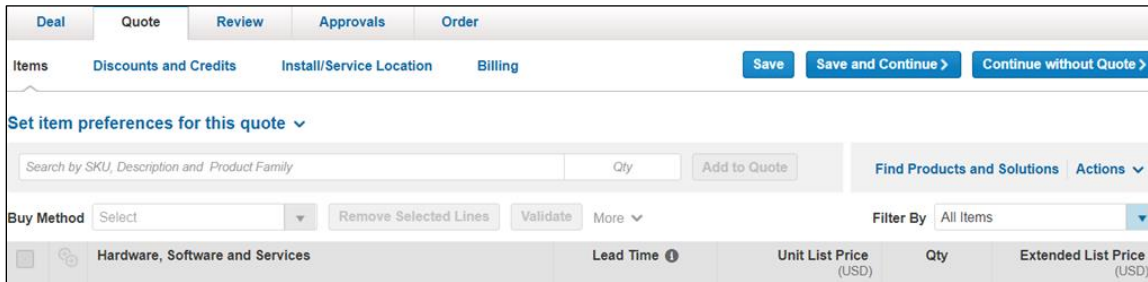
[Adding Items](#)

To add services, see [Adding Services](#)

To review discount and credit, see [Reviewing Discounts and Credits](#)

To view or change install site information, see [Reviewing or Editing the Install Site Information](#)

To view or change billing information, see [Reviewing or Editing Billing Information](#)



The screenshot shows the 'Review' tab of the Cisco Deals and Quotes interface. At the top, there are navigation tabs: Deal, Quote, Review (selected), Approvals, and Order. Below these are sub-tabs: Items, Discounts and Credits, Install/Service Location, and Billing. Action buttons include Save, Save and Continue >, and Continue without Quote >. A section titled 'Set item preferences for this quote' includes a search bar with the placeholder 'Search by SKU, Description and Product Family', a quantity field, and an 'Add to Quote' button. There are also buttons for 'Find Products and Solutions' and 'Actions'. Below this, there is a 'Buy Method' dropdown set to 'Select', a 'Remove Selected Lines' button, a 'Validate' button, and a 'More' dropdown. A 'Filter By' dropdown is set to 'All Items'. At the bottom, a table header is visible with columns: Hardware, Software and Services; Lead Time ⓘ; Unit List Price (USD); Qty; and Extended List Price (USD).

4.1 Adding Items

There are several ways to add items to a deal:

Finding items using a search (see [Finding Items Using a Search](#))

Adding items by SKU, product description, or product family (see [Adding Items by SKU](#))

Importing an estimate or a configuration (see [Importing an Estimate or a Configuration](#))

4.1.1 Finding Items Using a Search

Searching for products allows you to add multiple products to the deal at one time. There are three options for finding items using a search:

Search and add by product description or SKU (search by product description or SKU if a specific SKU or portion of the product description is available): see [Search and Add by Product Description or SKU](#)

Search and add by product family (search by product family to find the product by scanning through a list of Cisco product families): see [Search and Add by Product Family](#)

Search and add by solution: see [Search and Add by Solution](#)

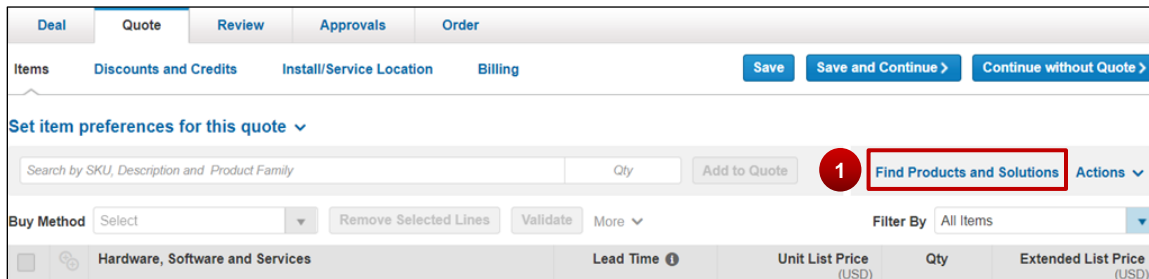


Best Practice: If you know the product family, then use the Search and add by product family option. It makes the search easier.

4.1.1.1 Search and Add by Product Description or SKU

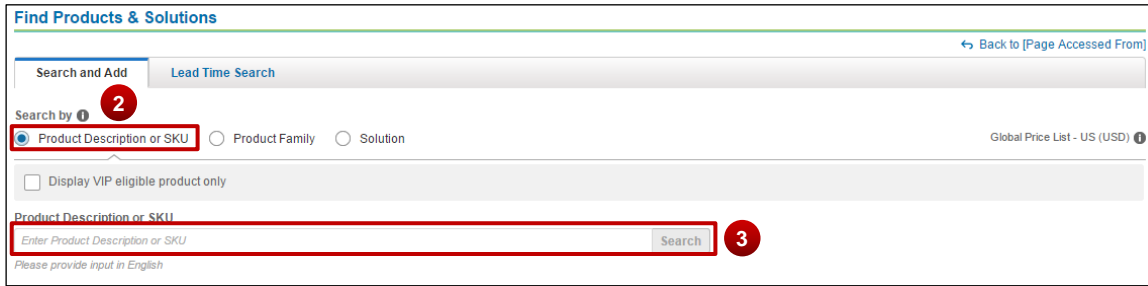
To search for items to add to the deal, complete the following steps:

1. From the Quote tab: Items sub-tab, click **Find Products and Solutions**. The Find Products and Solutions page displays.



Quote Tab: Items Sub-Tab – Find Products

2. Select **Product description or SKU** radio button.



Find Products & Solutions Page: Search By - Product Description or SKU

3. In the search field, enter a product description, SKU, or partial SKU, and click **Search**. You do not need to enter the entire SKU.

The page refreshes to display the results.

4. Locate the appropriate product(s).

5. Enter the appropriate quantity and add the item to your cart.

Note: There are several ways to enter or change the quantity for a product.

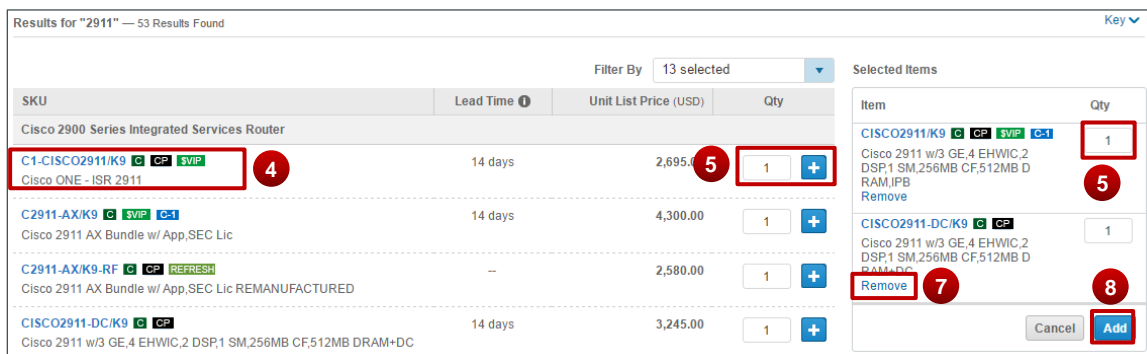


- As listed in step 5 above
- Add the item to your cart, then adjust the quantity in the Selected Items section
- On the Quote tab: Items sub-tab (see [Setting Quantities for Items](#))

6. Repeat steps 3 - 5 to populate the items in the deal.

7. To remove unwanted items from the Selected Items cart, click **Remove**.

8. When you have added all the desired products from the search to the Select Items cart, click **Add**. The Quote tab: Items sub-tab displays with the new line(s).

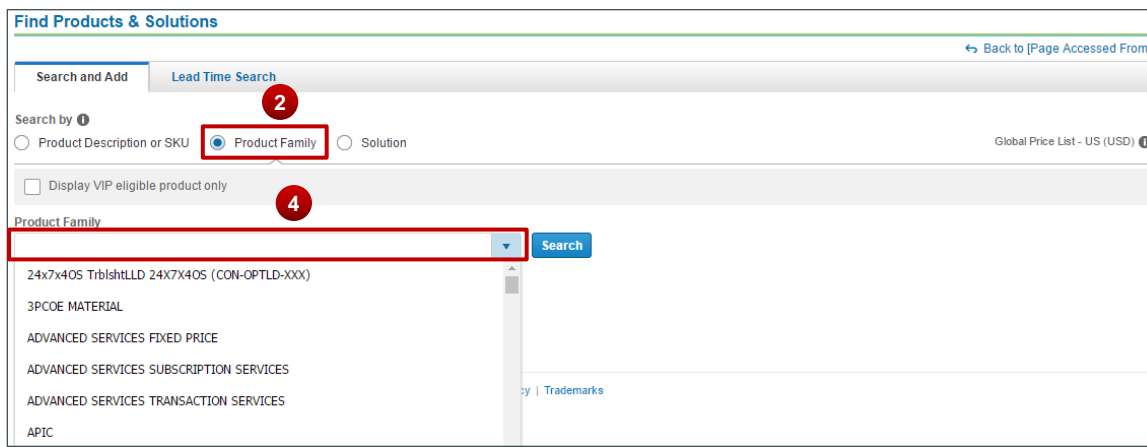


Find Products & Solutions Page: Search Results

4.1.1.2 Search and Add by Product Family

To search by product family, complete the following steps:

1. From the Quote tab: Items sub-tab, click **Find Products & Solutions**. The Find Products & Solutions page displays.
2. Select **Product Family** radio button.
3. Click the Type to filter or click **drop-down arrow** to see a full list of product families.
4. Scroll through the list or begin typing the product family name and then click the desired product family.



Find Products & Solutions Page: Search by – Product Family

5. Click **Search**. Results display all applicable product families.
6. Locate the appropriate product(s).
7. Enter the appropriate quantity and add the item to your cart.



Note: There are several ways to enter or change the quantity for a product.

As listed in step 7 above (entering the quantity in the Selected Items cart).

Add the item to your cart, then adjust the quantity in the Selected Items section.

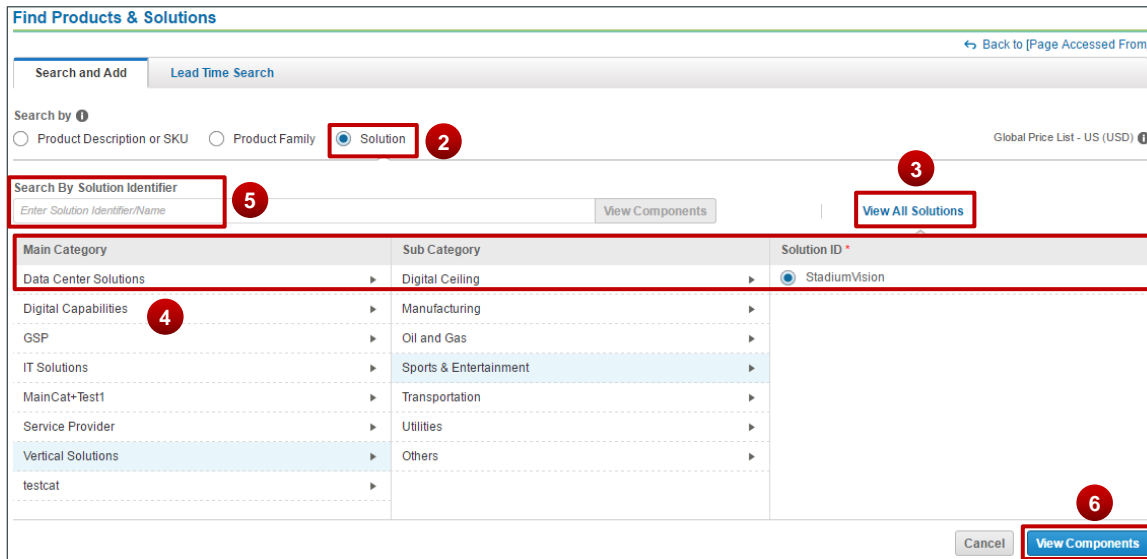
On the Quote tab: Items sub-tab (see [Setting Quantities for Items](#)).

8. Repeat steps 3–7 to populate the items in the deal.
9. When all desired products from the search have been added to the Select Items cart, click **Add**. The Quote tab: Items sub-tab displays with the new line(s).

4.1.1.3 Search and Add by Solution

To search by solution, complete the following steps:

1. From the Quote tab: Items sub-tab, click **Find Products & Solutions**. The Find Products & Solutions page displays.
2. Click **Solution** radio button.
3. Click **View All Solutions** to see a full list of solutions.
4. Browse through the Main Category and Sub Categories to find your desired solution.
5. Alternately, begin typing a Solution Identifier/Name in the Search field. Select the desired solution from the drop-down.
6. Once you've selected the desired solution, click **View Components** to view the associated SKUs.



Find Products & Solutions

Search and Add | Lead Time Search

Search by **1**

Product Description or SKU Product Family **Solution 2**

Global Price List - US (USD) **1**

Search By Solution Identifier **5**

Enter Solution Identifier/Name

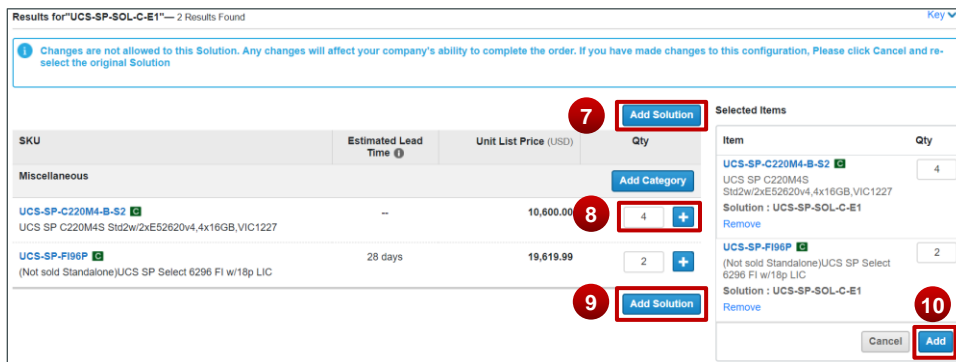
View Components | **View All Solutions 3**

Main Category	Sub Category	Solution ID *
Data Center Solutions	Digital Ceiling	<input checked="" type="radio"/> StadiumVision
Digital Capabilities 4	Manufacturing	
GSP	Oil and Gas	
IT Solutions	Sports & Entertainment	
MainCat+Test1	Transportation	
Service Provider	Utilities	
Vertical Solutions	Others	
testcat		

Cancel | **View Components 6**

Find Products & Solutions Page: Search By - Solution

7. To add the default solution to your cart, click **Add Solution**.
8. To add all SKUs in a category, click **Add Category**.
9. Alternately, you can add individual SKUs to your cart.
10. Once you are done with adding the solution(s), Click **Add**



Find Products & Solutions Page: Search By - Solution

4.1.1.4 Using the Lead Time Functionality

The Lead Time Search functionality allows you to obtain lead-time information for both major and minor lines. A lead-time of a particular product or minor line option is the amount of time from order placement to product shipment. It is possible to search for lead times by product family, product SKU, product description, or a wild card search. You can then download or email the lead-time information in either an Excel or a PDF format.

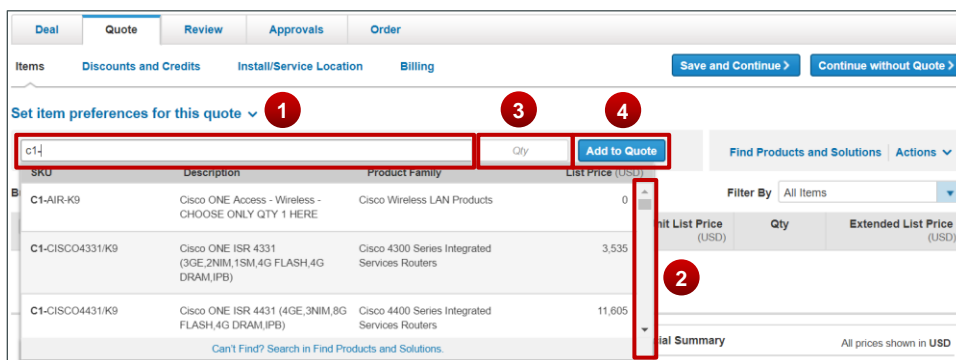
You can access the lead-time tool in Quick Links also. Refer to the [Getting Started with Cisco Commerce User Guide](#) to perform a lead-time search.

4.1.2 Adding Items by SKU



To add items to the deal by entering an SKU, product description, or product family without using the Find Products & Solutions tool, complete the following steps:

1. On the Quote tab: Items sub-tab, click the Search by SKU, Description, and Product Family field and enter at least three letters or numbers. A drop-down menu displays items with matching results.



Quote Tab: Items Sub-Tab - Add Product Item

2. Scroll down the drop-down menu and click an appropriate product.

Note: To locate products that are orderable but not published on the indicated price list, enter the full SKU and press Enter. If the SKU is still not found, then the standard process to address errors applies.

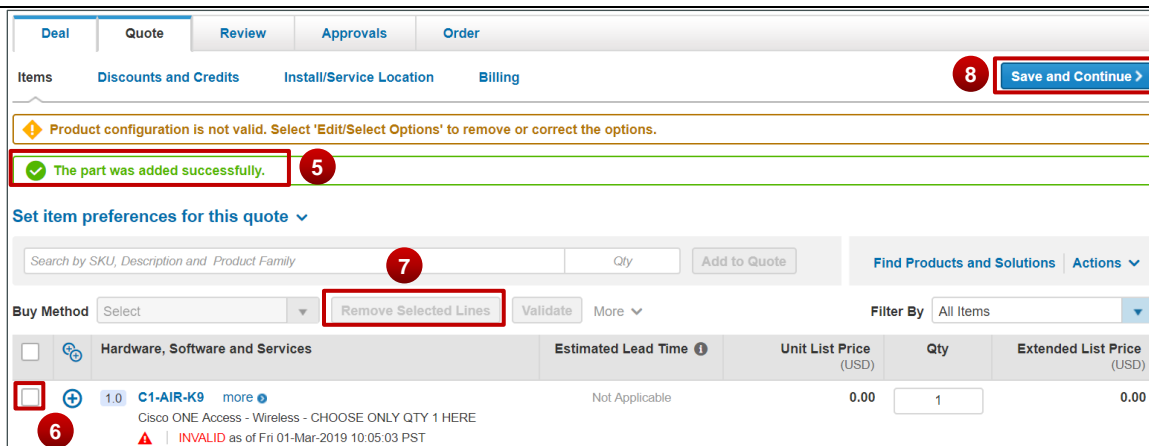


Prior to contacting support, verify that the SKUs cannot be located via the auto-populate, wild card search, or general Cisco Commerce search functionalities and that the SKU in question has been published to the price list selected on the deal.

3. Click the **Qty field** and enter an appropriate quantity.
4. Click **Add to Quote**.
5. A green message displays, indicating that the part was added successfully. A new line displays the added item.
6. To remove a line, check the appropriate checkbox.
7. Click **Remove Selected Lines**.
8. To continue adding lines, click **Save and Continue**. The page remains unchanged, and additional lines can be added by repeating the above process.



Best Practice: For items that are configurable, it is best to add services as part of the configuration. See [Adding Services](#).

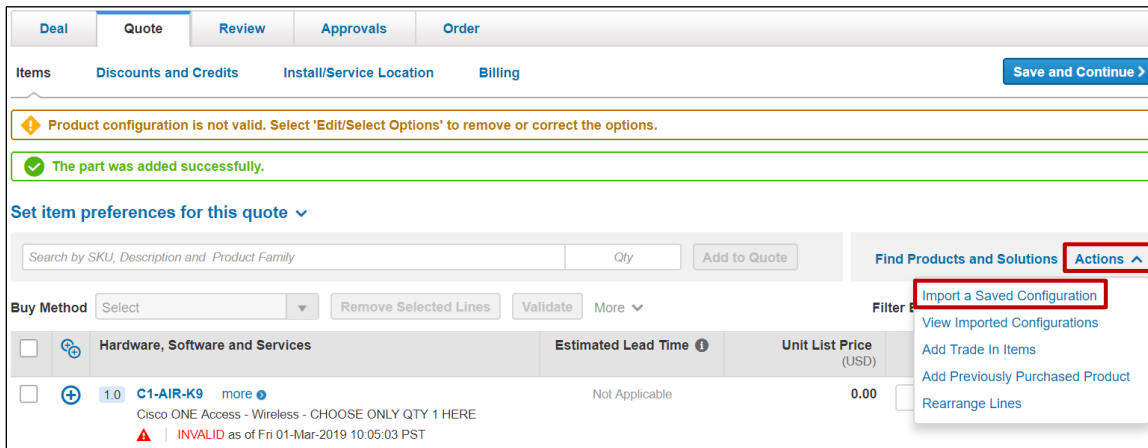


The screenshot shows the 'Quote' tab in the Cisco Commerce interface. At the top, there are tabs for 'Deal', 'Quote', 'Review', 'Approvals', and 'Order'. Below these are sub-tabs for 'Items', 'Discounts and Credits', 'Install/Service Location', and 'Billing'. A red circle with the number '8' highlights the 'Save and Continue >' button. A yellow warning message states 'Product configuration is not valid. Select 'Edit/Select Options' to remove or correct the options.' Below this, a green success message says 'The part was added successfully.' with a red circle '5' next to it. Under 'Set item preferences for this quote', there is a search bar with a red circle '7' and an 'Add to Quote' button. Below the search bar, there is a 'Buy Method' dropdown set to 'Select', a 'Remove Selected Lines' button with a red box and circle '7', and a 'Validate' button. A 'Filter By' dropdown is set to 'All Items'. The main table has columns for 'Hardware, Software and Services', 'Estimated Lead Time', 'Unit List Price (USD)', 'Qty', and 'Extended List Price (USD)'. The table contains one row for 'C1-AIR-K9' with a quantity of 1 and a price of 0.00. A red box and circle '6' highlight an error message: 'INVALID as of Fri 01-Mar-2019 10:05:03 PST'.

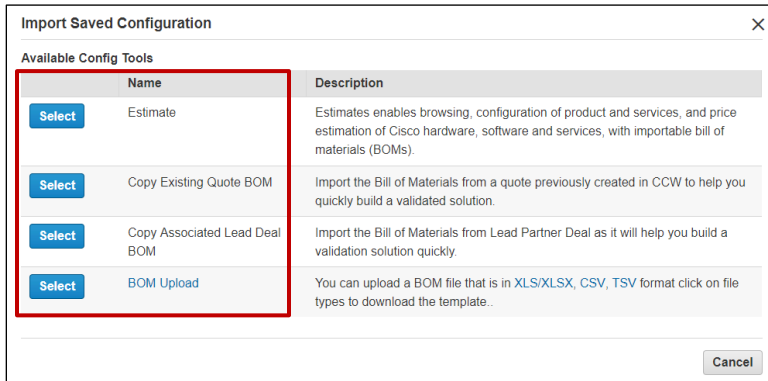
Quote Tab: Items Sub-Tab – Remove Selected Line

4.1.3 Importing an Estimate or a Configuration

Another way to add products to the deal is to import a saved estimate. Cisco Commerce Deals & Quotes tab allows for saved estimates and BOMs to be imported into the deal. Access the different tools via the Import Saved Configuration dialog box.



Quote Tab: Items Sub-Tab – Import a Saved Configuration



Quote Tab: Import Saved Configuration Dialog Box

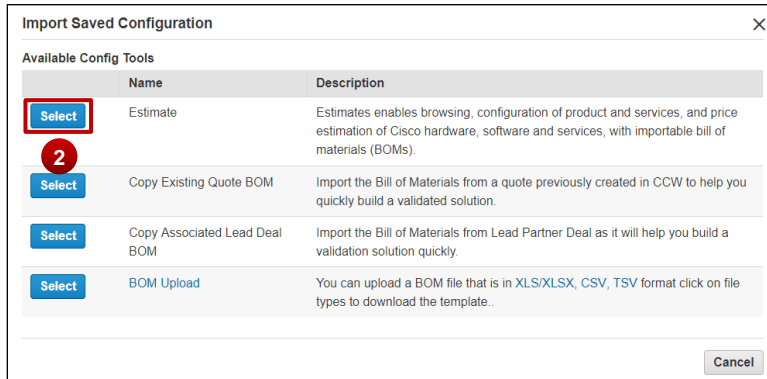
Tool	Document Section
Estimate	The Cisco Commerce Estimates application enables browsing, configuration, validation, and price estimation of Cisco hardware, software, and services, with importable Bills of Materials (BOM), as well as sharing capabilities. See Importing an Estimate .
Copy Existing Quote BOM	Import the Bill of Materials from a quote previously created in Cisco Commerce to help you quickly build a validated solution. See Copy Existing Quote BOM .
BOM Upload	You can upload a BOM file that is in XLS/XLSX, CSV, and TSV format. Use the template links available in the Import Saved Configuration dialog box to upload a BOM. See Uploading a BOM .

4.1.3.1 Importing an Estimate

You can save a configuration set from a deal and then import that saved configuration set, or estimate, into another deal.

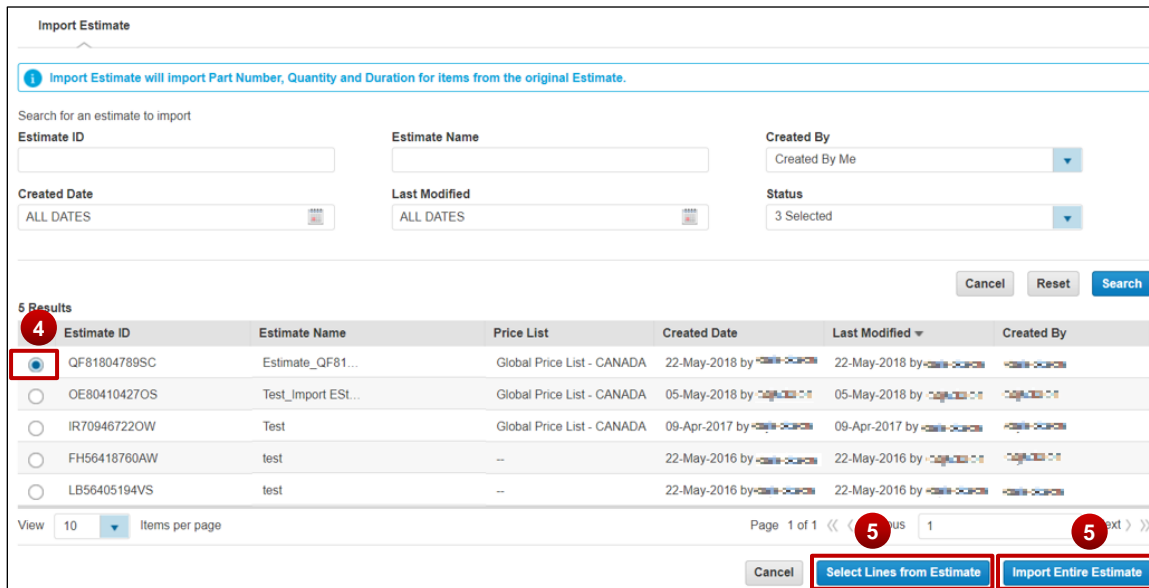
To import an estimate, complete the following steps:

1. From the Quote tab: Items sub-tab, click to expand the **Actions** drop-down menu and then click **Import a Saved Configuration**. The Import Saved Configuration dialog box displays.
2. Click **Select** to choose Estimate option. The Import Estimate page will load.



Quote Tab: Import Saved Configuration Dialog Box

3. Choose from the suggested results or use the criteria at the top of this view to conduct a more focused search.
4. Select the **radio button** associated with the desired estimate.



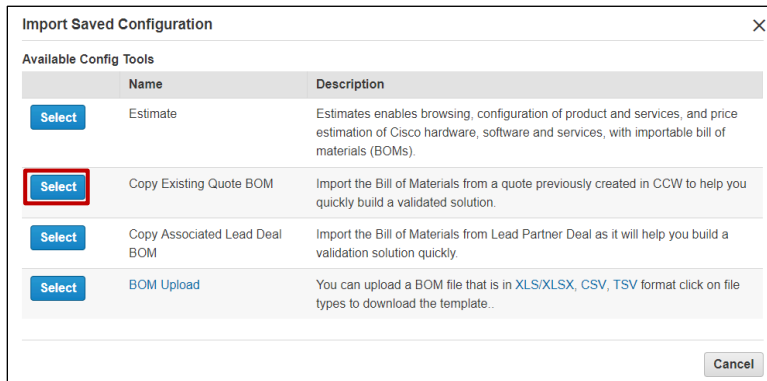
Importing an Estimate

5. Click **Select Lines from Estimate** to import individual line items or click **Import Entire Estimate** to import all items. The Quote tab: Items sub-tab displays the newly imported line items from the selected estimate.

4.1.3.2 Copy Existing Quote BOM

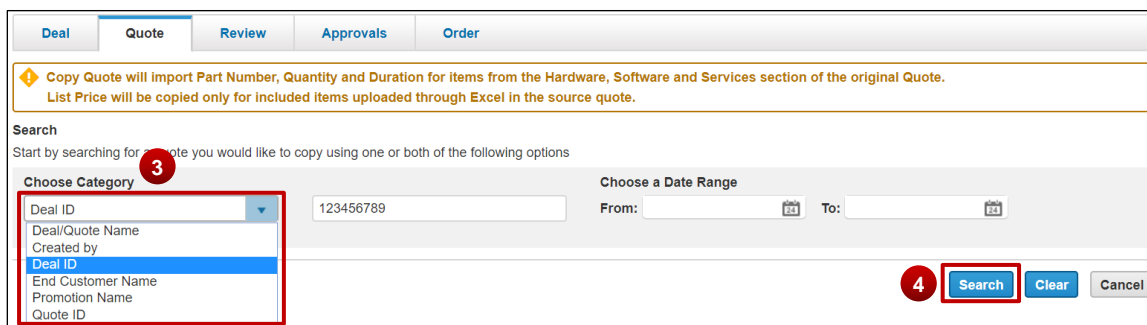
To copy a quote, complete the following steps:

1. From the Quote tab: Items sub-tab, click to expand the **Actions drop-down** menu and then click **Import a Saved Configuration**. The Import Saved Configuration dialog box displays.
2. Click **Select** for Copy Existing Quote BOM option.



Quote Tab: Import Saved Configuration Dialog Box

3. Select the parameters for search from the list of values under Choose Category and enter the appropriate text in the search field.
4. Click **Search**. The search result displays.



Copying a Quote: BOM Page

5. Select the appropriate option from the search results.

6. Click **Copy**. The Quote tab: Items sub-tab displays the newly imported line items.

The screenshot shows the 'Quote' tab interface. At the top, there are tabs for Deal, Quote, Review, Approvals, and Order. A yellow warning box states: 'Copy Quote will import Part Number, Quantity and Duration for items from the Hardware, Software and Services section of the original Quote. List Price will be copied only for included items uploaded through Excel in the source quote.' Below this is a search section with a 'Choose Category' dropdown set to 'Deal ID' and a search input field containing '987654321'. There are 'Search', 'Clear', and 'Cancel' buttons. The search results table has columns: Deal ID, Quote ID, Quote Name, Created On, Partner, End Customer, and Price List. The first row is selected, with a red circle and the number '5' next to the 'Deal ID' cell. At the bottom right, a 'Copy' button is highlighted with a red circle and the number '6'.

Deal ID	Quote ID	Quote Name	Created On	Partner	End Customer	Price List
139367259	4719729818	testdeal	01 Mar 2019	INC		Global Price List US Availability

4.1.3.3 Uploading a BOM

To upload a BOM, complete the following steps:

1. From the Quote tab: Items sub-tab, click to expand the **Actions drop-down** menu and then click **Import a Saved Configuration**. The Import Saved Configuration dialog box displays.
2. Click **Select** to choose BOM Upload option.

The screenshot shows the 'Import Saved Configuration' dialog box. It has a title bar with a close button. Below the title is a section 'Available Config Tools' with a table. The table has columns 'Name' and 'Description'. There are four rows, each with a 'Select' button. The 'BOM Upload' row is highlighted with a red box. At the bottom right is a 'Cancel' button.

Name	Description
Estimate	Estimates enables browsing, configuration of product and services, and price estimation of Cisco hardware, software and services, with importable bill of materials (BOMs).
Copy Existing Quote BOM	Import the Bill of Materials from a quote previously created in CCW to help you quickly build a validated solution.
Copy Associated Lead Deal BOM	Import the Bill of Materials from Lead Partner Deal as it will help you build a validation solution quickly.
BOM Upload	You can upload a BOM file that is in XLS/XLSX, CSV, TSV format click on file types to download the template..

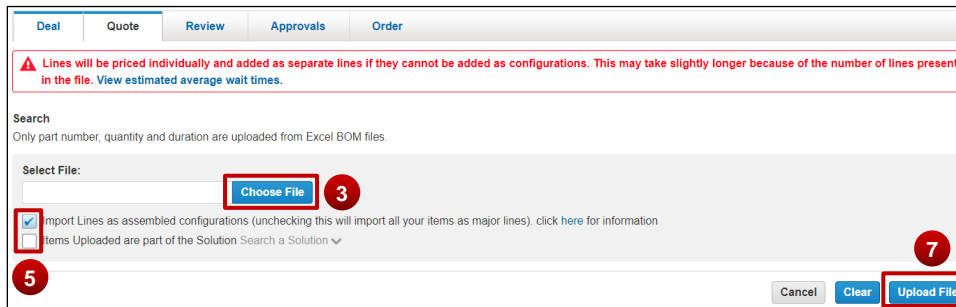
Quote Tab: Import Saved Configuration Dialog Box

3. Click **Choose File**.
4. Locate the appropriate file and click **Open**.



Best Practice: Use the available templates in XLS/XLSX, CSV, and TSV format to upload a BOM. The template links are available in the Import Saved Configuration dialog box.

5. Check the **checkbox** for Import lines as assembled configurations. Unchecking this box will import all configurations to your deal as major lines.
6. Optionally, check the **checkbox** to indicate that uploaded items are part of a solution. You can search for the solution using the drop-down menu.



Importing a BOM

7. Click **Upload File**. A progress bar indicates the percent complete. The Items sub-tab displays the imported BOM as line items.

4.2 Adding Different Types of SKUs

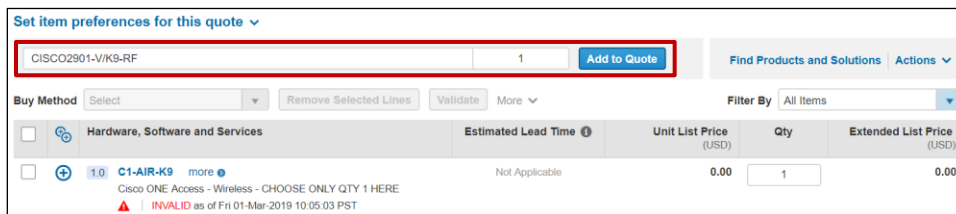


You can add different type of products, services, and configurations to the deal on the Quote tab: Items sub-tab before moving to the Discounts tab.

4.2.1 Adding Remanufactured Equipment

You can add remanufactured equipment (also known as Refresh), to a quote and/or an order with the applicable services.

1. Add remanufactured products directly by using any of the methods for adding items. The SKU for Refresh product will end in RF. See [Adding Items](#).

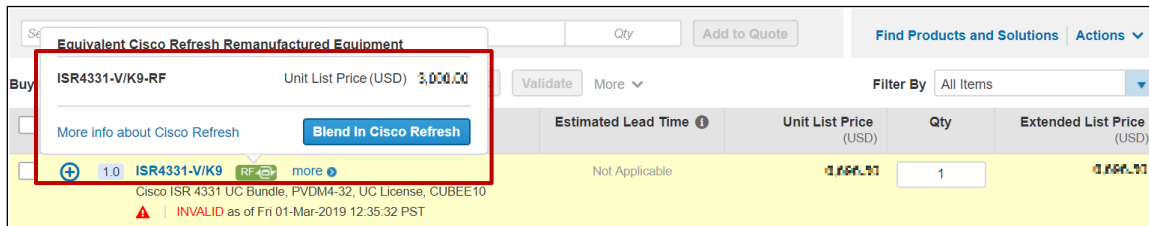


2. To configure products, see [Choosing Options and Resolving Issues](#).



Note: Some remanufactured products require a power cord. For those products, you must select the correct power cord for your country prior to submitting the deal for approval.

3. When Refresh product is available as an alternative to new product, you will see a green Refresh icon next the SKU. Hover over the icon to view the equivalent Refresh product SKU and price. The icon will display only when remanufactured product is available.



Quote Tab: Items Sub-Tab

4. To compare, view available inventory, and blend Refresh with new product, select the “Blend in Cisco Refresh” button.
5. Blending Process

Select Product to Blend

To review and include suggested Refresh product, which is referred to as blending, you will need to proceed to the Refresh Blended Solution page where you do a side-by-side comparison of new manufactured product and Refresh product. There are two ways to get to that page.

- a. First option: When you mouse over the green Refresh icon, a window will appear displaying the equivalent Cisco Refresh remanufactured equipment SKU which ends in “RF”, the Refresh unit list price, a link to more info about Cisco Refresh, and a Blend in Cisco Refresh button. Select the blue button.

<p>Hardware, Software and Services</p> <p>1.0 CISCO2901/K9 RF CP SVIP</p> <p>more</p> <p>Cisco 2901 w/2 GE,4 EHWIC,2 DSP, 256MB CF,512MB DRAM,IP Base</p>	<p>EQUIVALENT CISCO REFRESH REMANUFACTURED EQUIPMENT</p> <p>CISCO2901/K9-RF Unit List Price (USD) 1,377.00</p> <p>MORE INFO ABOUT CISCO REFRESH Blend in Cisco Refresh</p> <p>1.0 CISCO2901/K9 RF CP SVIP 35 days 2,2</p> <p>more</p> <p>Cisco 2901 w/2 GE,4 EHWIC,2 DSP, 256MB CF,512MB DRAM,IP Base</p>
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Cisco Refresh

Get the value of Cisco products at significant savings with fully Certified Remanufactured equipment.

[Watch video](#)

[Benefits](#) [Products](#) [How to Buy](#) [Top Tasks](#) [Contact](#) [For partners](#)

Only with Cisco Refresh can you...

Extend your budget

Our products are competitively priced in line with market rates.

Get speedy delivery

We carry a large inventory of Certified Remanufactured products available for immediate shipment and are able to remanufacture-to-order at standard lead times.

Be 100% compliant

Only with Cisco Certified Remanufactured products can you get the same quality as new. Products are fully licensed and eligible for Cisco services and SMARTnet support.

[View Circular Economy Infographic](#)

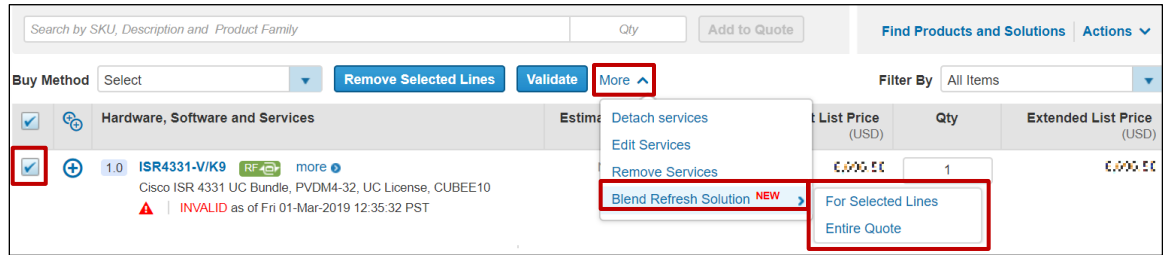
Genuine Cisco Certified Remanufactured products

Collaboration phones and endpoints

Routers, switches, and more

Security and software

- b. Second option: Select a single line, multiple lines, or all lines; From More list of values, click on **Blend Refresh Solution** option.



Note: In Quote view, you will see another level of options to Blend “For selected lines” or “Entire Quote”.

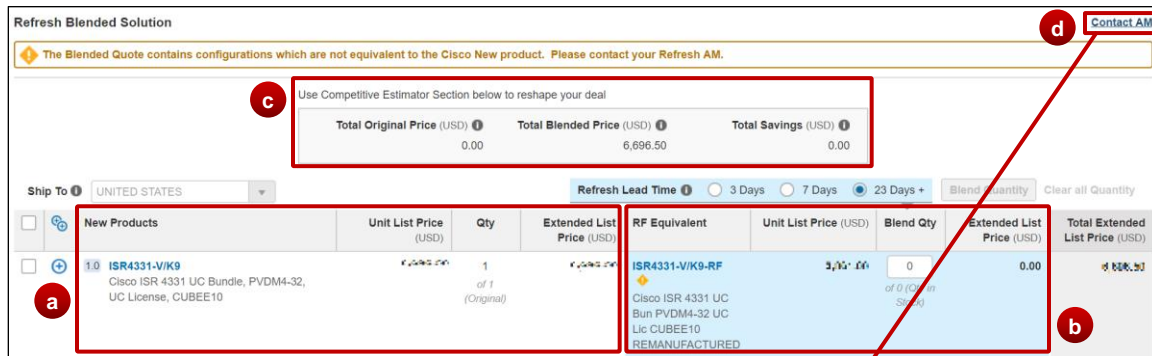
Note: Only Refresh eligible lines will be available to review in the blending tool.

View Refresh Blended Solution Tool

After your selection to Blend, you will see the Refresh Blended Solution page.

- (a) New manufactured product details on the left.
- (b) RF Equipment (Refresh product) detail on the right.
- (c) Competitive Estimator Section to reshape your deal.
- (d) The Contact AM link to see account manager(s) detail for additional support.

These will be explained further in the next several paragraphs.



The Unit List Price is available for comparison of new and Refresh.

Product	Unit List Price (USD)	Qty	Extended List Price (USD)	Discounts (%)	Extended Net Price (USD)	RF Equivalent	Unit List Price (USD)	Blend Qty	Extended List Price (USD)	Discounts (%)	Extended Net Price (USD)	Total Extended Net Price (USD)
1.0 CISCO2901/K9 Cisco 2901 w/2 GE, 4 EHWIC, 2 DSP, 15M, 512MB DRAM, IP Base	2,796.00	10	27,960.00	0	27,960.00	CISCO2901/K9-RF Cisco 2901 w/2 GE, 4 EHWIC, 2 DSP, 15M, 512MB DRAM, IP Base Remanufactured	1,000.00	of 30 (Available)	1,000.00	0	1,000.00	29,000.00
2.0 WS-C6503-E Catalyst 6503 Enhanced 3-slot chassis, 4RU, no PS, no Fan Tray	4,000.00	10	40,000.00	0	40,000.00	WS-C6503-E-RF Catalyst 6503 Enhanced 3-slot chassis, 4RU, no PS, no Fan Tray Remanufactured	1,000.00	of 30 (Available)	1,000.00	0	1,000.00	29,000.00

Note: This screenshot is for example only. In CCW, the Unit List Price figures will accurately show for comparison.

Left Side of Blend – New Manufactured Product

The left side of the Refresh Blended Solution tool displays the new manufactured product information.

Ship To	UNITED STATES	New Products	Qty	Extended List Price (USD)	Discounts (%)	Extended Net Price (USD)
		1.0 CISCO2901/K9 Cisco 2901 w/2 GE, 4 EHWIC, 2 DSP, 256MB CF, 512MB DRAM, IP Base	1 of 1 (Original)	2,796.00	0	2,796.00

Right Side of Blend – Refresh Product

The right side of the Refresh Blended Solution tool displays the Refresh equivalent product, three options for lead-time, price, and availability.

- a. There are three options for Refresh lead-time. When you individually select 3, 7, or 23 days, you will see edit version of the quantity available for that lead time.

Refresh Lead Time	3 Days	7 Days	23 Days +	Blend Quantity	Clear all Quantity
RF Equivalent	Blend Qty	Extended List Price (USD)	Discounts (%)	Extended Net Price (USD)	Total Extended Net Price (USD)
CISCO2901/K9-RF 2901w2 GE4 EHWIC2 DSP256MB CF512MBDRAM,IPBase REMANUFACTURED	0 of 190 (Available)	0.00	0.00	0.00	2,796.00

- b. When you choose a lead-time and enter a number for Blend Quantity, the pricing fields will populate.

RF Equivalent	Blend Qty	Extended List Price (USD)	Discounts (%)	Extended Net Price (USD)	Total Extended Net Price (USD)
CISCO2901/K9-RF 2901w2 GE4 EHWIC2 DSP256MB CF512MBDRAM,IPBase REMANUFACTURED	1 <small>of 190 (Available)</small>	1,538.00	0.00	1,538.00	1,538.00

NOTE: You can only enter a quantity for Refresh product that matches or is less than original quantity you entered for new manufactured product. In the example above, you had a new product quantity of one, so you can only choose 1 Refresh product.

NOTE: Discount percentage will be adjustable in Estimate for all users. In Quote and Order, this adjustment is available based on your Cisco CEC sign-on permissions.

Top Section of Blend – Competitive Estimator

The Competitive Estimator helps you reshape your deal. The three financial figures on top section of the page will show Total Original Price, Total Blended Price, and Total Savings from blending Refresh into your BOM. As you change the quantities in your blend, the blended price and total savings will change.

Ship To	Refresh Lead Time	Blend Qty	Total Original Price (USD)	Total Blended Price (USD)	Total Savings (USD)			
UNITED STATES	3 Days 7 Days 23 Days +		68,465.00	65,479.50	2,985.50			
Item	Unit List Price (USD)	Qty	Extended List Price (USD)	RF Equivalent	Unit List Price (USD)	Blend Qty	Extended List Price (USD)	Total Extended List Price (USD)
10 ISR4331-V/K9 Cisco ISR 4331 UC Bundle, PVD4-32, UC License, CUBEE10	6,846.50	9 <small>of 10 (Original)</small>	61,618.50	ISR4331-V/K9-RF Cisco ISR 4331 UC Bun PVD4-32 UC Lic CUBEE10 REMANUFACTURED	3,861.00	1 <small>of 0 (Qty in Stock)</small>	3,861.00	65,479.50

Note: The Competitive Estimator is a tool to reshape your deal while estimating. Like any estimate, one with a user created blend must go through the regular CCW review process.

6. Once you are done with adding blend quantity, click **Done**.

Refresh Blended Solution Contact AM

The Blended Quote contains configurations which are not equivalent to the Cisco New product. Please contact your Refresh AM.

Use Competitive Estimator Section below to reshape your deal

Total Original Price (USD)	Total Blended Price (USD)	Total Savings (USD)
68,465.00	65,479.50	2,985.50

Ship To: UNITED STATES

Refresh Lead Time: 3 Days 7 Days 23 Days +

	Unit List Price (USD)	Qty	Extended List Price (USD)	RF Equivalent	Unit List Price (USD)	Blend Qty	Extended List Price (USD)	Total Extended List Price (USD)
<input type="checkbox"/> 1.0 ISR4331-V/K9 Cisco ISR 4331 UC Bundle, PVD4-32, UC License, CUBEE10	6,846.50	9 <i>of 10 (Original)</i>	61,618.50	<input checked="" type="checkbox"/> ISR4331-V/K9-RF Cisco ISR 4331 UC Bun PVD4-32 UC Lic CUBEE10 REMANUFACTURED	3,861.00	1 <i>of 0 (Qty in Stock)</i>	3,861.00	65,479.50

Subtotal: All Prices Shown in USD
Total Blended List Price: 65,479.50

Cancel **Done**

7. A dialogue box appears asking for confirmation, Click **OK**.

Blending Confirmation

Please click okay to add the Cisco Refresh Remanufactured Equipment applicable lines and discount to your original BOM. Please note that the transaction will still go through the standard approval process.

Close **OK**

8. This will take you back to your cart view where you will be able to see Refresh product blended to your BOM

Remove Selected Lines More

	Hardware, Software and Services	Lead Time	Unit List Price (USD)	Qty	Unit Net Price (USD)	Discount (%)	Extended Net Price (USD)
<input type="checkbox"/>	1.0 CISCO2901/K9 RF AEOS CP C-1 more Cisco 2901 w/2 GE, 4 EHWIC, 2 DSP, 256MB CF, 512MB DRAM, IP Base Invalid as of 07-Aug-2017 03:39:15 PDT Edit Options Edit Service/Subscription Validate Add Note More Actions	35 days	2,150.00	3 Split	2,150.00	0.00	2,150.00
<input type="checkbox"/>	2.0 CISCO2901/K9-RF CP REFRESH C-1 more 2901w2 GE4 EHWIC2 DSP256MB C F512MBDRAM,IPBase REMANUFACTURED Invalid as of 07-Aug-2017 03:39:37 PDT Edit Options Edit Service/Subscription Validate Add Note More Actions	Not Applicable	2,150.00	7	2,150.00	0.00	2,150.00

9. Blended BOM

Refresh Product Replaced New Product

Refresh product replaced the original new manufactured product. BOM only contains Refresh product.

<input type="checkbox"/>	Hardware, Software and Services	Lead Time ⓘ	Unit List Price (USD)	Qty	Unit Net Price (USD)	Discount (%)	Extended Net Price (USD)	
<input type="checkbox"/>	1.0 CISCO2901/K9-RF CF REFRESH C-1 more ⓘ 2901w2 GE4 EHWIC2 DSP256MB C F512MBDRAM,IPBase REMANUFA CTURED Invalid as of 07-Aug-2017 02:59:04 PDT	Not Applicable		1				
Edit Options Edit Service/Subscription Validate Add Note More Actions ⌵							Add Subtotal	

New Product Blended with Refresh Product

If you start with a quantity of 10 new manufactured products, use the Blended Solution Tool to modify the desired Refresh quantity to 7, and follow the same steps above, you would get a blend showing 3 standards new manufactured product and 7 Refresh product all contained on the same blended BOM.

Note: You can continue to add Refresh and new manufactured product to you BOM and edit line items as usual. Refresh product is available to add to your BOM at any time in same fashion as adding normal new manufactured product to an Estimate, Quote, and Order.



Note: If the Quantity Available is zero, the product is not available. A three-day shipment lead time applies to shipments from in-country warehouses. A seven-day shipment lead time applies to shipments from out-of-country warehouses. The inventory found in the 23+ days shipment lead time represents inventory that can be remanufactured to meet the request.



Note: Remanufactured equipment cannot be shipped to some countries (Currently LATAM, Korea, Sudan, and Iran limit shipment of remanufactured goods.)

4.2.2 Adding Fixed Scope Consultancy SKUs

You can quote and order Fixed Scope Consultancy services only in Cisco Commerce. There are two types of Fixed Scope Consultancy services:

- Installations
- Network Optimization

These services are fixed price, fixed scope, and fixed duration. Therefore, Fixed Scope Consultancy services will always be purchased at net price. To add technical services, see [Adding Services](#).

Fixed Scope Consultancy SKUs can be added as a separate line, or configured as an option for eligible software offers (see [Choosing Options and Resolving Issues](#)).

To add Fixed Scope Consultancy SKUs, complete the following steps:

1. From the Quote tab: Items sub-tab, click **Search by SKU** field and enter “ASF-“. A list of Fixed Scope Consultancy SKUs displays.
2. Select desired SKU.
3. Verify the quantity is correct depending on the SKU and click **Add**. The Fixed Scope Consultancy line is added to the line items of the deal.
4. Ensure the buy method is correct.



Best Practice: Contact information for Fixed Scope Consultancy SKUs must be accurate and should be the contact with whom a project team will work to schedule the installation. In most cases, this is not the Ship To contact.

Providing accurate information results in seamless delivery.

4.2.3 Adding Cisco Integrated Customization Services (CICS) SKUs

CICS (also referred to as Silver-level License SKUs) can be added to a quote, but the process can only be completed once the quote is converted to an order (and the Attach Template button becomes active). CICS require files to be attached in the order and this step cannot happen as part of the quote process. See [Getting Started with Cisco Commerce User Guide](#) for more information on completing this process.

4.3 Using Optional Functions for Individual Line Items



For an individual line item, you will have optional functions for editing, selecting service, editing service, copying, deleting, adding notes and other actions. Difference line types may offer different functions.

Copying Line Items: To copy a line item click **Copy**. A new, identical line item with the same attributes displays on the deal.

Deleting a Line Item: To delete a line item, click **Delete**. The line item is removed from the quote

Select or Edit Options: See [Choosing Options and Resolving Issues](#)

Select Services or Edit/Remove Services: See [Adding Services](#)

Select a buy method for each item

User Notes: Follow the steps below to add a user note for your own personal reference:

1. Click **Add Note** under the appropriate line item. A text field displays.
2. Click into the text field. Enter up to 300 characters and click Save

3. To change the user note, click **Edit Note**. The note displays.
4. Once note is added. Add note will be changed to Edit Note.
5. To edit/change added notes, Click on Edit note change the content and click **Save**.



Note: These notes are for your personal use only and are not reviewed by the Customer and Partner Services (CPS) team.

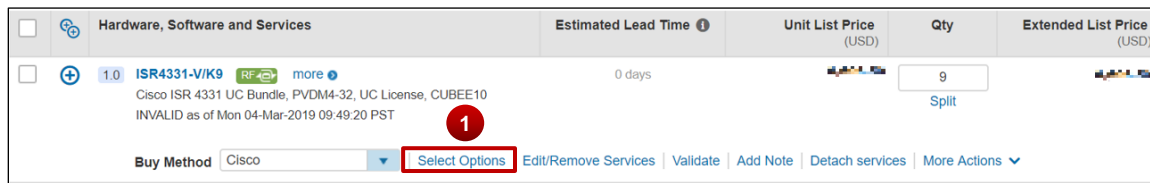
4.4 Choosing Options and Resolving Issues



When a product requires additional configuration, select the appropriate options and resolve any issues so that the product is properly configured. **Select Options** is active under products that require additional configuration.



Note: Edit Options displays for products already configured. However, you can select new options.



Quote Tab: Items Sub-Tab

To select options, configure products, and resolve any warnings or errors in the configuration, complete the following steps:

1. From the Quote: Items sub-tab, click **Select Options** below the line item that needs to be configured so it can become valid. The Option Selection page displays.

The configuration can be completed for multiple options, individual options, when the SKUs are known, and when the SKUs are not known.

- If the SKUs for the required items are known, use the multiple option search function to enter the SKUs in a list and have all results display on the page (see [Searching for Multiple Known SKUs](#)).
- To search for a known SKU one at a time, use the Option Search tab or search for a SKU manually through the system of links and messages (see [Searching for a Single Known SKU](#)).
- If the SKUs are not known or to search by each required component, use the individual search function (see [Searching Unknown SKUs Individually](#)).

OPTION SELECTION CISCO2911/K9 Global Price List - US (USD)

Configuration Summary [View Full Summary](#)

Country Specification 3

Select Country (Not Required) 2

Warnings (3):

- The quantity of Power Cables must be equal to the quantity of Primary Power Supply selected. Please adjust the quantity. (CE200050)
- Have you considered using Cisco ONE <http://www.cisco.com/go/one> for this order? The Cisco ONE equivalent for the current BID is C1-CISCO2911/K9 (CE201028)

Option Search Multiple Options Search

CISCO2911/K9 > IOS Software Version and Type 5 Key ▾

Image with Payload Encryption | Image with No Payload Encryption

SKU	Qty	Lead Time	Unit List Price (USD)
<input type="radio"/> S29UK9-15501T CP	1	14 days	0.00
Cisco 2901-2921 IOS UNIVERSAL			
<input type="radio"/> S29UK9-15303M CP 4	1	14 days	0.00
Cisco 2901-2921 IOS UNIVERSAL			
<input type="radio"/> S29UK9-15403M CP	1	14 days	0.00
Cisco 2901-2921 IOS UNIVERSAL			
<input type="radio"/> S29UK9-15503M CP	1	14 days	0.00
Cisco 2901-2921 IOS UNIVERSAL			

Subtotal 2,695.00
Estimated Lead Time 14 days

Reset Configuration Cancel Done

Clear Selection | [Show Incompatible SKUs](#)

Option Selection Page

- Review the product list displaying on the left of the page in the Configuration Summary pane.
- Attend to the warning or error messages displaying at the top of the page indicating corrections within the configuration. You cannot submit the order without completing the configuration.
- Some of the options have icons next to them. These icons give additional information about the corresponding option. Hover over the icon to view related information.
- Click the **Key drop-down** to view icon-related information.

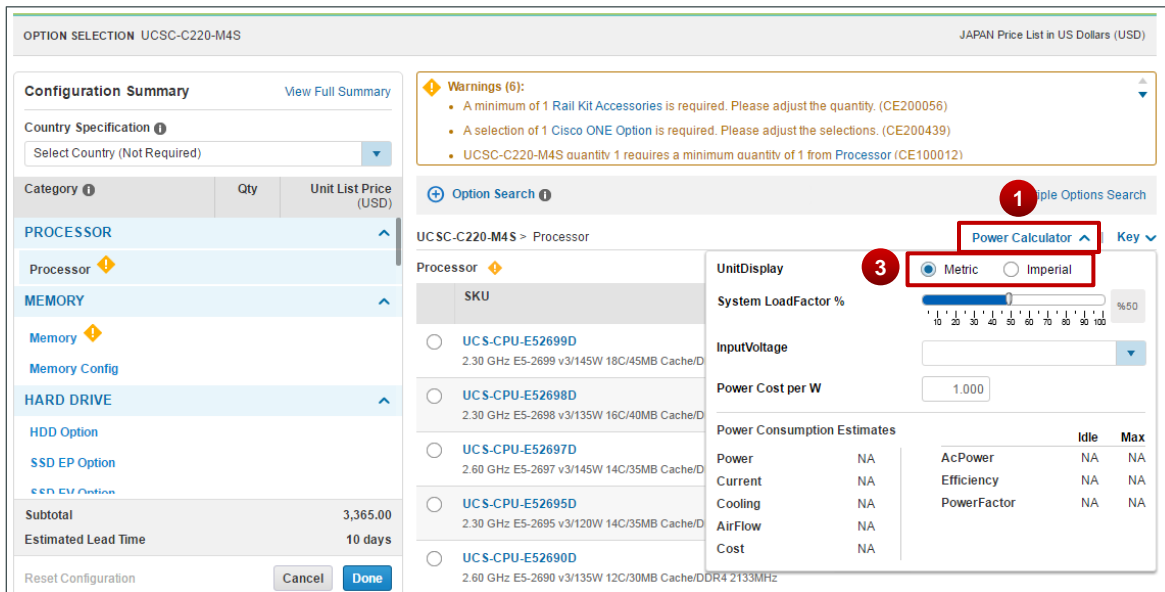
4.4.1 Using the Power Calculator

Power Calculator option is only applicable to Unified Computing System (UCS) products and identifies the electrical power consumption of products to make better selection.

To view the power consumption information for a UCS product, complete the following steps:

- Select the appropriate option and click **Power Calculator drop-down** arrow to view the consumption.
- A legal disclaimer displays. Click **Accept** to view the power consumption details.
- Select **Metric** or **Imperial** to view appropriate units in the power calculator drop-down menu.

4. Click **Power Calculator** to close the drop-down menu.



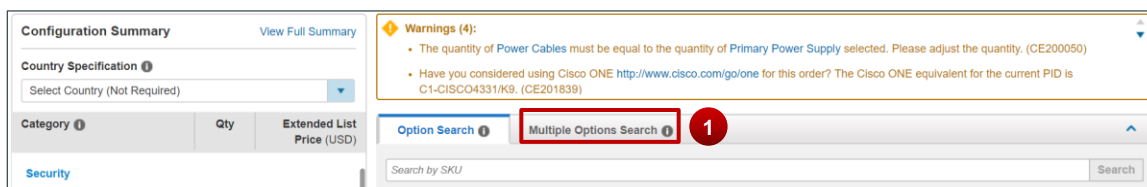
Option Selection Page – Power Calculator

4.4.2 Searching for Multiple Known SKUs



To search for multiple known option SKUs at a time, complete the following steps:

1. From the Option Selection page, click **Multiple Options Search**. The content on the right of the page refreshes and displays the Multiple Options Search section. Click **Show Instructions** for support and examples.



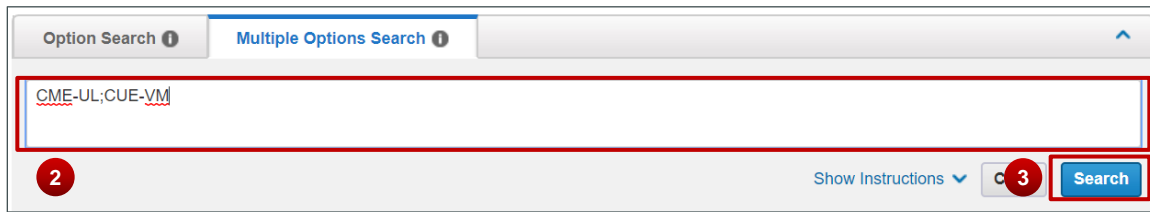
2. Click the text box and enter SKUs and respective quantities. Copy and paste information from another source or enter the information manually if needed.



Note: Enter the SKU and respective quantity; separated by a space, a comma, a tab, or a semi-colon on the same line, one SKU per line.

Enter the product items in a column. Do not enter the product items in a list separated by commas.

3. Click **Search**.



Option Selection Page: Multiple Options Search

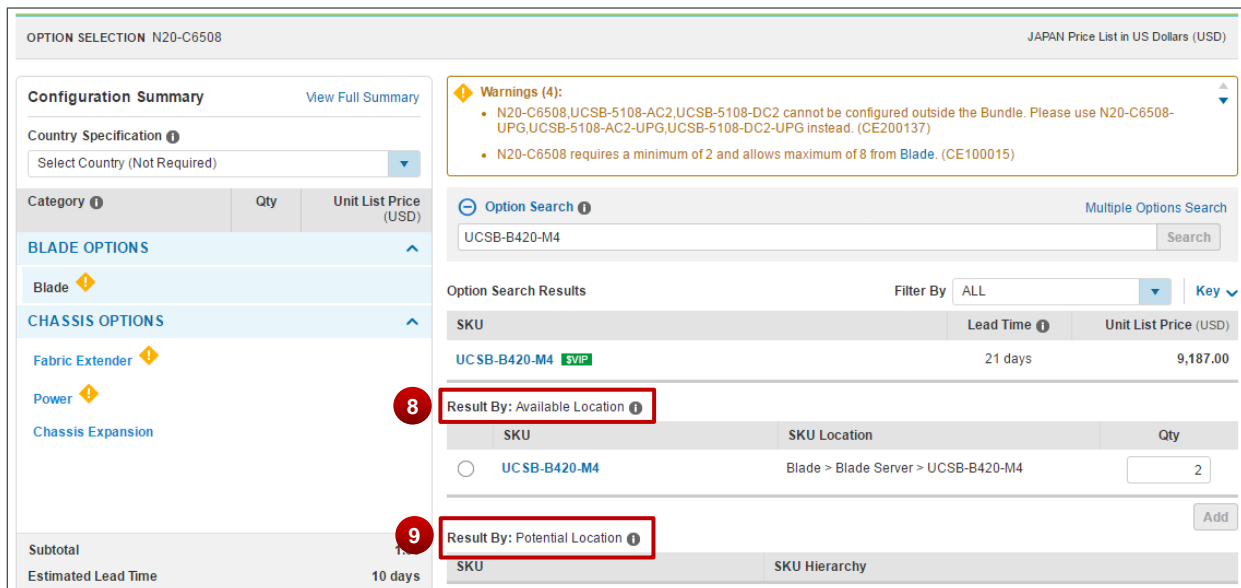
- The search results display at the bottom of the under Result: By Available Location, Result: By Potential Location, and Result: Not available. Search results include estimates lead times, SKU list prices, and locations (available and potential).

Some of the results have icons next to them. These icons give additional information about the corresponding option. Hover over the icon to view the information.

- From the search results under Available Location section, check the checkbox (es) corresponding to the desired items.
- Errors with the indicated quantities display above the Multiple Options Search tab. Click each link to resolve the error. Once the quantity errors are resolved, the items are added to the configuration.

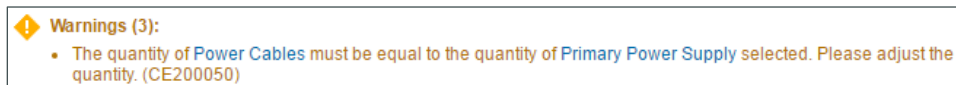


Note: Some Qty fields are editable and some are not. If the Qty field is populated and greyed out so that you cannot make edits, the quantity is controlled by the system according to the rules of quantity limitations.



Multiple Option Search Tab: Search Results

7. Click **Done**. The Order page displays.
8. Available Location indicates the path to the SKU(s) under the Configuration Summary pane on the left side of the page. Items can be added to the configuration by leaving the appropriate checkbox (es) checked. To remove a product from the list of items to add, uncheck the checkbox corresponding to that product.
9. The Potential Location indicates a possible path to the indicated SKU(s) under the Configuration Summary pane on the left side of the page. Items cannot be added to the configuration from this section. Click the link within the indicated path and select the appropriate product.
10. If there are any error messages associated with a SKU, the error message displays at the top of the page and the SKU displays under Results: Not available. These SKUs are not selectable.
11. Hover over the information icon to learn more about available and potential locations.



Option Selection Page: Quantity Error Messages

4.4.3 Searching for a Single Known SKU

To search for a single known SKU, complete the following steps:

1. From the Option Selection page, expand **Option Search** section
2. Enter the SKU and a drop-down menu displays all the available options based on what was entered. Select the desired SKU from the drop-down list.

Once the correct SKU has been entered into the field, click **Search**. The Option Search tab displays and the Option SKU field is automatically populated.

3. Click **Search**. The search results display at the bottom of the page under Result: By Available Location, Result: By Potential Location, and Result: Not available. Search results include estimates lead times, SKU list prices, and locations (available and potential).

Some of the results have icons next to them. These icons give additional information about the corresponding option. Hover over the icon to view the information.

4. Click the **radio button** corresponding to the SKU.
5. Click **Add**.

Option Selection Page: Option Search Tab

4.4.4 Searching Unknown SKUs Individually

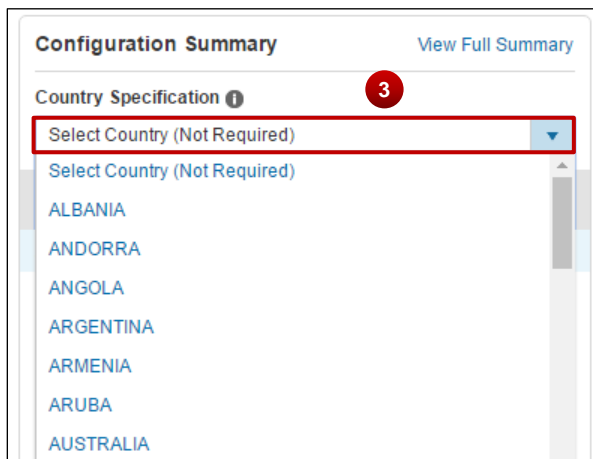
To select options, configure products, and resolve any warnings or errors in the configuration without knowing the SKUs needed, complete the following steps:

1. From the Quote tab: Items sub-tab, click **Select Options** below the line item. The Option Selection page displays.

Options that require additional configuration have an orange icon next to them and are identified at the top of page above the Option Search section.

Option Selection Page

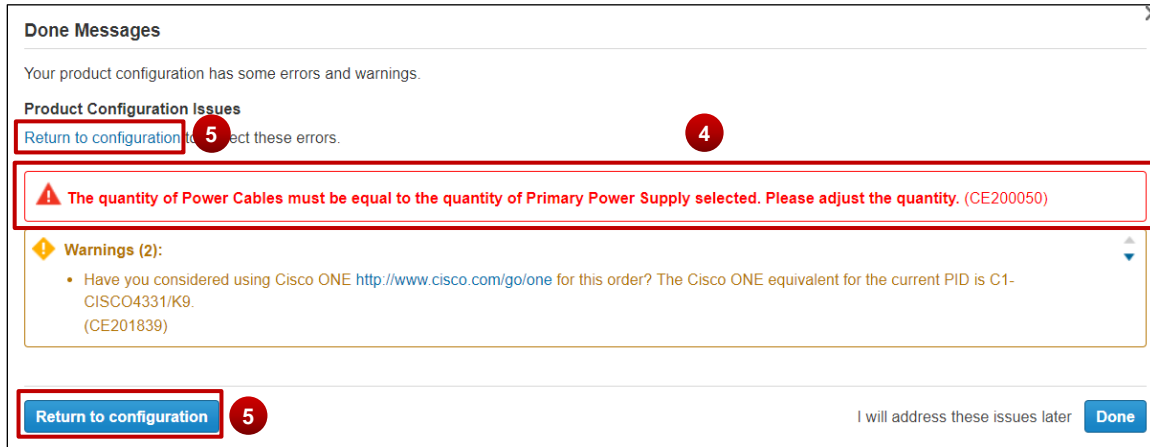
2. Scroll through the Configuration Summary pane. Using the warning messages at the top of the page as a guide, click on the **link** within the message to resolve each warning or error. Click the appropriate option(s). Continue this process until all issues have been.



Option Selection Page: Country Specification Feature

3. Click the **Country Specification drop-down** arrow in the Configuration Summary pane and click the appropriate country. The system will then filter the products based on the country selection, making it easier and faster to configure products correctly.
4. Click **Done**. If issues remain, an error message displays in the Done Messages dialog box. Upon clicking **Done** in the Done Messages dialog box, the Items tab displays a confirmation message indicating that the changes have been saved.

5. To correct the error(s), click **Return to Configuration**.

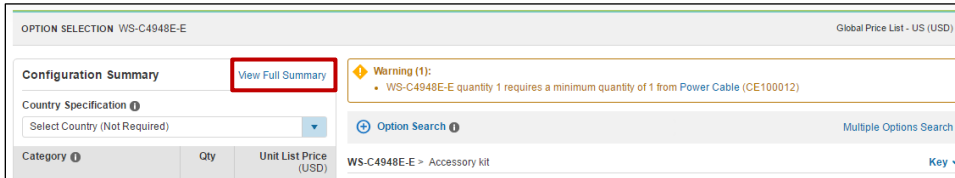


Done Messages Dialog Box

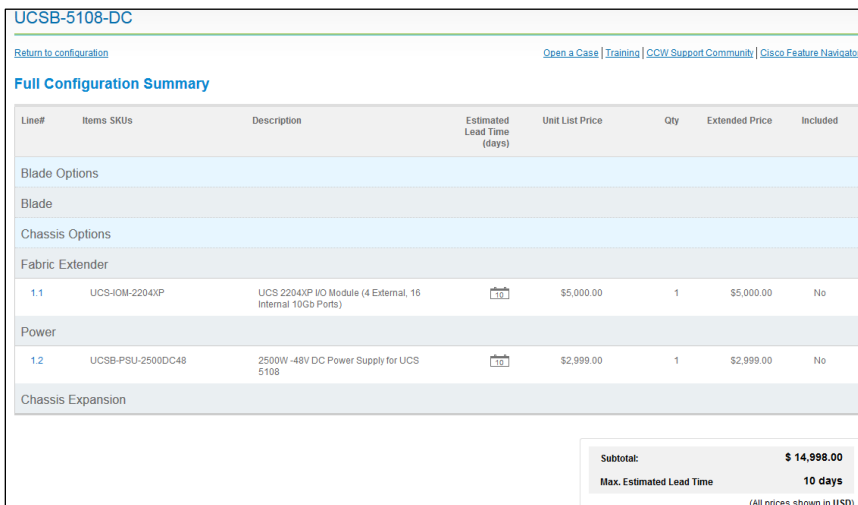
4.4.5 Viewing Full Summary

You have the option of viewing a summary page of the configuration with the selected options.

From the Option Selection page, click **View Full Summary**. The page refreshes to display the Full Configuration Summary.



Option Selection Page: Configuration Summary Pane



Option Selection Page: Full Configuration Summary

4.4.6 Using Cisco Feature Navigator

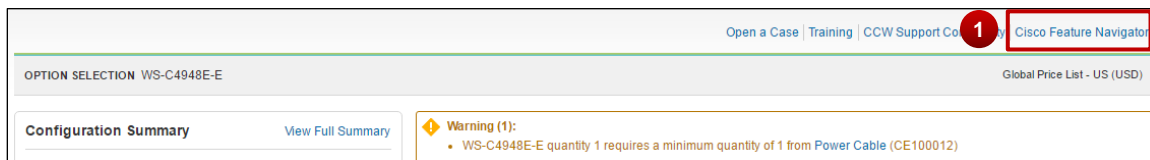


The Cisco Feature Navigator helps you to find the best software solution for the selected hardware. By using this function, you can find the right product based on software or feature needs.

To access Cisco Feature Navigator, complete the following steps:

1. From the Option Selection page, click **Cisco Feature Navigator**.

The Cisco Feature Navigator page displays in a new window.



Option Selection Page: Cisco Feature Navigator

2. To return to Cisco Commerce, close the new window.

There is no navigation back to Cisco Commerce from the Cisco Feature Navigator page.



Cisco Feature Navigator Page

4.5 Setting Quantities for Items



You can add quantities of items when adding them to the Items tab or when they are already added to the Items tab.



Note: The Qty field in Cisco Commerce Deals & Quotes tab accommodates up to nine digits, for example, 1234567891.

To change the quantity for each of the items, enter the desired number of items or options in the Qty field for that line and click outside the text field. For multiple items and options, repeat this step for each item. The extended list price is the price per unit multiplied by the quantity.

<input type="checkbox"/>	Hardware, Software and Services	Estimated Lead Time ⓘ	Unit List Price (USD)	Qty	Extended List Price (USD)
<input type="checkbox"/>	1.0 ISR4331-V/K9 more Cisco ISR 4331 UC Bundle, PVDIM4-32, UC License, CUBEE10 VALID as of Tue 05-Mar-2019 05:18:04 PST	Not Applicable		<div style="border: 1px solid red; padding: 2px;"> 9 Split </div>	

Buy Method

Quote Tab: Items Sub-Tab - Qty Field

4.5.1 Splitting Quantity of Items

You can split quantity of items for configuration, adding different services or ordering partial quantity.

To split quantity of an item, complete the following steps:

1. Click **Split** below the item quantity. The Split Quantity dialog box displays.

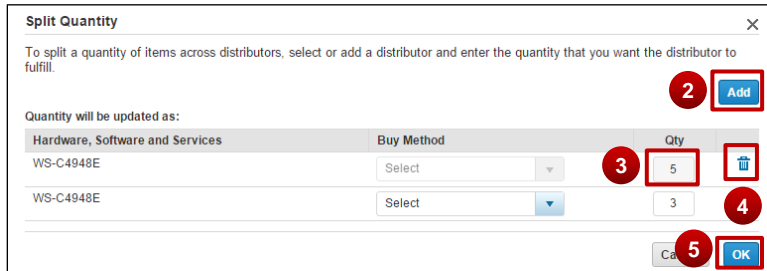
<input type="checkbox"/>	Hardware, Software and Services	Estimated Lead Time ⓘ	Unit List Price (USD)	Qty	Extended List Price (USD)
<input type="checkbox"/>	1.0 ISR4331-V/K9 more Cisco ISR 4331 UC Bundle, PVDIM4-32, UC License, CUBEE10 VALID as of Tue 05-Mar-2019 05:18:04 PST	Not Applicable		<div style="border: 1px solid red; padding: 2px;"> 9 Split </div>	

Buy Method

Select Items to Order Page

2. Click **Add** to add a distributor to whom the updated quantity will be assigned. The dialog box refreshes.
3. Type the **quantity** in the new line.
4. Alternately, click **delete icon** to remove a newly added line.

5. Click **OK**. The Items sub-tab refreshes to display the new line with split quantity.



Split Quantity Dialog Box

4.6 Adding Services

There are various types of Cisco service offerings:

Technical services are always attached to hardware or software product. They can either be ordered at the point of sales (in Cisco Commerce) or purchased separately as a service only line (either in Cisco Commerce or CCW-R).



Note: Standard durations for technical services can be between 12 and 60 months. However, multi-year discounts for standard orders are not available for service durations greater than 36 months.

Advanced Services (AS): Each type of Advanced Service has different deliverables, delivery model, as well as ordering rules. Not all are orderable within Cisco Commerce.

AS Transaction (AS-T): These cannot be ordered within Cisco Commerce, you must fax this order.

- AS Subscription (AS-S): These cannot be ordered within Cisco Commerce. Refer Advanced Services – Subscription Ordering QRG – [Partners](#) and [Distributors](#)

AS-Fixed (AS-F): These services have a fixed scope, fixed price, and fixed cost and are orderable with Cisco Commerce. For more information on ordering AS-F SKUs in Cisco Commerce Deals & Quotes tab, see [Adding Fixed Scope Consultancy SKUs](#).

You can add services to items as part of the product quoting process. Services for previously ordered products can also be ordered separately as a service-only quote, later converted to an order. See [Creating a Quote for Service-Only Order](#).



Best Practices: Add services as part of the product configuration within your quote or order, rather than as a separate service-only line item. To create an order for service-only line items, see [Creating a Quote for Service-Only Order](#).

For more information on Cisco services, you can reference: <http://www.cisco.com/web/partners/services/index.html>

4.6.1 Setting Default Services Options



Within your Cisco Commerce My Profile and Preference section, you can select your default service choices, as well as determine whether you would like Cisco Commerce to automatically add services to your valid configurations across all quotes, estimates, and orders in Cisco Commerce (refer to the [Getting Started with Cisco Commerce User Guide](#)). You can also override these preferences at the quote, estimate, or order level.

If you ask Cisco Commerce to automatically add services to your order, they will be chosen based on the following:

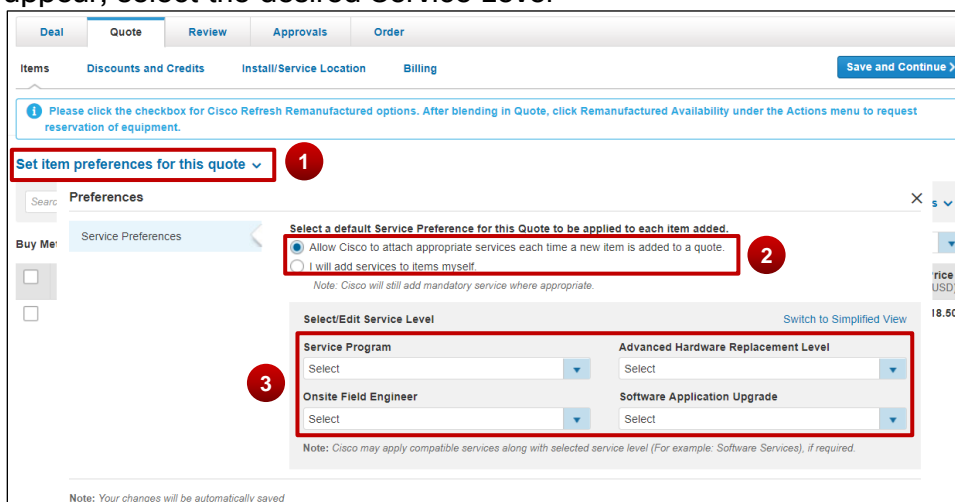
Services will be attached based on the service preferences set within the order

If no services are set within the order, then preferences from your My Profile and Preferences will be used

If selected preferences are not applicable (or not set), the system attaches services based on existing service attach rules, such as, products being ordered, service program availability, certifications, Bill-to and install site and others

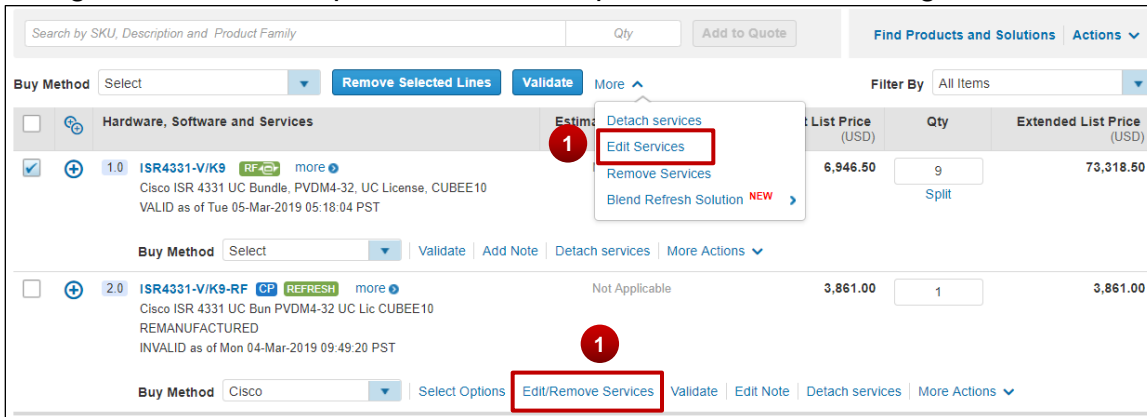
To set the service options in the items sub-tab (these will override any preferences that were set under your My Profile and Preferences), complete the following steps:

1. In the **Service Preferences** window, your Default Service Preference appear. You can also Search for the Service Level, select Service Level, and your selection will be automatically saved for this quote.
2. Click the appropriate **radio button** to allow Cisco to attach services automatically or to add services manually.
3. Start typing in the **Select/Edit Service Level** box and a list of matching Services will appear; select the desired Service Level



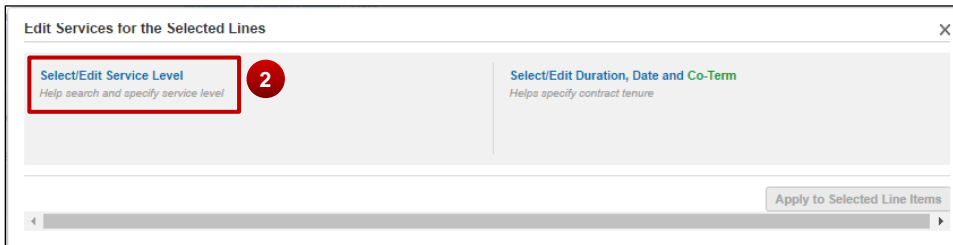
4.6.2 Adding Services to Items in the Configuration

There are two ways to edit services using the Services Option widget. You can attach services at the Header level by clicking on **Edit Service** in the More dropdown on your quote. The Service Level you select will apply to all selected lines of your configuration. Use this option for basic Service Level changes. You can also click **Edit/Remove Service** on an individual line of your configuration. Use this option for more complex Service Level changes.



You can attach Services at the Header level if you wish to apply the service level across all selected lines of the configuration in the cart. However, because Product lines do not filter preferences in the cart, the Service level may or may not successfully apply to each line. You should verify that each line of your configuration has the correct Service level applied before proceeding with your order.

1. Place a checkmark next to the desired SKUs before selecting **Edit Services** from the **More** dropdown
2. Click **Select/Edit Service Level**



3. Start typing the name of the Service; the widget will display a list of potentially-matching Service Levels



4. Notice the Compatible Service Lines display after selecting a service

5. Change the duration by entering in number of months, start date, or start and end date
6. Click **Apply to Selected Line Items** (see Note below):

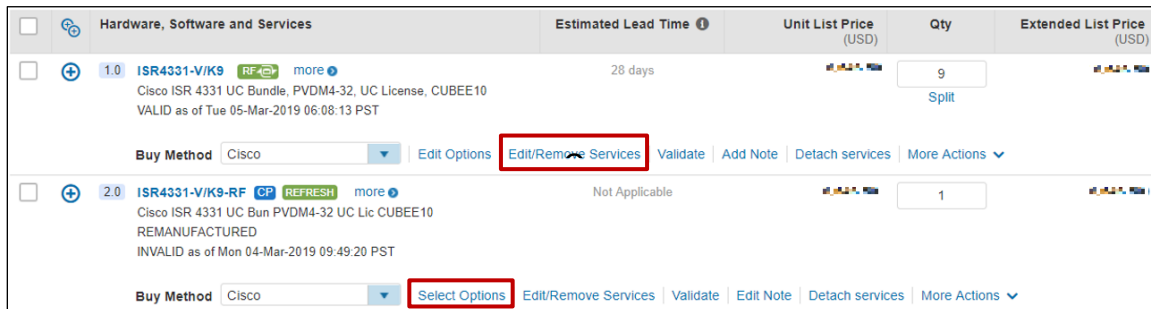


Note: applying the Service to the selected lines does not guarantee that the Service will be added to each line; you should manually verify each individual configuration to ensure it has the correct service level.

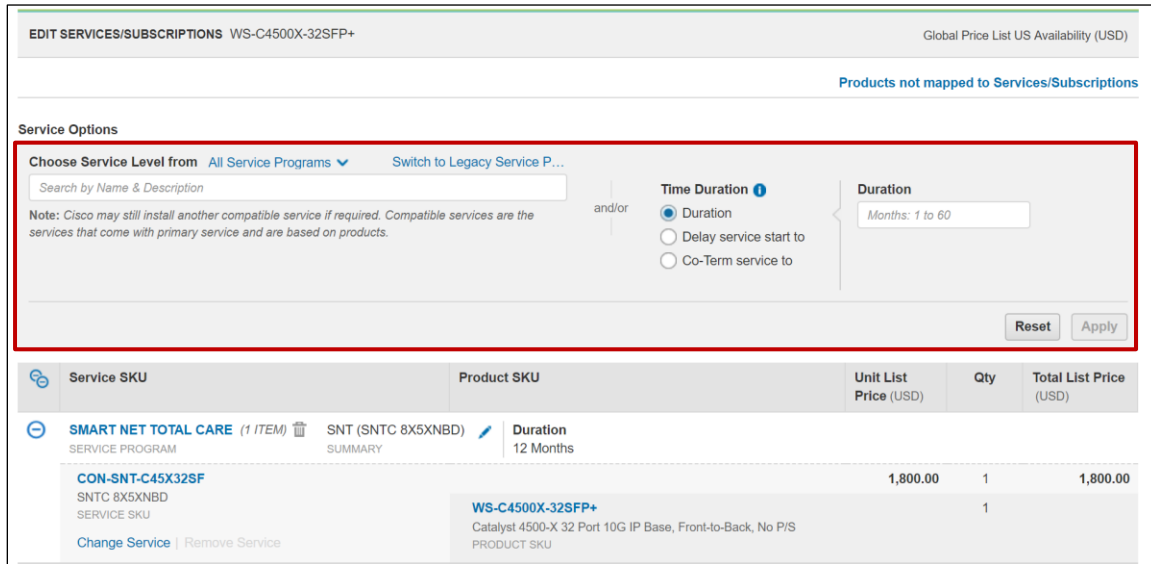
4.6.2.1 Attach Services on the Edit Services/Subscription Page

The Edit Services/Subscription page summarizes all attached services. You can use this page to compare prices for different service offerings, see what services are available, or add secondary services. You can also attach one or more service levels to one or more lines of your configuration.

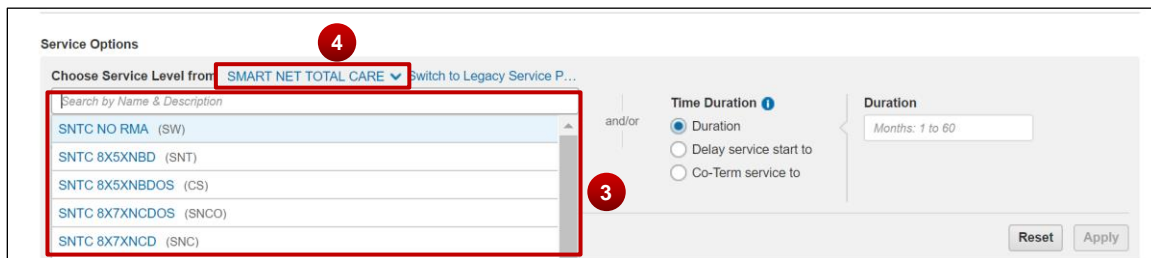
1. Click either **Edit/Remove Services** or **Select Options** on any line to open the Edit Services page.



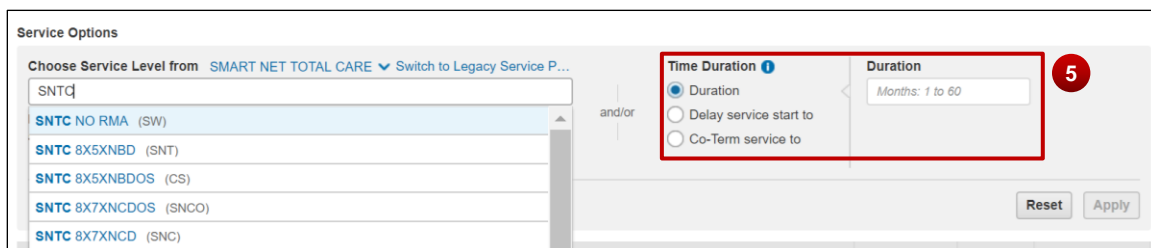
- The Service Options widget will appear in Simplified View with the service-eligible lines below.



- Search for specific service levels within a service program
- Select a service program from the dropdown list to focus your search to a specific program. All included services and compatible services will be displayed after choosing a service.



- Specify the **Time Duration** in months. You can also **Delay Service start by** selecting a start date and duration. You can also **Co-term Service by** inputting the proper start and end dates.



6. Select **Apply** to add the service configuration

7. After clicking **Apply**, you will see the updated Service and Duration

8. To delete all the added services at any time, click **Remove All Services**

Service SKU	Product SKU	Unit List Price (USD)	Qty	Total List Price (USD)
SOLUTION SUPPORT WITH SNTC (1 ITEM)	SSSNT (SOLN SUPP 6X5XNBD) SUMMARY			
CON-SSSNT-ISR4331V	ISR4331-V/K9	861.00	1	861.00
SOLN SUPP 6X5XNBD Cisco ISR 4331 Bundle with UC Sec...	Cisco ISR 4331 UC Bundle, PVDMM4-32, UC License, CUBE...		1	

4.6.2.2 Attach Services to Unassigned Products

Products that do not have services attached are listed under **Unassigned**.

1. To add services, click on **Add a Service SKU**.
2. Select the service you want to want to attach.
3. Click **Apply**.

The screenshot shows a table with columns: Service SKU, Product SKU, Unit List Price (USD), Qty, and Total List Price (USD). The first row shows 'CON-ECMU-C1F1S19K' with a unit price of 192.00 and a total price of 192.00. Below this, a tab labeled 'Unassigned' is highlighted. A modal window titled 'Add Service' is open, displaying a list of service options. The option 'SNTC 8X5XNBD (SNT)' is selected. The modal also includes a 'Configuration Summary' section showing 'Services' with a price of 192.00. Red annotations include a box around the '+ Add a Service SKU' button (1), a box around the selected 'SNTC 8X5XNBD (SNT)' option (2), and a box around the 'Apply' button (3).

- The product is moved off the **Unassigned** tab and is displayed with its attached Service Program, Duration, and Service SKU.

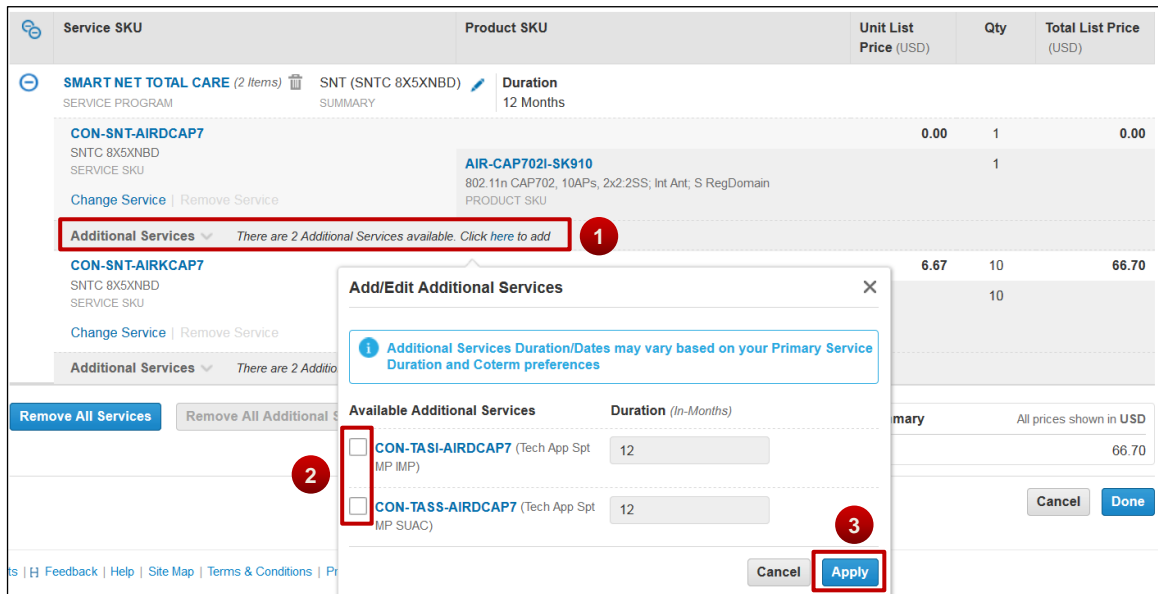
The screenshot shows a table with columns: Service SKU, Product SKU, Unit List Price (USD), Qty, and Total List Price (USD). The first row shows 'CON-SNT-C1C1921' with a unit price of 22.33 and a total price of 22.33. The service is identified as 'SNTC 8X5XNBD' and the product as 'C1-CISCO1921/K9'.

- If the service selected cannot be attached, a warning message will appear with instructions

The screenshot shows a warning message in a yellow box: "Service preferences cannot be applied to C1-CISCO1921/K9 configuration. System will restore any existing services on configuration. Please use Select/Change Services link to see available services. (CS410)".

4.6.2.3 Adding Secondary Services in the Edit Services/Subscriptions Page

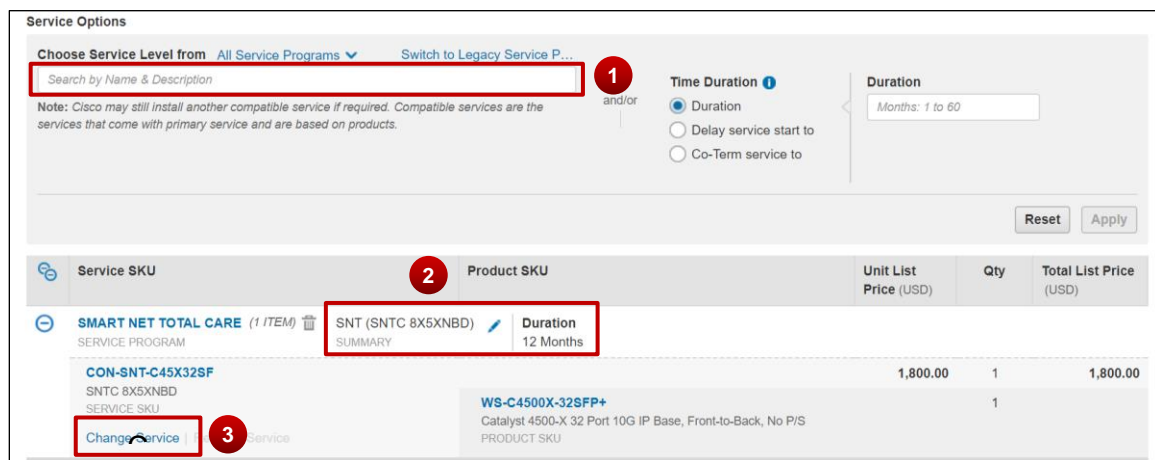
1. When available, click on **Additional Services** to show available secondary services
2. Select the appropriate service and duration
3. Click **Apply**



4.6.2.4 Changing Services in the Edit Services/Subscriptions Page

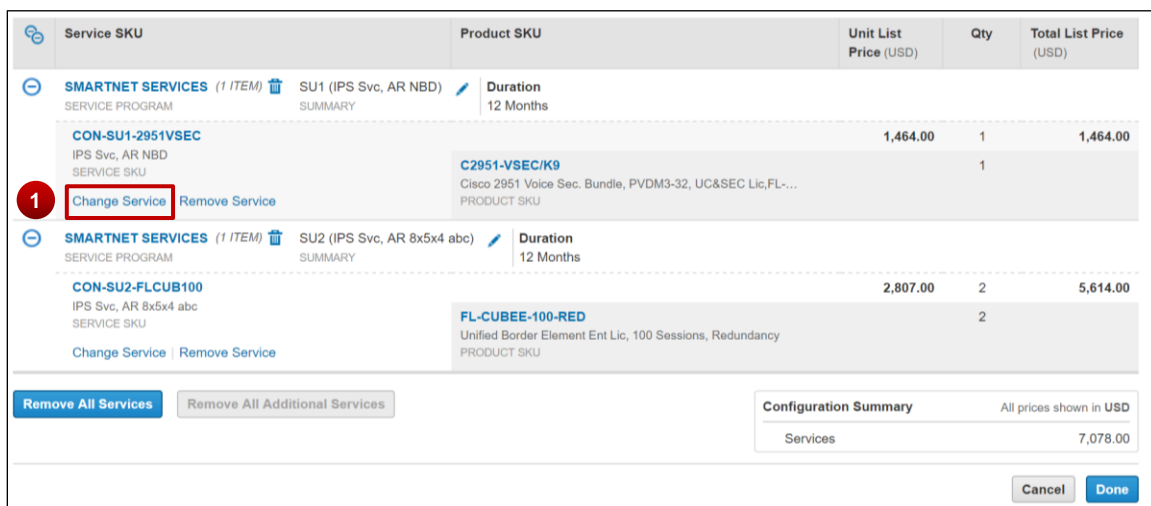
There are three different levels where you can make changes to your Service. It is important to understand how your selections will affect your configuration. The following are three different configuration level changes available and how they affect the entire configuration.

1. Header Level Changes
2. Group Level Changes
3. Line Level changes



- Line Level Change
Only the selected line changes. No other lines affected
- Group Level Change
The Group Service will change. This might also affect other Service Groups based on compatibility with the new Group Service
- Header Level Change
All Service lines and Groups will be affected according to service compatibility

1. On the **Edit/Remove Services** Page, the eligible items will display and the option to **Change Service** will be available to make a Line level



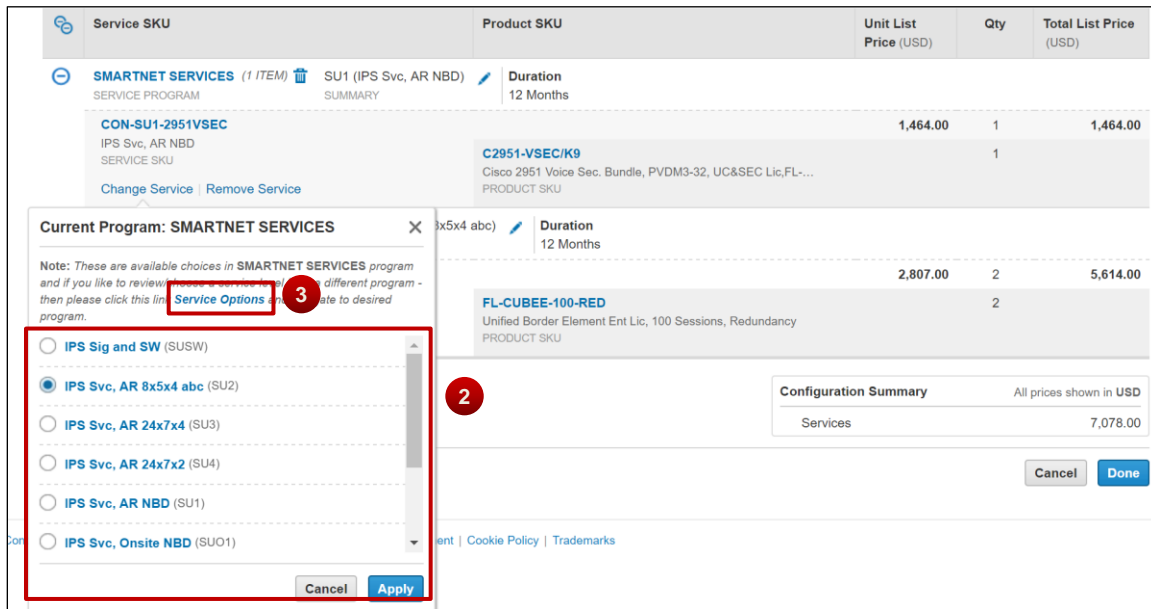
Service SKU	Product SKU	Unit List Price (USD)	Qty	Total List Price (USD)
SMARTNET SERVICES (1 ITEM) Duration: 12 Months				
<small>SERVICE PROGRAM: SU1 (IPS Svc, AR NBD) SUMMARY</small>				
CON-SU1-2951VSEC <small>IPS Svc, AR NBD SERVICE SKU</small>	C2951-VSEC/K9 <small>Cisco 2951 Voice Sec. Bundle, PVDM3-32, UC&SEC Lic,FL-...</small>	1,464.00	1	1,464.00
Change Service Remove Service	<small>PRODUCT SKU</small>		1	
SMARTNET SERVICES (1 ITEM) Duration: 12 Months				
<small>SERVICE PROGRAM: SU2 (IPS Svc, AR 8x5x4 abc) SUMMARY</small>				
CON-SU2-FLCUB100 <small>IPS Svc, AR 8x5x4 abc SERVICE SKU</small>	FL-CUBEE-100-RED <small>Unified Border Element Ent Lic, 100 Sessions, Redundancy</small>	2,807.00	2	5,614.00
Change Service Remove Service	<small>PRODUCT SKU</small>		2	

Remove All Services Remove All Additional Services

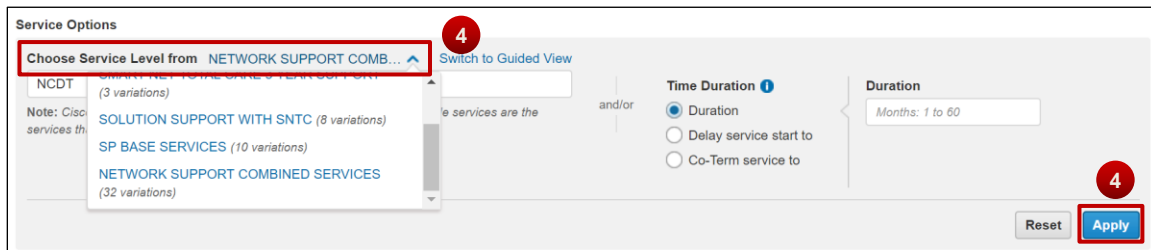
Configuration Summary All prices shown in USD
 Services 7,078.00

Cancel Done

2. A dropdown menu will appear with possible options to change the service. Select the appropriate service and click **Apply** to complete the Line level change.
3. If the required service is not available in the current program, click **Service Options** to make a Group level Service change



- The system directs you to the top to search for an appropriate Service Program. Search and select the appropriate Program and click **Apply**.



- The system will automatically adjust all necessary Service programs in other Minor Product Lines as necessary
Note: This will not affect Unassigned Products eligible for service.
- Once all changes are complete, Click **Done**

For Header level changes, refer to section 2.1.

Note: Header Level changes will affect Unassigned Product lines eligible for service.

4.6.2.5 Add/Edit a Corresponding Subscription



Note: Only Product SKUs that have Subscriptions associated with them will have the option of adjusting subscription licenses and durations. Otherwise, the Subscriptions Tab will not appear in the Edit Services/Subscriptions Page.

1. Click **Edit Subscription** to change the details of the subscription

The screenshot shows the 'EDIT SERVICES/SUBSCRIPTIONS' interface for 'ESA-ESI-LIC='. It includes a 'Subscription Options' section with a 'License Count' of 100 and a 'View 100-199 Users' dropdown. Below is a table with columns: Subscription SKU, Product SKU, Qty, Unit List Price (USD), and Total List Price (USD). The table lists 'ESA INBOUND BUN LIC' and 'ESA-ESI-3Y-S1'. A red box highlights the 'Edit Subscription' link for the 'ESA-ESI-3Y-S1' row. A 'Configuration Summary' box shows a total price of 4,193.00. 'Cancel' and 'Done' buttons are at the bottom right.

2. You can edit the **Start Date** and **Duration** of the subscriptions.

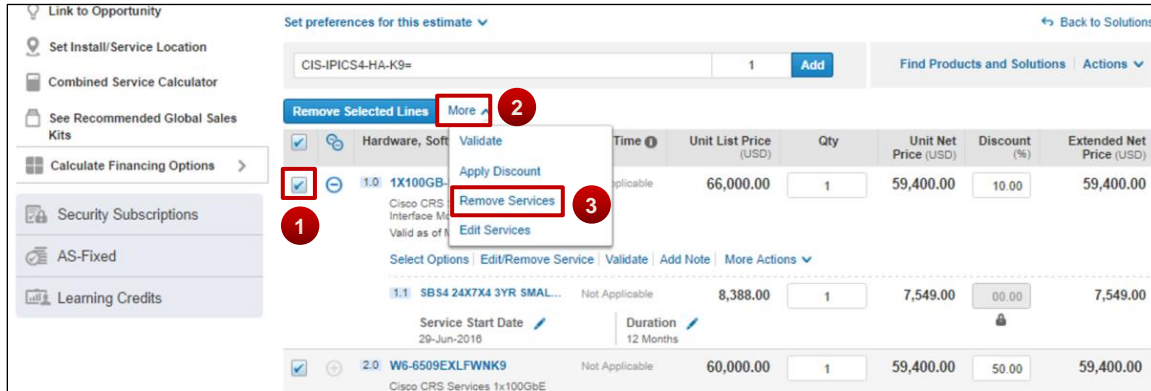
This screenshot shows the 'Edit Subscription' dialog for 'ESA-ESI-3Y-S1'. It displays the 'Duration (Months)' as 36 and the 'Unit List Price' as 41.93. A red box highlights the 'Duration' field and the 'Apply' button. Other options include 'ESA-ESI-1Y-S1' (12 months, 19.06) and 'ESA-ESI-5Y-S1' (60 months, 66.69). 'Cancel' and 'Apply' buttons are at the bottom right.

3. Click **Apply** and then **Done** to make updates to the subscription.
4. Once these steps are completed and the Services/Subscriptions are configured, proceed normally with the Quote to Order process

4.6.3 Remove Services

There are multiple ways to remove services from a product. The following are the most common.

1. Select the **Product lines** that will have their services removed
2. Click on **More** to display the available options, if it has not already displayed
3. Click on **Remove Services**. This will remove the attached services for all selected Product lines

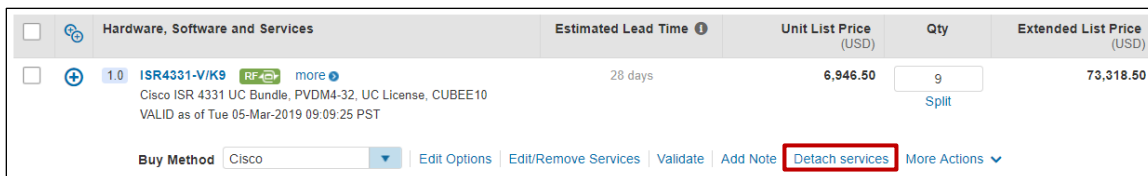


4.6.3.1 Remove services in Edit/Remove Services page

1. On the Edit/Remove Services page, click on **delete icon** next to the service program you want to remove. This will remove the service program for all products serviced by it.
2. Alternatively, if you only need to remove the service for one Product line, click on **Remove Service**, if applicable
3. Lastly, click on **Remove All Services** or **Remove All Additional Services** to remove accordingly.

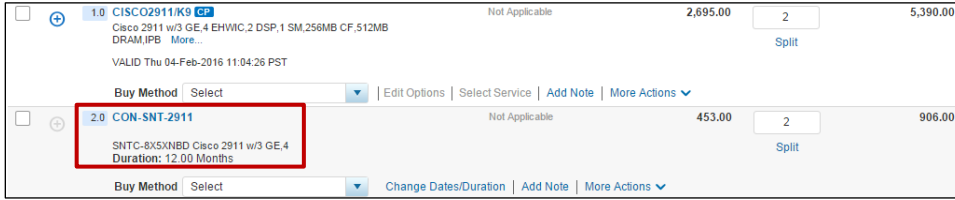
4.6.4 Detaching Services

You can detach non-mandatory services attached to an item in a quote and add them as standalone services. This will allow you to quote products and services with different buy methods.



Quote Tab: Items Sub-Tab - Detach services

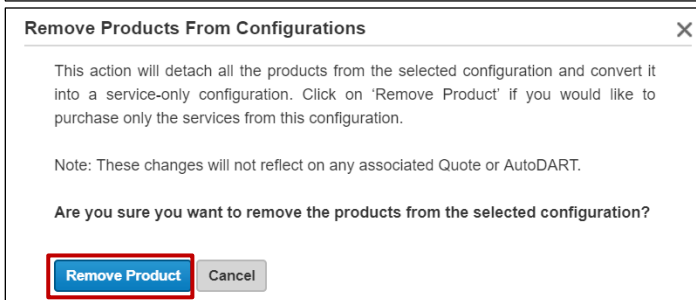
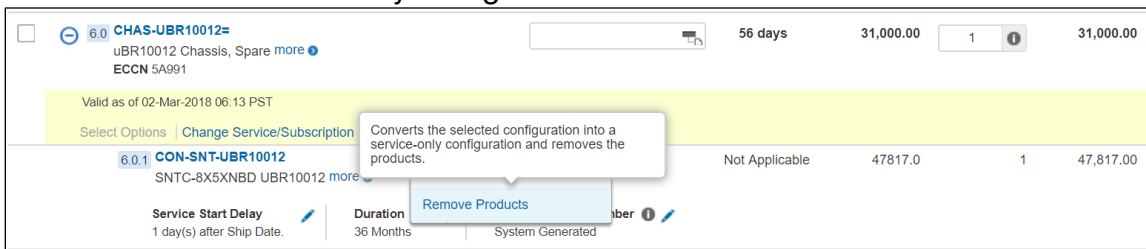
Click **Detach Service** to detach non-mandatory services from an item. Alternatively, select multiple items and click **Detach services** to detach non-mandatory services from multiple items in the items sub-tab. The items sub-tab refreshes to display the services as a major line item.



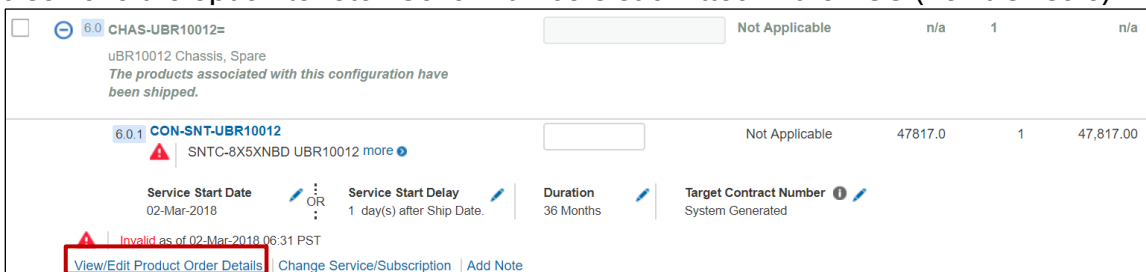
Quote Tab: Items Sub-Tab –Refreshed

4.6.5 Remove Product & Reassign Services to Existing Inventory

You can use a Remove Product capability on an imported configuration that contains both hardware and attached services. On the imported product line item under the More Actions pull down menu, select **Remove Product** when you already have hardware on hand and just want to purchase the services. This action removes the hardware parts from the configuration and converts it into a service-only configuration.



Using **View/Edit Product Order details** link available on this configuration, users will have the option to specify the exact serial numbers that they want covered by this new service. They would also have the option to fetch Serial Numbers submitted in the POS (Point Of Sale).



Serial Numbers X

Multiple Serial Numbers can be entered by separating each with a comma or newline.
A unique serial number is required for each product.

Example :932550, 408098, 929400

SKU:CISCO1921DC/K9 Qty: 1

Previously entered serial numbersInvalid Serial Numbers

➕ FGL2141911N

4.7 Renewing Software Subscriptions



You can renew existing subscription contracts and create new subscription contracts using Cisco Commerce, either directly through the Services & Subscriptions tab or from within an order.



Note: This capability is limited in Cisco Commerce and has only been enabled for limited offers. Use CCW-R to manage subscription offers that have not been enabled.



Note: When adding a subscription renewal to an existing contract, you can co-term the end dates of the software subscription renewal to an existing contract in Cisco Commerce Order (see the [Cisco Commerce Order User Guide](#) for details). However, this feature is available for 1-tier partners only.



Best Practices: Do not renew the same subscription through multiple ordering platforms.

You will find detailed assistance on all things CCW-R Services & Subscriptions at the Operations Exchange Community Training site for Services & Subscriptions located at this [link](#).

4.8 Adding Trade-in Items to get MIP Discount



You can enroll in the Migration Incentive Program (MIP) to activate the MIP Incentive and use the trade-in functionality in Cisco Commerce.



Note: Once the Trade-in items are added to a deal, no other orders can be placed on that deal. You cannot create multiple orders from a single trade-in deal. The deal must contain only one buy method. To have different buy methods, create a new trade-in deal for each item.

1. Add Trade-In Items

1. Add product and select the **check box** on a line item
2. Select the **Actions** drop down menu; Select **Add Trade in Items**

3. There are three ways to add trade in product:
 - a. Import Trade in BOM
 - b. Add Cisco Products
 - c. Add Competitor Products
 - d. As an example, you can select Add Cisco Products and a window will appear where you can search by Product Family or Part Number. Enter the quantity you would like to trade in and select Save.

4. Trade in item will be added successfully and will appear in the Trade-in window

5. Click **Save and Continue**; Trade-In item will be processed as a MIP discount

2. View MIP Discount

Within the Discounts and Credit view, you will see the credit given for the trade-in item display as a MIP Discount.

Hardware, Software, Services and Subscriptions	Unit List Price (CAD)	Qty	Extended List Price (CAD)	Total Discounts %	Amount (CAD)	Credits (CAD)	Extended Net Price (CAD)
1.0 1941-2901-FANBLWR= Cisco 1941/2901 Fan Blower Assembly		1				--	81.97
MIP - Canada BR-MIPC-180910-01973							
Core Category - Certification - Gold - CAD							
Add Subtotal							
2.0 A9XX-PWR-CBL-MGMT= ASR 9XX Power Cable Management Guide		1				--	498.96
Core Category - Certification - Gold - CAD							
MIP - Canada BR-MIPC-180910-01973							
Add Subtotal							

Financial Summary			
	Total List Price (CAD)	Discounts (CAD)	Total Net Price (CAD)
Total Items			
Special Line Items	--	(--%)	--
Discounts & Credits			
Discounts			
Credits			
Adjustments			
Quote Total			

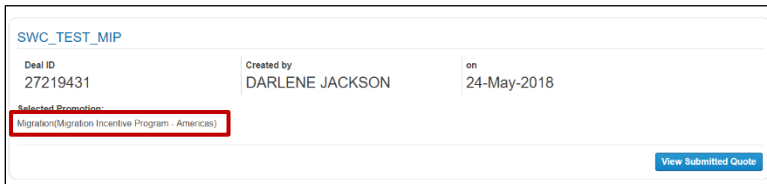
3. Review

On the Review Tab, you can click on any of the circular icons at the top to review Who's Involved, About the Deal, Incentive, Quoting information, Trade in Items, Install Site, or Billing. Once satisfied with the review, select the button for Submit Quote for Approval.

Total List Price (CAD)	Discount	Extended Net Price (CAD)
Products		
Special Line Items	--	--
Discounts & Credits		
Discount	(--%)	
Credits		
Adjustments		
Quote Total		
Deal Consumption Total		

Deal Summary	
Expected Cisco Hardware and Software List Amount	
Expected Cisco Service List Amount	0.00
Deal Total	
User currency dictated by promotion rules and country policy	

The Quote submits and the confirmation view displays that it was submitted with MIP discount.



4. Internal Review

After the Quote enters internal review process, CPS reviews the quote and manages the Return Material Authorization (RMA) process for the Trade in Product. CPS actions conclude with an approved quote.

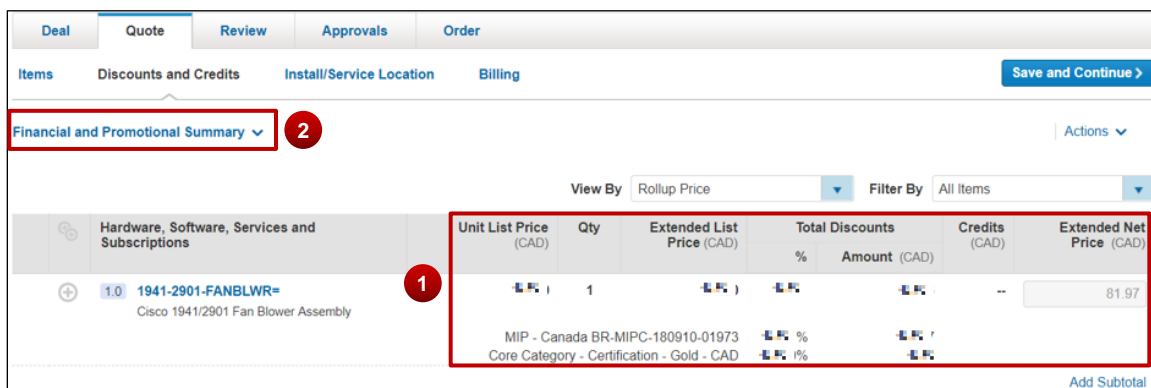
4.9 Reviewing Discounts and Credits



In the Quote tab: Discounts & Credits sub-tab, you can view detailed information about the discounts applied.

1. You can view:

- Unit List Price and the Extended List Price
- Base discounts and stackable discounts as per the various incentives (programs and promotions) selected displays under the Total Discounts
- Extended Net Price on the far right



Quote Tab: Discounts & Credits Sub-Tab

When the major lines are collapsed, the discount column displays a blended discount. Expand a major line to view each individual line's discount.

- Click **Financial and Promotional Summary** to view promotion details. In the expanded view, promotions details are displayed along with Promotion End Date, excluding the grace period.



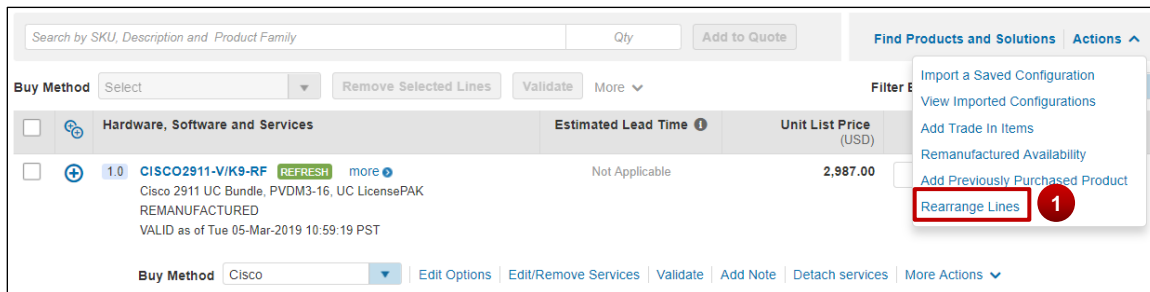
Best Practice: Review the List Price Catalog to see the base discount percentages, category, and end of sale date. See [Getting Started with Cisco Commerce User Guide](#).

4.9.1 Formatting a Quote

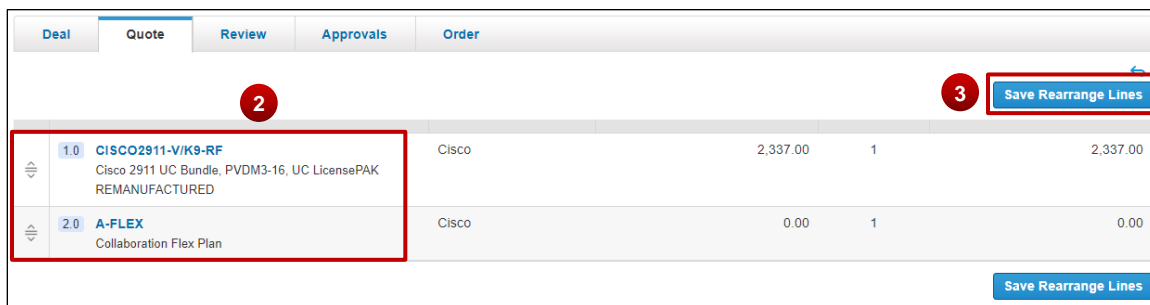
Use the option **Rearrange Lines** to rearrange the quote lines.

To format a quote, complete the following steps:

- From the Discounts & Credits sub-tab, expand the **Actions drop-down** menu and click **Rearrange Lines**. The Deals and Quotes page refreshes in an edit mode.



Quote Tab: Discounts & Credits Sub-Tab - Format Quote Link



Deals and Quotes Page

- Drag and Rearrange the lines.
- Click **Save and Continue**. Quote tab: Discounts & Credits sub-tab displays.

4.9.2 Viewing Financial Details

To view financial details, complete the following steps:

1. From the Discounts & Credits sub-tab, click **Financial and Promotional Summary**. The Financial and Promotional Summary dialog box displays.

The screenshot shows the 'Financial and Promotional Summary' dialog box. The main interface displays a table with the following data:

Hardware, Software, Services and Subscriptions	Unit List Price (CAD)	Qty	Extended List Price (CAD)	Total Discounts %	Credits (CAD)	Extended Net Price (CAD)
1.0 1941-2901-FANBLWR= Cisco 1941/2901 Fan Blower Assembly		1			--	81.97
MIP - Canada BR-MIPC-180910-01973				%		
Core Category - Certification - Gold - CAD				%		

The dialog box 'Financial and Promotional Summary' provides a detailed breakdown:

Item Type	Total List Price (CAD)	Discount Type	%	Amount (CAD)	Extended Net Price (CAD)
Products		Total Product Discount			
		Standard Discount			
		Non Standard Discount	0.00	0.00	
Special Line Items	--	Non Standard Discount	--	--	--
Discounts & Credits					
Discount					
Special Items Discounts					
Credits					
Adjustments					
Quote Total					

Quote Tab: Discounts & Credits Sub-Tab

4.9.3 Using Financing Options (For US and Canada only)

If you are a partner or a reseller in US or Canada, you can embed financing options during the quote/deal creation process in Cisco Commerce.

You are systematically provided with a default lease quote that can be viewed on the Review tab of the quote/deal after the deal is approved. See [Modifying and Re-Generating a Lease Quote](#).

If you are working with resellers, then you will have the option of generating a lease quote from the Review tab. To generate a leasing quote, you will need to provide information on the end user.

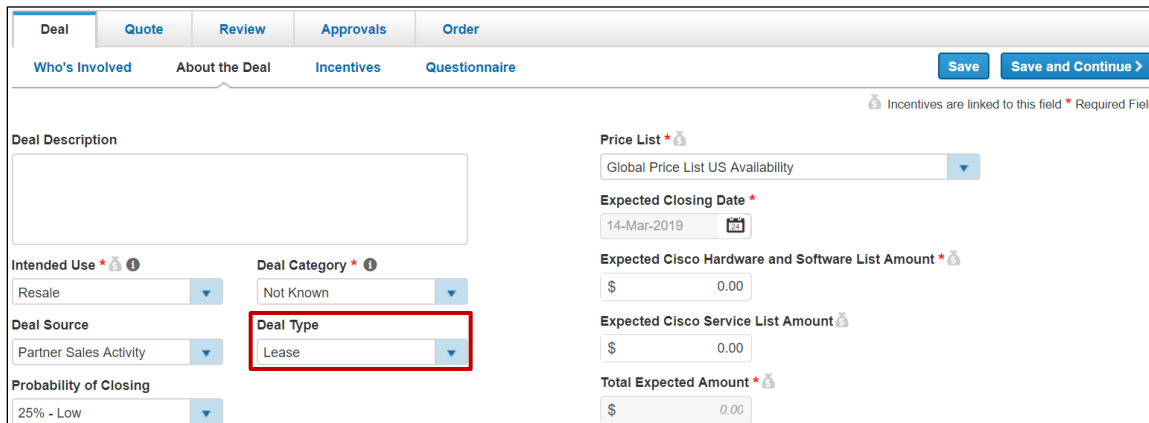


Note: Deals with Reusable Non-standard Discounts (RNSDs), Global Deals and SaaS Deals will be exempt from lease quotes.

4.9.3.1 Modifying and Re-Generating a Lease Quote

Complete the following steps to re-generate a lease quote:

1. Create and submit a deal or quote for approval. Refer to [Creating a Deal](#) and [Creating a Quote](#) for more information on creating a deal or a quote.
2. Complete all required information on the Who's Involved tab. Select **Cisco** as the buy method and ensure that only standard discounts are applied.
If creating a quote, skip to step 6.
If creating a deal, continue to step 3.
3. If creating a deal, rather than a quote, on the About the Deal tab, ensure to click the **Deal Type drop-down** arrow and select Lease. In addition, enter any other required information



The screenshot shows the 'About the Deal' tab with various fields for deal configuration. The 'Deal Type' dropdown menu is highlighted with a red box and set to 'Lease'. Other visible fields include 'Intended Use' (Resale), 'Deal Category' (Not Known), 'Price List' (Global Price List US Availability), 'Expected Closing Date' (14-Mar-2019), and 'Expected Cisco Hardware and Software List Amount' (0.00).

About the Deal Tab: Deal Type - Lease

4. If creating a deal rather than a quote, navigate to the Incentives sub-tab and select the correct incentive (program or promotion) if applicable. Answer any questions related to the promotion and save the deal.
5. If creating a deal where the selected incentive requires qualification approval, submit the incentive for qualification
6. If creating a deal, once the incentive is successfully qualified, a notification e-mail is sent. Re-open the deal and navigate to the Quote tab: Items sub-tab to begin building the quote. See [Building a Deal](#). If creating a quote only, add items to the quote from the Items sub-tab.
7. The quote is priced with any discounts you are entitled to receive
8. On the Quote tab: Billing sub-tab, select the Cisco Capital bill-to address and contact
9. Click **Submit Quote for Approval**

4.9.3.2 Partner Financing Options

Once the quote is approved, open the quote again. On approved quotes, Cisco Commerce will invoke the Cisco Capital pricing service to generate the default lease quote and display the lease Quote Summary at header level on the Review tab.

The financing amount is displayed. The financing amount is the same dollar amount as the Quote Total in the Quote Summary section. The Financing Amount may change if the partner has indicated an end customer discount off list price in the preferences.

The system generates a default lease quote based on the following attributes:

The net end customer discount off the Cisco list price for hardware, software, and services, made up of:

- The customer hardware and software net price (product net from sales quote)
- And the customer service net price (service net from sales quote)

The financial product's fair market value (FMV), lease term, payment type, and billing frequency

Click **Calculate Financing Options** in the Financing Amount section. The **Lease Payments Calculator** dialog box displays.

4.9.3.3 Partner Lease Payment Calculator

On the Lease Payments Calculator dialog box, you can modify fields on the lease quote to have it re-generated. If the new quote information is saved, the updated lease quote information will be displayed on the Review tab. To change the leasing options, complete the following steps:

A message displays in the Lease Payments Calculator dialog box that it is an indicative, or temporary, lease quote.

1. Update the end customer discount in the Discount % field under the Discount column in either the Cisco Hardware and Software or Cisco Services fields. A new net price will be re-calculated.
2. Alternatively, click into **Net Price field** and enter a net price. The corresponding discount % will be calculated.

It is also possible to click in the Non Cisco Amount field and enter or change the non-Cisco dollar amount.



Note: For a default lease quote, the system always defaults the Non Cisco Amount as zero. If you are interested in getting some non-Cisco products to be financed by Cisco Capital, you can enter the amount while regenerating the lease quote.

3. Billing frequency defaults to Monthly. Click the Select Billing Frequency drop-down arrow and select the desired option.
4. The financial product is defaulted to fair market value (FMV). Click the Select Financial Product drop-down arrow and select FMV to indicate fair market value at the end of term.
5. Alternatively, select \$1 Buy Out to indicate the purchase of the product for \$1 at the end of the term.

- Click **Calculate** to re-generate the lease quote and to re-calculate the budgetary leasing options on the quote. This invokes the Capital Pricing Service and financing payment options will be re-generated on the lease quote and displayed to you.

Lease Payments Calculator [X]

Below is an indicative lease quote, valid for 30 days from the proposal date. (All amounts are in USD)

1 Lease Quotes reflect the last saved values. Any changes made to the Quote pricing will not reflect automatically. Please click 'Calculate' button to update the lease quote.

1 Add Estimated Discount/Net Price for End Customer			
Asset Type	List Price	Discount %	Net Price
Cisco Hardware and Software	2695	0.00 %	2695.00
Cisco Services	453	0.00 %	453.00
Non Cisco Amount			0.00
Financing Amount			3148.00

3 Select Billing Frequency: Monthly

4 Select Financial Product: FMV

5 [Reset] [Calculate]

Financing Options Capital Promotions Applied:

Calculate to view Financing Options

Term Amount Financed Monthly FMV Payment

Terms & Conditions

View [More About Cisco Capital](#) or [Contact Information](#)

Please contact me regarding end-customer financing

Export Lease Proposal

PDF Save

Lease Payments Calculator Dialog Box

- Select the radio button corresponding to the desired payment period or term. The billing period (also known as the lease term) default is 36 months.
You do not need to click **Calculate** to change only the lease term, simply click **Save**. If you want to change the End Customer Net Price, Billing Frequency, Non-Cisco amount, or select \$1BUYOUT, click **Calculate**.
- To optimize the use of Cisco financing options, click **View More About Cisco Capital** or **Contact Information** links.
- If desired, select **Please contact me regarding end customer financing** checkbox to request to be contacted by a Capital Channel Account Manager or Leasing Manager.



Note: Cisco Commerce displays Capital Terms and Conditions when displaying the indicative financing quote

- If desired, click **PDF** icon to export the lease proposal to save a local copy.

11. Click **Save**. The financing options are saved in the system and the Review tab displays.

Once the financing quote is saved, an e-mail with the deal info is sent to you. The e-mail contains information that is pertinent to the sales quote and financing quote.

If you re-open an approved quote, the lease quote will be re-generated upon re-approval of the sales quote.

4.10 Reviewing or Editing the Install Site Information



From the Install Site sub-tab, you can review the install site information, set defaults, and edit it for individual or multiple items.

From the Quote tab, click **Install Site**. The Quote tab: Install Site sub-tab displays. The install site established when creating the deal is the default site for the entire quote. Individual line items can be installed at different locations. The original install site remains the default for any new items added.

Install Site * ⓘ

This address will be default for new items

UNITED STATES OR + Add a Full Install Site

Service Location * ⓘ

[End Customer location using SaaS subscription]

This address will be default for new items

UNITED STATES OR + Add a Full Service Location

Ship To * ⓘ

This address will be default for new items

UNITED STATES

Save and Continue >

Quote Tab: Install Site Sub-Tab

The price list for services is determined by the install site country.



Best Practice: When there are multiple install site countries for a quote, set the install site country at the line level rather than at the quote level. See [Setting Separate Install Sites for Individual Line Items](#) or [Changing Install Site for Multiple Lines](#).



Note: If the buy method is a distributor and the distributor BID and the install site ID of a quote line belong to different country pricelists, Multi-National Quoting (MNQ) discounts are applicable for the country pricelist of the install site country. The MNQ discount is applied systematically when the pricing is evoked on the quote so there is no manual process needed.

4.10.1 Setting the Default Install Site for the Entire Quote

Under Default Install Site section on the Quote tab: Install Site sub-tab, complete the following steps:

1. To set the original install site as the install site for the entire quote, click the **Apply Default to All Items** button.
2. The Install Site Country is populated automatically. If applicable, click **Country drop-down** arrow and select the appropriate option to change the install site country.
3. If applicable, click **Add a Full Install Site**. The Search for Install Site dialog box displays. See [Populating the End Customer Section](#); the functionality for adding a full install site and creating a new customer address are similar.

Search for Install Site ✕

Search Tips ⓘ * Required Field

<p>Customer Company Name *</p> <input style="width: 95%;" type="text"/>	<p>Address 1</p> <input style="width: 95%;" type="text"/>
<p>Country *</p> <p>UNITED STATES ▼</p>	<p>Address 2</p> <input style="width: 95%;" type="text"/>
<p>State/Province *</p> <p>Select ▼</p>	<p>Address 3</p> <input style="width: 95%;" type="text"/>
<p>City ⓘ Zip/Postal Code</p> <input style="width: 45%;" type="text"/> <input style="width: 45%;" type="text"/>	<p>Address 4</p> <input style="width: 95%;" type="text"/>

Note: If you cannot find the customer you are looking for following a search, please contact your Cisco account team for correct customer details. AS A LAST OPTION ONLY, you will be able to create a new end customer, however this will delay the deal approval process.

Search for Install Site Dialog Box



Note: Create a new address only after verifying that the address does not already exist in the database.

4.10.2 Setting Separate Install Sites for Individual Line Items

If separate install sites are to be used, complete the following steps:

1. Scroll down to the Items section.
2. Next to the line item that will have a different install site, click **Add a Full Install Site**. The Search for Install Site dialog box displays. See The Search for Install Site dialog box displays. See Populating the End Customer Section; the functionality for adding a full install site and creating a new customer address are similar.

4.10.3 Changing Install Site for Multiple Lines

To change the install site for multiple items at the same time, complete the following steps:

1. Scroll down to the Items section.

<table style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 20px;"><input checked="" type="checkbox"/></td> <td style="border-bottom: 1px dashed #ccc;">Hardware, Software and Services</td> <td style="width: 20%;"></td> <td style="width: 60%;">Install Site/Service Location Country *</td> </tr> <tr> <td><input checked="" type="checkbox"/></td> <td style="border-bottom: 1px dashed #ccc;">1.0 CISCO2911/K9 <small>Cisco 2911 w/3 GE,4 EHWIC,2 DSP,1 SM,256MB CF,512MB DRAM,IPB</small></td> <td style="border-bottom: 1px dashed #ccc;">UNITED STATES ▼</td> <td style="border-bottom: 1px dashed #ccc;"><input type="button" value="+ Add a Full Install Site"/></td> </tr> <tr> <td><input checked="" type="checkbox"/></td> <td style="border-bottom: 1px dashed #ccc;">2.0 WS-C4948E <small>Catalyst 4948E, opt sw, 48-Port 10/100/1000+ 4 SFP+ no p/s</small></td> <td style="border-bottom: 1px dashed #ccc;">UNITED STATES ▼</td> <td style="border-bottom: 1px dashed #ccc;"><input type="button" value="+ Add a Full Install Site"/></td> </tr> </table>	<input checked="" type="checkbox"/>	Hardware, Software and Services		Install Site/Service Location Country *	<input checked="" type="checkbox"/>	1.0 CISCO2911/K9 <small>Cisco 2911 w/3 GE,4 EHWIC,2 DSP,1 SM,256MB CF,512MB DRAM,IPB</small>	UNITED STATES ▼	<input type="button" value="+ Add a Full Install Site"/>	<input checked="" type="checkbox"/>	2.0 WS-C4948E <small>Catalyst 4948E, opt sw, 48-Port 10/100/1000+ 4 SFP+ no p/s</small>	UNITED STATES ▼	<input type="button" value="+ Add a Full Install Site"/>	
<input checked="" type="checkbox"/>	Hardware, Software and Services		Install Site/Service Location Country *										
<input checked="" type="checkbox"/>	1.0 CISCO2911/K9 <small>Cisco 2911 w/3 GE,4 EHWIC,2 DSP,1 SM,256MB CF,512MB DRAM,IPB</small>	UNITED STATES ▼	<input type="button" value="+ Add a Full Install Site"/>										
<input checked="" type="checkbox"/>	2.0 WS-C4948E <small>Catalyst 4948E, opt sw, 48-Port 10/100/1000+ 4 SFP+ no p/s</small>	UNITED STATES ▼	<input type="button" value="+ Add a Full Install Site"/>										

Edit Install Site for Multiple Lines

2. Check the appropriate checkboxes for the line items that should be installed at an address other than the default address.
3. Click **Choose/Edit Install Site**. The Choose/Edit Install Site for Multiple Lines dialog box displays.
4. Select **Yes** radio button to specify only the install site country.



Choose/Edit Install Site for Multiple Lines Dialog Box

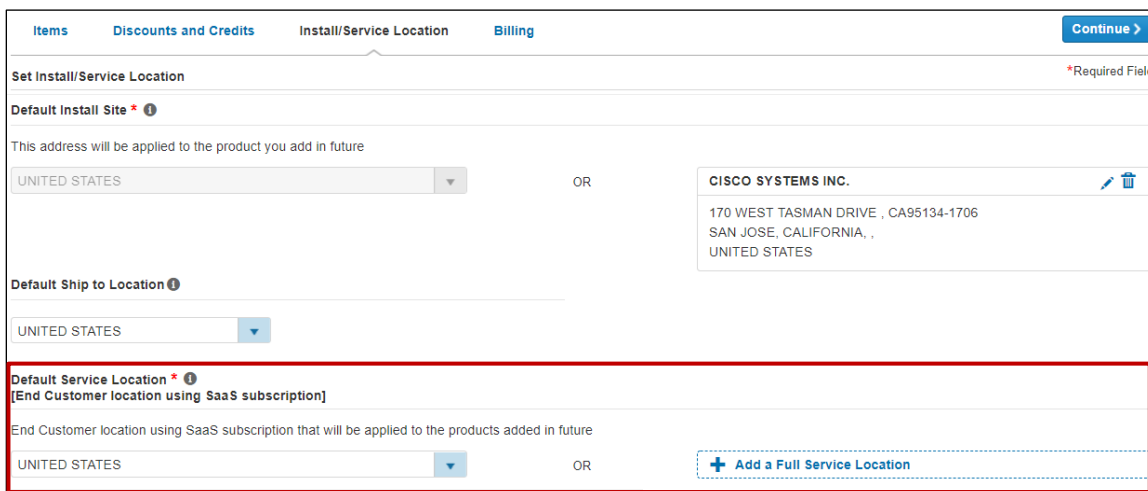
5. Click the **Country drop-down** arrow and select the appropriate option.
6. Click **Apply**. The dialog box closes and the install site information is updated.

4.10.4 Changing the Service Location Country

Specify the Service Location if you are transacting SaaS Subscriptions. By default, the Service Location will be the end customer country.

To change the default Service Location, click the Country drop-down arrow and click the appropriate country. To enter a full service to site, click **Add a Full Service Location**. The Search for Service Location dialog box displays. The steps are the same as editing an Install Site Country details (see [Reviewing or Editing the Install Site Information](#)). To change the Service Location for an individual line, select the desired line and click **Edit Service Location**.

Click **Save and Continue** to proceed to the Billing tab.



4.11 Reviewing or Editing Billing Information



To review or edit the billing information, complete the following steps:

1. From the Quote tab, click **Billing**. The Quote tab: Billing sub-tab displays.

Quote Tab: Billing Sub-Tab

2. Review the price list and partner content.
3. To change the billing address and contact information, click edit icon. The Select a Billing Address dialog box displays.
4. Click the appropriate radio button and click **Continue**. The dialog box closes.



Note: If you are a tier-1 partner placing product lease orders, then enter or select the Cisco Capital bill-to address and contact. Product and service lease order capabilities are available (see [Using Financing Options \(For US and Canada only\)](#)).

5. Click **Save and Continue** or the **Review and Submit** tab to continue. The Review and Submit tab displays.

5 Reviewing and Submitting the Deal



Depending on the incentive (program and promotion) chosen, either the deal will be submitted for qualification or the quote will be submitted for approval. If the chosen incentive requires qualification, see [Submitting the Deal for Qualification](#). If the chosen incentive does not require qualification, see [Submitting the Quote for Approval](#).

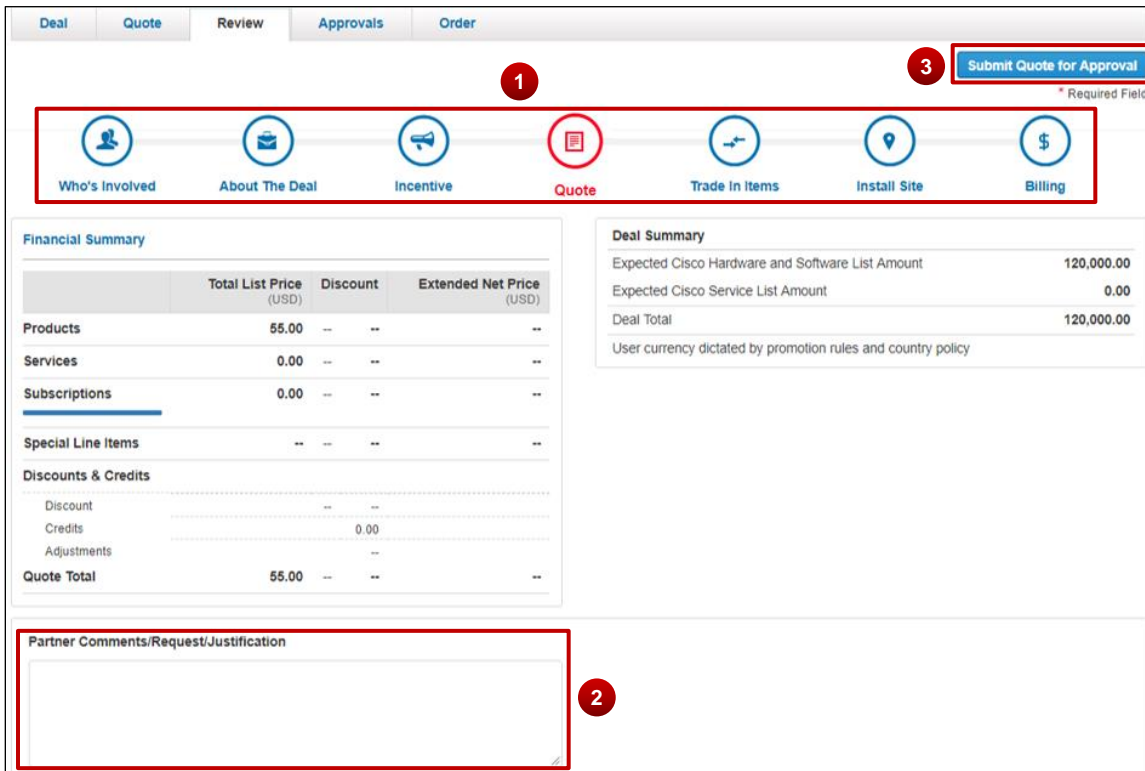
Click expand (Plus) icon and review each section on the Review and Submit tab.

5.1 Submitting the Deal for Qualification

The Review tab displays many sections that change depending on whether the incentive or promotion chosen requires qualification. The options detailed below are with respect to a deal with an incentive or a promotion that requires qualification.

If the chosen incentive requires qualification, complete the following steps:

1. From the Review tab, to make any changes to Deal Information, click the appropriate icon that displays in red indicating a warning or an error.
2. Optionally, under the Comments section, click **Add a Comment** to add a comment on this deal.



The screenshot shows the 'Review' tab of a deal. The navigation bar includes icons for 'Who's Involved', 'About The Deal', 'Incentive', 'Quote', 'Trade In Items', 'Install Site', and 'Billing'. The 'Quote' icon is highlighted in red with a '1'. The 'Submit Quote for Approval' button is highlighted in red with a '3'. The 'Partner Comments/Request/Justification' text area is highlighted in red with a '2'.

	Total List Price (USD)	Discount	Extended Net Price (USD)
Products	55.00	--	--
Services	0.00	--	--
Subscriptions	0.00	--	--
Special Line Items	--	--	--
Discounts & Credits			
Discount		--	--
Credits		0.00	
Adjustments		--	--
Quote Total	55.00	--	--

Expected Cisco Hardware and Software List Amount	120,000.00
Expected Cisco Service List Amount	0.00
Deal Total	120,000.00
User currency dictated by promotion rules and country policy	

Comment Section

3. Click **Submit Deal for Approval**. The Deal Submission confirmation page displays.

4. A confirmation page displays.



Confirmation Page

After the qualification is approved, complete the following steps:

5. Build the quote. See

6. [Adding](#) Items.
7. From the Quote tab, click **Discounts & Credits** tab to view the details of the promotional pricing.
8. The default view is the Summary View. Click the **View By** drop-down arrow and select the appropriate option: Discount Type, Discount Details, Unit Net Price, and Product and Service Totals.
9. To see the details of the discount, click **Discount Details**.
10. When viewing the Discounts and Credits is complete, click **Save and Continue**. The Review and Submit tab displays.
11. Continue to [Submitting the Quote for Approval](#).

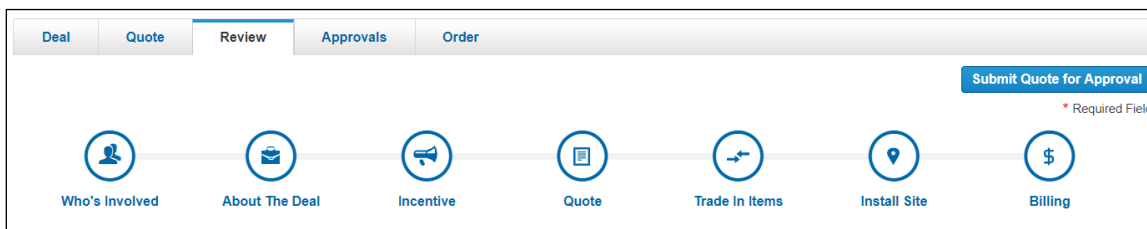


Note: If an incentive on a deal is rejected, the rejected incentive will be removed from the deal. A rejected incentive will not prevent the rest of the deal from being approved. If all incentives have been rejected, only the contractual discount will apply.

5.2 Submitting the Quote for Approval

The Review and Submit tab displays many sections that change depending on whether the incentive chosen requires qualification.

The options detailed below are with respect to a deal with an incentive that does not require qualification.



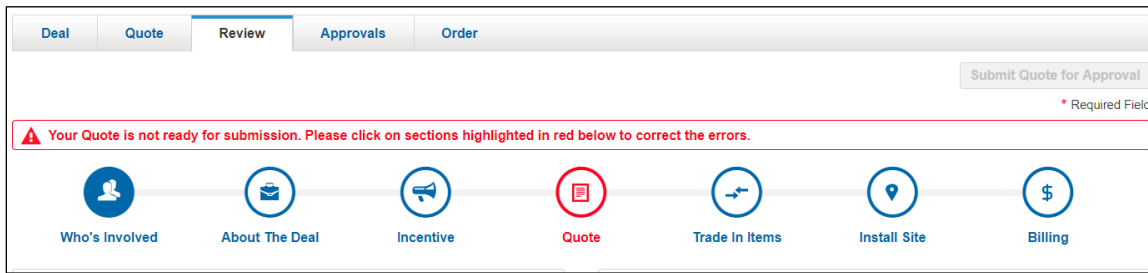
Review Tab

5.2.1 Reviewing Deal Information Section

The Deal Information section displays the different sections of the quote. If the section is complete with no errors, it displays in blue. If there are warnings or errors, it displays in red.

To make any changes or corrections prior to submitting for approval, click that section's icon and make the changes.

Unless all sections display in blue, the **Submit Quote for Approval** button will be inactive.



Deal Quote **Review** Approvals Order

Submit Quote for Approval

* Required Field

⚠ Your Quote is not ready for submission. Please click on sections highlighted in red below to correct the errors.

Who's Involved About The Deal Incentive **Quote** Trade In Items Install Site Billing

Errors on Review Tab

5.2.2 Reviewing Quote Summary and Deal Summary Sections

Review the quote and deal summary sections. Once the deal or quote is approved, click **View Deal Consumption** to view what products have been ordered or consumed. The Deal Consumption dialog box displays. Click 'X' to close the dialog box and return to the previous page.

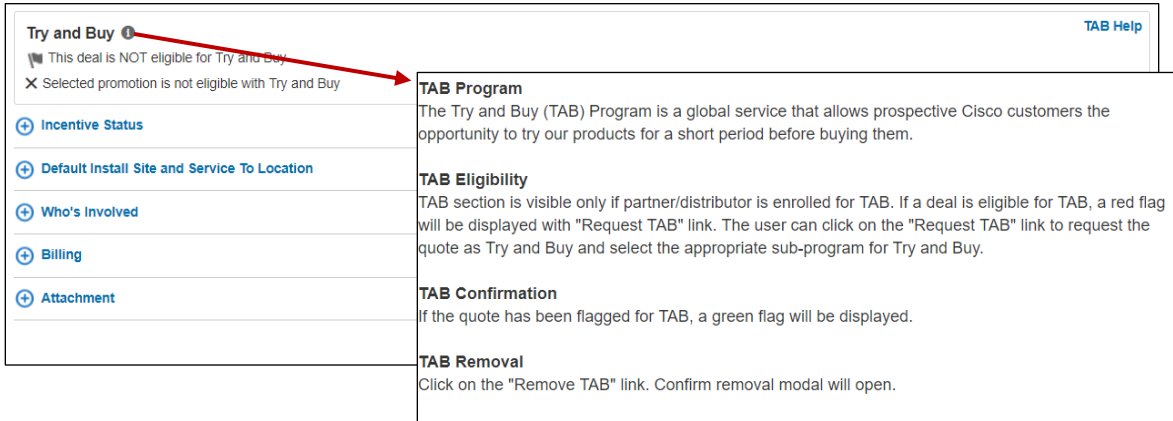
Expected Deal Total List Amount	Deal Total Approved List Amount	Total Ordered List Amount Booked/Claimed (Hardware, Software & Services)		Currency	
	Product	Services	Product	Services	
450,000.00	849,552.00		0.00	0.00	CAD

Review Tab: Quote and Deal Summary Sections

5.2.3 Reviewing Try and Buy Section

The Try and Buy (TAB) Program is a global service that allows Cisco customers to try Cisco products for a short period of time before buying them. It is a product sale with deferred invoicing up to a certain number of days, which is referred to as the “trial period”. If you decide not to complete the purchase for any reason, you can return the product, at no charge, prior to invoicing on the first day of possession after the trial period ends.

Deal or quote eligibility for TAB is located on the Review and Submit tab.



Restrictions for TAB deals:

Depending on theater program availability, TAB may be combined with: OIP, SIP, TIP, MSCP

Must have a single source of fulfillment (buy method) on the quote

TAB cannot be combined with Migration Incentive Program (MIP) or with deals containing CDBU

Are excluded if they are IronPort or service-only deals/quotes

To request TAB on eligible deals, click **Request TAB**.

For current and specific information about TAB, click **TAB Help**.

Note: The Partner/Distributor involved will need to be enrolled in the TAB Program. Unique issues such as US Federal partners requesting TAA-compliance on Federal TAB orders and many other details, select TAB Help.



Review Tab: Try and Buy Section

Request Try and Buy ✕

Please request Try and Buy below Choose a Sub-program/Sub-Track

Try and Buy Choose a Sub-program/Sub-Track ▼

Final Trial Period for the Deal

Please ensure that you have addressed the following before continuing with Try and Buy:

1. Customers have leveraged our Customer Briefing Center and/or Customer Proof of Concept programs and are well aware of our current offerings
2. Cisco products are strongly positioned to succeed against performance benchmark with competitor products
3. There is a good understanding of high level Test Plan and the timeframe by which the customer intends to complete all tests and is ready to purchase our products
4. High confidence that customer will end up purchasing our products at the end of specified trial period
5. There is a mitigation plan for factors that could delay completion of TAB trial on time

Request Try and Buy Dialog Box

When you request TAB, the Request Try and Buy dialog box displays. Select the checkbox to request TAB and select the appropriate option from the drop-down menu. Click **Save**.

The TAB section refreshes to display the TAB details.

Try and Buy ⓘ This deal is requested for Try and Buy [Edit TAB](#) [Remove TAB](#) [TAB Help](#)

✓ Try and Buy

Sub-Program/Sub-Track Regular Try and Buy

Final Trial Period for the Deal 90 Days

Review and Submit Tab: TAB Section - TAB Details

5.2.4 Distributor Deviations Authorizations (DART)

Deviations are any part of a quote that is not standard. Deviations trigger the creation of a DART. To create a DART using an RNSD, create a transactional deal and reference the RNSD Deal ID.

Under the Quote Tab, there will be a sub-tab for **Distributor Deviation Authorizations**.

1. Deviations associated with the deal and the deviations workbench will be displayed when you click on the link **Distributor Deviations Authorizations** on the Quote tab.

Deal Quote Review Approvals Order

Items with Discounts and Credits Install/Service Location Billing **Distributor Deviations Authorizations**

Distributor: WESTCON CANADA

Deviaton Id#	Approval Authorization#	Created by	Creation Date	Expiration Date
No records				

[Initiate New DART](#)

Deal Quote Review Approvals Order

Items with Discounts and Credits Install/Service Location Billing **Distributor Deviations Authorizations**

View Items Preferences Financial and Promotional Summary Actions

Distributor: INGRAM MICRO

Deviaton Id#	Approval Authorization	Created By	Creation Date	Expiration Date	
6773922	MDMF-6773922-1711.ver.1	[User Icon]	13-Nov-2017	13-Nov-2018	Cancel Resend Email/B2B
6773923	MDMF-6773913-1711.ver.1	[User Icon]	13-Nov-2017	13-Nov-2018	Cancel Resend Email/B2B
6773924	MDMF-6773914-1711.ver.1	[User Icon]	15-Nov-2017	13-Nov-2018	Cancel Resend Email/B2B

[Initiate New DART](#) [Revise Deviation](#)

2. Click **Initiate New DART** to create a new deviation.

Deal Quote Review Approvals Order

Items with Discounts and Credits Install/Service Location Billing **Distributor Deviations Authorizations**

Distributor: WESTCON CANADA

Deviaton Id#	Approval Authorization#	Created by	Creation Date	Expiration Date
No records				

[Initiate New DART](#)

The items listed below are not included in any deviations. An Auto-DART will be generated for the items you select.

	Hardware, Software, Services and Subscriptions	Unit List Price (CAD)	Qty	Extended List Price (CAD)	Total Discounts %	Amount (CAD)	Credits (CAD)	Effective Disc (%)	Extended Net Price (CAD)
<input checked="" type="checkbox"/>	1.0 M9148S-DPL12P8G= MDS 9148S 16G FC 12-port upgrade license + BG SW SFPs	11,510.40	20	230,208.00	--	--	--	--	Final price not available
<input type="checkbox"/>	2.0 WDM-1300-1550-S= 1300nm/1550nm WDM splitter cable	990.00	30	29,700.00	--	--	--	--	Final price not available

View 20 Items Per Page Results 2 of 2 << Previous 1 Next >>

[Create Deviation](#)

- On the Review Tab, select **Distributor Deviation Authorization (DART)** to view progress of the approval process rather than waiting for approval notification.

The screenshot shows the 'Review' tab of a deal. At the top, there is a navigation bar with 'Deal', 'Quote', 'Review', 'Approvals', and 'Order'. A red warning banner states: "This Quote cannot be converted to Order in CCW. Please continue to use your existing ordering processes. Click here to find out why". Below this is a progress bar with icons for 'Who's Involved', 'About The Deal', 'Incentive', 'Quote', 'Trade in Items', 'Install Site', and 'Billing'. The 'Quote' icon is highlighted. To the right, there is a 'Deal Summary' section with a table:

Products	Total List Price (CAD)	Discount	Extended Net Price (CAD)
Products	849,552.00	--	--
Special Line Items	0.00 (0.00%)	0.00	0.00
Discounts & Credits			
Discount	--	--	
Credits		0.00	
Adjustments	--	--	
Quote Total	849,552.00	--	--
Deal Consumption Total			

Below the table, there is a 'Distributor Deviation Authorizations (DART)' section highlighted with a red box. It contains a table with columns: DART ID, Authorization, Revision No, Source Profile Name, Start Date, and End Date. The table is currently empty, showing 'No records'.

5.2.5 Reviewing Comments Section

Add a comment, if applicable, by clicking **Add a Comment**. Comment on this Deal dialog box displays. From the Visibility drop-down menu, select who can view deal comments. Note that Cisco users are able to automatically view comments. Add your comment and click **Save**.

The screenshot shows the 'Approvals' tab of a deal. The 'Comments' section is highlighted with a red box. It contains a text input field labeled 'Add a Comment...' and a 'Validation & Approvals' section at the bottom right with the text 'Estimated Approval Date 06-Mar-2019'.

The screenshot shows a 'Comment on this Deal' dialog box. It has a title bar with a close button. The main content area contains a text input field labeled 'Comments' highlighted with a red box. Above it is a 'Visibility' dropdown menu set to 'Visible to Partner'. Below the 'Comments' field is an 'Addressed To' field. At the bottom right are 'Cancel' and 'Save' buttons.

Comment on this Deal Dialog Box

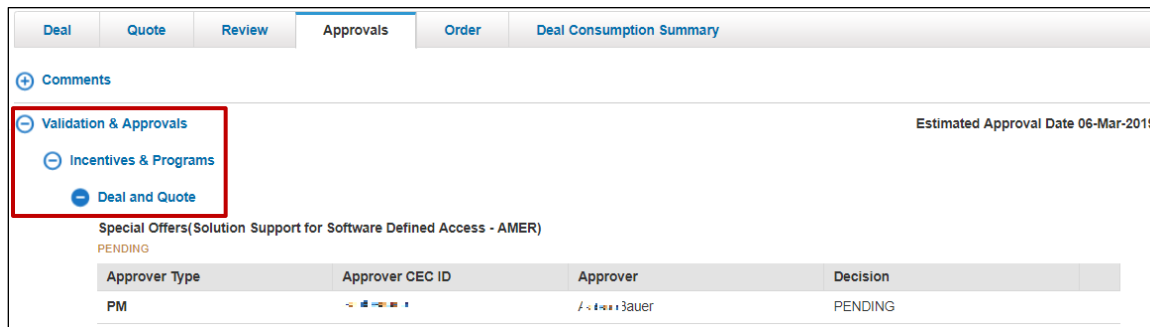
Click **Submit Quote for Approval**. A confirmation page displays.

5.2.6 Viewing Promotion Details

A notification will display above the Deal Summary if the promotion is expiring within 15 days. Once the promotion expires, you will need to recreate the deal.

Click the link in the banner message to view the promotion expiry date.

To view the approver and the approval status of each incentive (program or promotion), scroll down the Review tab. Expand the **Validation & Approvals** section.



Deal | Quote | Review | Approvals | Order | Deal Consumption Summary

Comments

Validation & Approvals Estimated Approval Date 06-Mar-2019

Incentives & Programs

Deal and Quote

Special Offers(Solution Support for Software Defined Access - AMER)

PENDING

Approver Type	Approver CEC ID	Approver	Decision
PM		/ 4 3auer	PENDING

Review Tab: Incentives & Programs

6 Creating a Global Deal



To create a global deal, complete the five-step process. See [Global Partner Network](#).

6.1 Locating an Agent Partner

Locate an eligible local Partner using the [GPN website](#) or [Partner Locator](#).

6.2 Registering the Global Deal by Host Partner

As the host partner, you need to register your global deal in Cisco Commerce. To do so, complete the following steps:


1. Click **Create Deal** from the Deals & Quotes tab.



Best Practice: Use the deal name to indicate customer name, project name, and that it is a global deal. For example, “GD-customer name-project name”.

2. Select 'Check this box to create and register a Global Deal' checkbox.

Create a Deal * Required Field

 If your deal involves an End Customer buying in multiple countries, or being fulfilled by multiple Partner types (Self, Subsidiary, Agent or Disti as Agent) in a country, check the applicable box below and refer to this [Global Deal Training Guide](#)

If you are not creating a Global Deal, simply click the "Create Deal" button to continue. (Note: Not applicable for Outsourcing deals).

Deal Name *

Check this box to create and register a Global Deal

Create a Local Component of your Global Deal

Note: Global Deal needs to be created and Qualified /Approved prior to creating Local Deals.

Create a Deal Page



Note: If the Check this box to create and register a global deal checkbox does not display on the page, then the partner company needs to enroll in GPN through Partner Program Enrollment (PPE).

3. Provide the details for Partner, End Customer, and Cisco Channel Account Manager. See

4. [Populating Who's Involved](#).
5. Click **Create Deal**.



Note: Global deals can only be initiated from the customer's headquarters location/country.

6. Populate deal information on the About the Deal page. See [Selecting the Deal Options](#).
7. Scroll down to the Global Deal Breakdown section.
8. Click **Add**. The Global Deal Breakdown section refreshes.

Global Deal Breakdown *

Enter the list of end-customer countries of procurement (one entry per Fulfillment Partner type per country). For each entry, enter the expected revenue amount and the type of Fulfillment Partner (Self if you are Host Partner fulfilling orders, Subsidiary if you are Host Partner with a legal presence in the fulfilling country fulfilling orders, Agent if another partner in the fulfilling country will fulfill orders, or Dist As Agent if a Distributor acting as an Agent in the fulfilling country will fulfill orders).

<input type="checkbox"/>	Country *	Expected Cisco Hardware & Software List Amount (USD) *	Expected Cisco Service List Amount (USD)	Total Expected Amount (USD)	Fulfilling Partner *
<input type="checkbox"/>	UNITED STATES	<input type="text"/>	<input type="text"/>	<input type="text"/>	Self
<input type="checkbox"/>	AUSTRALIA	<input type="text"/>	<input type="text"/>	<input type="text"/>	Agent
<input type="checkbox"/>	JAPAN	<input type="text"/>	<input type="text"/>	<input type="text"/>	Subsidiary

Global Deal Breakdown Section - Refreshed

9. Specify the landing countries, the expected hardware & software list amount, and the expected service list amount.
10. Click **Fulfilling Partner drop-down** arrow and select the appropriate option to indicate the fulfilling partner (self, agent partner, subsidiary agent, distributor agent). Self is the only option for the headquarters country.



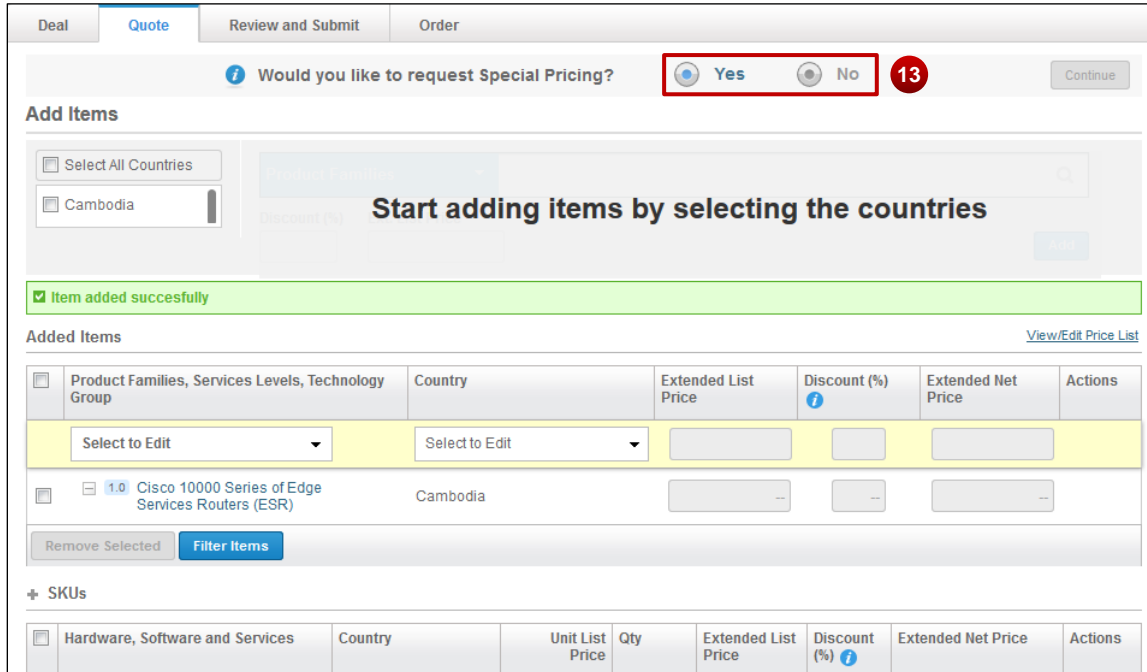
Note: It is critical to provide this information for every country added to the global deal. If a country is missed, the global deal will need to be re-opened, which will delay deal approval. When forecasting sales, try to estimate a reasonable expected Cisco List Amount. Aim to be within 10% of the prediction.

11. Click **Save and Continue**. The Incentives tab displays.
12. Select an incentive or continue without one. See [Viewing and Selecting Applicable Incentives](#).

You can select the eligible incentives on the Incentives sub-tab. The global deal must be eligible for the incentive in the headquarters country. All features of the incentive are fully applicable in the headquarters country; for all other countries in the deal, only the promotional

discount will be transferred. If choosing an incentive from the Opportunity Incentive Program (OIP) category, the global deal must have a local component in the headquarters country.

13. Click **Save and Continue**. The Quote tab refreshes.



Product Families, Services Levels, Technology Group	Country	Extended List Price	Discount (%)	Extended Net Price	Actions
Select to Edit	Select to Edit				
1.0 Cisco 10000 Series of Edge Services Routers (ESR)	Cambodia	--	--	--	

Hardware, Software and Services	Country	Unit List Price	Qty	Extended List Price	Discount (%)	Extended Net Price	Actions

Quote Tab Refreshed

14. Indicate whether special pricing will be requested. Product SKUs can be selected for discounting. Commercial Finance requires product SKUs for global deal non-standard discounts above 60%.

- If not, select 'No' radio button and click **Continue**. The Review and Submit tab displays.
- If so, select 'Yes' radio button. The deal becomes non-standard. If applicable, add a bill of materials (BOM) to request special pricing for those items. Check the appropriate country checkboxes under Add Items, select the appropriate items, and click **Save and Continue**. The Review and Submit tab displays.

Note: Upload a high-level BOM by adding items based on country, product family, SKU, or technology group. Check the Select All Countries checkbox or select a group option to include items that will be delivered in all countries. Click **Save and Continue**. This selects the product list for multiple countries at one time.



The price lists are defaulted for the landing countries. To select an optional price list where applicable, click **View/Edit Price List**. The View/Edit Price List dialog box displays. Click the drop-down arrow and select the appropriate price list for each country. Click **Save**. The View/Edit Price List dialog box closes. Click **Save and Continue**.

15. Review the summary information. If there are errors, the system displays links to resolve them.

16. Click **Submit Quote for Approval**. A confirmation page displays.

6.3 Getting Cisco Approval

Once the deal is approved, the system sends a notification to the host partner indicating the global deal is approved.

For standard deals without special pricing, the approval should take two days. If approval notification is not received within two business days, contact go-gpn@cisco.com.

For non-standard deals that request special pricing, contact the AMs to negotiate and approve the special pricing.

GPN global deal IDs are frameworks to manage business landing in multiple countries. Global deal IDs are not orderable. You must attach a local deal to the global deal, and that local deal ID is the only orderable ID.

6.4 Registering the Local Deal

To order, you need to create the local deal in Cisco Commerce.

Note: No transactions (orders) are placed against the global deal. The quote is converted to an order in the local deals.



Once the deal is approved, agent partners convert the quote to an order using the approved local deal ID. Host partners can share the approved deal with the agent partners to execute. Agent partners will receive an e-mail notification from Cisco Commerce, indicating that the host partner has shared a local deal with them.

To register a local deal, complete the following steps:

1. Click **Create Deal** from the Cisco Commerce Deals & Quotes tab. The Create Deal page displays.

2. Enter a deal name.
3. Select **“Check this box to create and register a local component of your Global Deal”** checkbox. The Create Deal page expands to show all of your approved global deal registrations.
4. Click the appropriate radio button to select the global deal against which you are registering the local deal. The Create Deal page refreshes to display the countries that were entered in the global deal registration.

Create a Deal * Required Field

! If your deal involves an End Customer buying in multiple countries, or being fulfilled by multiple Partner types (Self, Subsidiary, Agent or Dist as Agent) in a country, check the applicable box below and refer to this [Global Deal Training Guide](#)

If you are not creating a Global Deal, simply click the "Create Deal" button to continue. (Note: Not applicable for Outsourcing deals).

Deal Name *

Check this box to create and register a Global Deal
 Create a Local Component of your Global Deal

Note: Global Deal needs to be created and Qualified /Approved prior to creating Local Deals.

Global Deals

Deal Id	Global Deal Name	End Customer	Total Deal Amount	Approved Incentive Reward Name
<input checked="" type="radio"/> 21881147	Q3FY16_Accuprice_GPN01		100	
<input type="radio"/> 21877102	GPN SIT DEAL PRICING		868612107	
<input type="radio"/> 20402365	GPN Test	SYSTEMS INC	107000	
<input type="radio"/> 20401341	Test_Global_deal		100	

Cisco Channel Account Manager (CAM) * Cisco Account Manager (AM)

Create Deal Page

5. Select the appropriate radio button to select the Country from the global deal breakdown for which you wish to register the local deal.



Note: If the applicable global deal does not display, it may not be approved yet. Local deal registration cannot proceed until the global deal is approved.

6. Under the Fulfilling Partner section:

If this local deal is fulfilled by **‘Self’**, the system pre-populates the host partner details as the fulfilling partner.

To identify the agent partner, click **Select a Fulfilling Partner**. The Select a Fulfilling Partner dialog box displays.

Select a Fulfilling Partner

Search By Cisco.com ID

Cisco.com User ID


Search a Fulfilling Partner

Search By Partner Company Name

Partner Company

Search a Fulfilling Partner

Recently Used Fulfilling Partner

	Cisco.com ID	First Name	Last Name	Company Name	Country
Select				 SYSTEMS, INC	USA

[Close](#)

Associate a Fulfilling Partner Dialog Box

7. Choose the Cisco CAM.
8. Enter the required host partner contact information. Choose the local deal end customer for the landing country and enter their contact information. For more information, see [Populating Who's Involved](#).
9. Click **Create Deal**. The Who's Involved sub-tab displays pre-populated with the information you entered.
10. Click **Save and Continue**. The About the Deal sub-tab displays. The system pre-populates the fields based on the information in the global deal. All fields are editable except Intended Use.
11. Click **Save and Continue**. Incentives (programs and promotions) cannot be added to local deal registration. All deal characteristics are inherited from the global deal, including discounts.
12. Click **Continue**. The Quote tab displays. The appropriate price list is copied from the global deal. Confirm the billing information.
13. Click **Save and Continue**. The Quote tab refreshes.
14. Creating a quote for the local deal is similar to creating a quote for non-GPN orders. The host partner finalizes the quote by adding SKUs or uploading a saved BOM and/or configuration. For more information on adding products, see [Building a Deal](#).
15. Select the appropriate buy method(s).
16. Click **Save and Continue**. The pricing approval displays.
17. Click **Save and Continue**. The Review and Submit tab displays.
18. To submit the local deal, click **Submit Quote for Approval**. Most local deals will be automatically approved.

If the local deal is landing in Australia, Canada, Japan, or China, contact the GPN ops team at go-gpn@cisco.com to request support for discount normalization.

6.5 Executing the Local Deal

Execution of the local deal is completed by the agent partner. Once the deal is approved, the host partner contacts the agent partners about ordering in each landing country. Agent partners will convert the quote to an order using the approved local deal ID and the normal local ordering methods.

A distributor agent as the fulfilling partner on the local deal may use any of these methods to order: auto DART, Net Price, or CBN.

Partner agents need the local deal ID to order using local methods.

Host partners fulfilling the deal themselves also use the local deal ID to order (headquarter orders).

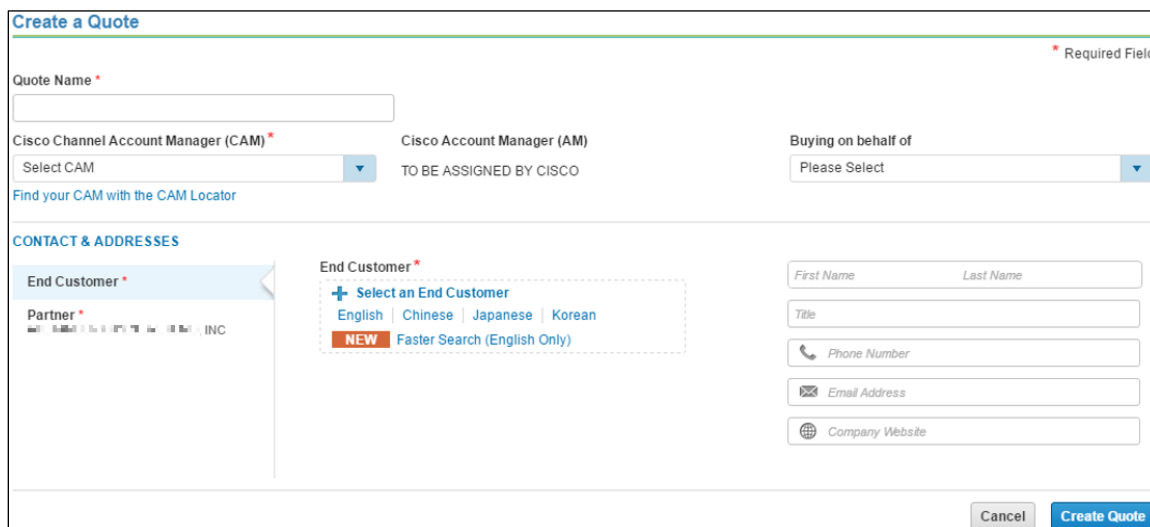
The host partner can track all the local deals via the global deal.

7 Creating a Quote



Create a quote when only pre-approved incentives (programs and promotions) will be applied. To choose a special incentive, follow the steps for creating a deal (See [Creating a Deal](#)).

From the Deals & Quotes tab on the Cisco Commerce homepage, click **Create Quote**. The Create a Quote page displays. Enter a deal name.



Create a Quote Page

7.1 Populating Who's Involved

7.1.1 Reviewing the Partner Information

The partner name is automatically populated by the system.

7.1.2 Populating the Partner Contact Information

Ensure that all mandatory information fields, indicated with a red asterisk (*), are populated. To automatically populate the Partner Contact section, select 'Use the Contact Details in my User Profile' checkbox. The partner contact information populates. Alternatively, click each field and enter the appropriate information.

7.1.3 Choosing an End Customer

To populate the end customer information, see Populating the End Customer Section.

7.1.3.1 Adding End Customer Contact

You can add the end customer contact information here, or the Reseller can add it later. This information is not required.

To add the contact information, click each field and enter the appropriate information.

7.1.4 Populating the Cisco Section: CAM

Populate the CAM section. See [Populating the Cisco Section: CAM](#).

Cisco Channel Account Manager (CAM) * <input type="text" value="Select CAM"/>	Cisco Account Manager (AM) (To be assigned by Cisco.)
Find your CAM with the CAM Locator.	

Cisco Section

Once all fields are populated on Create a Quote page, click **Create Quote**. The About the Deal tab displays.

7.2 Populating About the Deal Information

Populating the deal information for a quote is the same as populating it for a deal. See [Populating Information About the Deal](#).

Click **Save and Continue**. The Quote tab displays.

7.3 Populating the Quote Tab

There are three sections on the Quote tab: Billing Information, Buy Method, and Install Information. Specify the Service To information if you are transacting SaaS Subscriptions.

Populate the appropriate information in the Quote tab. See [Providing Buy Method and Install Site](#).

Populating the Billing Information: To change the billing information, click the edit icon. The Select a Billing Address dialog box displays. Click the appropriate radio button and click **Continue**.

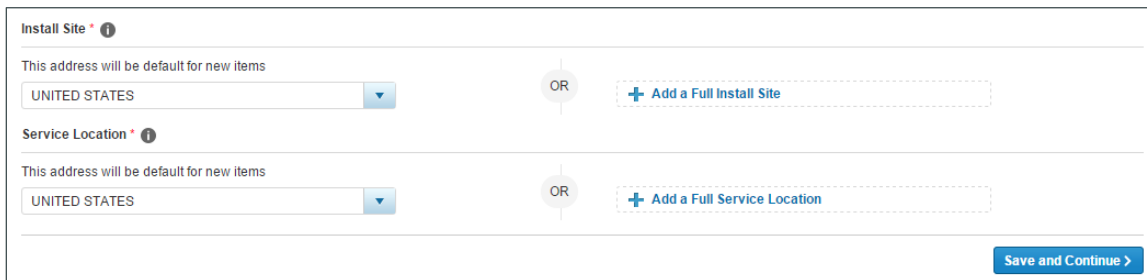
Populating the Buy Method: To choose the buy method, click the Buy Method drop-down arrow and select the appropriate option. The chosen method is applied as the default buy method for all applicable line items. The buy method can be changed for an individual line on the Items tab.

Choose appropriate Install Site and Service To options.



Best Practice: Adding a full install site enables validations and pricing. The address must be accurate to quote services correctly. If full address information is not known, the country information must be valid. Adding a full install site enables validations and pricing. The price list for services is determined by the Install Site country.

To populate the install site and service to information, see Adding an End Customer. The steps are similar.



Install Site

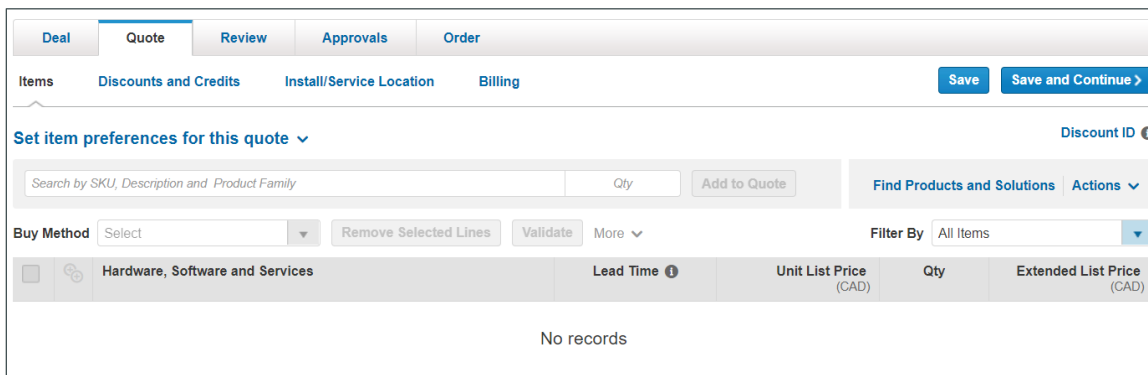
Click the edit icon to populate a different full install site. Alternatively, click the delete icon to remove the populated install site.

Click **Save and Continue**. The Quote tab refreshes to display four sub-tabs.

8 Building a Quote



Best Practice: While working through these multiple portions of the Items page of the Quote tab, click **Save** periodically to ensure that work is saved. The work saves, and you will remain on the current page.



The screenshot shows the 'Quote' tab selected in the top navigation bar. Below it, the 'Items' sub-tab is active. The interface includes a search bar for 'Set item preferences for this quote' with a 'Discount ID' field. There are buttons for 'Save' and 'Save and Continue'. A table is displayed with columns: 'Hardware, Software and Services', 'Lead Time', 'Unit List Price (CAD)', 'Qty', and 'Extended List Price (CAD)'. The table is currently empty, showing 'No records'.

Quote Tab: Items Sub-Tab

From the Quote tab: Items sub-tab, you can:

Apply a Reusable Non-standard Discount (RNSD) to the quote for RNSD-eligible items (see [Entering Discount ID to Apply RNSD](#))

Add items (see [Adding Items](#))

Add services (see [Adding Services](#))

Renew software subscriptions (see [Renewing Software Subscriptions](#))

Add trade-in items (see [Remove Product & Reassign Services to Existing Inventory](#))

8.1 Adding Trade-in Items

)

8.2 Entering Discount ID to Apply RNSD

In Cisco Commerce, you can apply an RNSD to a quote or to an order by referencing the discount ID number that was initiated by Cisco sales team and communicated by a Cisco Account Manager (AM). You can also create a transactional quote referencing an RNSD to ensure the Cisco-approved pricing is automatically applied to the quote. It is only necessary for you to create a transactional quote if the order will be fulfilled through distribution.

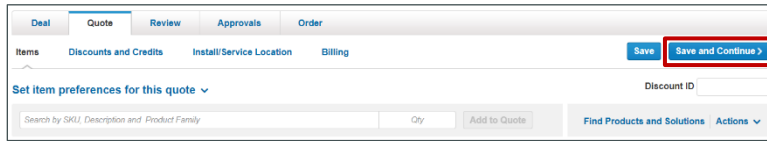


Best Practice: Go straight to ordering and reference the RNSD discount ID (see [Cisco Commerce Order User Guide](#)), rather than starting with a quote, unless the order will be fulfilled through distribution.

8.2.1 Applying the RNSD

To apply an RNSD discount to eligible items on the quote, complete the following steps:

1. From the Quote tab, click the Discount ID field and enter the RNSD ID received from the AM.



Discount ID Field

- Hit enter on your keyboard. Once added, any RNSD product or service added to the quote will have the discount applied automatically.



Note: You can apply discounts to spare equivalents. For example, if an RNSD is set up for WS-C6509-E, the discount will be applied on both WS-C6509-E and WS-C6509-E=.



Note: The system will display warnings and provide explanations when the RNSD is consumed, not in approved status, expired, not migrated to EDMS, not an RNSD, or the deal ID is not found.

- Add the desired products to the quote (see [Adding Items](#)).
- To modify the discounts manually at the line level, click **Discounts & Credits** and enter the discount in the Effective Discount % field. See [Reviewing Discount and Credits](#).
- Complete the remaining processes for the quote and submit the quote for approval. If the partner has entered all the discount and quoting information correctly, the quote is approved automatically upon submission.

8.3 Adding Items



To add items to the quote, use one of the following four methods:

Finding items (see [Finding Items Using a Search](#))

Adding a SKU (see [Adding Items by SKU](#))

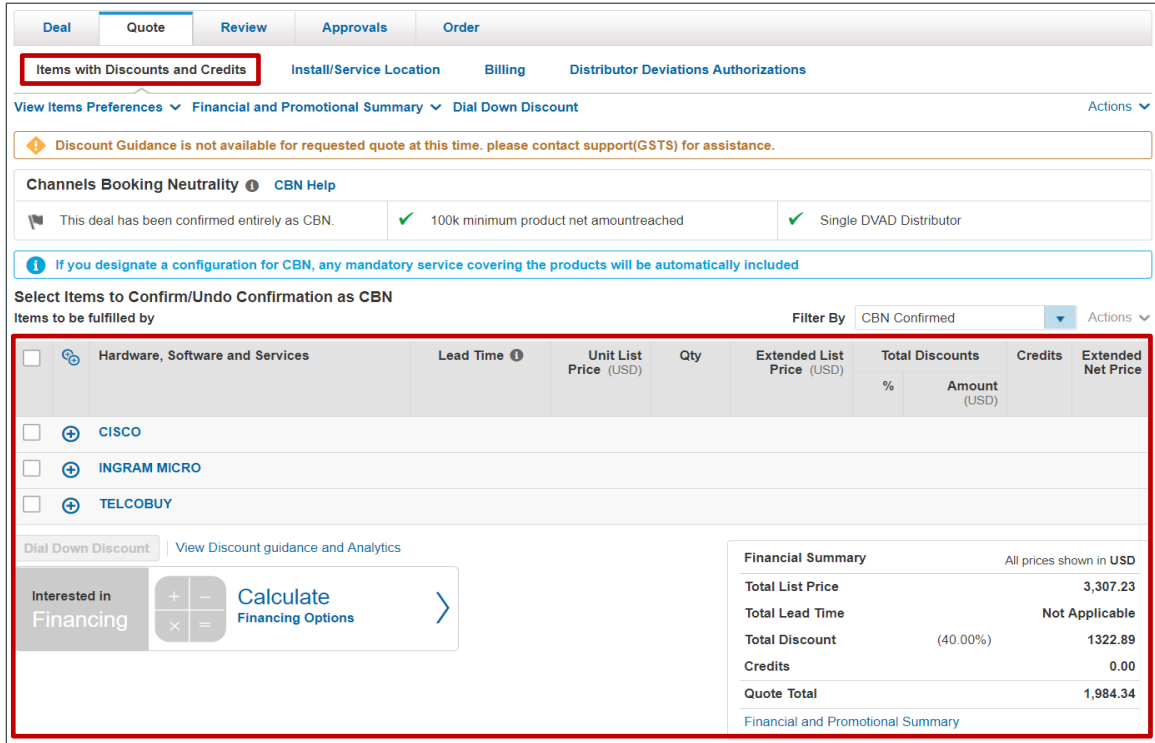
Importing an estimate or a saved configuration (see [Importing an Estimate or a Configuration](#))

Adding different types of SKUs (see [Adding Different Types of SKUs](#))

8.3.1 Channels Booking Neutrality (CBN)

The CBN Feature, which was once under the Review tab will display within 'Items with Discounts and Credits' section of Quote tab.

- All the items (SKUs only) in the quote will be grouped based on Buy-Methods at line/configuration levels and displayed in a single grid with the financial summary for the entire quote at the bottom of the view



The screenshot shows the 'Quote' tab in the Cisco Deals and Quotes interface. A red box highlights the 'Items with Discounts and Credits' section, which contains a table of items and a financial summary.

	Hardware, Software and Services	Lead Time ⓘ	Unit List Price (USD)	Qty	Extended List Price (USD)	Total Discounts %	Credits Amount (USD)	Extended Net Price
<input type="checkbox"/>	CISCO							
<input type="checkbox"/>	INGRAM MICRO							
<input type="checkbox"/>	TELCOBUY							

Financial Summary		All prices shown in USD
Total List Price		3,307.23
Total Lead Time		Not Applicable
Total Discount	(40.00%)	1322.89
Credits		0.00
Quote Total		1,984.34

- Special Discount Items and Adjustments will be displayed as usual below the SKUs grid and financial summary

8.4 Using Optional Functions for Individual Line Items

See

[Using Optional Functions for Individual Line](#) Items to use additional functionalities for individual lines.

8.5 Choosing Options / Resolving Issues

See [Choosing Options and Resolving Issues](#) to select or change options for items.

8.6 Setting Quantities for Items

To set quantities of items when populating a quote, see [Setting Quantities for Items](#).

8.7 Adding Services

To add services, see [Adding Services](#).

8.8 Renewing Software Subscriptions

To renew software subscriptions through a quote, see [Remove Product & Reassign Services to Existing Inventory](#)

8.9 Adding Trade-in Items

To add trade in items to a quote, see [Adding Trade-in Items to get MIP Discount](#).

9 Reviewing Discounts and Credits

You can view the Unit List Price and the Extended List Price in the Quote tab: Discounts & Credits sub-tab for each line. See [Reviewing Discounts and Credits](#).

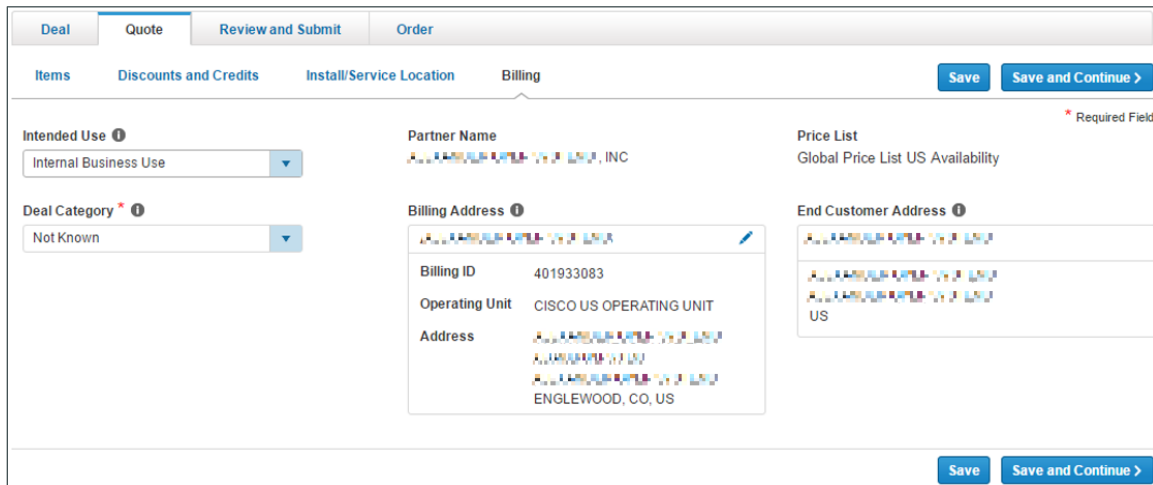
9.1 Reviewing or Editing the Install Site Information

To review or edit the install site information, see [Reviewing or Editing the Install Site Information](#).

9.2 Reviewing or Editing Billing Information

To review or edit the billing information, complete the following steps:

1. Click **Billing**. The Quote tab: Billing sub-tab displays.



Quote Tab: Billing Sub-Tab

2. Review the price list, partner name, and end customer. These fields display, but are not editable.
3. The Intended Use drop-down menu is automatically populated from the defaults set in My Profile and Preferences section. To change this information, if applicable, click the Intended Use drop-down arrow and click the appropriate option (hover over the information icon to learn more about Intended Use options). Incentives and promotions are offered for certain Intended Use deals. Ensure that the Intended Use is accurate. For information on Managed Service options, see [Managing the Managed Service Provider Option](#).
4. Click **Deal Category drop-down** arrow and click the appropriate option. Hover over the information icon to learn more about Deal Categories.
5. The billing address and contact information is editable. To change this information, click the edit icon.
6. The Select a Billing Address dialog box displays. Select the appropriate radio button and click **Continue**. The dialog box closes.

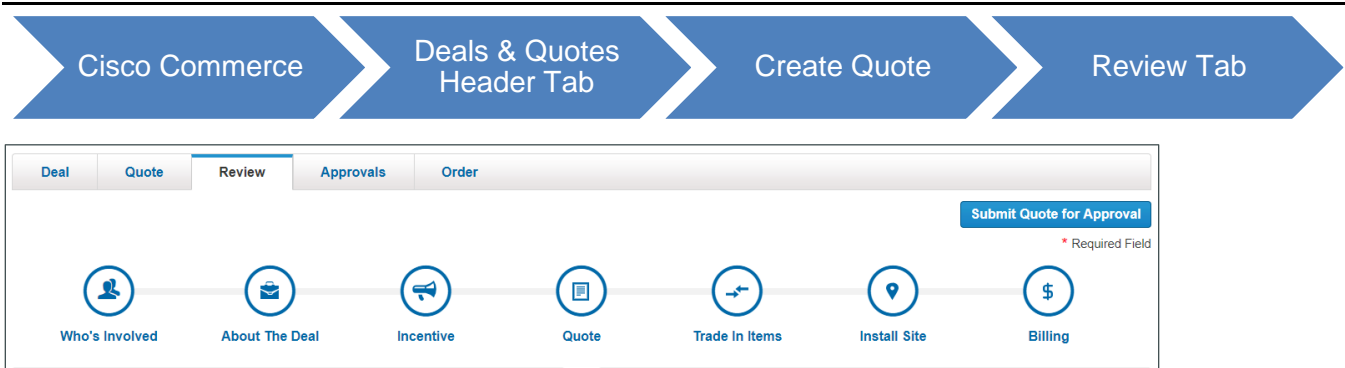


Note: If you are a tier-1 partner placing product lease orders, enter or select the Cisco Capital bill-to address and contact. Product and service lease order capabilities are available (see [Using Financing Options \(For US and Canada only\)](#)).

7. Click **Save and Continue** to continue. The Review and Submit tab displays.

To continue the process of creating a quote, see [Reviewing and Submitting the Quote](#).

10 Reviewing and Submitting the Quote



Review and Submit Tab

10.1 Reviewing and Submitting the Quote

For the following sections, the steps are the same as indicated in creating a deal (see [Submitting the Quote for Approval](#)).

Deal Information section

Quote Summary section

Deal Summary section

Try and Buy section



Note: TAB is not applicable for RNSD quotes.

Manage Deviations section

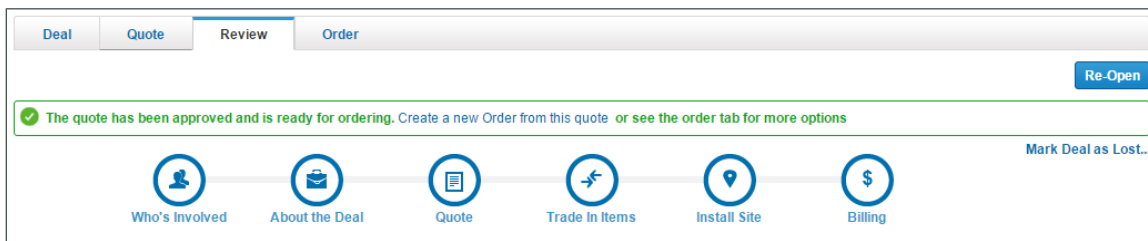
Comments section



Note: Partners in the Americas and Canada can request special pricing through an option on the Quote page: Review tab. If a US or Canada partner creates a quote with no trade-in items and distributor fulfillment only, the Request Special Pricing checkbox displays. See [Requesting Special Pricing](#).

Click **Submit Quote for Approval**. A confirmation page. A message that the quote has been approved displays at the top of the page.

Click **View Submitted Quote**. The quote header information displays. The quote status is now Approved.



Approved Quote

10.2 Requesting Special Pricing



If you are a partner in US and Canada, you can create a quote to request special pricing, also known as a non-standard discount. A request for special pricing can be done in two ways:

You share the quote using the share functionality with a Cisco Account Manager (AM) and request special pricing with a justification.

As a partner in the US or Canada fulfilling through distribution, you can create a quote with no trade-in items and check a checkbox on the Review tab to indicate the request for special pricing

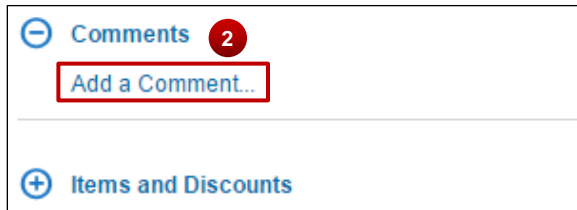
To request special pricing using the checkbox on the Review and Submit tab, the following criteria must be met:

- Only US and Canadian partners
- No trade-in items can be added to the quote
- Fulfillment must be through distribution only
- Can only create a quote (not a deal)

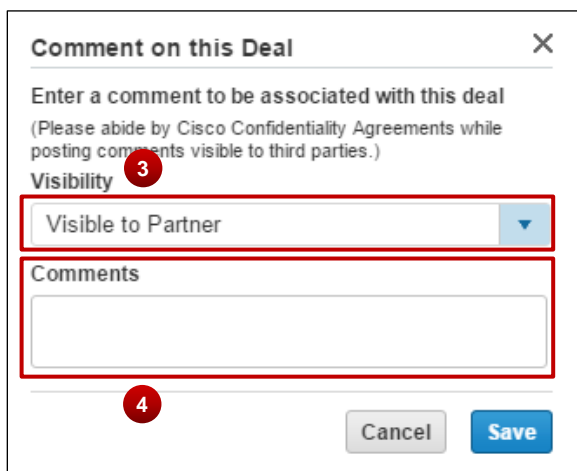
10.2.1 Adding a Justification

On the Review tab, scroll down to the Comments section to add a justification for the special pricing on the quote.

1. Expand the comments section.
2. Click **Add a Comment**. The Comment on this Deal dialog box displays.



Comment Section



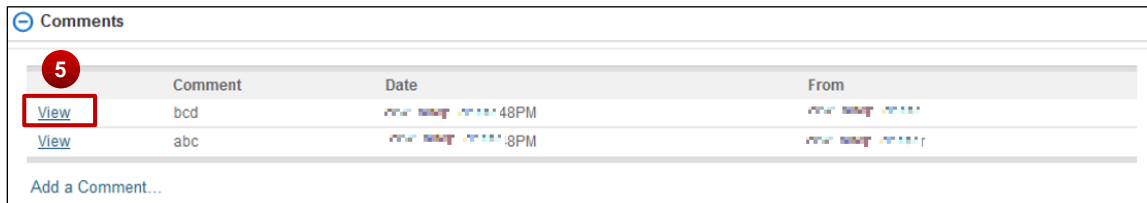
Comment on this Deal Dialog Box

3. From the **Visibility drop-down** menu, select who can view deal comments. Note that Cisco users are able to automatically view comments.
4. Click the Comments field and include the discount being requested and the justification for the special pricing. Be very specific and include any notes from Cisco's team.



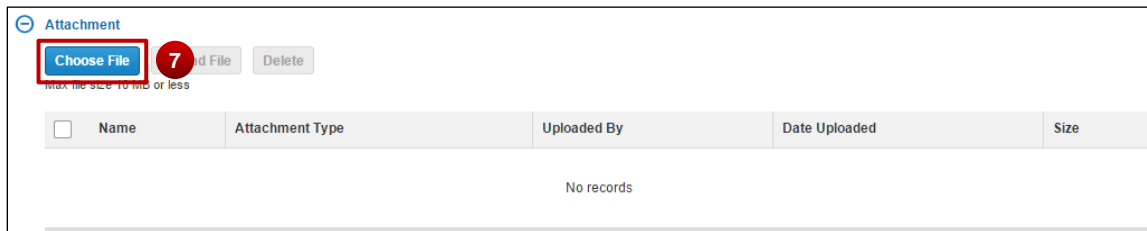
Best Practice: Copy the justification so as to paste it into the body of the message that gets shared with the Cisco AM. See [Getting Started with Cisco Commerce User Guide](#) to learn how to share a quote.

- If there are multiple comments, they will display in rows. Click **View** to view them.



Comment Section with Multiple Comments

- If there are any attachments with the request, scroll to the **Attachment** section.
- Click **Choose File** to browse for the file, select the file and then click **Upload File**.



Add Attachments

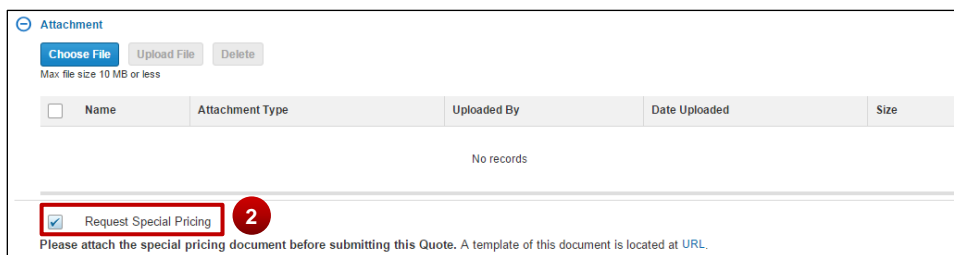
- If there are multiple attachments, they will display in rows. Click **View** to view them.
- Alternatively, check the checkbox for each attachment and click the delete icon to delete them.

10.2.2 Using Request Special Pricing Checkbox

If you are a partner in the US or Canada fulfilling through distribution and creating a quote with no trade-in items, a checkbox displays on the Review and Submit tab to indicate a request for special pricing.

Complete the following steps to use the Request Special Pricing checkbox:

- Ensure all appropriate steps have been taken and information filled in on the Review and Submit tab.
- Scroll down and check the **Request Special Pricing** checkbox to indicate the quote is marked for special pricing.



Request Special Pricing Checkbox



Best Practice: This section does not apply if you are a partner outside of the US or Canada. Partners in these regions share a quote with the AM to request special pricing.

10.2.2.1 Uploading a DART Template

Once the Request Special Pricing checkbox is checked, a message displays and gives the link for a special pricing document, the Deviation Authorization Request Tool (DART) template. This file needs to be filled in and uploaded before submitting the quote for approval.

1. Click **URL** to download a local copy of the DART template.
2. Populate all the necessary information on the template.
3. Expand the **Show/Hide Attachments** section.
4. Click **Upload a file** to attach the completed special pricing DART document.
5. If there are multiple attachments, they will display in rows. Click **View** to view them.
6. Alternatively, select the checkbox for each attachment and click **delete icon** to delete them.
7. To submit the quote for approval click **Submit Quote for Approval**.

After the quote with the request for special pricing is shared with the Cisco AM and submitted for approval, you can monitor the status of the quote on the Deals & Quotes tab.

Once the AM agrees to the special pricing and approves the non-standard discount, you can:
Convert the approved quote into an order.

Reopen the approved quote to modify the discount and resubmit it for final approval (see [Modifying Discounts in Re-opened Quotes](#)).

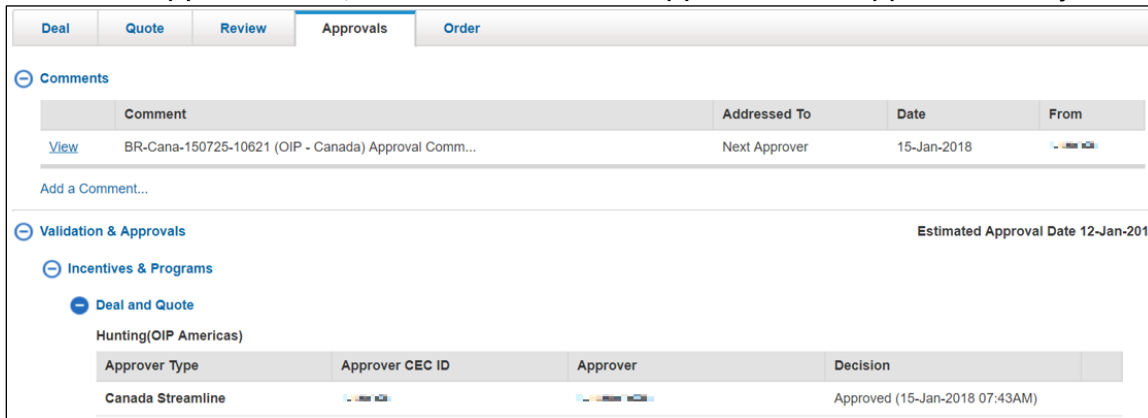
11 Creating a Quote for Service-only Order

For details on how to detach, and subsequently order, services, see the [Cisco Commerce Service Only Quick Reference Guide](#).

Please note that if you have detached services from your order, service lines containing all necessary product information will be automatically added to the original quote. See the [Ordering Detached Services QRG](#) for more information.

12 Approvals Tab

Under the Approvals Tab, there will be a list of Approvers and approval history.



The screenshot shows the 'Approvals' tab selected in a navigation bar. Below the navigation bar, there are sections for 'Comments' and 'Validation & Approvals'. The 'Comments' section contains a table with columns: Comment, Addressed To, Date, and From. A comment is visible: 'BR-Cana-150725-10621 (OIP - Canada) Approval Comm...' with 'Next Approver' as the address, '15-Jan-2018' as the date, and a user icon as the sender. Below this is an 'Add a Comment...' field. The 'Validation & Approvals' section shows 'Estimated Approval Date 12-Jan-2018' and a sub-section 'Incentives & Programs' with 'Deal and Quote' selected. Under 'Deal and Quote', there is a table with columns: Approver Type, Approver CEC ID, Approver, and Decision. A row is shown for 'Canada Streamline' with a user icon as the approver and the decision 'Approved (15-Jan-2018 07:43AM)'.

13 Re-opening an Approved Deal or a Quote

To re-open an approved quote, Search for a quote (see [Getting Started with Cisco Commerce User Guide](#)). Click the deal ID next to the appropriate quote. The quote opens in the Review tab.

Click **Re-Open** on the Review tab. When you reopen a deal, the Deal status is changed to **More Information Required**. You then have the option to revise or edit the deal, select or deselect incentives and re-submit it for qualification/approval.

If the deal characteristics are changed, then incentives selected may be impacted. In this case, the deal will need to be re-submitted for qualification for all incentives. If the deal characteristics are not changed and new incentives are added, then only select incentive will require qualification.

Note: Once a quote has been re-opened and changed, it may need to be re-approved. A quote would be resubmitted for approval in the following cases:

- If a configuration is replaced with another configuration in the same product family, but the new price exceed variance limits
- If a configuration is replaced with another configuration outside of the original product family
- If services are added or removed from another family, other than what was originally approved
- If parts of the configuration are added or removed, other than in the original product family
- If needed parts are removed and defined as a spare

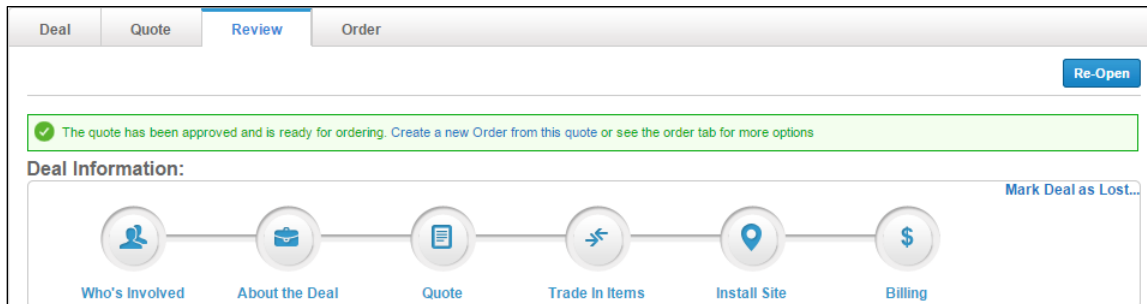


13.1 Marking a Deal as Lost

When a deal is lost, update the status of the deal in Cisco Commerce as “Lost”. The deal ID is still searchable, but is not useable. No edit functions are available. If the opportunity to offer this deal presents itself again, then restart creating the deal from the beginning.

To mark a deal as lost, complete the following steps:

1. Search for a quote (see [Getting Started with Cisco Commerce User Guide](#)).
2. Click the deal ID next to the appropriate quote. The quote opens in the Review tab.



Approved Quote: Review Tab

3. Click **Mark Deal as Lost**. The Mark the Deal as Lost dialog box displays.
4. Click **Continue**. The Deals and Quotes page refreshes. The status indicates Lost.
5. Alternatively, click **Cancel**. The dialog box closes.

13.2 Editing a Quote

To edit an unsubmitted quote, click the deal ID. Make any changes as necessary.

To edit an approved quote, the quote must be “re-opened” by clicking **Re-Open** on the Review Tab. If a quote is re-opened and edited, it may require additional approvals. See [Re-Opening an Approved Deal or a Quote](#) for more information on the circumstances under which a quote would need to be reapproved and which changes trigger re-approval.

Once re-opened, the following previously completed functions can be repeated or changed:

Add or remove items: see

[Adding](#) Items

Add or remove options for items: see [Choosing Options and Resolving Issues](#)

Add or remove services: see [Adding Services](#)

Additional functionality includes:

Mark Deal as Lost: see [Marking a Deal as Lost](#)

Add or remove Try and Buy: see

[Reviewing Try and Buy](#) Section

Change Quantity: see [Modifying Quantity in Re-opened Quotes](#)

Change Discounts: see [Modifying Discounts in Re-opened Quotes](#)

Compare Versions or Restore to Previous Version: see [Compare Versions or Restore to Previous Version](#)

13.2.1 Modifying Quantity in Re-opened Quotes

When you fulfill through distribution, you have visibility to the transactions that have occurred on the quote via distribution using Point of Sale (POS) information. Any attempt to update a line item in the quote that has been marked as POS, the system notifies you. The system provides guidance on valid modifications that you can make.

13.2.2 Modifying Discounts in Re-opened Quotes

You can modify the discounts and apply non-standard discounts with standard discounts on an RNSD quote. In a quote, minor line discounts are populated when the discount is entered at the primary level. Click '+' to expand the line item and edit at the minor line level. Quotes are automatically approved if the discounts entered are less than the approved threshold and have no other non-standard components.

1. Request Non-Standard Discount/Duration: In Americas and APJC, you can request a non-standard discount and/or non-standard duration. From any tab within a deal or quote, click **Share** in the Common Utilities bar. Enter the AM credentials and enter a request for a non-standard discount/duration into the Message to New Recipients field. Click **Save and Close**.

In Americas, partners can request non-standard pricing on quotes that have all lines fulfilled by distributors, see [Requesting Special Pricing](#).

2. Submit Quote for Approval: If the AM agrees to the non-standard discount, open the quote, ensure all details on the quote are complete, and submit the non-standard quote for approval. Monitor the status of the quote from the Cisco Commerce Deals & Quotes tab.
3. Re-open Quote: Once a non-standard quote is approved, you can modify it. Click on the **Deal ID** on the Cisco Commerce Deals & Quotes tab, and click **Re-Open**.
4. Modify Discount: To modify the non-standard discount, click **Discounts & Credits**. Modify the discount either at the line level or at the header level.
 - Line level: On the appropriate lines, enter the discount in the Effective Disc % field. Modifications can be entered on major and minor lines.
 - Header level: Click **Update Quote Discounts**. Modify the overall quote discount for all products and services affected by the Discount in the Effective Discount % field. Click **Save**.

Discounts, lead-time, and final pricing information are available only for items fulfilled by Cisco. Discount modifications do not apply to trade-in credits.

- Submit for Approval: When the modified quote is ready to be submitted, click **Submit Quote for Approval** on the Review and Submit tab.

13.3 Compare Versions or Restore to Previous Version

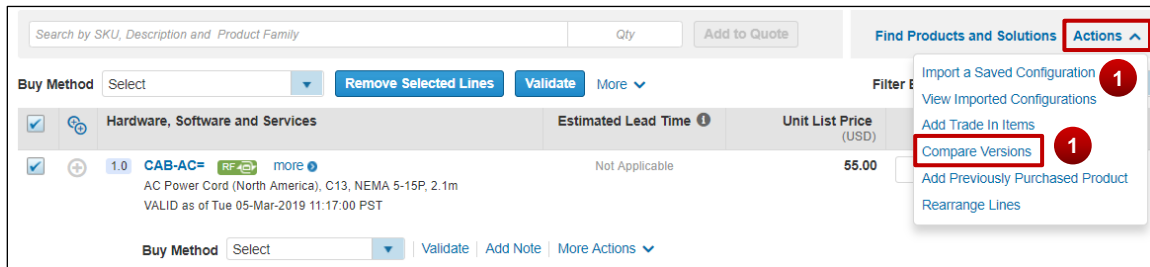


13.3.1 Compare Versions

Once a quote is re-opened, you have the option of comparing different versions of the same quote.

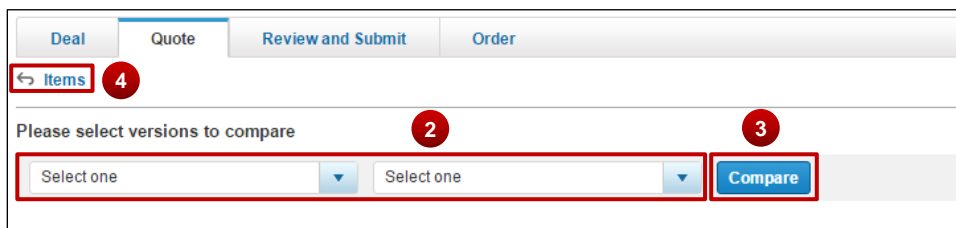
To compare versions, complete the following steps:

- From the Quote tab; Items sub-tab, click **Actions drop-down** menu, and select **Compare Versions**. The page refreshes, with drop-down menus that enable you to compare versions.



Reopened Quote: Compare Versions Link

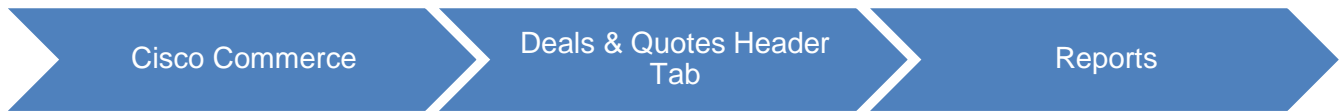
- Use the drop-down menus to select the versions that you want to compare.



Compare Versions Page

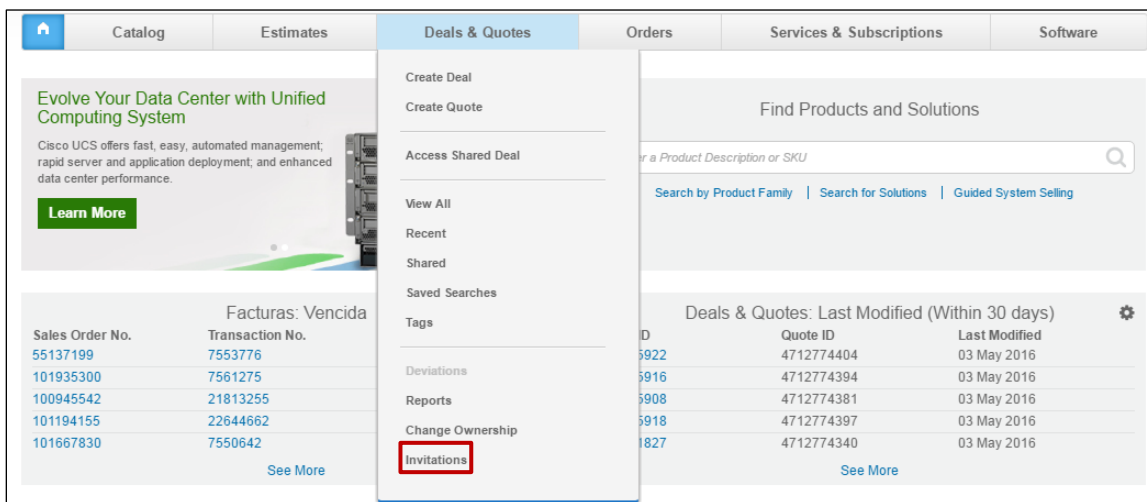
- Click **Compare**. The page refreshes, showing details from the selected versions.
- Click **Items** to return to the re-opened quote.

14 Managing Reports



You can generate, view, and download reports under the Reports option from the Cisco Commerce Deals & Quotes drop-down menu.

From the Reports page, you can download reports when ready. You can delete any generated report; if you do not, the system will automatically remove them after a month. An e-mail alert will be sent to you when your report is completed and ready to download.

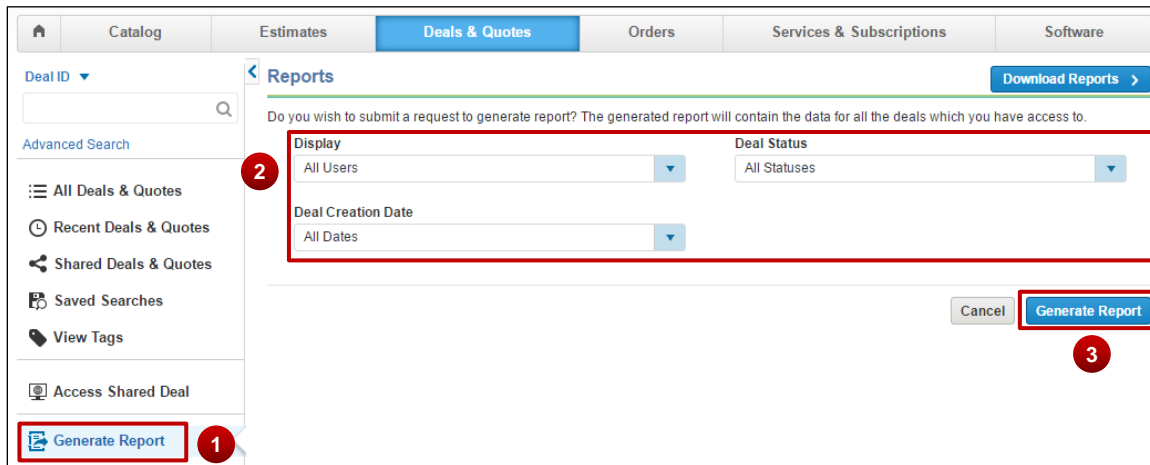


Deals & Quotes Tab: Reports Option

14.1 Generating a Report

To generate a report, complete the following steps:

1. From the Deals & Quotes fly out, select **View All** and click **Generate Report**. The Reports page displays.
2. Filter your report generation information using the Display, Deal Creation date, and Deal Status drop-down arrows.
3. To generate the report, click **Generate Report**. A success message indicates that the report request has been submitted and that an e-mail will be sent when the report is ready to download.



Reports page

14.2 Viewing and Downloading a Report

To download generated reports, click **Reports** from the Deals & Quotes fly out. The Reports page displays with a list of reports that have been generated. Reports remain in this list for 30 days. After 30 days, the system automatically deletes reports.

Click the report name link to download and save a local copy to your machine when the status reads as “Ready”.

Additionally, to remove reports manually, make a selection and click **Remove**. The selected report will be deleted.

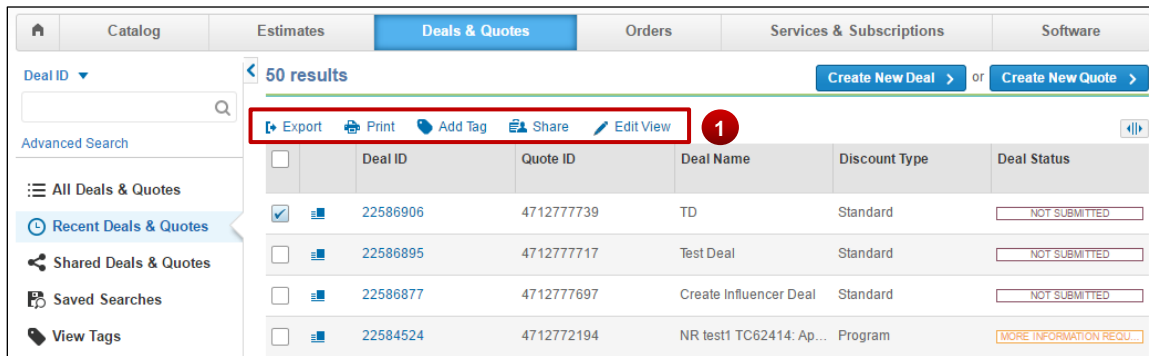
<input type="checkbox"/>	Report Name	Status	Requested On	Completed On
<input type="checkbox"/>	cisco_commerce_workspace_report-05-may-2016 23-16-36	Ready	05-may-2016 / 23:16	05-may-2016 / 23:30
<input type="checkbox"/>	cisco_commerce_workspace_report-05-may-2016 07-10-48	Ready	05-may-2016 / 07:10	05-may-2016 / 07:20
<input type="checkbox"/>	cisco_commerce_workspace_report-04-may-2016 07-04-39	Ready	04-may-2016 / 07:04	04-may-2016 / 07:17
<input type="checkbox"/>	cisco_commerce_workspace_report-29-apr-2016 13-52-45	Ready	29-apr-2016 / 13:52	29-apr-2016 / 14:09
<input type="checkbox"/>	cisco_commerce_workspace_report-26-apr-2016 03-28-22	Ready	26-apr-2016 / 03:28	26-apr-2016 / 03:28
<input type="checkbox"/>	cisco_commerce_workspace_report-26-apr-2016 02-48-04	Ready	26-apr-2016 / 02:48	26-apr-2016 / 02:48
<input type="checkbox"/>	cisco_commerce_workspace_report-15-apr-2016 05-13-36	Failed	15-apr-2016 / 05:13	15-apr-2016 / 05:13
<input type="checkbox"/>	cisco_commerce_workspace_report-08-apr-2016 09-28-05	Ready	08-apr-2016 / 09:28	08-apr-2016 / 09:29

Reports Page

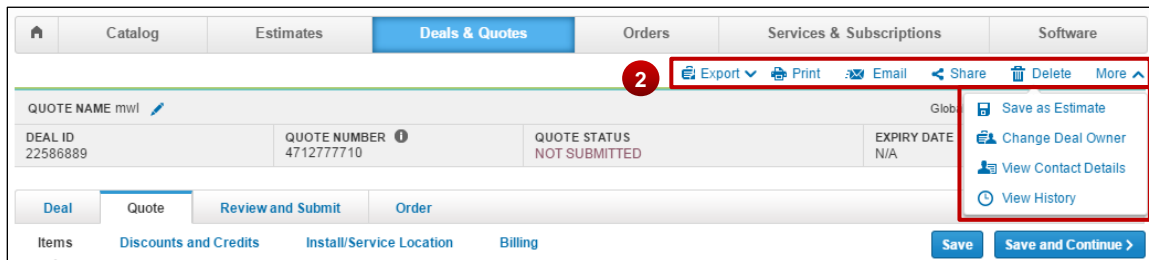
15 Using the Common Utilities

You can view, export, print, e-mail, share, delete, tag, or save as an estimate, deals or quotes order using the common utilities. You can access these utilities from:

1. The Deals & Quotes tab
2. Within a deal or a quote



Cisco Commerce: Deals & Quotes Tab



Quote Page: Common Utilities



Best Practice: Use the common utilities, such as Export, Print, Share, or Tag from the Deals & Quotes tab to export, print, share, or tag multiple deals or quotes at once (see [Getting Started with Cisco Commerce User Guide](#)).

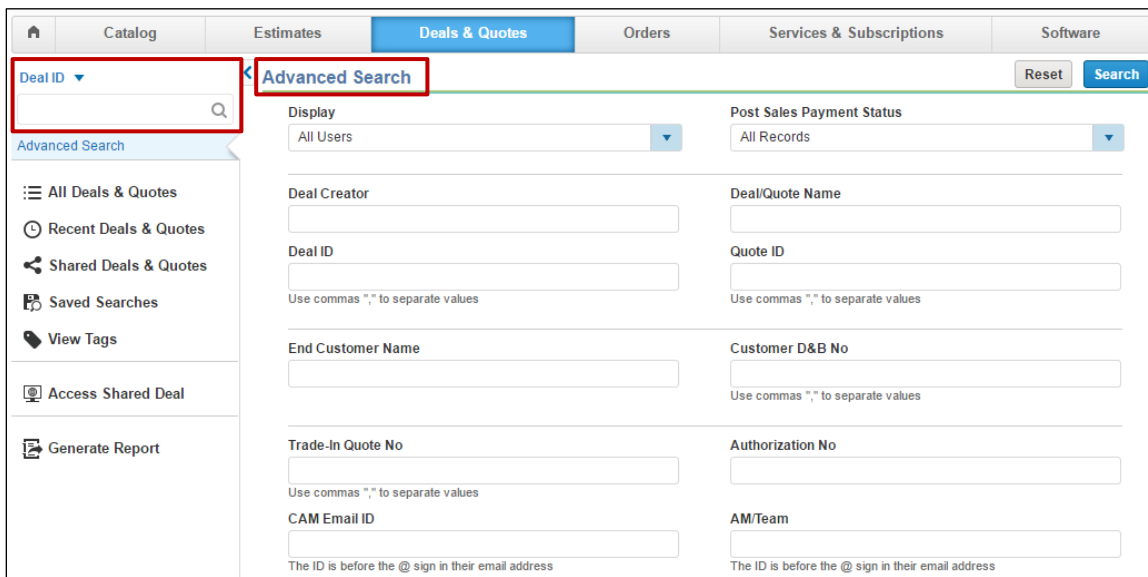
15.1 Searching for Deals and Quotes

You can search for deals and quotes using the Cisco Commerce search functionality (see [Getting Started with Cisco Commerce User Guide](#)).



Note: You can also search for your deals and quotes using Advanced Search functionality (see [Getting Started with Cisco Commerce User Guide](#)).

It allows you to search for deals and quotes with invalid configurations as well.



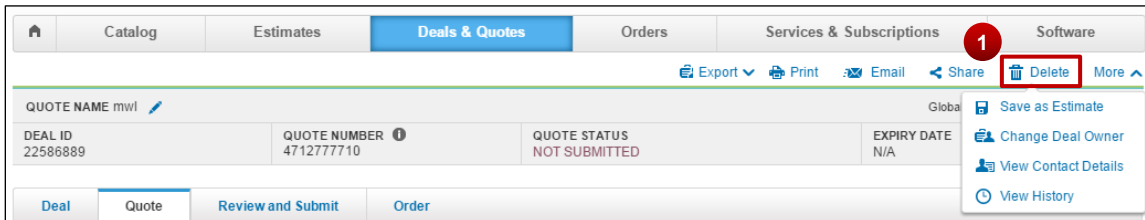
Cisco Commerce Deals & Quotes Tab: Advanced Search

15.2 Deleting a Deal or a Quote

Only un-submitted deals and quotes can be deleted. Deleting a deal or quote permanently removes the record and all related data. Be advised that once deleted, it cannot be retrieved.

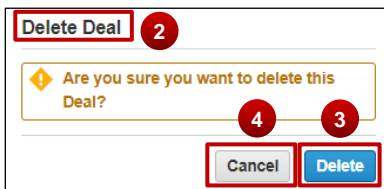
To delete a deal or a quote, complete the following steps:

1. Click **Delete**.



Quote Page: Delete

2. The Delete dialog box displays. The system displays a warning message that this will delete the quote permanently.



3. To delete the deal or a quote permanently, click **Delete**.
4. To cancel and return to the Quote Page, click **Cancel**.

15.3 Saving a Deal or a Quote as an Estimate

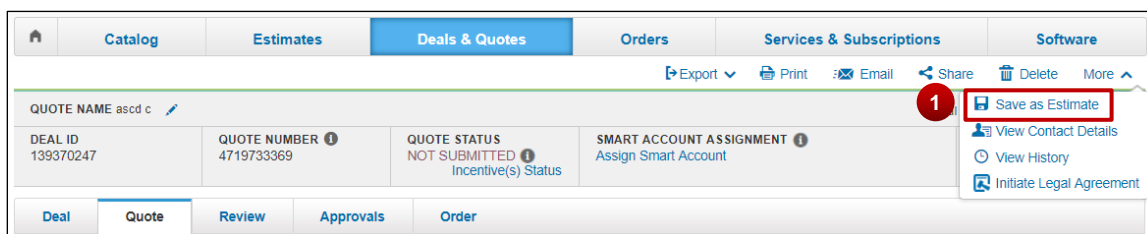
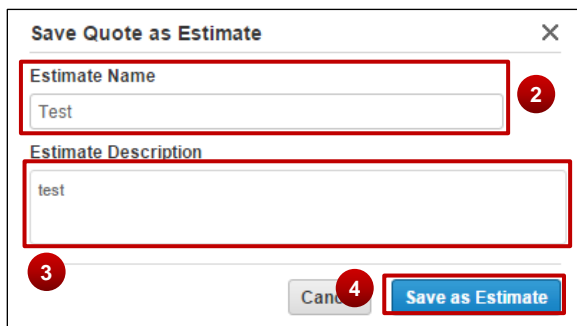
When you create and configure a deal or a quote, the configuration set can be named and saved to be reused. The system will save the configuration set as an estimate and you will receive an estimate ID.



Note: The Save as Estimate icon does not display on RNSD deals and quotes.

To save the configuration set, complete the following steps:

1. From the Quote page; from **More** drop-down, click **Save as Estimate**. The Save as Estimate dialog box displays.

The screenshot shows the 'Save Quote as Estimate' dialog box. It has two text input fields: 'Estimate Name' (containing 'Test') and 'Estimate Description' (containing 'test'). Both fields are highlighted with red boxes and a red circle containing the number 2. At the bottom, there are 'Cancel' and 'Save as Estimate' buttons. The 'Save as Estimate' button is highlighted with a red box and a red circle containing the number 4. A red circle containing the number 3 is positioned near the bottom left of the dialog box.

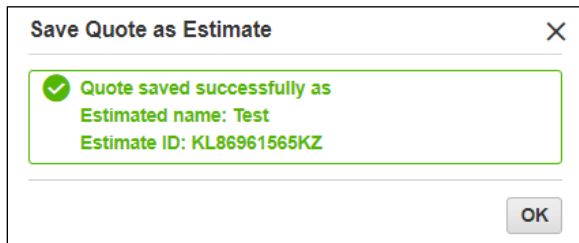
Save as Estimate Dialog Box

2. Click the Estimate Name field and enter the appropriate information.
3. Click the Estimate Description field and enter the appropriate information.
4. Click **Save as Estimate**. A Save as Estimate dialog box refreshes with a success message that indicates the estimate ID.



Best Practice: Make note of the estimate ID from the refreshed Save as Estimate dialog box.

5. Click **OK**. The dialog box closes.



Save Quote as Estimate Dialog Box

To reuse the configuration, import a saved configuration (see [Importing an Estimate](#)).