



Cisco Commerce



Cisco Commerce Order

User Guide

Cisco Proprietary

Note: This document is no longer being actively updated as of March 2020. Please contact crc-training@cisco.com if an update is requested.

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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.”
- Links that display in blue on the Cisco Commerce homepage, whether underlined or not, are underlined in the user guide. Example: “On the Items tab, click Find Products.”
- 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 an Order](#) 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.



1.1 Order Support Enhancements

1.1.1 ChatBot

ChatBot is an AI assistant in core CCW. ChatBot is a quick customer service interaction that has the intelligence to answer some of the more commonly asked Order related questions. It will specifically support order validations, order search, discount validations, contract validations and order status. ChatBot will be integrated with CCW Change Management documents to provide answers to frequently asked questions, and direct users to right documentation based on the context.

ORDER NAME 0221 | Global Price List in US Dollars (USD)

PURCHASE ORDER # | WEB ORDER ID 86272427 | STATUS UNSUBMITTED | SMART ACCOUNT Assign Customer Smart Account

Items | Discounts | Shipping and Install | Billing | Review and Submit

Set preferences for this order | Check Local Validations | Save | Save and Continue

To identify errors, you can use the Filter options available on this page.

Search by Sku, Description and Product Family | Qty | Add | Find Products and Solutions | More Actions

Remove from Order	Validate	Edit Services	More	Filter By	Show All Items
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
Hardware, Software and Services	P.O. Line Reference	Estimated Lead Time	Unit List Price (USD)	Qty	Ext. List Price (USD)
<input type="checkbox"/>	1.0 C9300-48U-A	20 days	11,864.00	1	11,864.00

Showing 1 - 1 of 1 Line Items | Previous | 1 | Next

Check Local Validations | Save | Save and Continue

Terms & Conditions | Privacy Statement | Cookie Policy | Trademarks of Cisco Systems Inc

Cisco Commerce Order | EMILY STEWART

Catalog | Estimates | Deals & Quotes | Orders | Services & Subscriptions | Software

ORDER NAME Test_sw_c_test | PURCHASE ORDER # | WEB ORDER ID 86173101 | STATUS UNSUBMITTED | SMART ACCOUNT Assign Smart Account

Items | Discounts | Shipping and Install | Billing | Review and Submit

Set preferences for this order | Check Local Validations

Search by Sku, Description and Product Family | Qty | Add | Find Products and Solutions | More Actions

Remove from Order | Validate | Edit Services | More | Filter By

Hardware, Software and Services | P.O. Line Reference | Estimated Lead Time | Unit List Price

No Records

Chat Assistant

NextGen-CCW-NonProd

You created this conversation. 6:22 PM

NextGen-CCW-NonProd 6:22 PM

Hello Emily

My name is Linka, the Cisco Commerce Workspace virtual assistant.

I can help you with queries on the following topics:

- Help with address creation
- Fix an error on order/Cannot submit order
- Trouble shooting access issues
- Help with issues on Contract number

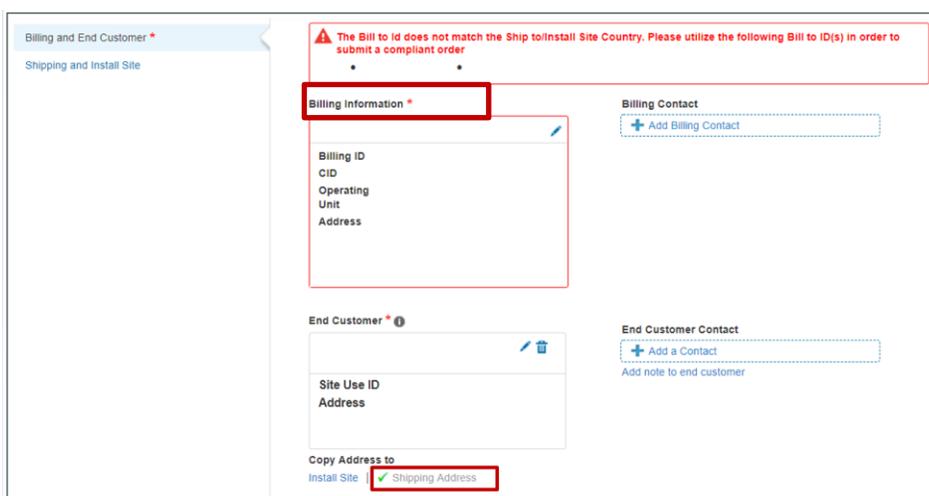
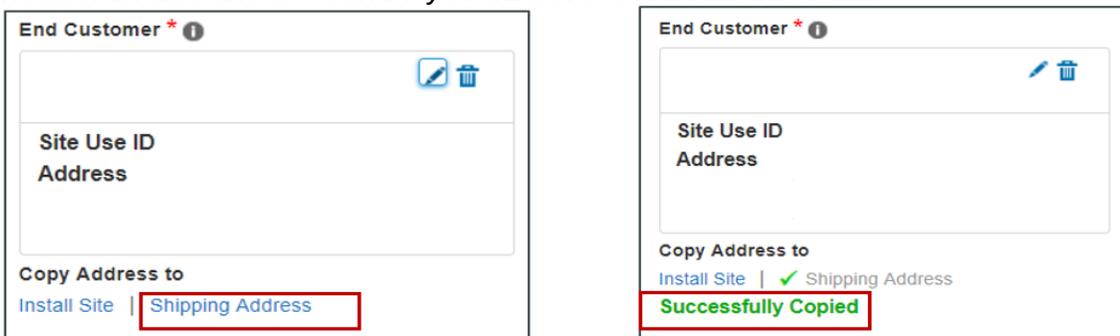
1.2 Special Processes or Programs

1.2.1 Global Customer Support Process

The Global Customer Support Process (GCSP) is a program to allow a Partner to submit an Order for a specific End Customer where the Partner does not have physical presence in that country. Partners must register for GCSP and meet qualification criteria. End Users must be registered as GCSP eligible. Once registered, Partners can then sell to a limited set of Cisco Global End Users without obtaining Global Certification. The GCSP eligibility page is available [here](#). Please contact the GCSP Program Team at GCSP@cisco.com with any questions.

During Order creation, CCW will check if the Partner and End Customer have GCSP eligibility, then check if the Partner is using the correct Bill To ID (BID) aligned with the GCSP registered End User. When mismatches are discovered along the way, warning messages will display as you build the Order.

PRO TIP: As you create your Order and select your Billing Information and End Customer, select “Copy Address to: Shipping Address”, then select Continue. When a GCSP mismatch is present, the warning GCSP message will appear and you will not be able to continue until it is resolved. If you do not select Copy Address to Shipping Address then you do select continue, the warning message will appear later in follow on tabs and to resolve it you will have to recreate the Order.



You will see three main warning messages regarding GCSP as follows.

Use Case 1:

When the customer is GCSP eligible, and CCW knows of a different Bill To ID to use, you will see this warning message:

“The Bill to Id does not match the Ship to/Install Site Country. Please utilize the following Bill to IDs in order to submit a compliant order (Bill to IDs will be listed within this message)”

Use Case 2:

When the customer is GCSP eligible, and CCW cannot locate a good Bill To ID to suggest, you will see this warning message:

“Please use a Bill-To-ID with [Insert Operating Unit] Operating Unit. If you do not have a Bill To ID with this Operating Unit, please work with your Partner Account Manager or contact our Customer Partner Support Team.”

Use Case 3:

When the customer is GCSP eligible, and CCW identifies the Ship To Country/Install Site Country as not yet approved for GCSP, you will see this message:

“Ship To /Install Site Country is not yet approved as GCSP. Please contact Partner Account Manager for the Ship To/Install Site Country approval.”

When you change the Billing Information, you will see a “Suggested” icon to guide you to more appropriate Bill Tos.



Change Billing Information [X]

Warning: The Bill To ID does not match the Ship To/ Install Site Country. Please utilize the following Bill To ID(s) in order to submit a compliant order.

■ 234973 ■ 234974 ■ 234975 ■ 234976

Select a Billing Address

Choose a Billing Address from the table below.

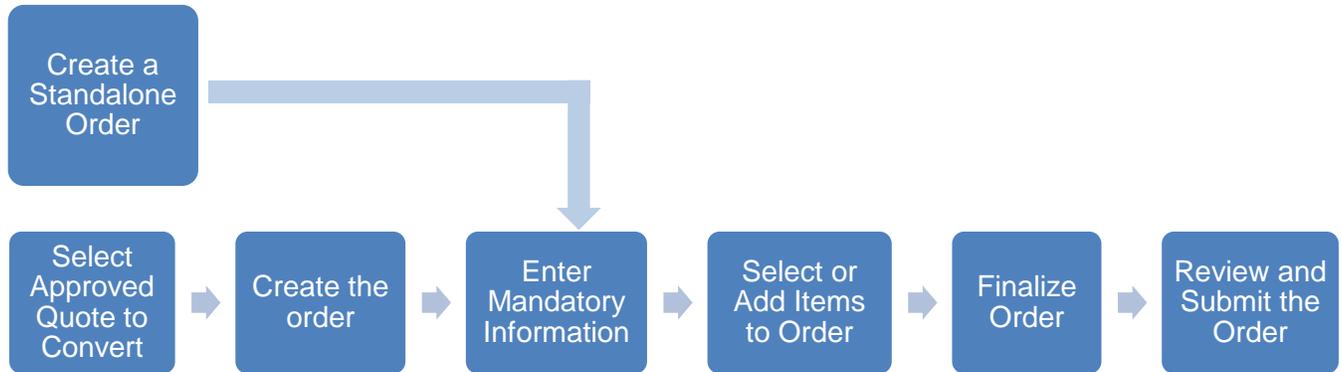
Show Ship To/Install Site compatible Operating Unit

	Company	Billing ID	Address	City	State/Province	Zip/Postal Code	Country	Bill To Usage	Business Model	Operating Unit	Flooring BID
<input type="radio"/>		234973	Hereford House, Mitre Close, Bishopsteignton, Teignmouth TQ14 9RY, United Kingdom	Bishopsteignton	Teignmouth	WC2N	United Kingdom	Y		Cisco UK	Y

2 Cisco Commerce Ordering Workflow

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

Using the ordering functionality, you can create standalone orders, place orders created from quotes, order services for previously purchased products, renew software subscriptions, view and pay invoices, view the status of orders, and manage returns.



Ordering Workflow

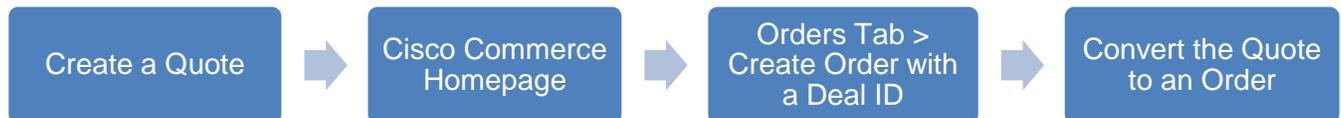
2.1 Creating an Order

In Cisco Commerce, you can create an order in two ways:

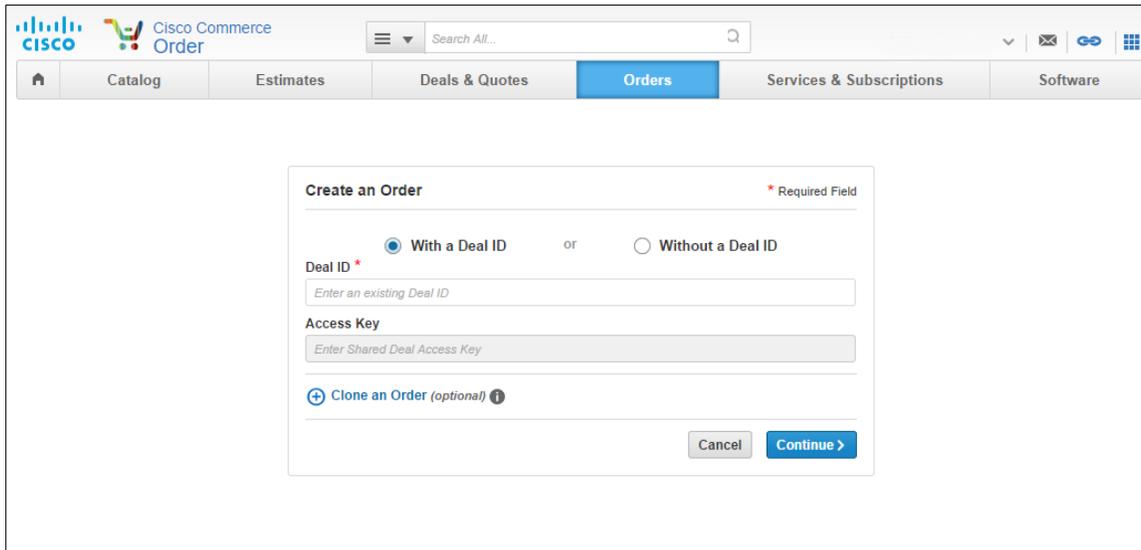
1. Converting an approved quote to an order referencing a deal ID

To convert a quote to an order, you must have access to the quote before you can convert it to an order. You can either:

- Convert a quote that you created to an order or,
- Convert a quote that was shared with you to an order using the Access Key

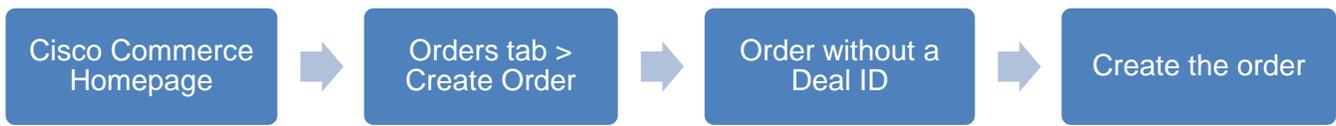


Convert Quote to an Order



Cisco Commerce: Create Order Page

2. Creating a standalone order with no reference to a deal ID



Create a Standalone Order

To create a standalone order, you do not need to have a deal ID. You can:

- Create standalone new order
- Clone (or copy) a new order from an existing order

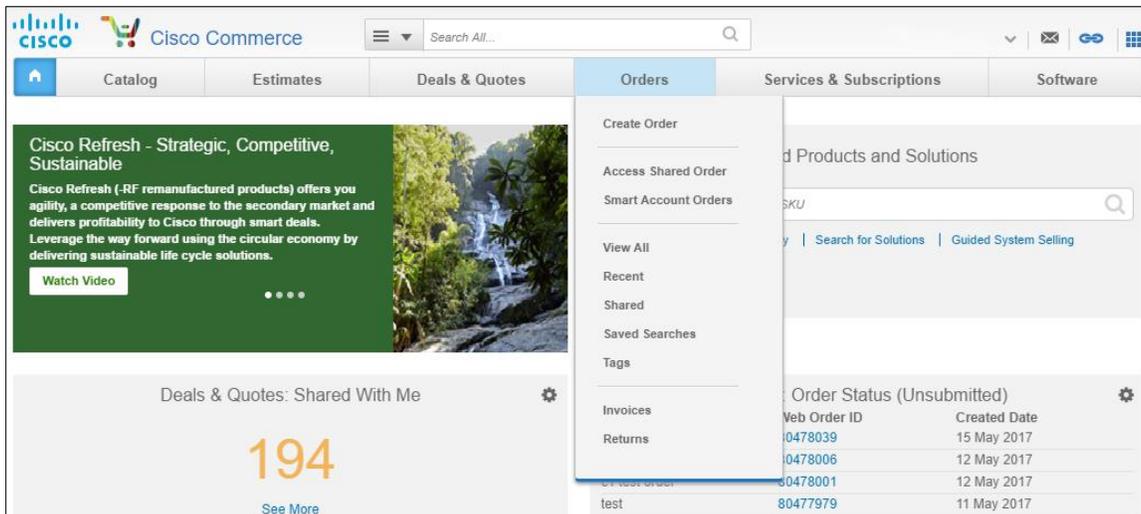
Once the order is created and the order number or name and the web order ID number display at the top of the page, the process for populating order details and submission is the same no matter which of the above methods was used to begin.

2.2 Using Options on the Orders Tab

In Cisco Commerce, the Orders tab allows you to:

- Create an order
- Access shared order
- View Smart Account Orders
- View all or specific orders
- Tag orders
- Manage invoices

- Manage returns



Options on the Orders Tab

2.3 Limited Access to the Orders Tab

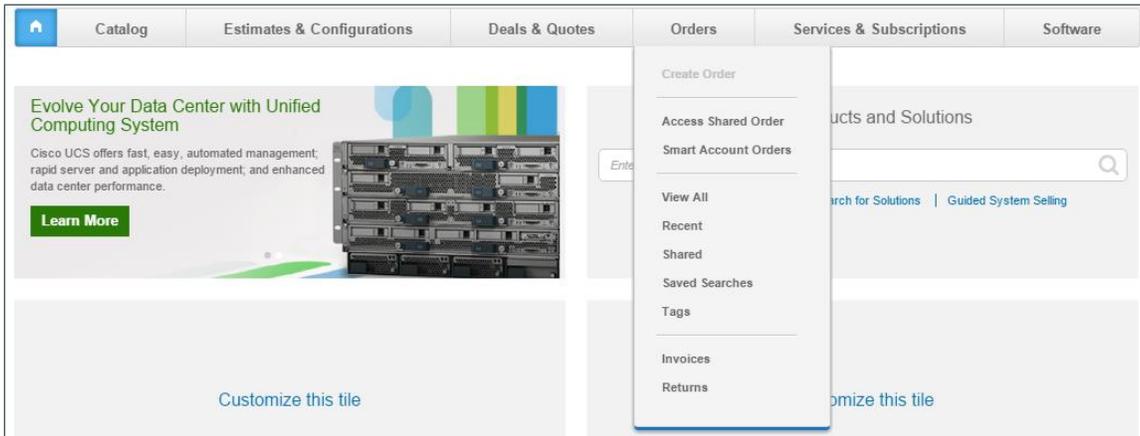
Depending on your access levels, you may have limited view of the Cisco Commerce Orders tab.

2.3.1 Partner-initiated Customer Access

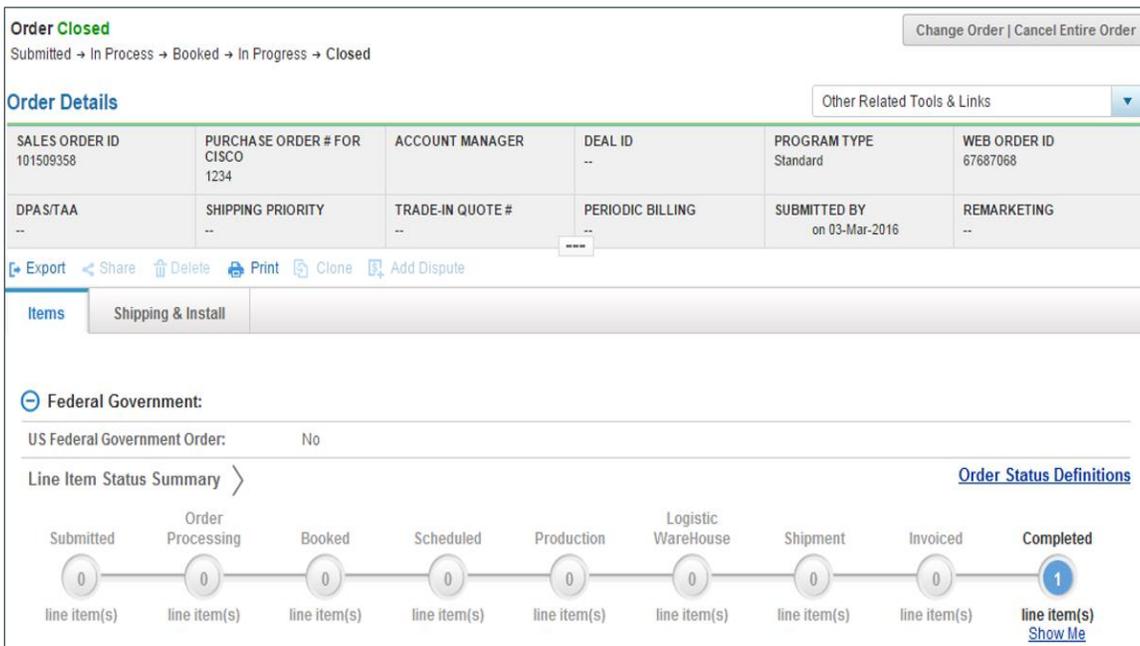
Partners who have a Partner-initiated Customer Access (PICA) contract with Cisco can grant PICA user privileges to end customers, providing limited access to Cisco Commerce.

If you are a PICA user, you will have access to limited functionality in the orders tab. You can:

- View submitted orders (no unsubmitted orders display)
- View only the Items and Shipping & Install tabs in an order
- Use only the export and print common utilities for an order, other options will display but are not enabled



PICA View of Orders Tab



PICA View of an Order

2.3.2 Internet Commerce Agreement

If you have not signed an Internet Commerce Agreement (ICA), you will not be authorized to submit orders and will receive notification in both:

- Order Initiation page
- Review and Submit tab

It is possible to create an order without signing the ICA, however the Submit Order button will be disabled on the Review and Submit tab.

! Order submission disabled until [Internet Commerce Agreement](#) is signed. Order can be routed to an authorized submitter in the organization.

Create an Order * Required Field

With a Deal ID or Without a Deal ID

Deal ID *

Access Key

[+ Clone an Order \(optional\)](#) ⓘ

Cisco Commerce: Order Initiation Page

Click [Internet Commerce Agreement](#) in the message to access the ICA website. Select your country and click-to-accept the ICA. A case will be routed to Customer Service who will verify your access level with your company’s admin before modifying your access level, so that you can submit orders in Cisco Commerce.

Items
Discounts
Shipping and Install
Billing
Review and Submit

! Order submission disabled until [Internet Commerce Agreement](#) is signed. Order can be routed to an authorized submitter in the organization.


 Items


 Discounts


 Shipping & Install


 Billing

Cisco Commerce Orders Page: Review and Submit Tab

3 Converting Quotes to Orders

You can convert your own quote to an order or a quote shared with you to an order. When you do so, standard contractual discounts will apply to the order and any nonstandard ones that are approved on the deal or quote.

If you make any changes to the items on the order, and need any nonstandard discount, then make the appropriate changes to the quote and submit it for re-approval. A quote to be converted to an order would need 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 is added or removed, other than in the original product family
- If needed parts are removed and defined as a spare



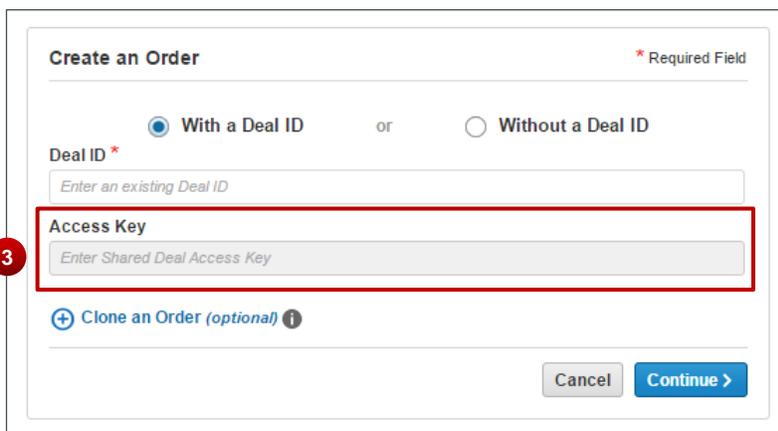
Best Practice: Accessing the Order page with a deal ID is recommended for deals associated with a Reusable Nonstandard Discount (RNSD) without trade-in products.

If you are 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 through Cisco Commerce Orders tab.

3.1 Converting a Quote to an Order

To create an order from an approved quote, complete the following steps:

1. From the Cisco Commerce homepage, click **Create Order** from the Orders tab. The Order with Deal ID radio button is selected by default.
2. Click the Deal ID field and enter the appropriate deal ID.
3. If the deal was shared with you, enter the Access Key information from the email notification.



Create an Order Page: With a Deal ID

4. Click **Continue**. The Order Initiation page populates with information from the quote, such as Intended Use and Billing Address.
5. Continue through the steps in the following document sections as applicable, beginning with [Verifying the Order Initiation Page Details](#).

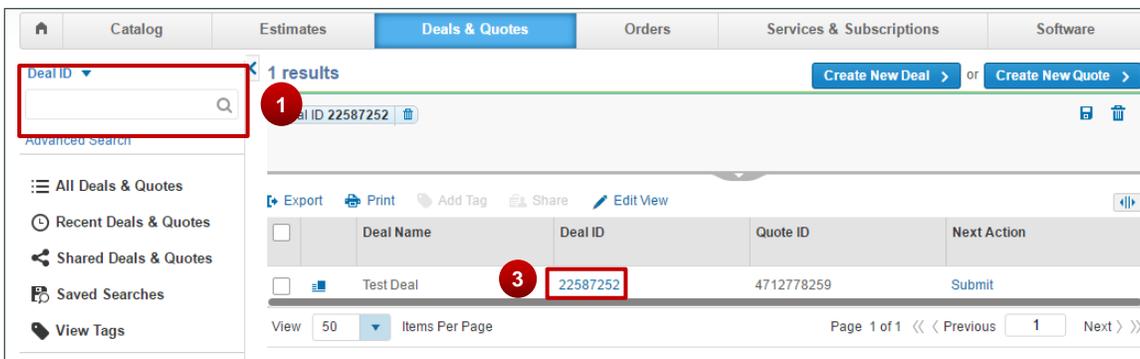
3.2 Converting to Order from Within a Quote

You can also convert a quote to an order from within a quote itself.

To search for a deal that you have access to, complete the following steps:

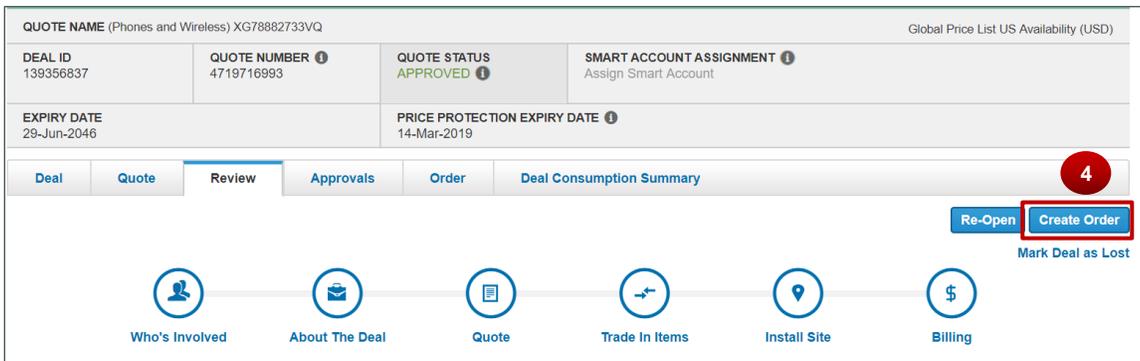
1. From the Deals & Quotes tab, perform a basic search using any of the search parameters by clicking the drop-down arrow.

In this instance, enter the Deal ID in the search field.



Deals & Quotes Tab: Search Using a Deal ID

2. Click **Search**. The deal displays.
3. Click the numerical deal ID link. The deal displays in the Review tab.



Quote Page

4. Click Create Order from this quote. The Order Initiation page displays.
5. Continue through the steps in the following document sections as applicable, beginning with [Verifying the Order Initiation Page Details](#).

3.3 Verifying the Order Initiation Page Details

Verify the information that populates automatically on the Order Initiation page. If any information needs to be changed, complete the steps in the following sections.

3.3.1 Deal ID, Order Name, Price List, Intended Use, and Managed Service Order

The order populates with some of the information from the quote itself. Follow the given steps to change editable options:

1. To change the deal ID, click the edit icon () next to it. The initial Create Order Page displays to enter the new deal ID.
2. Click **Continue**.
3. To add or change the order name, click the Order Name field and enter the appropriate information. This is optional.
4. The intended use defaults from the quote and is not editable.
5. To mark this order as a managed service order and indicate a managed service contractual provider, see [Managed Service Order from a Managed Service Quote](#).
6. Other fields on this page:
 - The price list defaults from the quote and is not editable.
 - To add or change the billing address and contact, see [Changing the Billing Address and Contact](#).
 - The shipping address, install site, and end customer address sections are not editable until the billing address is populated. See [Adding or Changing the Shipping Address and Contact](#), [Adding or Changing the Install Site](#), and [Adding or Changing the End Customer Address and Contact](#).

Create Order Page Details

3.3.1.1 Managed Service Order from a Managed Service Quote



You can create a managed service order by converting a managed service quote. Managed service indicates that the deployment of your order is proactively monitored by a contractual provider.



Note: You can only view and change the contractual provider information for managed service orders on this page. This information will not display anywhere else in the Cisco Commerce Order process when a quote is converted to an order.

If Managed Service is the deal category on the original quote that is being converted, the Managed Service Order radio button will default to Yes and cannot be changed. The information about contractual provider defaults from the quote.

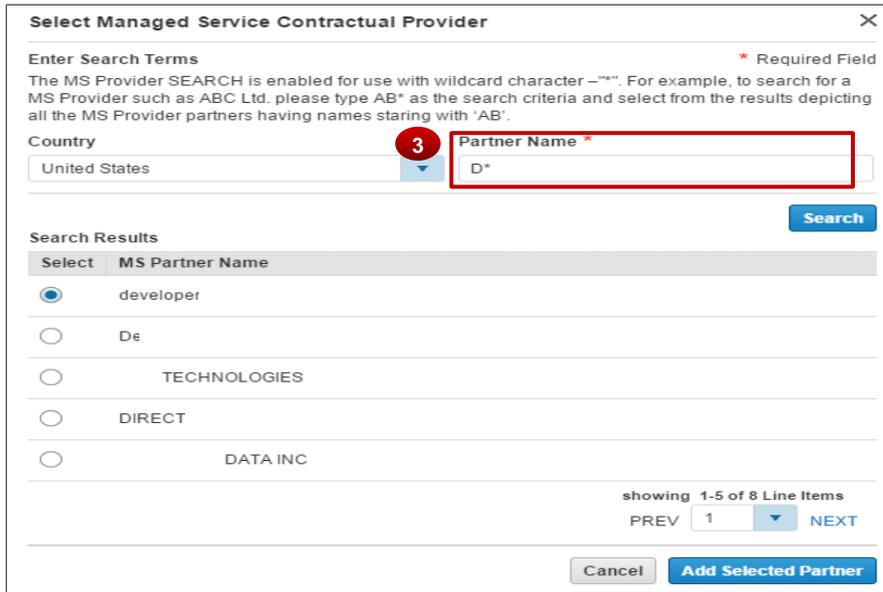
Create Order Page: Managed Service Order

3.3.1.1.1 Changing the Managed Service Provider

The Managed Service (MS) Contractual Provider is the entity that provides the proactive monitoring of the deployment. To learn more about the Managed Service Contractual Provider, click the more information icon.

If a different Managed Service Provider is required, complete the following steps:

1. From the Create Order page, click the pencil icon under Managed Service Contractual Provider. The Select Managed Service Contractual Provider dialog box displays.



Select Managed Service Contractual Provider Dialog Box

2. Click the Country drop-down arrow to display the list of countries. Select the appropriate country. It is not a mandatory field, but narrows the search results to select the provider in the indicated country. Some providers may operate in multiple regions.
3. Enter a partial or complete provider name in the Partner Name field and click **Search**.
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 display in the Search Results section.
4. Click the radio button for the appropriate MS partner from the Search Results section. Once a radio button is selected, the Add Selected Partner button activates.
5. Click **Add Selected Partner** to continue. The order details get updated to reflect the changed provider.

3.3.2 Address Information Section

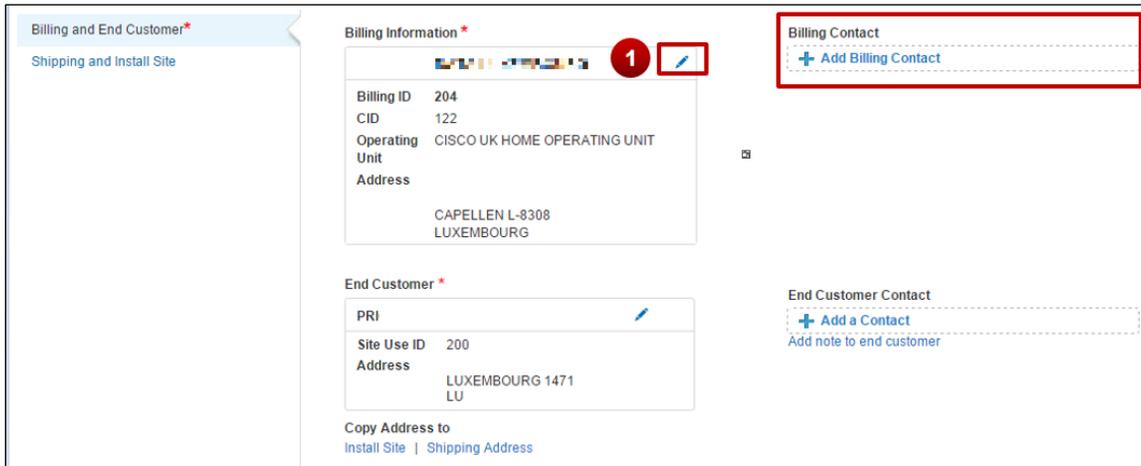
You can update the Billing, Shipping, Install Site, and End Customer addresses and contacts in this section. There are separate tabs for the Billing and End Customer, and Shipping and Install Site.



Note: Once the addresses are populated, additional links become active for copying addresses. For example, you can copy the shipping address to install site address section by clicking Copy Address to Install Site below shipping address section.

If the billing information was provided in the quote, the Billing Address and Contact populates automatically.

If not, then add the billing address and contact.



Billing and End Customer*

Shipping and Install Site

Billing Information *

Billing ID 204
 CID 122
 Operating Unit CISCO UK HOME OPERATING UNIT
 Address CAPELLEN L-8308 LUXEMBOURG

Billing Contact
 + Add Billing Contact

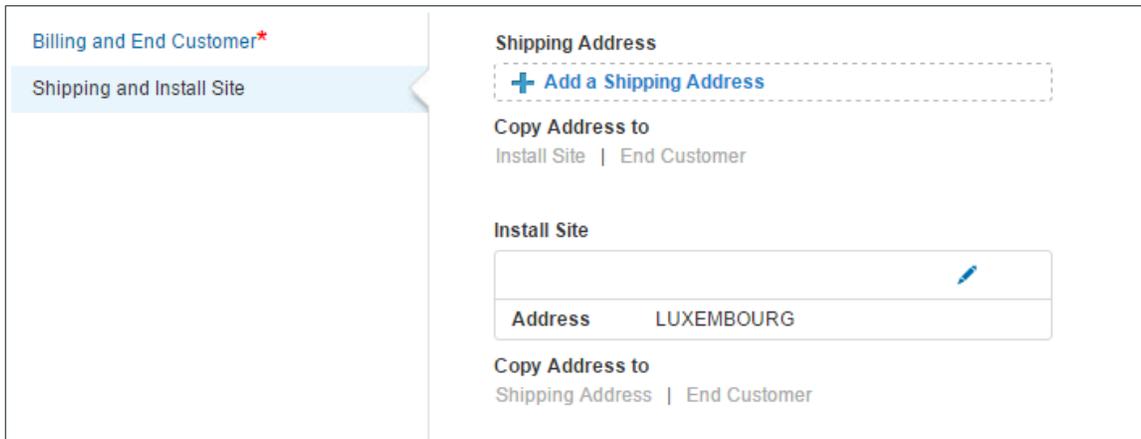
End Customer *

PRI
 Site Use ID 200
 Address LUXEMBOURG 1471 LU

Copy Address to
 Install Site | Shipping Address

End Customer Contact
 + Add a Contact
 Add note to end customer

Create Order Page: Address Information Section, Billing and End Customer



Billing and End Customer*

Shipping and Install Site

Shipping Address
 + Add a Shipping Address

Copy Address to
 Install Site | End Customer

Install Site

Address LUXEMBOURG

Copy Address to
 Shipping Address | End Customer

Create Order Page: Address Information Section, Shipping and Install Site

3.3.2.1 Changing the Billing Address and Contact

The billing address populates automatically from the quote. To change the billing address, complete the following steps:

1. From the Create Order page, click the edit icon under Billing Information. The Change Billing Information dialog box displays.
2. Click the appropriate radio button and click **Use Selected Address**. The dialog box closes and the Order Initiation page displays.
3. To add a contact, see the next section.

Change Billing Information ✕

⚠ Changing the Billing Address will require you to re-select the Billing Contact, if Contact was already selected for this Order.

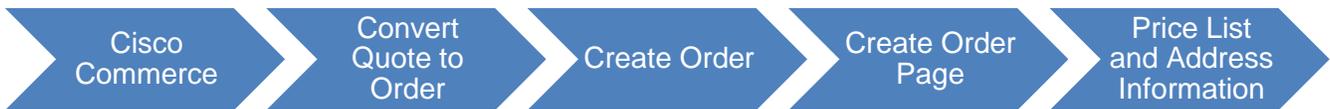
Select a Billing Address

Choose a Billing Address from the table below.

	Company	Billing ID	Address	City	State/Province	Zip/Postal Code	Country	Bill To Usage	Business Model	Operating Unit
<input checked="" type="radio"/>	DIM BELGIUM	506	3 VASTO	ZAVENTEM		1930	Belgium	Y		CISCO UK HOME
<input type="radio"/>	DIM BELGIUM	304	DIEGEM	VLAAMS-BRABANT		1831	Belgium	Y		CISCO UK HOME
<input type="radio"/>	DIM COMMUNICATION	134	N 12 ABC	MUNSBACH		L-5365	Luxembourg	Y		CISCO UK HOME

Change Billing Information Dialog Box

3.3.2.1.1 Adding, Editing, or Creating a Contact



The billing contact automatically populates from the quote. Click the edit icon to change the contact. If the contact is not provided in the quote, then you can add the contact in the Billing Address and Contact section. From the Order Initiation page, click **Add Billing Contact**.

Billing and End Customer*

Shipping and Install Site

Billing Information*

Billing ID:

CID:

Operating Unit: CISCO UK HOME OPERATING UNIT

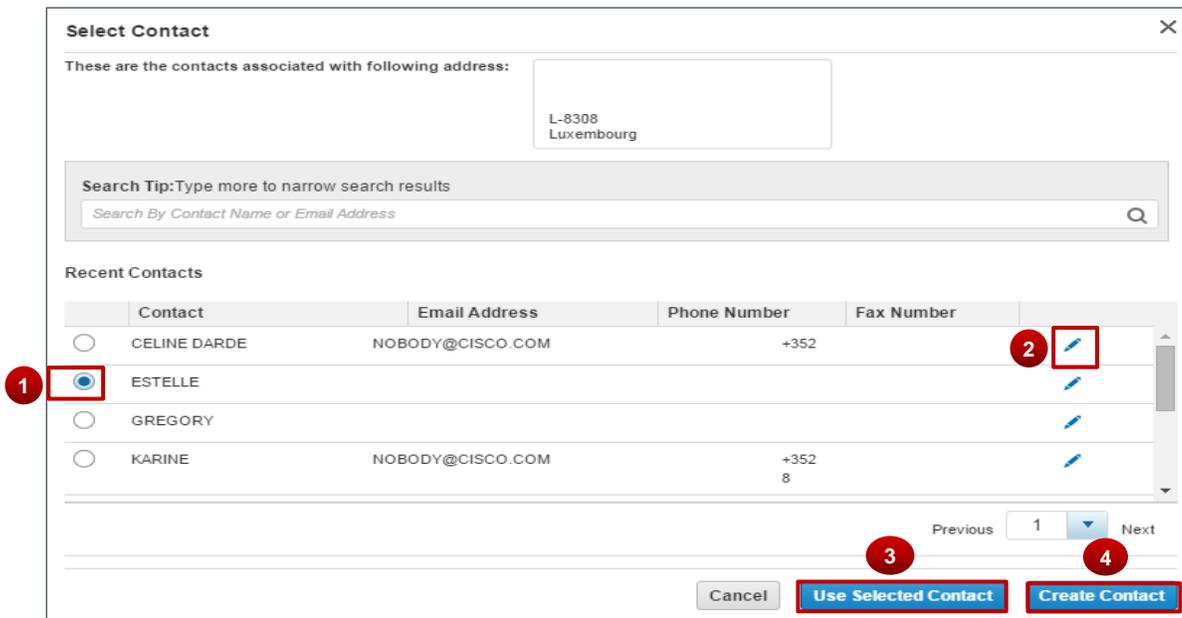
Address: WESTSIDE VILLAGE
RUE PAFEBRUCH 89D BATIMENT D
CAPELLEN L-8308
LUXEMBOURG

Billing Contact

+ Add Billing Contact

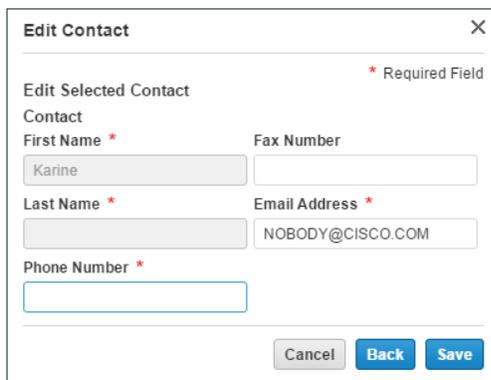
Billing Address and Contact Section: Add a Contact

The Select Contact dialog box displays. From the Selected Contact dialog box, you can associate a listed contact, edit a listed contact, or add a new contact.



Order Initiation Page: Add Contact – Select Contact Dialog Box

1. To associate a contact with the displayed address, click the radio button next to the appropriate contact and click **Use Selected Contact**.
2. To edit existing contact information, click the edit icon in the appropriate contact line. The Edit Contact dialog box displays.
 - Click the appropriate field(s) and edit as necessary. Only the phone number, fax number, and email address can be changed. Click **Save**. The Edit Contact dialog box closes, and the Select Contact dialog box displays.

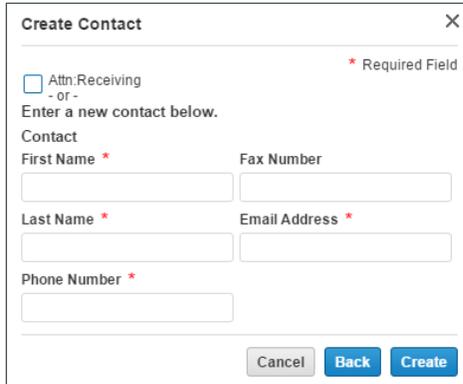


Edit Contact Dialog Box

3. Ensure the correct radio button is selected and click **Use Selected Contact**.
4. To create a contact for this address, click **Create Contact** from the Select Contact dialog box. The Create Contact dialog box displays.

Populate the required fields, indicated with a red asterisk (*).

Click **Create**. The dialog box closes, and the contact information displays on the Create Order page.



Create Contact Dialog Box

- Alternatively, to create a contact titled Attn: Receiving, check the checkbox on the top left of the Create Contact dialog box. The system greys out the contact information fields and no other contact information is required.

3.3.2.1.2 Changing a Contact

You are able to change the identified billing contact.

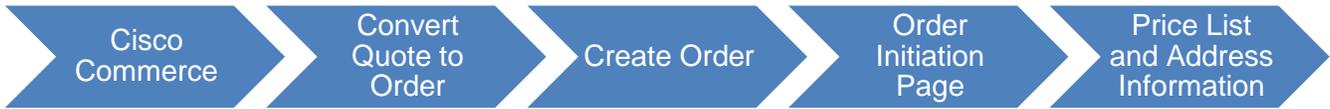


Billing Contact Details

- Click the edit icon. The Select Contact dialog box displays.
- Click the appropriate radio button and click **Use Selected Contact**.

It is also possible to edit existing contact information and create a new contact (see [Adding, Editing, or Creating a Contact](#)).

3.3.2.2 Adding or Changing the Shipping Address and Contact



3.3.2.2.1 Adding or Changing the Shipping Address



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

To add or change the shipping address, complete the following steps:

- From the Create Order page, click the Shipping and Install Site tab, then click **Add a Shipping Address** or the edit icon if it is already populated. The Address Search dialog box displays.
Click the delete icon if you wish to delete the already populated address.
- To choose a favorite address, click the appropriate address radio button.
- Click **Use Selected Address**.

Edit End Customer Address

Choose a favorite address from the table below or Search English | Chinese | Japanese | Korean

All Addresses for STATE OF KANSAS OITS Favourite Addresses

Company	Address	City	State/Province	Zip/Postal Code	Country
<input type="radio"/> DEPARTMENT OF EDUCATION	3833 GREENWAY DR	LAWRENCE	KS	66046 550	UNITED STATES
<input type="radio"/> EXECUTIVE OFFICE OF THE STATE OF KANSAS	300 SW 10TH AVE	TOPEKA	KS	66612 1504	UNITED STATES
<input type="radio"/> JUDICIARY COURTS OF THE STATE OF KANSAS	301 SW 10TH AVE	TOPEKA	KS	66612 1502	UNITED STATES
<input type="radio"/> KAN ED PROJECT	211 W SPRING AVE	CONWAY SPRINGS	KS	67031	UNITED STATES

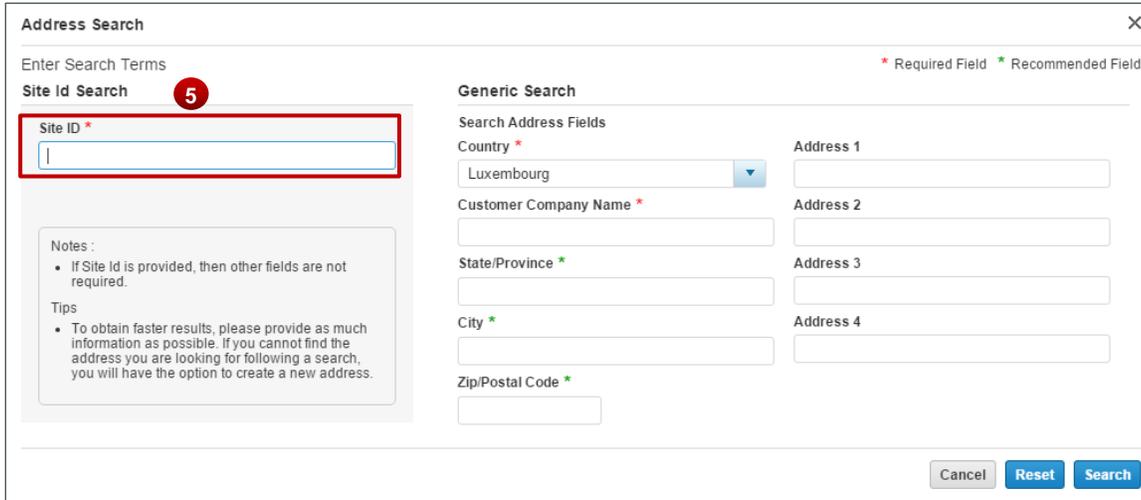
Previous Next>

Address Search Dialog Box

- Alternatively, click English to search the Cisco directory in English. Click Chinese, Japanese, or Korean to search the Cisco directory in Chinese, Japanese, or Korean. If Chinese is selected as the language, the system will translate addresses entered in Chinese to English and you will have to confirm or modify the translation.
 - The Address Search dialog box refreshes with search fields. Populate the required fields, indicated with a red asterisk (*).
 - Click **Search**.

- Click the appropriate address radio button and click **Use Selected Address** or **Use and Add to Favourite** or create a new address (see [Creating a Shipping Address](#)).

The Country field automatically populates from the billing country.



Address Search Dialog Box: Refreshed

5. If preferred, use the Site Id field to search. If the site ID is provided, then other fields on the Address Search dialog box are not required.
6. If the desired address does not display as a result of a search, the option to create a new address displays on the Address Search dialog box.
7. To add the shipping contact, see [Adding, Changing, or Removing a Shipping Contact](#).

3.3.2.2.2 Creating a Shipping Address

If the desired address does not display as a result of a search, the option to create a new address displays on the Address Search as well as Select Address dialog box.

To create a customer address, complete the following steps:

1. From the Select Address dialog box, click **Create Address**. The Create Address dialog box displays.

Select Address ✕

Search Results

	Site Id	Company	Address	City	State/Province	Zip/Postal Code	Country
<input type="radio"/>	133135836	TDC	ROUTE	DIEKIRCH		9230	LUXEMBOURG
<input type="radio"/>	135748319		BANKEN AB 15 RUE	LUXEMBOURG		1229	LUXEMBOURG
<input type="radio"/>	135755683		BANKEN AB 15 RUE BENDER	LUXEMBOURG		1229	LUXEMBOURG
<input type="radio"/>	135515567	AB	5 A RUE	LUXEMBOURG		1445	LUXEMBOURG
<input type="radio"/>	135513664	AB	5 A RUE	LUXEMBOURG		1445	LUXEMBOURG

Cancel
Search Again
Create Address

Select Address Dialog Box

2. Populate the required fields, indicated with a red asterisk (*).
3. If applicable, check the Add to Favorites checkbox.
4. Click **Create**. The dialog box closes, and the address populates on the Order Initiation page.

Create Address ✕

Create a New Address in the Cisco Directory

* Required Field

Tips

- Customer specific references such as ATTN, FAO and PO Numbers should not be entered here. Please use the Carton Notes or Shipping/ Package Notes fields on the Shipping and Install Tab of your order to enter these details

Country *

Customer Company Name *

Address 1 *

Address 2

Address 3

Address 4

State/Province *

City *

Zip/Postal Code *

Add to Favorites

Cancel
Search Again
Create

Create Address Dialog Box

3.3.2.2.3 Adding, Changing, or Removing a Shipping Contact

The steps for adding, changing, or removing a shipping contact are the same as adding, changing, or removing any contact. To add, change, or remove a contact under the Shipping Address, see [Adding, Editing, or Creating a Contact](#) and [Changing a Contact](#).

3.3.2.3 Adding or Changing the Install Site

Adding the install site or contact and changing it is same as [Adding or Changing the Shipping Address and Contact](#).



Note: The install site country and install site contact must be added to order services. For resale orders, add a full install site address.

To change the install site address once it is populated, click the edit icon. A dialog box displays. Click the radio button corresponding to the appropriate install site address and click **Use Selected Address**. The dialog box closes.



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

<p>Billing and End Customer*</p> <p>Shipping and Install Site</p>	<p>Shipping Address</p> <div style="border: 1px solid #ccc; padding: 5px;"> <p>PRICE ✎ 🗑</p> <p>Site Use ID 133</p> <p>Address LUXEMBOURG 1471 LUXEMBOURG</p> </div> <p>Copy Address to Install Site End Customer</p> <p>Install Site</p> <div style="border: 1px solid #ccc; padding: 5px;"> <p>Address LUXEMBOURG ✎</p> </div> <p>Copy Address to Shipping Address End Customer</p>	<p>Shipping Contact</p> <div style="border: 1px dashed #ccc; padding: 5px;"> <p>+ Add a Contact</p> </div>
---	---	--

Install Site

3.3.2.4 Adding or Changing the End Customer Address and Contact

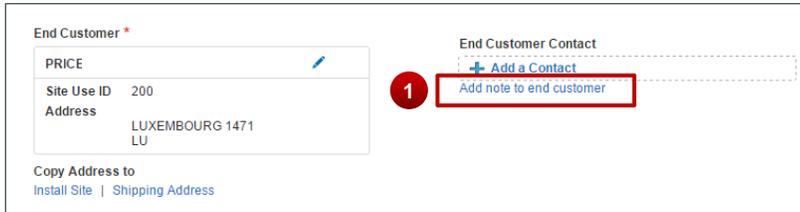
The end customer information automatically populates from the quote and can be modified. Adding and changing the end customer address and contact is same as [Adding or Changing the Shipping Address and Contact](#).

3.3.2.4.1 Adding or Removing End Customer Note

The Add note to end customer can be used to input any note, such as the Purchase Order (PO) number or the contract number. The note is printed on shipping labels and is displayed in the View Status of an order.

To input a note, complete the following steps:

1. Select Add note to end customer. The Add Note dialog box displays.



End Customer: Add Note

2. Type required text and click **Save**.
3. To edit the note, click Edit Note. The Edit Note dialog box displays.
4. Replace the existing note with the new text and click **Save** to update it.
5. Click **Remove Note** to delete it altogether.

3.4 Completing the Conversion



When converting a quote to an order, you can select specific items from the quote or purchase all items from the quote in a single order.

To complete the conversion, complete the following steps:

1. Ensure that you have populated all the required sections on the Create Order page.
2. To choose some of the items from the quote to place on the order, click **Select Items to Order**. The Select Items page displays.
3. Check the appropriate checkbox(s). Click **Continue**.

Order Initiation Page: Options for Converting a Quote to an Order

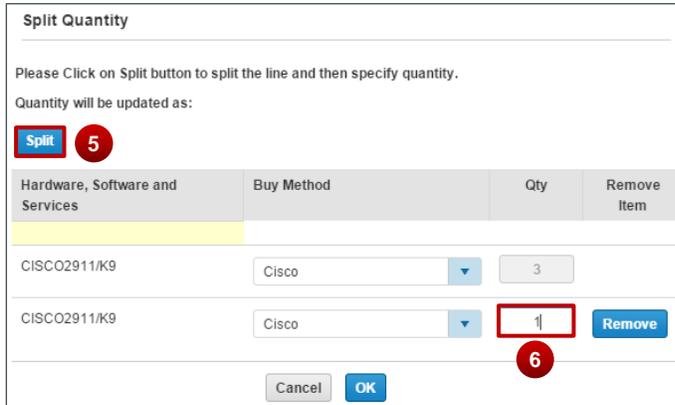
4. Alternately, click Split to order a partial quantity of the item. The Split Quantity dialog box displays.

	Lead Time	Unit List Price (USD)	Qty	Ext. List Price (USD)	Discount %	Discount Total	Credits	Ext Net Price (USD)
<input type="checkbox"/> 1.0 WS-C6506-E= Catalyst 6500 Enhanced 6-slot chassis,11RU,no PS,no Fan Tray	21 days	5,500.00	4 Split	22,000.00	42.00	9,240.00	0.00	12,760.00
<input type="checkbox"/> 2.0 CISCO2911/K9 Cisco 2911 w/3 GE,4 EHWIC,2 DSP,1 SM,256MB CF,512MB DRAM,IPB	21 days	3,189.03	3 Split	9,567.09	42.32	4,048.59	0.00	5,518.50

Select Items to Order Page

5. Click **Split**. The dialog box refreshes.
6. Type the quantity to add to a new line and then click outside of the quantity field. The other quantity(s) updates.
7. Click **OK**. The Select Items dialog box refreshes.

Check the appropriate checkbox(s). Click **Continue**.



Split Quantity

Please Click on Split button to split the line and then specify quantity.

Quantity will be updated as:

Split **5**

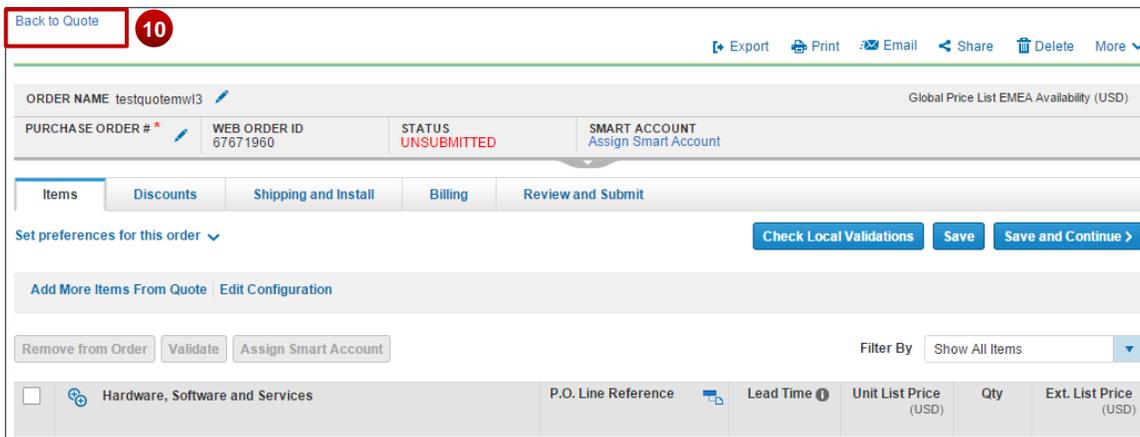
Hardware, Software and Services	Buy Method	Qty	Remove Item
CISCO2911/K9	Cisco	3	
CISCO2911/K9	Cisco	1	Remove

Cancel **OK**

6

Split Quantity Dialog Box

8. To order all of the items included on the quote, click **Order Entire Quote**.
9. In both cases, an order is created. The Order page: Items tab displays. The order number/name, the web order ID number, and status display at the header level. See [Populating the Header Content](#). Expand the header to see additional information.
10. Alternatively, to cancel the conversion, click [Back to Quote](#). The quote opens to the Quote page: Review tab.



Back to Quote **10**

Export Print Email Share Delete More

ORDER NAME testquotemw13 Global Price List EMEA Availability (USD)

PURCHASE ORDER # * WEB ORDER ID 67671960 STATUS **UNSUBMITTED** SMART ACCOUNT Assign Smart Account

Items Discounts Shipping and Install Billing Review and Submit

Set preferences for this order Check Local Validations Save Save and Continue >

Add More Items From Quote Edit Configuration

Remove from Order Validate Assign Smart Account Filter By Show All Items

<input type="checkbox"/>	Hardware, Software and Services	P.O. Line Reference	Lead Time	Unit List Price (USD)	Qty	Ext. List Price (USD)

Order Page: Items Tab: Quote Converted Order

3.4.1 Using the Conversion Options on the Items Tab

From the Order page: Items tab, you can:

- View the remaining line items on the quote and add additional items to the order from the quote
- Enable the line items on the order converted from the quote for editing



Order Page: Items Tab – Conversion Options

3.4.1.1 Adding More Items from the Quote

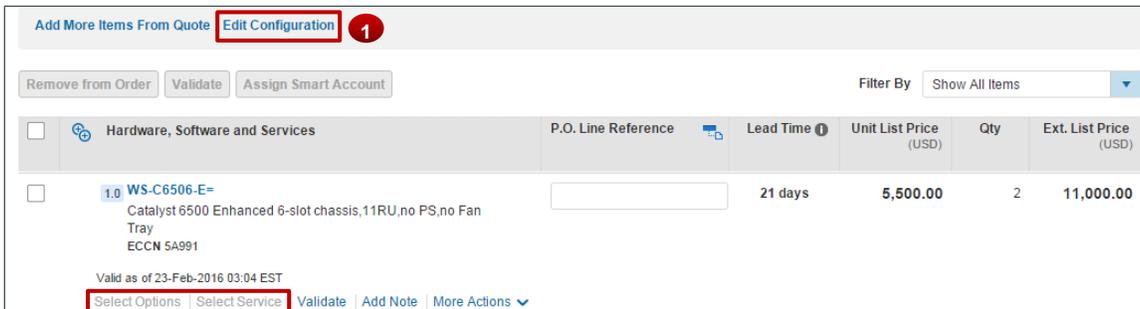


From the Order page: Items tab, you can opt to add more items to the order from the original quote. To add more items from the quote, complete the following steps:

1. Click Add More Items From Quote. The Items tab refreshes with the line items from the quote.
2. Check the appropriate checkbox(es).
3. Click **Add to Order**. The additional items from quote are added as line items to the order.

3.4.1.2 Enabling Editing for the Converted Line Items

When line items are converted from a quote to an order, the configuration is not editable by default. The Select Options and Select Service (Change Service/Subscription if options already selected) links are disabled.



Order Page: Items Tab - Line Items

To enable the links to edit the configuration, complete the following steps:

1. Click Edit Configuration. The Edit Configuration dialog box displays.



Edit Configuration Dialog Box

- Click **Ok** to continue. The Order page refreshes with the [Change Options](#) and [Select Service](#) links enabled.

The screenshot shows the 'Items' tab of the Cisco Commerce Order page. It features a table of line items with columns for P.O. Line Reference, Lead Time, Unit List Price, Qty, and Ext. List Price. Two line items are visible:

P.O. Line Reference	Lead Time	Unit List Price (USD)	Qty	Ext. List Price (USD)
1.0 WS-C6506-E- Catalyst 6500 Enhanced 6-slot chassis, 11RU, no PS, no Fan Tray ECCN 5A991	21 days	5,500.00	2	11,000.00
2.0 CISCO2911/K9 Cisco 2911 w/3 GE, 4 EHWIC, 2 DSP, DRAM, IPB ECCN 5A002.A.1	21 days	3,189.03	3	9,567.09

Red circles and boxes highlight the 'Select Options' and 'Replace Configuration' links in the context menu for the second line item.

Order Page: Items Tab - Line Items (With Enabled Links)

- Additionally, the [Replace Configuration](#) link is also enabled (see [Replacing the Configuration](#)).
- Alternatively, click **Cancel** to return to the previous page without enabling the line items.



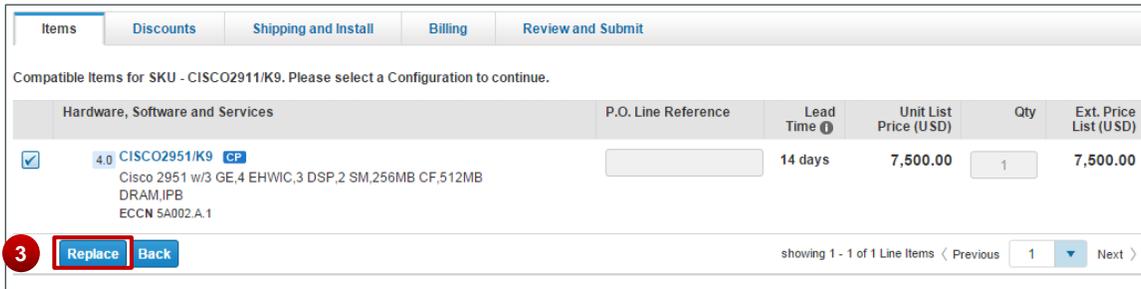
Note: Editing the configuration may require the quote to be modified and reapproved to receive nonstandard discounts. See [Converting Quotes to Orders](#).

3.4.1.3 Replacing the Configuration

Once the converted line items are enabled for editing, [Replace Configuration](#) is enabled. Use this option to replace a specific line item with a compatible line item. Applicable discounts are automatically applied. See [Converting Quotes to Orders](#) for details on when nonstandard discounts are not applied.

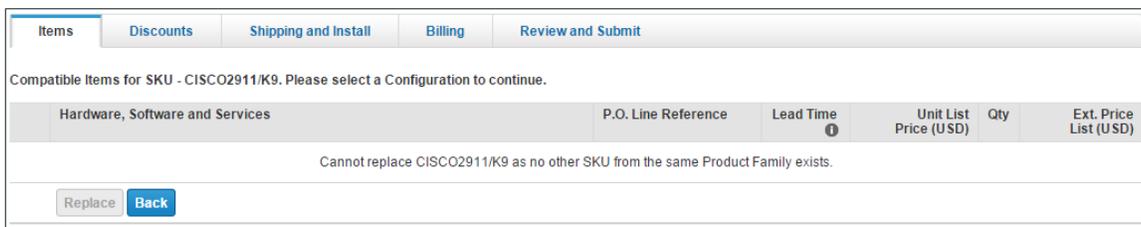
To replace a line item with another compatible item on the order, complete the following steps:

- From the Order page: Items tab, add the replacement item(s) to your order (see [Adding Items to the Order](#)).
- Click [Replace Configuration](#). The Items tab refreshes, displaying a list of compatible items for the indicated SKU.



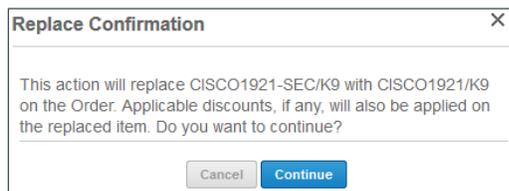
Order Page: Items Tab - With Replacement Items

If replacement items are not added, an error message displays.



Order Page: Items Tab - With Error Message

- Click the radio button that corresponds to the appropriate SKU from the same Product Family and click **Replace**.
- The Replace Configuration dialog box displays. Click **Continue**. The configuration is replaced on the items page of the Order with the selected configuration.



Replace Configuration Dialog Box

3.4.2 Using Additional Links on the Converted Quote Items Tab

Other than [Back to Quote](#), [Adding More Items from the Quote](#), and [Replacing the Configuration](#), the processes for creating an order with or without a deal ID are the same from the Order page.

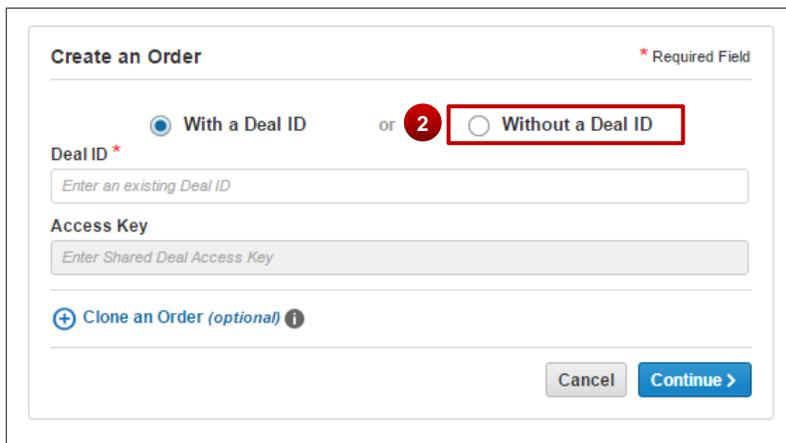
Continue to [Populating the Order Details](#) for instructions on using the additional options available, such as adding or removing items, adding service/subscriptions for previously purchased products, check remanufactured availability, and others.

4 Creating a Standalone Order



To create a standalone order, complete the following steps:

1. From the Cisco Commerce homepage, click **Create Order** from the Orders tab. The following page displays.



Create Order Page

2. Click the Without a Deal ID radio button.
3. Click **Continue**. The Create Order page populates with information from the default preferences set within My Profile and Preferences.
4. Continue through the steps in the following document sections as applicable, beginning with [Verifying the Create Order Page](#) Details.

4.1 Verifying the Create Order Page Details

Verify the information that populated automatically on the Create Order page from My Profile and Preferences. See [Getting Started with Cisco Commerce User Guide](#) for information on setting default preferences.

Refer to the sections ahead to change any information populated automatically.

4.1.1 Order Name, Intended Use, and Managed Service Order

Populating the Create Order page details is the same as populating these details when a quote is converted to an order. See the relevant parts of [Deal ID, Order Name, Price List, Intended Use, and Managed Service Order](#) section.

Order Initiation Page

To mark this order as a managed service order and indicate a managed service contractual provider, click the Yes radio button below the Managed Service Order? section on the Order Initiation page. Click [Select Provider](#) to select the Managed Service Contractual Provider. The steps from here on are same as [Changing the Managed Service Provider](#).

4.1.2 Address Information Section



In the Address Information section, you can update the address and contacts for billing, shipping, install site, and end customer.

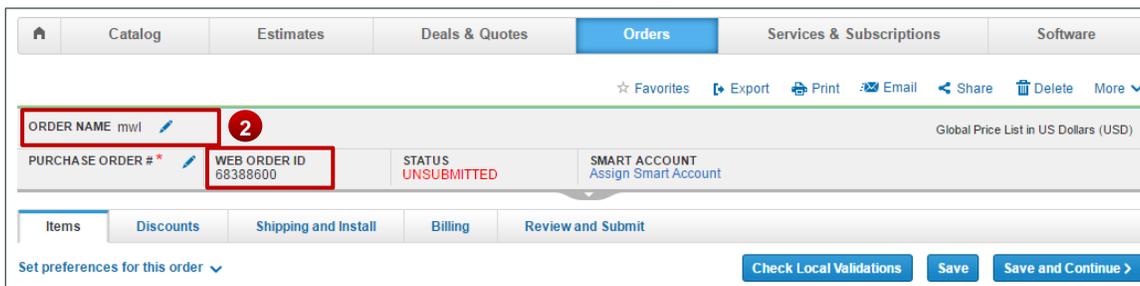
1. To add or change a billing address and contact, see [Changing the Billing Address and Contact](#).
2. The shipping address, install site, and end customer sections are not editable until the billing address is populated (see [Adding or Changing the Shipping Address and Contact](#), [Adding or Changing the Install Site](#), and [Adding or Changing the End Customer Address and Contact](#)).

Order Initiation Page: Address Information Section

4.2 Completing the Order Initiation Page

Prior to creating the order, complete all required sections on the Create Order page.

1. To create the order, click **Continue**.
2. The order is created. The order name and web order ID number, among other information, display on the header. You can edit the order name, if required.



Order Page: Header Details

4.3 Adding Products and Services to the Order

Prior to adding products and services, consider if any of the information at the top of the Order page (order name, purchase order number) needs to be updated. See [Populating the Order Details](#) as applicable.

To add products and services, see [Adding Items to the Order](#) and [Adding Services](#).

5 Creating Orders from Existing Orders

You can create new orders from existing orders in Cisco Commerce. To create a cloned order,

- Unsubmitted orders need to be marked as a "favorite" before they can be cloned.
- Submitted orders can be cloned, even if they are not marked as a favorite.

5.1 Creating a Cloned Order from a Favorite Order

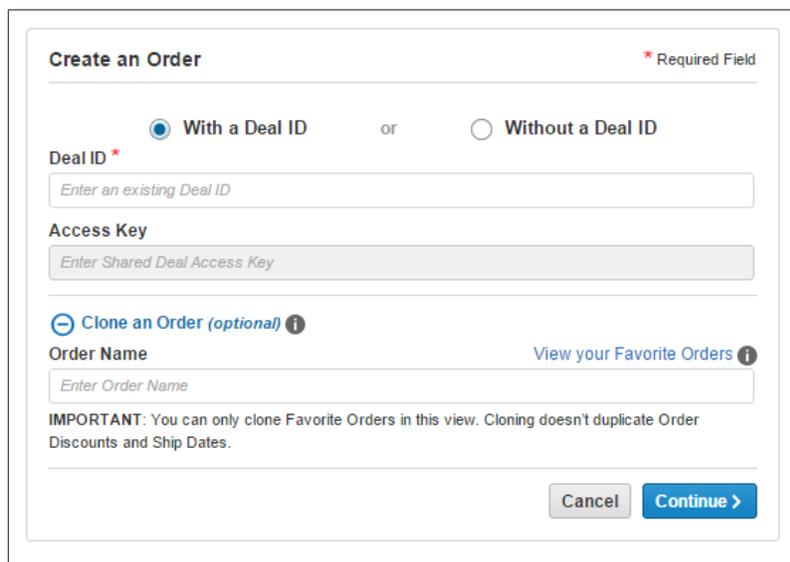


It is possible to create a clone of an order previously marked as a favorite order (see [Marking Order as a Favorite](#) for more information about favorite orders).

Alternatively, you can search for a favorite order under the Orders tab from Cisco Commerce homepage (see [Searching for an Order](#)).

To create a clone of a favorite order, complete the following steps:

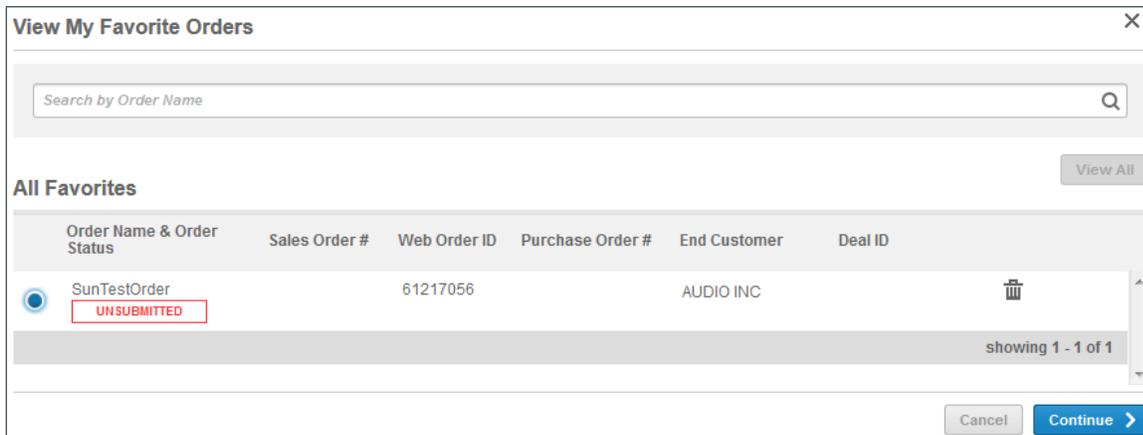
1. From the Cisco Commerce homepage, click Orders tab> Create Order. The following initial Order page displays where you can look up or view favorite orders.



Create Order Page

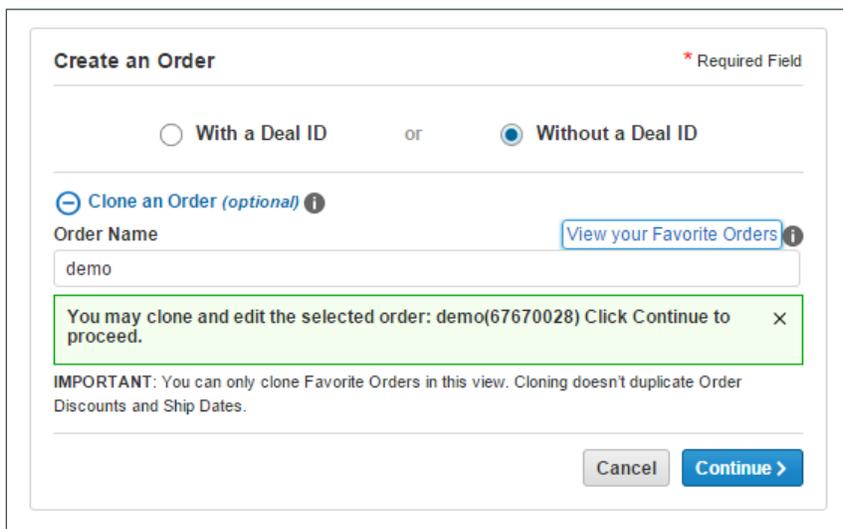
2. Click the Enter Order Name field, and begin entering the order name. The field expands to a drop-down menu, displaying the favorite order names that match the entered characters. Click the appropriate order. The order name displays in the Order Name field.
3. Alternatively, click [View your favorite Orders](#).
4. The View My Favorite Orders dialog box displays.

You can search using the order name in the search field or select from the list of previously added favorites that display in the All Favorites section.



View My Favorite Orders Dialog Box

5. Click the appropriate Order Name radio button. Click **Continue**.
6. The order name displays in the Order Name field.



Create Order Page: Order Name Refreshed

7. Click either the With a Deal ID radio button or the Without a Deal ID radio button.
8. Click **Continue**. The new order is created matching the order details from the favorite order. The Order page: Items tab displays.
9. Edit the order as applicable. See [Adding Items to the Order](#).
10. Submit the order. See [Reviewing and Submitting the Order](#).

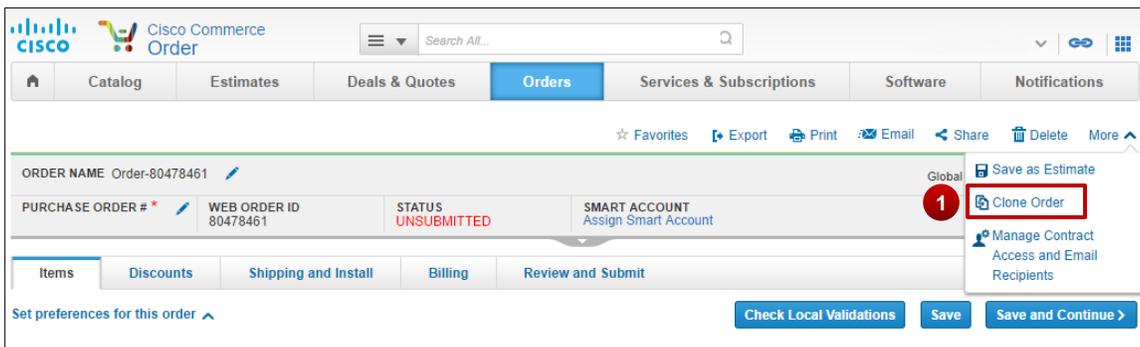
5.2 Creating a New Order by Cloning an Order



When you create and configure an order, that order can be instantly cloned for editing and/or reuse.

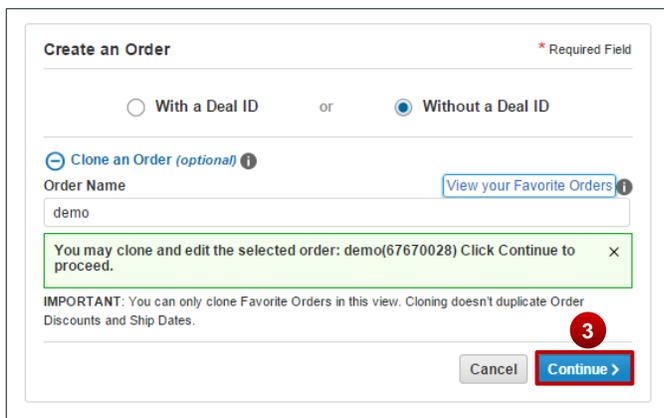
To clone an already created order, complete the following steps:

1. From the Order page: Items tab of a created order, click **Clone Order**. The initial Order page displays (similar to after clicking **Create Order** from the Cisco Commerce Orders tab).



Order Page: Items Tab

2. Click either the With a Deal ID radio button or the Without a Deal ID radio button.
If applicable, click the Deal ID field and enter the appropriate information.
3. Click **Continue**. The new order is created matching the order details from the cloned order. The Order page: Items tab displays.



Create Order Page: Clone an Order Page

4. Edit the order as applicable. You can add or remove items, if required. See [Adding Items to the Order](#).
5. Submit the order. See [Reviewing and Submitting the Order](#).

6 Populating the Order Details



Regardless of the method used to create an order, populating the order details remains the same, unless otherwise noted.

Populating the order details includes the following:

- Reviewing and updating the header content of an order
- Setting Specific Order Preferences for Services or Federal Government
- Assigning smart account to the order
- Adding or removing items to the order
- Resolving issues
- Adding or removing services to the order
- Renewing software subscriptions
- Reviewing and managing discounts
- Setting shipping and installation information
- Verifying billing information
- Reviewing and submitting the order

6.1 Populating the Header Content

6.1.1 Expanding or Collapsing the Header Section

The order name, purchase order number, web order ID number, order status, and smart account information displays at the header level on top of the page.

To display the full header content, click the Show Order Details icon. The header expands and the following additional information displays: the deal ID number, the deal name, created and last modified by information, and the quote status. To collapse the header section to show less information, click the Hide Order Details icon.

ORDER NAME Test Order 		Global Price List in US Dollars (USD)			
PURCHASE ORDER # 	WEB ORDER ID 67684885	STATUS UNSUBMITTED	SMART ACCOUNT Assign Smart Account		
CREATED BY m on 26-Feb-2016	LAST UPDATED BY m on 26-Feb-2016	DEAL ID Not Applicable	DEAL NAME Not Applicable	QUOTE STATUS Not Applicable	
<input type="button" value="Hide Order Details"/>					
<div style="display: flex; justify-content: space-between;"> Set preferences for this order  <input type="button" value="Check Local Validations"/> <input type="button" value="Save"/> <input type="button" value="Save and Continue >"/> </div>					

Order Page: Items Tab – Show/Hide Order Details

Note: Throughout the order process, there are messages at the top of the page that guide you through.

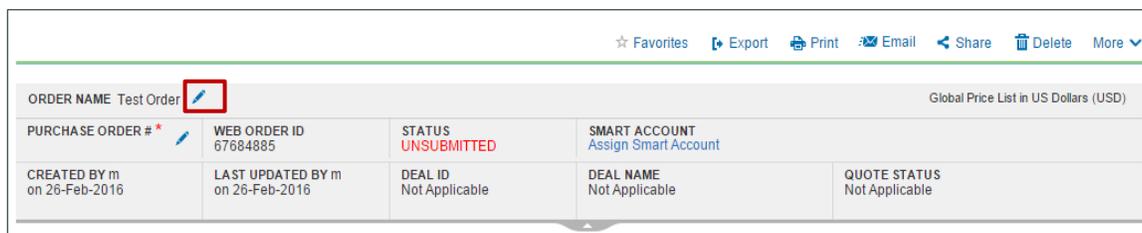


- When additions are successful, the message is **green**.
- When there is additional information to note, the message is **blue**.
- Warning messages that indicate additional tasks may be needed display in **yellow**.
- Error messages that must be resolved are in **red**.

6.1.2 Changing the Order Name in the Header

To change the order name, complete the following steps:

1. Click the edit icon next to the already populated order name.
2. Enter the new name in the field.
3. Click Update.



<div style="text-align: right;"> ☆ Favorites 📄 Export 🖨️ Print ✉️ Email ↔️ Share 🗑️ Delete More ▾ </div>				
ORDER NAME Test Order 		Global Price List in US Dollars (USD)		
PURCHASE ORDER # * 	WEB ORDER ID 67684885	STATUS UNSUBMITTED	SMART ACCOUNT Assign Smart Account	
CREATED BY m on 26-Feb-2016	LAST UPDATED BY m on 26-Feb-2016	DEAL ID Not Applicable	DEAL NAME Not Applicable	QUOTE STATUS Not Applicable

Order Page: Order Name

6.1.3 Entering the Purchase Order (PO) Number

Entering a PO number is mandatory prior to submitting the order. Purchase Order #* displays at the top of the page.

To enter the PO number, complete the following steps:

1. Click the edit icon. The Purchase Order # field becomes active.
2. Click the Purchase Order # field and enter the purchase order number.
3. Click Update.
4. Once the Purchase Order # field is populated, you can still change the information. To change the PO number, repeat steps 1-3.

ORDER NAME Test Order 		
PURCHASE ORDER # *	WEB ORDER ID 67684885	STATUS UNSUBMITTED
<input type="text"/>		
Update/Cancel		

Order Page: Purchase Order Field

6.1.4 Marking Order as a Favorite

You can mark a submitted or unsubmitted order as a favorite order, allowing you to easily access it for cloning when creating future orders.



Note: 'Favorite' orders are specific to users and will not be automatically saved universally to all those with access to that order. If more than one person has access to a single order, all users with access to the specific order will need to separately mark the order as a favorite in their log in.

To mark an order as a favorite, complete the following steps:

1. Create an order, or search for and open an existing order. See [Creating an Order](#) or [Getting Started with Cisco Commerce User Guide](#) to perform a search using the Cisco Commerce homepage.
2. From the Order page: Items tab, click Favorites. The Mark as Favorite dialog box displays.

2  Favorites  Export  Print  Email  Share  Delete  More 				
ORDER NAME Test Order 				Global Price List in US Dollars (USD)
PURCHASE ORDER # *	WEB ORDER ID 67684885	STATUS UNSUBMITTED	SMART ACCOUNT Assign Smart Account	
CREATED BY m on 26-Feb-2016	LAST UPDATED BY m on 26-Feb-2016	DEAL ID Not Applicable	DEAL NAME Not Applicable	QUOTE STATUS Not Applicable

Order Page: Items Tab – Mark Order as Favorite

Mark as favorite ✕

 Do you want to add this order to favorite list?

Mark as Favorite Dialog Box

3. Click **Yes**. The order is saved as a favorite.
4. The Favorites star is now yellow, indicating the order is saved as a favorite.



Order Page: Items Tab – Order Marked as a Favorite

5. Alternatively, click No on the Mark as Favorite dialog box to return to the order without marking it as a favorite.

Once an existing order is marked as a favorite, you can create a new order out of it. See [Creating a Cloned Order from a Favorite Order](#).

6.2 Setting Preferences for an Order

You can set the Service Preferences for your order, which will override any preferences set from your default ‘My Profile and Preferences’ set up. If you are a Federal Government customer, you will also be able to mark the order as Federal Government and enter your DPAS rating or request TAA.

6.2.1 Setting Order Service Preferences

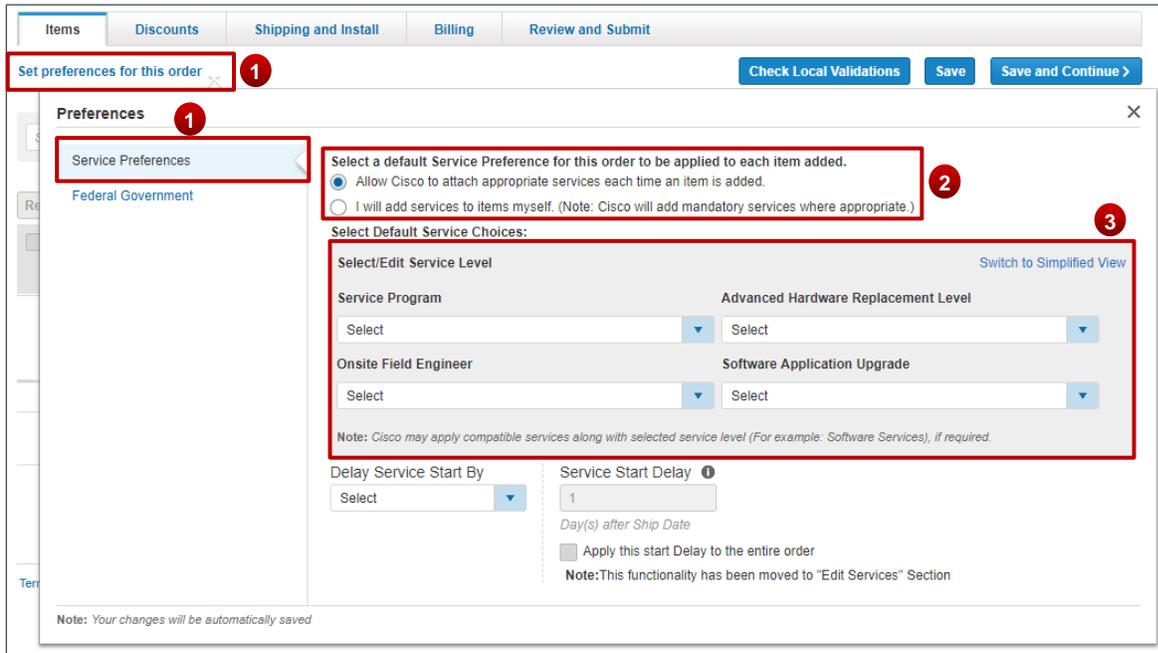
Within your Cisco Commerce ‘My Profile and Preference’ section, you can select your default service choices, as well as determine whether you would like Cisco Commerce to automatically add services to your valid configurations across all quotes, estimates, and orders in Cisco Commerce (refer to the [Getting 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:

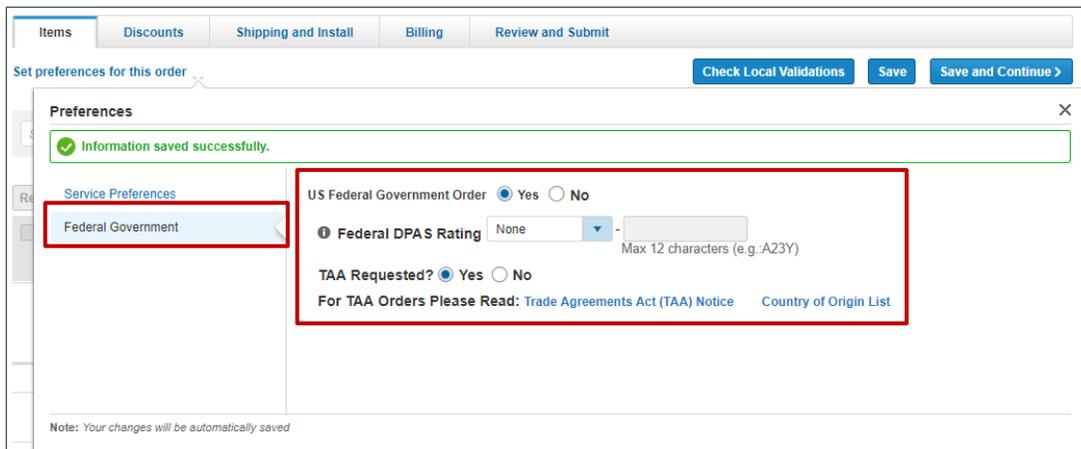
1. In the Service Preferences window, your Default Service Preference appear. You can also Search for the Service Level, select a service level, and your selection will be automatically saved for this quote.
2. Click the appropriate radio button to allow Cisco to attach services automatically or to add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



6.2.2 Setting Federal Government Order Preferences

If you are a Federal Government customer and your CCO profile has been updated as Federal you will also have the ability to set the Federal Government Order preferences:

- Federal Government Order - Choose Yes or No
- Federal DPAS Rating – Choose Either None, or you can enter a Priority Prefix and an alphanumeric Program Identifier
- TAA Requested – Choose Yes or No



6.3 Adding Items to the Order



There are several ways to add items to an order:

- Finding items using a search (see [Finding Items Using a Search](#))
- Adding items by SKU (see [Adding Items by SKU](#))
- Importing an estimate (see [Importing an Estimate](#))

Alternatively, to continue with the order, click **Save and Continue**. The Discounts tab displays.

6.3.1 Finding Items Using a Search

Searching for products allows you to add multiple products to the order 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](#).

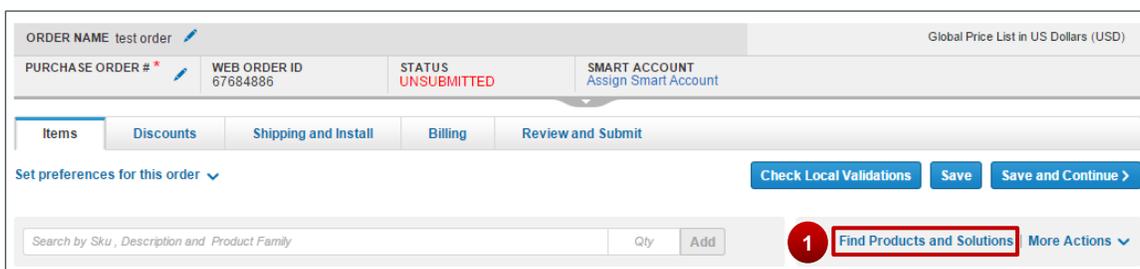


Best Practice: If you know the product family, then use the Search and add by product family option. It makes the search easier.

6.3.1.1 Search and Add by Product Description or SKU

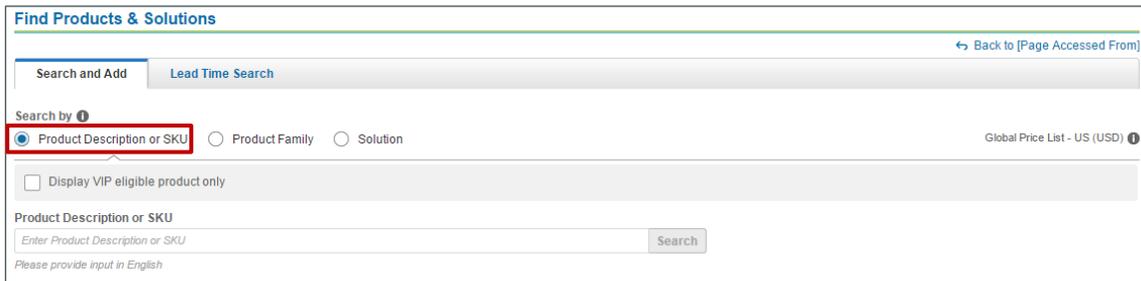
To search for items to add to the order, complete the following steps:

1. From the Order page: Items tab, click [Find Products and Solutions](#). The Find Products page displays.



Order Page: Items Tab – Find Products and Solutions

2. Click the Product description or SKU radio button.



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

3. Check the checkbox(s) to display only Trade Agreements Act (TAA) compliant products and/or products that are eligible for a Value Incentive Program (VIP).

Note that TAA displays only for US Federal orders. For more information, view the [TAA page](#).

4. In the search field, enter a product description, SKU, or partial SKU, and click **Search**.

You do not need to enter the entire SKU. For example, to display all search results for the Cisco 1800 Series Integrated Service Router, enter CISCO1803. All of the Cisco 1803 SKUs display.

The page refreshes to display the results.

5. Locate the appropriate product(s).

6. Click . The product is added to the Selected Items cart.

7. Click the Qty field and enter the appropriate quantity.

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).
- Locate the appropriate product (step 5). Click the Qty field and enter the quantity. Continue to step 6 (entering the quantity before adding the product to the Selected Items cart).
- On the Order page: Items tab (see [Setting Quantities for Products](#)).

8. Repeat steps 3 - 7 to populate the items in the order.

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

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

Results for "2911" — 53 Results Found Key ▾

SKU	Lead Time ⓘ	Unit List Price (USD)	Qty	Selected Items
Cisco 2900 Series Integrated Services Router				
C1-CISCO2911/K9 C CP SVIP	14 days	2,695.00	1 +	CISCO2911/K9 C CP SVIP C + 1 Cisco 2911 w/3 GE,4 EHWIC,2 DSP,1 SM,256MB CF,512MB D RAM,1DR
C2911-AX/K9 C SVIP C-1	14 days	4,300.00	1 +	Remove 9
C2911-AX/K9-RF C CP REFRESH	--	2,580.00	1 +	CISCO2911-DC/K9 C CP + 1 Cisco 2911 w/3 GE,4 EHWIC,2 DSP,1 SM,256MB CF,512MB D RAM+DC
CISCO2911-DC/K9 C CP	14 days	3,245.00	1 +	Remove 10 Cancel Add

Find Products & Solutions Page: Search Results

6.3.1.2 Search and Add by Product Family

To search by product family, complete the following steps:

1. From the Order page: Items tab, click Find Products and Solutions. The Find Products and Solutions page displays.
2. Click the Product Family radio button.
3. Check the checkbox(s) to display only Trade Agreements Act (TAA) compliant products and/or products that are eligible for a Value Incentive Program (VIP).

Note that TAA displays only for US Federal orders. For more information, view the [TAA page](#).

Find Products & Solutions ← Back to [Page Accessed From]

Search and Add Lead Time Search

Search by ⓘ 2

Product Description or SKU Product Family Solution Global Price List - US (USD) ⓘ

Display VIP eligible product only

Product Family 4

24x7x405 TrblshLLD 24X7X40S (CON-OPTLD-XXX)

3PCOE MATERIAL

ADVANCED SERVICES FIXED PRICE

ADVANCED SERVICES SUBSCRIPTION SERVICES

ADVANCED SERVICES TRANSACTION SERVICES

APIC

Search

Find Products & Solutions Page: Search By – Product Family

4. Click the Type to filter or click menu button drop-down arrow to see a full list of product families.
5. Scroll through the list and click the desired product family.

If you wish to search using a wild card, enter a few letters of the product name followed by an asterisk (for example, ABCD*). All SKUs that begin with ABCD will display in the Search Results section.

6. Click **Search**. Results display all applicable product families.

7. Locate the appropriate product(s).
8. Click . The product is added to the Selected Items cart.
9. Click the Qty field and enter the appropriate quantity.

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



- As listed in step 9 above (entering the quantity in the Selected Items cart).
- Locate the appropriate product (step 7). Click the Qty field and enter the quantity. Continue to step 8 (entering the quantity before adding the product to the Selected Items cart).
- On the Order page: Items tab (see [Setting Quantities for Products](#)).

-
10. Repeat steps 4–9 to populate the items in the order.
 11. When all desired products from the search have been added to the Select Items cart, click **Add**. The Order page: Items tab displays with the new line(s).

6.3.1.3 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 the 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 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.

Find Products & Solutions Page: Search By – Solution

6.3.1.4 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 PDF format.

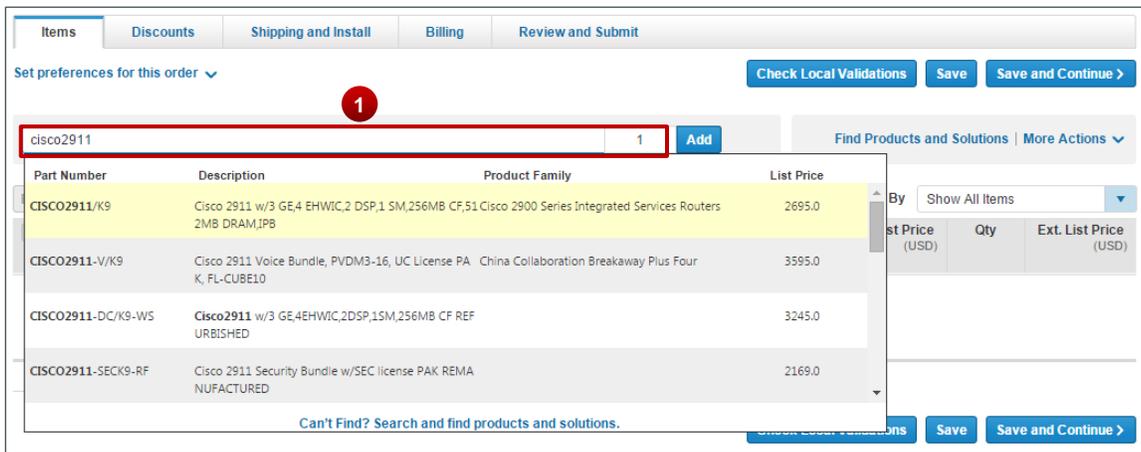
You can access the lead time tool in Quick Links also. Refer to the [Getting Started with Cisco Commerce User Guide](#) to perform a lead time search.

6.3.2 Adding Items by SKU



To add items to the order by entering an SKU, complete the following steps:

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



Order Page: Items Tab – Add Product Item

To search using a wild card, enter a few letters of the product name followed by an asterisk (for example, ABCD*). All SKUs that begin with ABCD will display in the Add Product Item drop-down menu that populates.

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

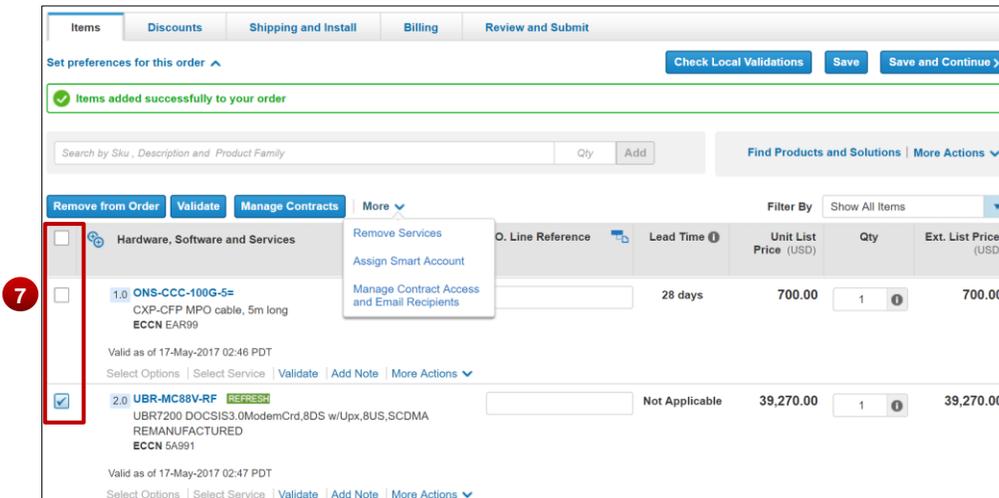


Note: To locate products that are orderable but not published on the indicated price list, enter the full SKU and press Enter. If the SKU is still not found, then the standard process to address errors applies.

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 order.

3. Click the Qty field and enter an appropriate quantity.
4. Click **Add**.

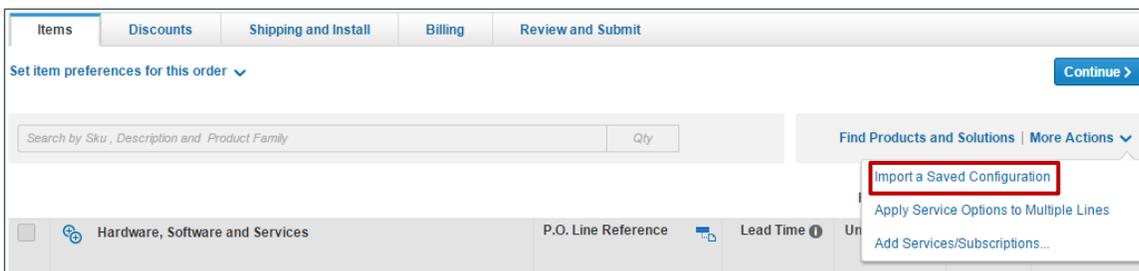
5. A green message displays, indicating that the part was added successfully. A new line displays the added item.
6. To continue adding lines, click **Save**. The page remains unchanged, and additional lines can be added by repeating the above process.
7. To remove a line, check the appropriate checkbox.
8. Click **Remove from Order**.



Order Page: Items Tab – Remove From Order

6.3.3 Importing an Estimate

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



Order Page: Items Tab – Import a Saved Configuration

Import Saved Configuration

Available Config Tools

Name	Description
<input type="button" value="Select"/> 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.
<input type="button" value="Select"/> BOM Upload	Upload a BOM file or download a template in the following formats: XLS/XLSX Not recommended for assembled configurations. Validation will not maintain Major/Minor line relations. (All lines will carry over as Major lines)

Order Page: Import Saved Configuration Dialog Box

Tool	Document Section
Estimate	Importing an Estimate is used for importing a configuration that was saved from an order. See Importing an Estimate
BOM Upload	BOM Upload is used for adding multiple spares to the order. See Uploading a BOM

6.3.3.1 Importing an Estimate

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

To import an estimate, complete the following steps:

1. From the Order page: Items tab, click to expand the [More Actions](#) drop-down menu and then click [Import a Saved Configuration](#). The Import Saved Configuration dialog box displays.
2. Click **Select** next to Estimate. The Import Estimate page will load.
3. Search for the estimate you wish to import by using the Estimate ID, Estimate Name, Created By, Created Date, Last Modified, and Status fields.
4. Click **Search**. The search results display.
5. Select the radio button associated with the desired estimate.

Import Estimate

Import Estimate will import Part Number, Quantity and Duration for items from the original Estimate.

Start by searching for an estimate you would like to copy.

Estimate ID:
 Estimate Name:
 Created By:

Created Date:
 Last Modified:
 Status:

520 results

Estimate ID	Estimate Name	Price List	Created Date	Last Modified	Created By
<input checked="" type="radio"/> CR53071273WX	Estimate_CR5307127...	Global Price List - US	21-Jan-2016	21-Jan-2016	maria
<input type="radio"/> EM53071263DS	test	Global Price List - US	21-Jan-2016	21-Jan-2016	maria
<input type="radio"/> EU53071270WB	Estimate_EU5307127...	Global Price List - US	21-Jan-2016	21-Jan-2016	maria

Importing an Estimate – Search Results

6. Click **Import Entire Estimate**. The Order page: Items tab displays the newly imported line items from the selected estimate.

Items | Discounts | Shipping and Install | Billing | Review and Submit

Set item preferences for this order

Estimate imported successfully.

Search by Sku, Description and Product Family Qty

Filter By

	Hardware, Software and Services	P.O. Line Reference	Lead Time	Unit List Price (USD)	Qty	Ext. List Price (USD)
<input type="checkbox"/>	1.0 CISCO-15454-M6 6 service slot MSTP chassis ATO (assemble to order)		28 days	1,712.00	1	1,712.00
<input type="checkbox"/>	2.0 CISCO1921-SEC/K9 CP Cisco1921/K9 with 2GE, SEC License PAK, 512MB DRAM, 256MB FI		14 days	1,835.00	1	1,835.00

Order Page: Items Tab – Imported Estimate

6.3.3.2 Uploading a BOM

To upload a BOM, complete the following steps:

1. From the Order page: Items tab, click to expand the More Actions drop-down menu and then click Import a Saved Configuration. The Import Saved Configuration dialog box displays. Click **Select** next to BOM Upload.
2. Click **Browse** and locate the appropriate file.



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

3. Click **Upload File**. The Items sub-tab displays the imported BOM as line items.

Importing a BOM

4. To continue adding lines, click **Save**. The page remains unchanged, and additional lines can be added by repeating the above process or by using any of the other processes for adding products.
5. Alternatively, to continue with the deal, click **Save and Continue**. The Discounts & Credits sub-tab displays.

6.3.4 Fulfillment Restrictions

Distributors will see a messages when adding SKUs that are on Fulfillment Restriction Flags “BLOCK” and “No Stock”. CPS Agents will see updated Task Name and Task Message when B2B EDI orders with fulfillment restriction SKUs are submitted. Message if SKU status is “Blocked”:

	P.O. Line Reference	Lead Time	Unit List Price (USD)	Qty	Ext. List Price (USD)
<input type="checkbox"/>	Hardware, Software and Services	14 days	435.71	1	435.71

Message if SKU status is “No Stock”:

6.4 Adding Different Types of SKUs

You can add different type of products, services, and configurations to the order on the Order Page: Items tab before moving to the Discounts tab.

6.4.1 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 using any of the methods for adding items. See [Adding Items to the Order](#).



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

2. To select or change options for the remanufactured product, see [Choosing Options and Resolving Issues](#).
3. Hover over the **REFRESH** icon to view the new equivalent product SKU and price. The icon will display only for the remanufactured product.

4. To view available inventory and shipment lead times in the Items tab in Order, click Remanufactured Availability. The Remanufactured Inventory dialog box displays.
5. Click **Cancel** to return to the Items tab.

Orders Tab: Items Tab – Remanufactured Product



Note: Place new items and remanufactured items in different shipping groups. See [Managing Shipping Groups](#) for more information.

Remanufactured Inventory						
Pre-Owned product inventory quantities are subject to availability and are not guaranteed until the order is submitted.						
Hardware	Qty on Order	Availability	Lead Time			
			3 Days	7 Days	30 + Days	
2.0 CP-6911-W-K9-WS Ship-To: CANADA	10	0	0	0	0	
3.0 CISCO2911-SECK9-RF Ship-To: CANADA	4	46	46	0	0	

Remanufactured Inventory Dialog Box

6.4.2 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](#)).

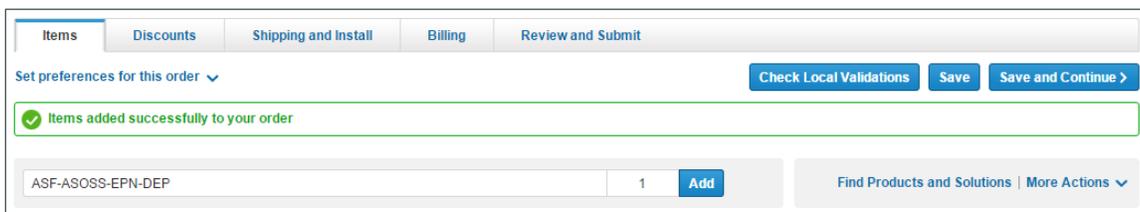
To add Fixed Scope Consultancy SKUs, complete the following steps:

1. From the Order page: Items tab, click the Add Product Item field and enter “ASF-“. A list of Fixed Scope Consultancy SKUs display.
2. Select the desired SKU.



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 at the time of order results in seamless delivery.



Order Page: Items Tab – Fixed Scope Consultancy 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 order.
4. Before completing the order, you must verify the contact information and move these items to a new shipping group if necessary. See [Managing Shipping Groups](#).

6.4.3 Adding a License SKU

SKUs that begin with L or LIC and end with = are license SKUs. Cisco Commerce offers two software/license delivery methods: electronic delivery (e-delivery) and physical delivery.

For example:

- License SKUs with e-delivery begin with the letter “L”, example: L-3PTY-DL-100K=
If you choose an L SKU, the license is sent electronically regardless of the indicated delivery method.
- License SKUs with physical delivery begin with the letters “LIC”, example: LIC-3PTY-DL-100K=
If you choose an LIC SKU, which is physical delivery, the system looks to the delivery option indicated. If e-delivery is the indicated delivery method, then the system overrides the LIC SKU and delivers the license electronically.

Note: Add a license following the same directions as adding any other items.



Pay attention to choosing the SKUs and indicating the appropriate delivery method. To change the delivery method of a license SKU, see [Changing the Delivery Method of a License SKU](#).

The same rules that govern software license delivery are applicable for e-software delivery. For electronic delivery, you must provide a shipping email address or an end customer email address.

6.4.3.1 Changing the Delivery Method of a License SKU

To manage the delivery method for license SKUs, complete the following steps:

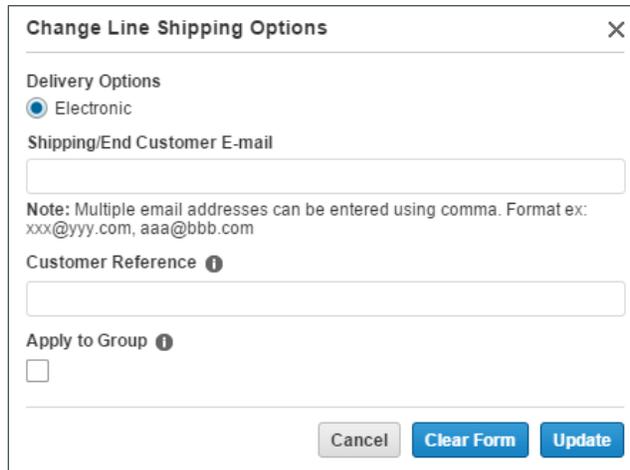
1. For licenses that are slated for physical delivery, choose a preferred carrier on the Shipping and Install tab, (only if applicable for the particular order). To set shipping information, see [Setting the Shipping and Installation Information](#).
2. Click **Edit** corresponding to the Delivery Method column. The Change Line Shipping Options dialog box displays.

Line Items	Qty	Delivery Method	End Customer Email	Lead Time
1.0 CISCO2911/K9 ⓘ	4	PHYSICAL		21 days
2.0 CP-6911-W-K9-WS ⓘ	10	PHYSICAL		Not Applicable
3.0 ASF-ASOSS-EPN-DEP ⓘ	1	PHYSICAL		Not Applicable
4.0 LIC-MX64W-ENT-5YR ⓘ	10	PHYSICAL		3 days
5.0 L-CSMST25-U-4.0-K9 ⓘ	1	ELECTRONIC Edit 2	<input type="text"/> 3	2 days

Order Page: Shipping and Install Tab -Edit Delivery Method

3. If the line item is scheduled for e-delivery only, complete the following steps:
 - Enter the shipping/end customer email and any customer reference information. Separate multiple email addresses with commas.
 - To make all line items eligible for electronic delivery, check the Apply to Group checkbox in the Change Line Shipping Options dialog box.
 - To update the delivery method, click **Update**.

- Alternatively, you can also update this information in the line items list next to the corresponding item.



The dialog box titled "Change Line Shipping Options" contains the following elements:

- Delivery Options:** A radio button labeled "Electronic" is selected.
- Shipping/End Customer E-mail:** An empty text input field.
- Note:** Multiple email addresses can be entered using comma. Format ex: xxx@yyy.com, aaa@bbb.com
- Customer Reference:** An empty text input field with an information icon.
- Apply to Group:** A checkbox that is currently unchecked, with an information icon.
- Buttons:** "Cancel", "Clear Form", and "Update" buttons are located at the bottom right.

Change Line Shipping Options

4. If the line item is scheduled for physical delivery only, complete the following steps:
 - If applicable, choose the appropriate preferred carrier on the Shipping and Install tab.
 - To make all line items eligible for physical delivery, check the Apply to Group checkbox in the Change Line Shipping Options dialog box.
 - To update the delivery method, click **Update**.
5. If a chosen line item is eligible for e-delivery or physical delivery, the option to change the service level from either e-delivery or physical delivery is available.
 - Click the radio button (either Electronic or Physical) corresponding to the appropriate option and add the necessary email and customer reference information.
 - To update the delivery method, click **Update**.

6.4.3.2 Changing From Physical to Electronic Delivery without Changing the Discount

To change a license or software delivery from physical to electronic delivery without changing the discount, complete the following steps:

1. Begin with an open order that already contains an LIC-...= SKU.
2. On the Order page, Items tab, click the Add Product Item field and enter the same SKU, except beginning with L, as opposed to LIC. The drop-down menu displays matching options after you enter a few characters.
3. Click the appropriate SKU from the Add Product Item drop-down menu. See [Adding Items by SKU](#).
4. Click **Add**. The e-delivery item is added as a line item to the configuration.

The screenshot shows the 'Items' tab in the Cisco Commerce Order interface. At the top, there are navigation tabs: 'Items', 'Discounts', 'Shipping and Install', 'Billing', and 'Review and Submit'. Below these, there are buttons for 'Check Local Validations', 'Save', and 'Save and Continue >'. A search bar is present with the text 'Search by SKU, Description and Product Family'. Below the search bar, there are buttons for 'Remove Selected Lines' (highlighted with a red box and labeled '6'), 'Validate', and 'Assign Smart Account'. A table of items is displayed with columns: 'Hardware, Software and Services', 'P.O. Line Reference', 'Lead Time', 'Unit List Price (USD)', 'Qty', and 'Ext. List Price (USD)'. Two items are listed: '1.0 L-LIC-CT4500-UPG' and '2.0 LIC-CT4500-UPG'. The '2.0 LIC-CT4500-UPG' item has a checked checkbox (highlighted with a red box and labeled '5').

Order Page: Items Tab – License SKUs

5. Scroll through the line items to locate the original LIC...= SKU. Once located, check the checkbox of the license that is set for physical delivery.
6. Click **Remove Selected Lines**. The Remove Items from Order dialog box displays.
7. Click **Remove Items**. This permanently removes the physical delivery item from the order.
8. Click the Discounts tab.
9. Review the discounts. The electronic delivery item has been added and the physical delivery removed, and the discounting remains the same.

See [Reviewing Discounts](#) for more information on discounts in Cisco Commerce Orders.

6.4.4 Adding a Spare

You can add multiple spares to the order by uploading an Excel spreadsheet (see [Adding Multiple Spares via Excel](#)). Alternatively, you can add spares individually by entering the appropriate SKU (see [Adding Individual Spares](#)).

Spares have an = sign at the end of their SKU.

6.4.4.1 Adding Multiple Spares via Excel

The Cisco Commerce Orders tab enables you to add multiple line items by uploading an Excel spreadsheet containing product numbers, quantities, and durations. Each line on the Excel file is added as a major line on the order and therefore the system is not able to identify which items would be a minor line of a different item. No validation is performed on uploaded items.



Note: Add a license following the same directions as adding any other items.

Pay attention to choosing the SKUs and indicating the appropriate delivery method. To change the delivery method of a license SKU, see [Changing the Delivery Method of a License SKU](#).

To add multiple spares by uploading an Excel spreadsheet, complete the following steps:

1. From the Order page: Items tab, click to expand the More Actions drop-down menu, then click [Import a Saved Configuration](#). The Import Saved Configuration dialog box displays.

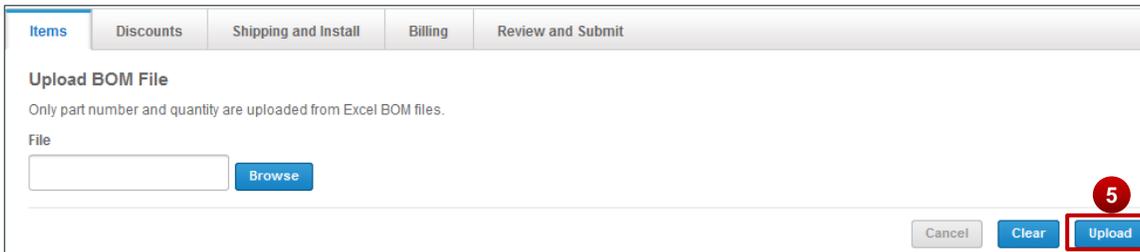


Import a Saved Configuration Dialog Box: BOM upload View

2. Click **Select** next to BOM Upload. The Order page: Items tab refreshes with an Upload BOM File section.
3. Click **Browse**.
4. Locate the appropriate file and click **Open**.

The template for use with this function is located on the Import Saved Configuration dialog box. Click [XLS](#) or [XLSX](#) in the text to the right of BOM Upload.

5. Click **Upload**.

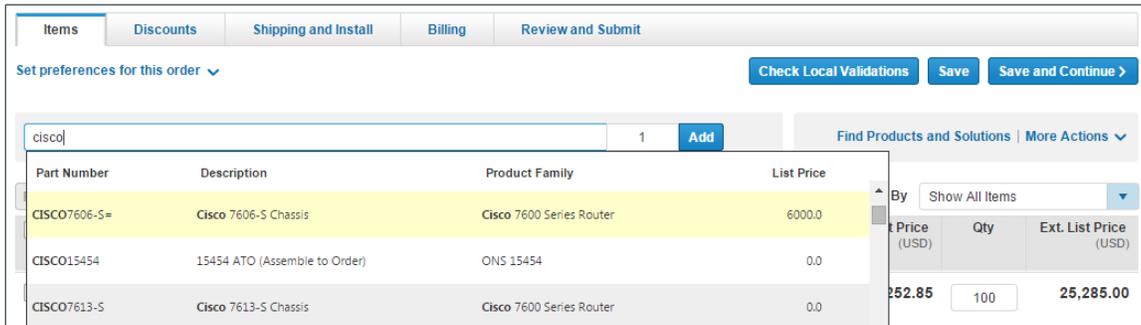


Order Page: Upload BOM File Section

6.4.4.2 Adding Individual Spares

To add a spare one at a time, complete the following steps:

1. From the Order page: Items tab, click the Add Product Item field and begin entering the SKU or partial SKU. For more information on entering by SKU, see [Adding Items by SKU](#).
2. Click the appropriate SKU from the Add Product Item drop-down list.
3. Click the Qty field and enter the desired quantity.



Order Page: Items Tab – Adding a Spare

4. Click **Add**. The spare is successfully added to the line items.

6.5 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. Edit Options is active under products that require additional configuration.



Order Page: Items Tab



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

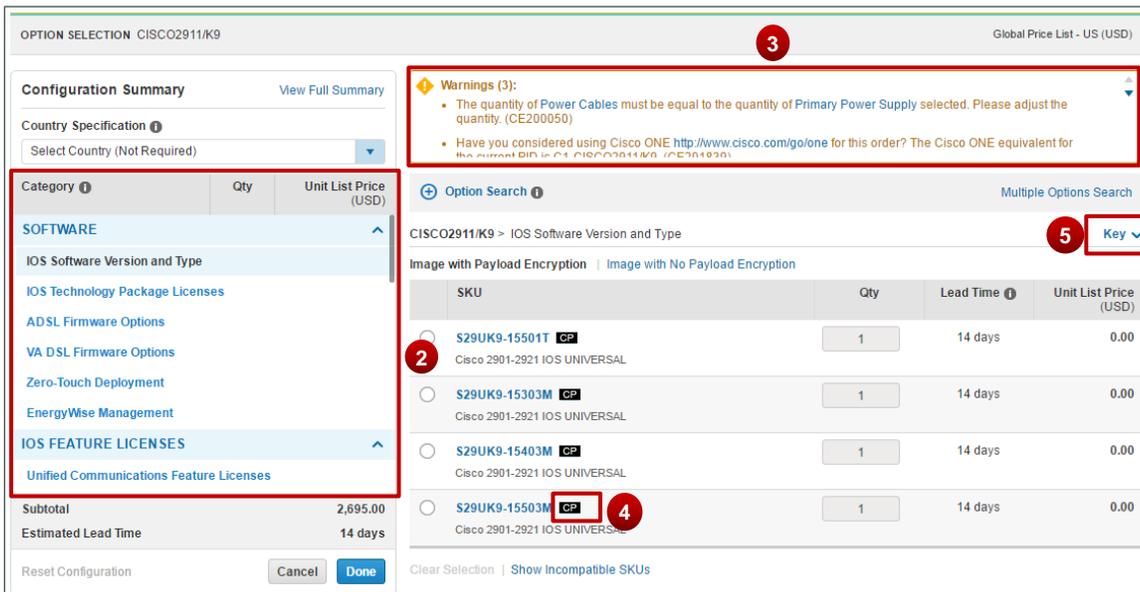
To select options, configure products, and resolve any warnings or errors in the configuration, complete the following steps:

1. From the Order page: Items 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](#)).
2. Review the product list displaying on the left of the page in the Configuration Summary pane.
 3. 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.
 4. 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.
 5. Click the Key drop-down to view icon-related information.



Option Selection Page



Key Drop-Down List

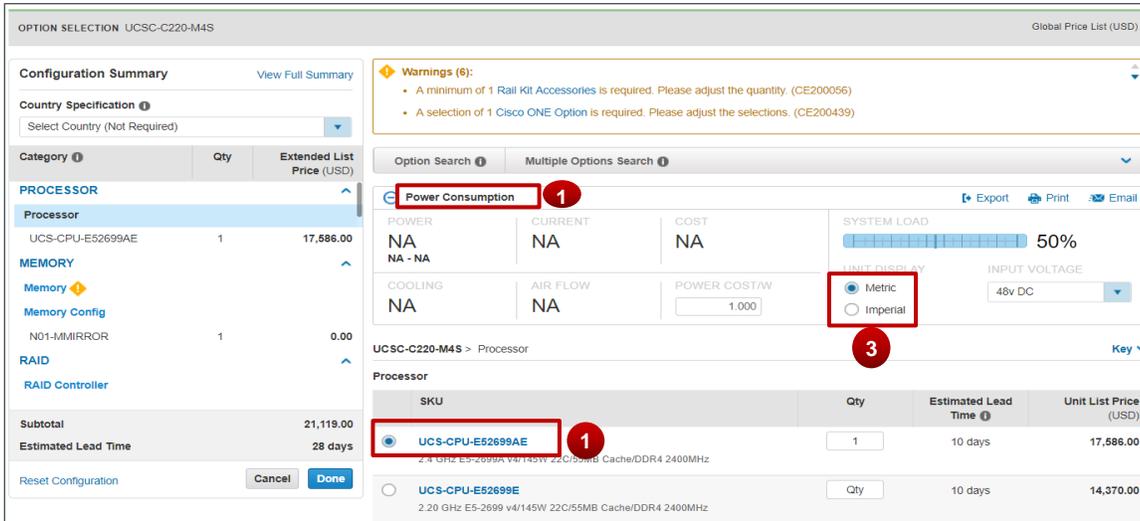
6.5.1 Using the Power Calculator

Power Calculator option is only applicable to 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:

1. Select the appropriate option and click Power Calculator drop-down arrow to view the consumption.
2. A legal disclaimer displays. Click **Accept** to view the power consumption details.

3. Click Metric or Imperial to view appropriate units in the power calculator drop-down menu.
4. Click again on Power Calculator to close the drop-down menu.



Option Selection Page – Power Consumption

6.5.2 Searching for Multiple Known SKUs



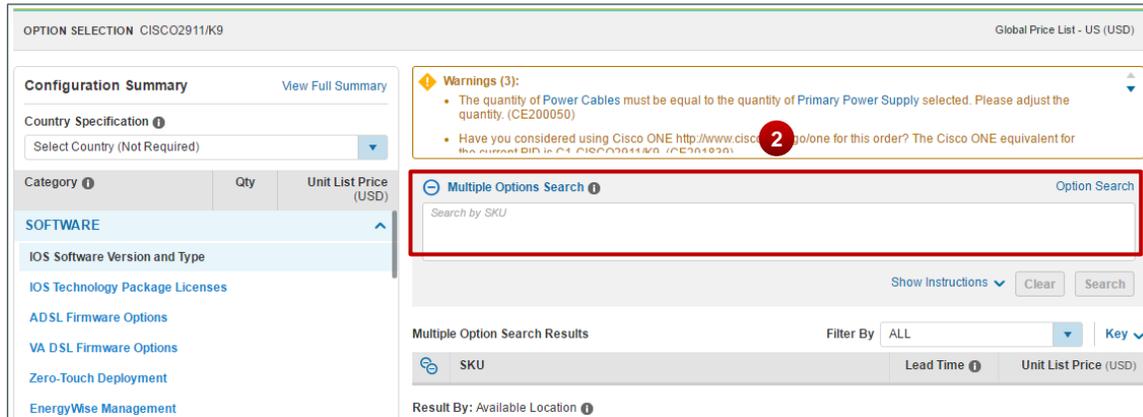
To search for multiple known option SKUs at a time, complete the following steps:

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.



Option Selection Page: Multiple Options Search

3. Click **Search**.
4. The search results display at the bottom 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. Mouse over the icon to view the information.
5. From the search results under Available Location section, check the checkbox(s) corresponding to the desired items.
6. 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.

OPTION SELECTION N20-C6508 JAPAN Price List in US Dollars (USD)

Configuration Summary [View Full Summary](#)

Country Specification ⓘ
Select Country (Not Required)

Category ⓘ	Qty	Unit List Price (USD)
BLADE OPTIONS		
Blade ⓘ		
CHASSIS OPTIONS		
Fabric Extender ⓘ		
Power ⓘ		
Chassis Expansion		
Subtotal	1.00	
Estimated Lead Time	10 days	

Warnings (4):

- N20-C6508, UCSB-5108-AC2, UCSB-5108-DC2 cannot be configured outside the Bundle. Please use N20-C6508-UPG, UCSB-5108-AC2-UPG, UCSB-5108-DC2-UPG instead. (CE200137)
- N20-C6508 requires a minimum of 2 and allows maximum of 8 from Blade. (CE100015)

Option Search ⓘ Multiple Options Search

UCSB-B420-M4

Option Search Results Filter By ALL Key

SKU	Lead Time ⓘ	Unit List Price (USD)
UCSB-B420-M4 SVIP	21 days	9,187.00

Result By: Available Location ⓘ **8**

SKU	SKU Location	Qty
<input type="checkbox"/> UCSB-B420-M4	Blade > Blade Server > UCSB-B420-M4	<input type="text" value="2"/>

Result By: Potential Location ⓘ **9**

SKU SKU Hierarchy

Multiple Option Search Tab: Search Results

- Click **Done**. The Order page displays.
- 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 (s) checked. To remove a product from the list of items to add, uncheck the checkbox corresponding to that product.
- 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.
- 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.
- Hover over the information icon to learn more about available and potential locations.

Warnings (3):

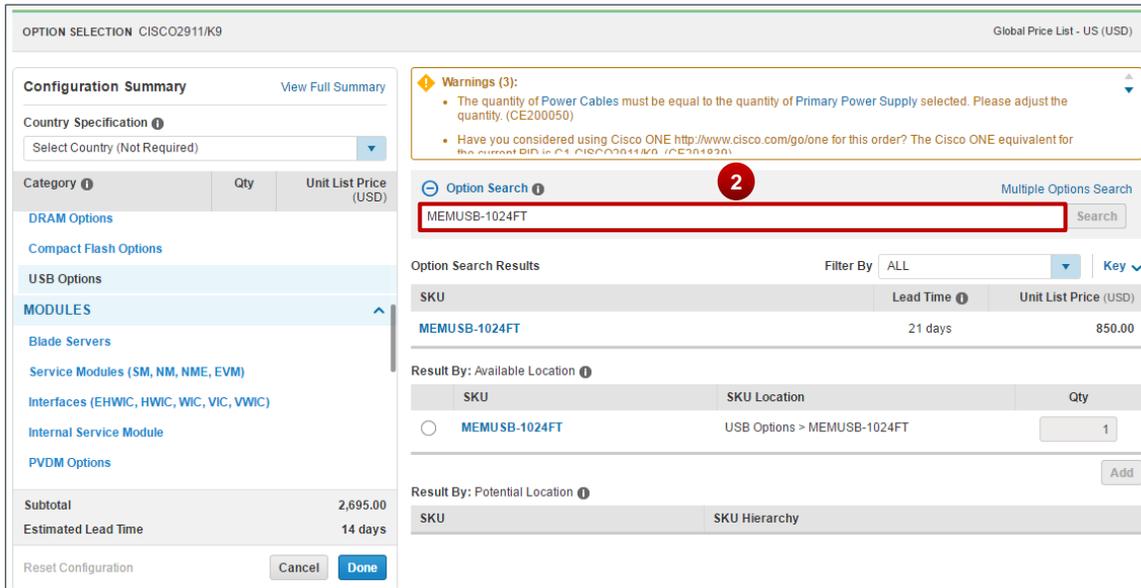
- The quantity of Power Cables must be equal to the quantity of Primary Power Supply selected. Please adjust the quantity. (CE200050)

Option Selection Page: Quantity Error Messages

6.5.3 Searching for a Single Known SKU

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

- From the Option Selection page, expand the Option Search section.
- Click the Option SKU field and enter the SKU.



Option Selection Page: Option Search Tab

3. 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.

4. 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.

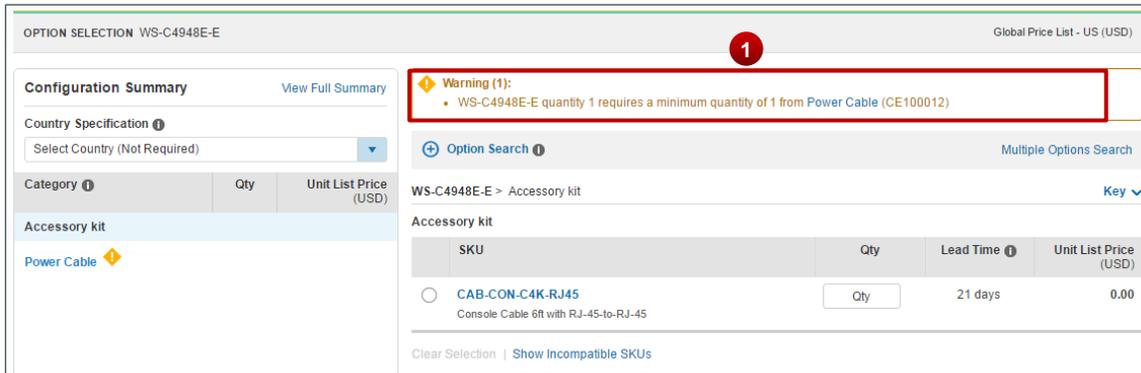
5. Click the radio button corresponding to the SKU.
6. Click **Add**.

6.5.4 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:

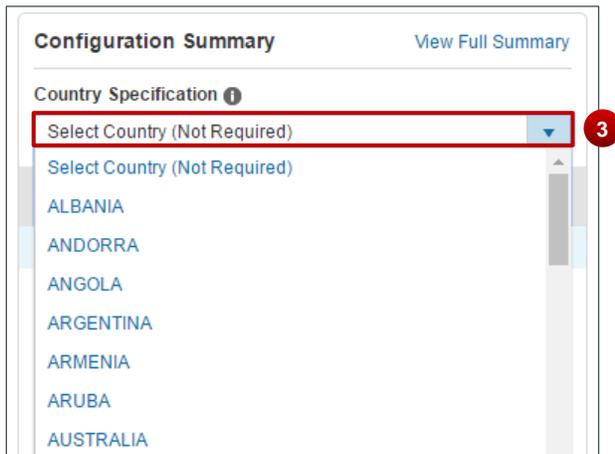
1. From the Order page: Items tab, click Select Options below the line item. The Option Selection page displays.

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 the appropriate 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 the Return to Configuration button or link.

Done Messages...

Your product configuration has some errors.

Product Configuration Issues

5 [Return to configuration](#) to correct these errors.

⚠️ A selection from Power Cables is required. Please make the selection. (CE200054)

5 [Return to configuration](#) I will address these issues later [Done](#)

Done Messages Dialog Box

6.5.5 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 WS-C4948E-E Global Price List - US (USD)

Configuration Summary [View Full Summary](#)

Country Specification ⓘ

Select Country (Not Required) ▼

Category ⓘ Qty Unit List Price (USD)

WS-C4948E-E > Accessory kit Key ▼

Warning (1):

- WS-C4948E-E quantity 1 requires a minimum quantity of 1 from Power Cable (CE100012)

[Option Search](#) ⓘ [Multiple Options Search](#)

Option Selection Page: Configuration Summary Pane

UCSB-5108-DC

[Return to configuration](#) [Open a Case](#) | [Training](#) | [CCW Support Community](#) | [Cisco Feature Navigator](#)

Full Configuration Summary

Line#	Items SKUs	Description	Estimated Lead Time (days)	Unit List Price	Qty	Extended Price	Included
Blade Options							
Blade							
Chassis Options							
Fabric Extender							
1.1	UCS-IOM-2204XP	UCS 2204XP I/O Module (4 External, 16 Internal 10Gb Ports)	10	\$5,000.00	1	\$5,000.00	No
Power							
1.2	UCSB-PSU-2500DC48	2500W -48V DC Power Supply for UCS 5108	10	\$2,999.00	1	\$2,999.00	No
Chassis Expansion							

Subtotal: \$ 14,998.00

Max. Estimated Lead Time 10 days

(All prices shown in USD)

Option Selection Page: Full Configuration Summary

6.5.6 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](#).

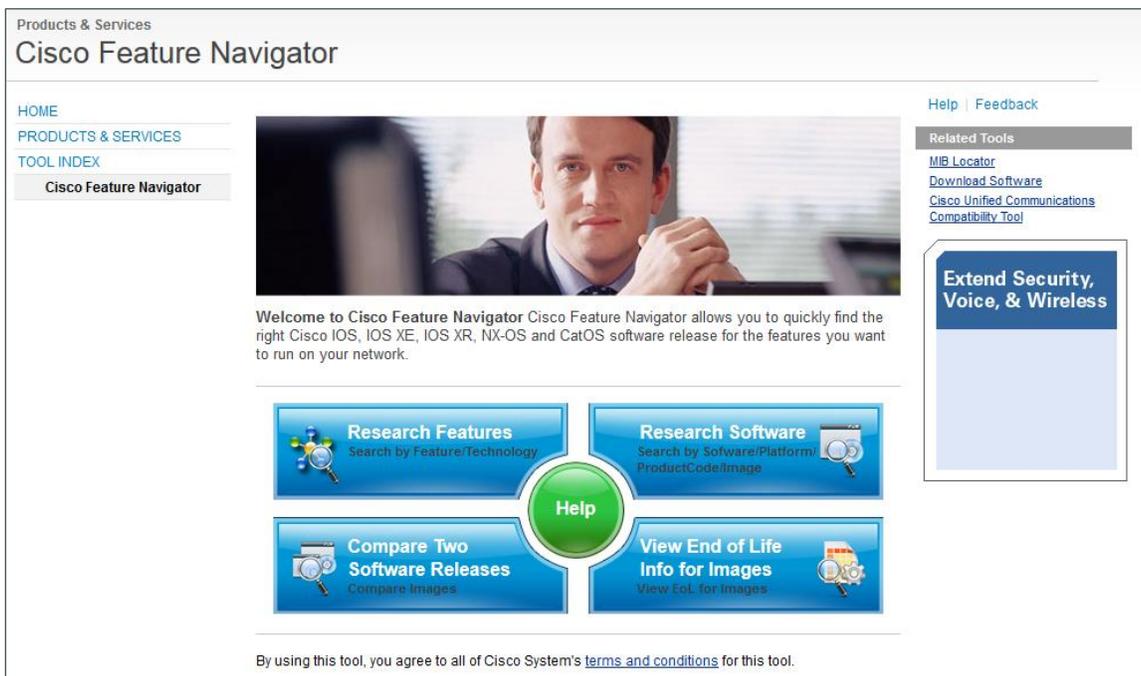
The Cisco Feature Navigator page displays in a new window.



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

6.6 Setting Quantities for Products

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



Note: The Quantity field in Cisco Commerce Orders tab accommodates up to ten digits, for example, 1234567891.

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

<input type="checkbox"/>	 1.0 L-LIC-CT4500-UPG		2 days	252.85	100	25,285.00
	Upg license SKU for Cisco 4500 Wireless Controller (e-deliv)					
	more					
	Multiple License Keys					
	ECCN EAR99					
	Valid as of 29-Feb-2016 04:06 EST					
	Edit options Change Service/Subscription Validate Add Note More Actions					

Order Page: Items Tab – Qty Field

6.7 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 can 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 ASF SKUs in Cisco Commerce Orders tab, see [Adding Fixed Scope Consultancy SKUs](#).

You can add services to items as part of the product ordering process. Services for previously ordered products can also be ordered separately as a service-only order. See [Creating Service Only Orders](#).



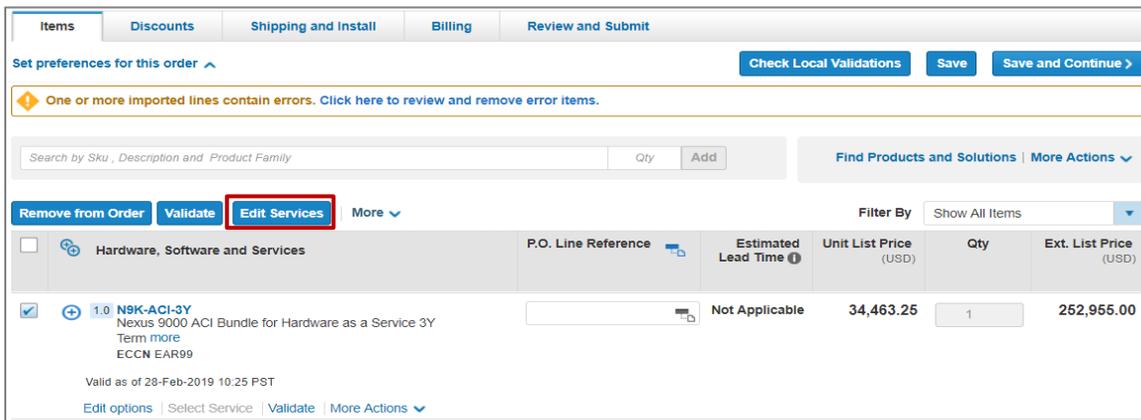
Best Practices: Add services as part of the product configuration within your quote or order, rather than as a separate service-only line item. To create an order for service-only line items, see [Creating Service Only Orders](#).

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

6.7.1 Adding Services to Items in the Configuration

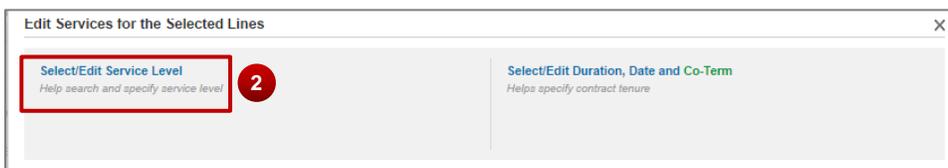


There are two ways to edit services using the Services Option widget. You can attach services at the Header level by clicking on **Edit Services** on your order. The Service Level you select will apply to all selected lines of your configuration. Use this option for basic Service Level changes. You can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

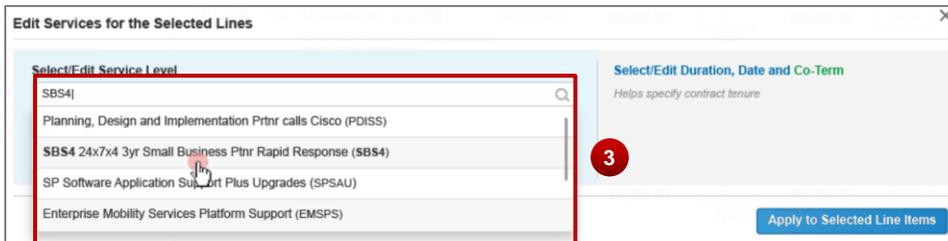


You can attach Services at the Header level if you wish to apply the service level across all selected lines of the configuration in the cart. However, because preferences in the cart are not filtered by Product lines, the Service level may or may not successfully apply to each line. You should verify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

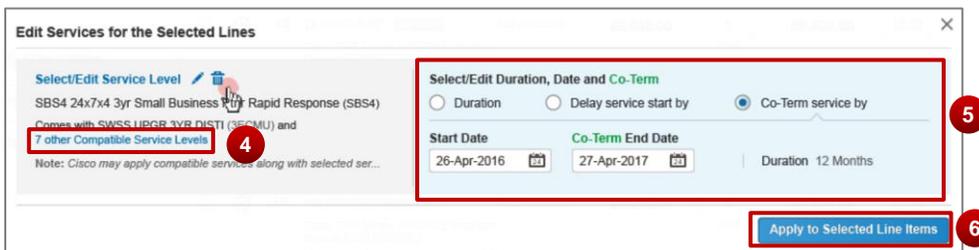
1. Place a checkmark next to the desired SKUs before selecting **Edit Services** from the **More** dropdown.
2. **Select/Edit Service Level**



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. Apply the Service to the Selected Lines (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.

6.7.1.1 Attach Services on the Edit Services/Subscription Page

The Edit Services/Subscription page summarizes all attached services and subscriptions. 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 Service/Subscription** or **Select Service/Subscription** on any line to open the Edit Services page.

Please click the checkbox against any/multiple line to review Cisco Refresh Remanufactured options.

Remove from Order | Validate | Edit Services | More ▾ | Filter By: Show All Items ▾

<input type="checkbox"/>	Hardware, Software and Services	P.O. Line Reference	Estimated Lead Time	Unit List Price (USD)	Qty	Ext. List Price (USD)
<input type="checkbox"/>	1.0 CISCO2911-V/K9-RF REFRESH Cisco 2911 UC Bundle, PVD3-16, UC LicensePAK REMANUFACTURED more ECCN 5A002.A Select Options Change Service/Subscription Validate Add Note More Actions ▾		Not Applicable	3,897.00	1	3,897.00
<input type="checkbox"/>	2.0 WS-C3850-48U-S CP RF Cisco Catalyst 3850 48 Port UPOE IP Base more ECCN 5A002.A Select Options Select Service Validate Add Note More Actions ▾		28 days	14,825.00	1	14,825.00

Showing 1 - 2 of 2 Line Items | < Previous 1 ▾ Next >

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

EDIT SERVICES/SUBSCRIPTIONS WS-C4500X-32SFP+ Global Price List US Availability (USD)

Products not mapped to Services/Subscriptions

Service Options

Choose Service Level from All Service Programs ▾ Switch to Legacy Service P...

Search by Name & Description

Note: Cisco may still install another compatible service if required. Compatible services are the services that come with primary service and are based on products.

and/or

Time Duration

Duration

Delay service start to

Co-Term service to

Duration

Months: 1 to 60

Reset Apply

Service SKU	Product SKU	Unit List Price (USD)	Qty	Total List Price (USD)
SMART NET TOTAL CARE (1 ITEM) TRASH SERVICE PROGRAM SNTC 8X5XNBD SERVICE SKU Change Service Remove Service	SNT (SNTC 8X5XNBD) EDIT SUMMARY Duration 12 Months WS-C4500X-32SFP+ Catalyst 4500-X 32 Port 10G IP Base, Front-to-Back, No P/S PRODUCT SKU	1,800.00	1	1,800.00

3. Search for specific service levels within a service program.
4. 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.

Service Options

Choose Service Level from **SMART NET TOTAL CARE** ▾ Switch to Legacy Service P...

Search by Name & Description

SNTC NO RMA (SW)

SNTC 8X5XNBD (SNT)

SNTC 8X5XNBDOS (CS)

SNTC 8X7XNCDOS (SNCO)

SNTC 8X7XNCD (SNC)

and/or

Time Duration

Duration

Delay service start to

Co-Term service to

Duration

Months: 1 to 60

Reset Apply

- 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.

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

- After selecting **Apply**, you will see the updated Service and Duration.

Service SKU	Product SKU	Unit List Price (USD)	Qty	Total List Price (USD)
SMART NET TOTAL CARE (2 Items) SERVICE PROGRAM	C4S (SNTC 8X5X4OS) SUMMARY			
	Duration 24 Months			

- You can always check the rest of your items by selecting **Products not mapped to Services/Subscriptions**.
- Delete all services at any time by selecting **Remove All Services**.

EDIT SERVICES/SUBSCRIPTIONS WS-C3560X-48T-S Global Price List US Availability (USD)

8 Product not mapped to Services/Subscriptions

Service Options

Choose Service Level from **SMART NET TOTAL CARE** Switch to Legacy Service P...

SW

Note: Cisco may still install another compatible service if required. Compatible services are the services that come with primary service and are based on products.

and/or

Time Duration

Duration

Delay service start to

Co-Term service to

Duration

Months: 1 to 60

Reset Apply

Service SKU	Product SKU	Unit List Price (USD)	Qty	Total List Price (USD)
SMART NET TOTAL CARE (1 ITEM) SW (SNTC NO RMA) SUMMARY	Duration 12 Months			
CON-SW-3560X4TS SNTC NO RMA SERVICE SKU	WS-C3560X-48T-S Catalyst 3560X 48 Port Data IP Base PRODUCT SKU	384.00	1	384.00
			1	

9 Change Service | Remove Service

Remove All Services Remove All Additional Services

Configuration Summary All prices shown in USD

Services	384.00
----------	--------

Cancel Done

6.7.1.2 Attach Services to Unassigned Products

Products that don't 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**.

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

5. If the service selected can't be attached, a message will appear with instructions.

6.7.1.3 Adding Secondary Services in the Edit Services/Subscriptions Page

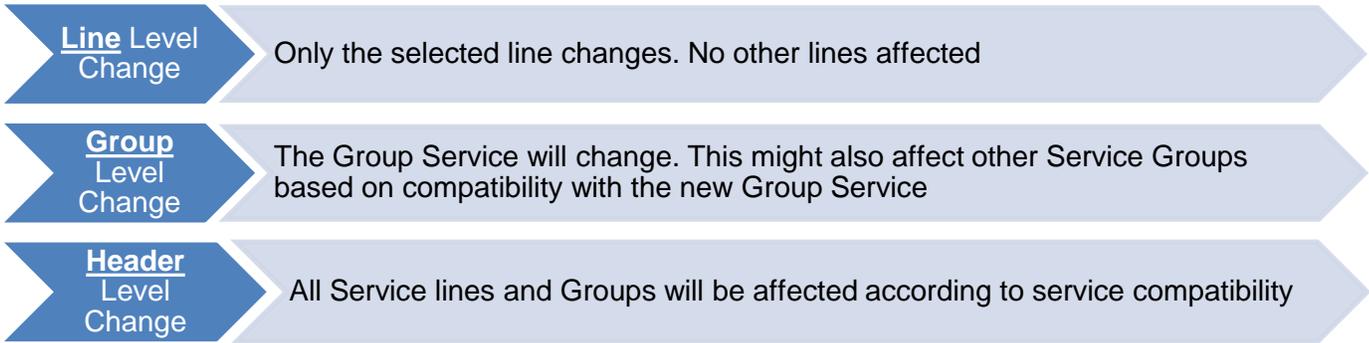
1. When available, click on **Additional Services** to show available secondary services
2. Select the appropriate service and duration.
3. Click **Apply**.

6.7.1.4 Changing Services in the Edit Services/Subscriptions Page

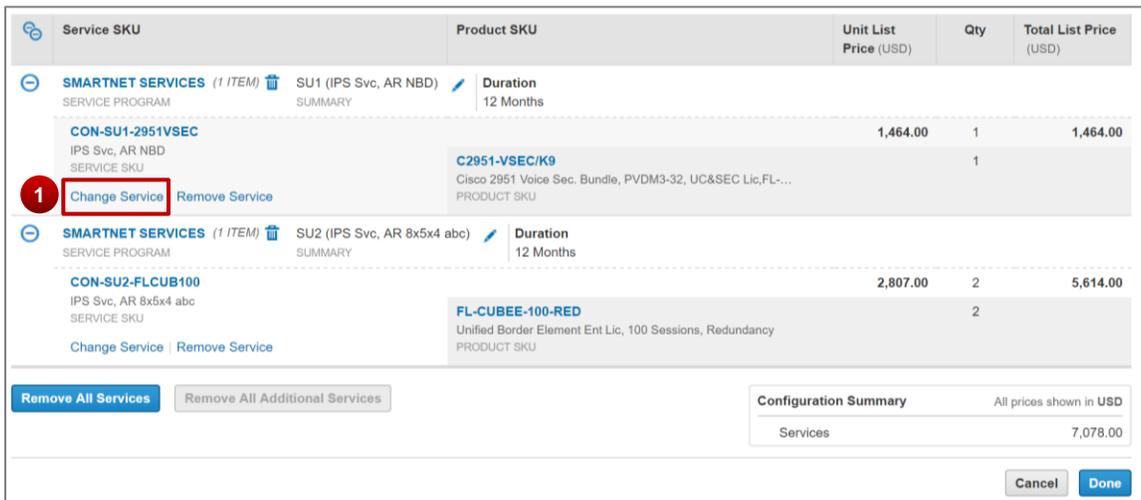
There are three different levels where you can make changes to your Service. It is important to understand how your selections will affect your configuration. The following are three different configuration level changes available and how they affect the entire configuration.

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

Service SKU	Product SKU	Unit List Price (USD)	Qty	Total List Price (USD)
SMART NET TOTAL CARE (1 ITEM)	SNT (SNTC 8X5XNBD)			
CON-SNT-C45X32SF	WS-C4500X-32SFP+	1,800.00	1	1,800.00



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



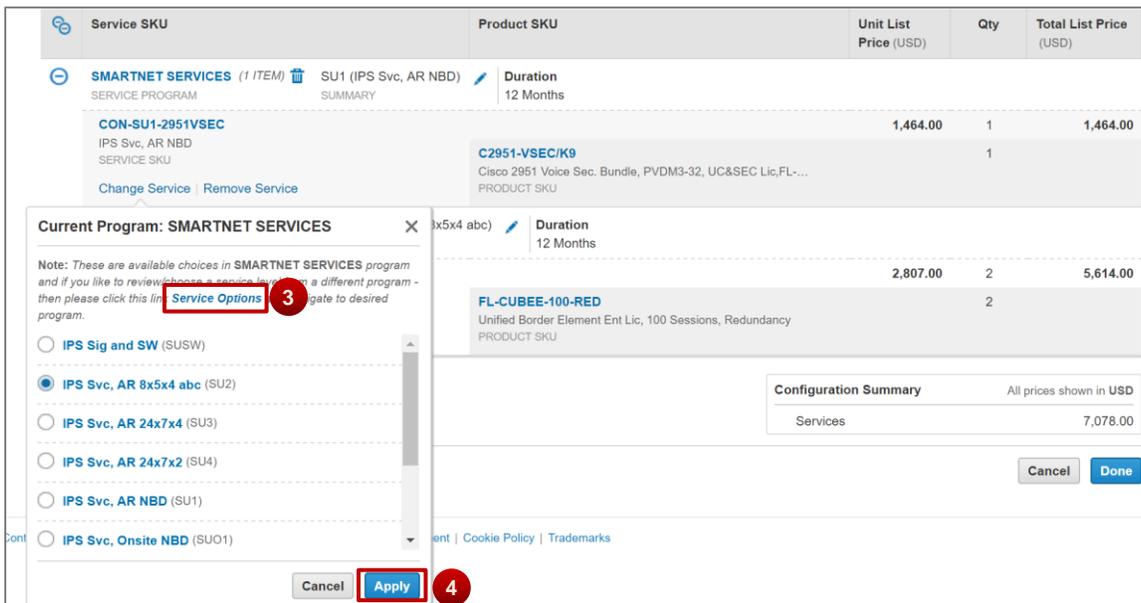
Service SKU	Product SKU	Unit List Price (USD)	Qty	Total List Price (USD)
SMARTNET SERVICES (1 ITEM) SU1 (IPS Svc, AR NBD) Duration: 12 Months				
CON-SU1-2951VSEC IPS Svc, AR NBD SERVICE SKU	C2951-VSEC/K9 Cisco 2951 Voice Sec. Bundle, PVDM3-32, UC&SEC Lic,FL-...	1,464.00	1	1,464.00
Change Service Remove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

Remove All Services | Remove All Additional Services

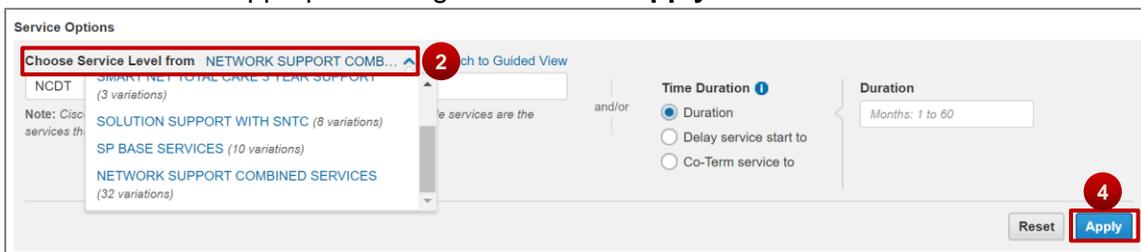
Configuration Summary: All prices shown in USD
Services: 7,078.00

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 on **Service Options** to make a **Group** level Service change.



4. 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.

6.7.1.5 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.

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

2. You can edit the Start Date and duration of the subscriptions.

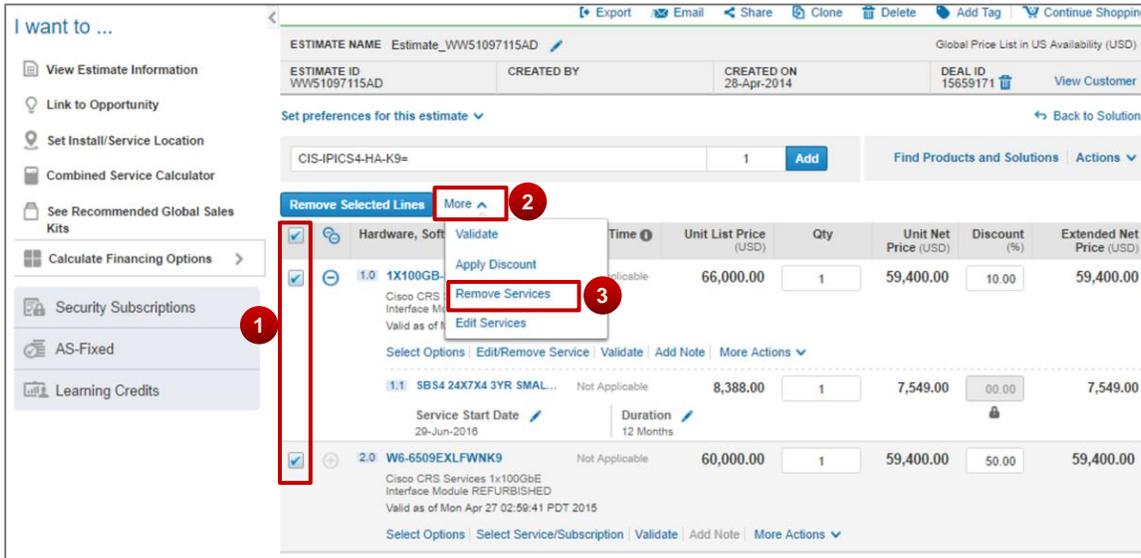
3. Click **Apply** and then **Done** to make updates to the subscription.

4. Once these steps are completed and the Services/Subscriptions are configured, proceed normally with the Quote to Order process

6.7.2 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



6.7.2.1 Remove services in Edit Service/Subscription page

1. On the Edit Service/Subscription page, click on the 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.

Additional services can also be imported if saved as a configuration using [Import a Saved Configuration](#) (see [Importing an Estimate](#)).

6.8 Identifying Target Contract Numbers



You can set a target service contract, search for an existing target contract, or let the system automatically assign to an eligible contract when ordering services in Cisco Commerce.

- This functionality applies to services and software subscriptions.
- The Service Contract Number link will not display when ordering services that do not have a contract (for example: fixed scope consultancy SKUs).
- You must set the target contract for each line.

<input type="checkbox"/>	1.0 CISCO2911/K9 CP Cisco 2911 w/3 GE,4 EHWIC,2 DSP,1 SM,256MB CF,512MB DRAM,IPB	14 days	2,695.00	1	2,695.00
Valid as of 01-Mar-2016 10:06 EST Select Options Change Service/Subscription Validate Add Note More Actions					
<input type="checkbox"/>	1.0.1 CON-SNT-2911 SNTC-8X5XNBD Cisco 2911 w/3 GE,4	Not Applicable	453.0	1	453.00
Service Start Date 1 day(s) after Ship Date.		Duration 12 Months	Target Contract Number System Generated 1		
<input type="checkbox"/>	1.1 PWR-2911-AC IC Cisco 2911 AC Power Supply	14 days	0.0	1	0.00

Order Page: Items Tab – Target Contract Number

The default option is established in your My Profile and Preferences. System Generated means that the system will try to match an existing contract. If a compatible contract is not found, a new contract number will be created. Alternately, you can set your default to have a new contract created.

To select a specific target contract number, complete the following steps:

1. From the Order page, expand the line and click the edit icon next to Target Contract Number. The Contract Number dialog box displays.

Contract Number Dialog Box

2. Select the appropriate option from the following and click **Continue**:
 - System Generated (this is the default value). The system will generate a new contract if a compatible contract is not found.
 - Use an Existing Contract: Enter the contract number
 - Search for an Existing Contract Number: The system returns a list of valid contract numbers for that service line.
 - Create a New Contract: The system will create a new contract, even if there are existing compatible contracts.

6.9 Identifying Flexible Service Start Delay (FSSD) Value

You can purchase a service at the point of product purchase and request a delayed service activation date of up to 60 days from the product ship date. A delayed service activation date results in a delayed service invoice date as well.

To identify the service start date, complete the following steps:

1. Navigate to the service line and click the edit icon next to Service Start Date. The Service Start Date dialog box displays.

1.0	CISCO2911/K9	Cisco 2911 w/3 GE,4 EHWIC,2 DSP,1 SM,256MB CF,512MB DRAM,IPB ECCN 5A002.A.1	14 days	2,695.00	1	2,695.00
Valid as of 01-Mar-2016 10:40 EST						
Edit options Change Service/Subscription Validate Add Note More Actions						
1.0.1	CON-SNT-2911	SNTC-8X5XNBD Cisco 2911 w/3 GE,4	Not Applicable	453.0	1	453.00
1	Service Start Date	21 day(s) after Ship Date	Duration	12 Months	Target Contract Number	System Generated
1.1	PWR-2911-AC	Cisco 2911 AC Power Supply ECCN EAR99	14 days	0.0	1	0.00

Order Details Page: Items Tab - Service Start Date

2. Select the desired start date from the drop-down list.
3. Click **Save**. The delay in service start is updated on the order.

Service Start Date

This applies to all services that are part of this configuration.

Service Start Date:

day(s) after Ship Date.
This determines when the service will be available to the end customer.

Service Start Date Dialog Box

See [Setting Default Services Options](#) for details on how to setup FSSD for all services in your order. Refer the [QRG on how to setup FSSD on Services and Subscription lines](#)

6.10 Adding a Smart Account

In order to standardize software licensing across Cisco, Assign Smart Account functionality is available in Cisco Commerce Order - Items tab.

With Smart licensing, you will be able to log in to your Smart Account to activate licenses and view all Smart Products you purchase from Cisco. Smart Accounts will be required when ordering Smart Products in Cisco Commerce.



Note: The icon displays for all Smart-Mandatory SKUs. For smart-optional SKUs, the assign now link will be available and the SA icon will not be displayed.

To assign a Smart Account, perform the following:

1. Click [Assign Smart Account](#) in the header area to assign a Smart Account for the entire order. Alternately, click [Assign Now](#) at the line level to assign a Smart Account for a single line. The Assign Smart Account dialog box opens.

- Use the radio buttons to select the Smart Account Type and your assignment preference.
- Begin typing the desired Smart Account in the search field. Select the appropriate account from the drop-down list of search results. Alternately, click [Request New Customer Smart Account](#) if the desired Smart Account does not exist. See the [Smart Account Operations Exchange](#) page for more information.
- Click **Assign**. The Items tab refreshes with a Smart Account assigned.
- Click the edit icon to change the assigned Smart Account or the delete icon to remove the assigned Smart Account.

ORDER NAME Test_2/28 Global Price List in US Dollars (USD)

PURCHASE ORDER # * WEB ORDER ID 86282665 STATUS UNSUBMITTED SMART ACCOUNT Assign Customer Smart Account **1**
Holding Smart Account aos5.com

Items Discounts Shipping and Install Billing Review and Submit

et preferences for this order Check Local Validations Save Save and Continue >

One or more imported lines contain errors. Click here to review and remove error items.

Search by Sku, Description and Product Family Find Products and Solutions More Actions v

Remove from Order Validate Edit Services More v Filter By Show All Items v

	Hardware, Software and Services	P.O. Line Reference	Estimated Lead Time	Unit List Price (USD)	Qty	Ext. List Price (USD)
<input type="checkbox"/>	1.0 L-H-ESA-ESI-LIC= Hybrid ESA Inbound Essentials SW Bundle (AS, AV, OF) License more End Customer Smart Account Assign Now 1 Holding Smart Account aos5.com Single License Key ECCN 5D002.C.1		2 days	0.00	500	0.00

Assign Smart Account

Smart Account Types End Customer Smart Account

End Customer Smart Account

Domain Identifier Enter Smart Account Name or Domain Identifier **3**

Domain Identifier **2**

Email ID

Assign SA to **2**

Assign to all current and future items in this order

Assign only to currently unassigned items

[+ Request New Customer Smart Account](#)

Suggested Smart Accounts for End Customer

No matching Smart Account(s) found.

Assign Cancel

Order Page: Items Tab – Smart Account

ORDER NAME [asfd](#) Global Price List in US Dollars (USD)

PURCHASE ORDER # * WEB ORDER ID 80478502 STATUS **UNSUBMITTED** SMART ACCOUNT CUSTOMER ACCOUNT [abc.com](#) **5**
Associate partner holding account with order **1**

Items | Discounts | Shipping and Install | Billing | Review and Submit

Set preferences for this order [^](#) [Check Local Validations](#) [Save](#) [Save and Continue >](#)

✔ Information saved successfully.

[Find Products and Solutions](#) | [More Actions >](#)

[Remove from Order](#) [Validate](#) [Manage Contracts](#) | [More >](#) Filter By

	Hardware, Software and Services	P.O. Line Reference	Lead Time	Unit List Price (USD)	Qty	Ext. List Price (USD)
<input type="checkbox"/>	1.0 2911-FANASSY= Cisco 2911 Fan Assembly (no Bezel included) ECCN 5A991 Valid as of 22-May-2017 01:36 PDT Select Options Select Service Validate Add Note More Actions >	<input type="text"/>	14 days	230.00	<input type="text" value="1"/> 1	230.00
<input type="checkbox"/>	2.0 L-CSR-BB-128K-S= SA 128K BB session smart license, 4G add-on memory. Perpetual SMART ACCOUNT abc.com [Customer Account] 5 Multiple License Keys Change to Single ECCN 5D991 Valid as of 22-May-2017 02:30 PDT Select Options Select Service Validate Add Note More Actions >	<input type="text"/>	2 days	128,000.00	<input type="text" value="1"/>	128,000.00

Order Page: Items Tabs Refreshed with Smart Account Information

6.11 Renewing Software Subscriptions



You can renew existing subscription contracts and create new subscription contracts Using Cisco Commerce, either directly through the 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.

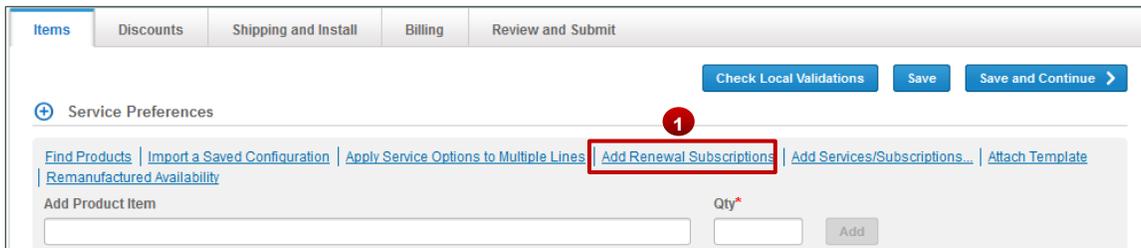
When adding a subscription renewal to an existing contract, you can co-term the end dates of the software subscription renewal to an existing contract. However, this feature in Cisco Commerce is available for 1-tier partners only.



Best Practices: Do not renew the same subscription through both Cisco Commerce Orders tab and CCW-R.

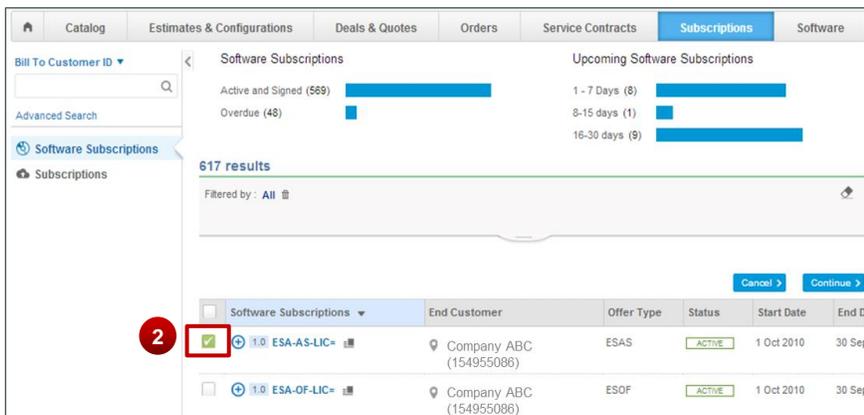
To renew software subscription, complete the following steps:

1. Click [Add Renewal Subscriptions](#) to add software subscription renewals to the order. The Subscription page displays in a new window.



Order Page: Items Tab

2. Select the subscriptions to add.



Subscriptions Page

3. Click **Continue** to return to the Items tab.
4. To co-term the subscription renewal to an existing contract for end date alignment, click the (+) icon next to the item to expand it.
5. Click the pencil icon next to the Target Contract Number. The Contract Number dialog box displays. (By default, the current Contract Number becomes the Target Number as long as the order BID matches the contract BID. If this is a new subscription, then the Contract Number will default to CREATE NEW. See [Identifying Target Contract Numbers](#) for more information.)

<input type="checkbox"/>	Hardware, Software and Services	P.O. Line Reference	Lead Time	Unit List Price (USD)	Qty	Ext. List Price (USD)
<input type="checkbox"/>	1.0 ESA-AS-LIC- ESA Anti-Spam License SMART ACCOUNT Assign Now Single License Key Valid as of 11-Dec-2015 08:31 EST Select Options Change Service/Subscription Validate Add Note More Actions		2 days	0.00	100	0.00
<input type="checkbox"/>	1.0.1 ESA-AS-3Y-S1 Email Security Anti-Spam 3YR Lic Key, 100-199 Users Service Start Date: 1 day(s) after Ship Date. Duration: 36 Months		1 days	27.78	100	2,778.00

Order Page: Items Tab – Added Subscriptions

6. Select the radio buttons corresponding to either “Use an Existing Number or Search for an Existing Contract Number” to add your subscription renewal to an existing contract.

Contract Number ✕

Contract Number

System Generated
We will try to match an existing contract number. If none are found, a new contract number will be automatically generated.

Use an Existing Number Apply Earliest Contract End Date

Search for an Existing Contract Number for INC Apply Earliest Contract End Date

Create a New Contract
During the submission process, a new contract will be created.

Contract Number Dialog Box

7. Check the Apply Earliest Contract End Date box. It ensures that the existing contract end date is applied to the subscription renewal.
8. Click **Continue**. The Items tab displays the updated subscription.



Note: Only when co-termining to an existing contract will duration between 1 and 12 months be considered standard. For non co-termed subscription renewals, the standard duration is between 12 and 60 months.

6.12 Adding and Deleting Item Notes or Comments



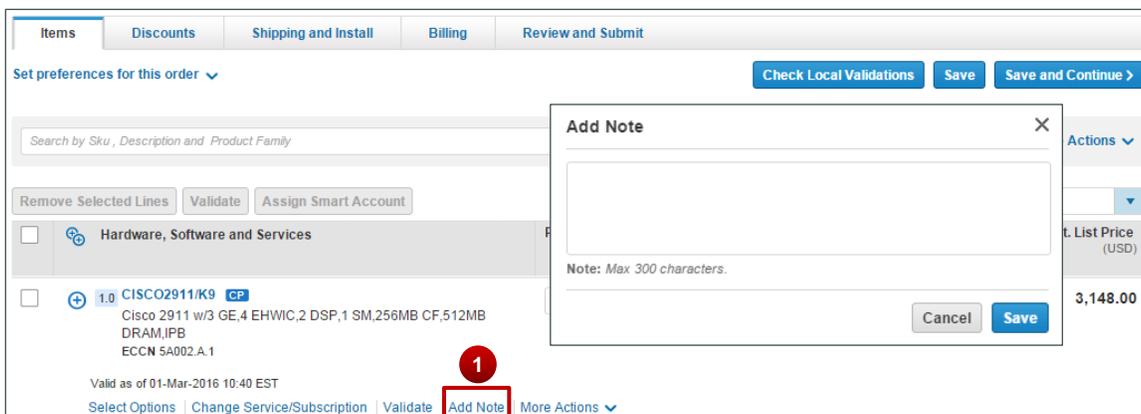
You can enter free-form notes at the major line level on an order.



Note: These notes are for your personal use only and will not put the order on hold, not raise a case, and not be systematically reviewed by Customer and Partner Services (CPS) team.

To create a note for a line, complete the following steps:

1. From the Order page: Items tab, click [Add Note](#). The note field opens.
2. Click the field and enter up to 300 characters. This note is for your internal communication only. Cisco does not view this note.
3. Click **Save**. The note is now saved.



Order Page: Items Tab – Add note to a Line Item

To delete an order note, complete the following steps:

4. From the Order page: Items tab, click [Edit Note](#). The Note field opens.
5. Click **Delete**. The note is deleted.

You can add notes on your Shipping and Install tab, see [Setting Order Shipping Options](#).

6.13 Populating the Purchase Order Line Reference



A PO Line Reference capability allows you to identify your internal Purchase Order (PO) line number to each Cisco Commerce order line.

To display the PO line reference field on order lines, you must go to your Order Preferences in My Profile and Preferences, and click the Yes radio button for PO Line References (see [Getting Started with Cisco Commerce User Guide](#)). The customer ID must also be set correctly for any entered values to appear on the invoice.

To populate the P.O. Line Reference field and cascade the information to the minor line levels, complete the following steps:

1. From the Order page: Items tab, click the P.O. Line Reference field.
2. Enter the purchase order number, for major and/or minor lines.
3. Click  to automatically populate the purchase order line reference number in the minor lines for that major line. To verify that the purchase order number has populated through all lines, click to expand a major line item to view the minor lines.

Note that the purchase order number populates for all the minor lines.

4. Repeat these steps as applicable for all line items within the order.

<input type="checkbox"/>	Hardware, Software and Services	P.O. Line Reference	Lead Time	Unit List Price (USD)	Qty	Ext. List Price (USD)
<input type="checkbox"/>	1.0 CISCO2911/K9 CP Cisco 2911 w/3 GE,4 EHWIC,2 DSP,1 SM,256MB CF,512MB DRAM,IPB ECCN 5A002.A.1 Valid as of 01-Mar-2016 10:40 EST Select Options Change Service/Subscription Validate Edit Note More Actions	1234	14 days	2,695.00	1	2,695.00
	1.0.1 CON-SNT-2911 SNTC-8X5XNBD Cisco 2911 w/3 GE,4 Service Start Date: 21 day(s) after Ship Date. Duration: 12 Months Target Contract Number: System Generated	1234	Not Applicable	453.0	1	453.00
	1.1 PWR-2911-AC IC Cisco 2911 AC Power Supply ECCN EAR99	1234	14 days	0.0	1	0.00
	1.2 CAB-AC AC Power Cord (North America), C13, NEMA 5-15P, 2.1m ECCN EAR99	1234	14 days	0.0	1	0.00

Order Page: Items Tab – PO Line Reference

6.14 Removing a Line Item from an Order

You can remove a line item(s) from an unsubmitted order. To do so, complete the following steps:

1. From the Order page: Items tab, check the appropriate checkbox for the line to remove.
2. To select all the lines on an order, simply check the header level checkbox. This would apply to every line on the order.
3. Click **Remove Selected Lines**. The line item is removed.
4. If the order was converted from a quote, you can opt to remove the line item from both the quote and the order, click **Remove from Quote and Order**. The line item is removed from both the quote and the order.
5. To remove a single line, you can also select Remove Line from the More Actions drop-down menu for the desired line.

If you want to remove a line from a submitted order, see [Cancelling a Line](#). A Change Order must be initiated on a submitted order to change any of its attributes.

Remove Selected Lines		Validate	Assign Smart Account	Filter By		Show All Items
<input type="checkbox"/>	Hardware, Software and Services	P.O. Line Reference	Lead Time	Unit List Price (USD)	Qty	Ext. List Price (USD)
<input checked="" type="checkbox"/>	1.0 CISCO2911/K9 CP Cisco 2911 w/3 GE,4 EHWIC,2 DSP,1 SM,256MB CF,512MB DRAM,IPB ECCN 5A002.A.1 Valid as of 01-Mar-2016 10:40 EST Select Options Change Service/Subscription Validate Edit Note More Actions ^	1234	21 days	3,148.00	1	3,148.00
<input checked="" type="checkbox"/>	2.0 L-ASAV10S-K9= SA ASAv10 (eDelivery) SMART ACCOUNT abc.eu DEFAULT [Customer Account] Multiple License Keys ECCN 5D002.C.1 Valid as of 01-Mar-2016 10:48 EST Select Options Change Service/Subscription Validate Add Note More Actions v	<input type="button" value="Remove Line"/>	2 days	4,794.00	20	95,880.00

Order Page: Items Tab – Remove from Order

6.15 Verifying Country Rules Validations

Country rules validations ensure that the items on an order are valid and orderable for the selected addresses.

When the order is submitted, country rule validations are automatically invoked. If all items pass the validations, the order will be submitted successfully. If the items do not pass the validations, an error at the header level will guide you to correct the issue. For example, an error will occur if an item fails validation for shipment to a specific country.

To avoid the error, click **Check Local Validations** before proceeding to the Discounts tab. A green success message will display once all items are verified to be orderable. An error message will display if the validation fails; hover over the red exclamation at the line level to view information on why the line failed the validation check.

Items	Discounts	Shipping and Install	Billing	Review and Submit		
Set preferences for this order v <input type="button" value="Check Local Validations"/> <input type="button" value="Save"/> <input type="button" value="Save and Continue >"/>						
<div style="border: 1px solid red; padding: 5px;"> ▲ Few lines on the order failed Country Rules Validation. </div>						
<input type="text" value="Search by Sku, Description and Product Family"/> <input type="button" value="Qty"/> <input type="button" value="Add"/> <input type="button" value="Find Products and Solutions"/> <input type="button" value="More Actions v"/>						
Remove Selected Lines		Validate	Assign Smart Account	Filter By Show All Items		
<input type="checkbox"/>	1.0 CISCO2911/K9 CP Cisco 2911 w/3 GE,4 EHWIC,2 DSP,1 SM,256MB CF,512MB DRAM,IPB ECCN 5A002.A.1 Valid as of 01-Mar-2016 10:40 EST ▲	1234	21 days	3,148.00	1	3,148.00
Select Options Change Service/Subscription Validate Edit Note More Actions v						

Order Page: Items Tab – Country Rules Validations

6.16 Reviewing Discounts



From the Discounts tab, you can review the discounts for the order before proceeding through the remaining order process. For the Discounts tab in the Cisco Commerce Change Order process, see [Viewing the Discounts Tab in Change Order](#).

Only contractual discounts are applied as a part of a standalone order. No special pricing/discounts display on a standalone order. To apply discounts and special pricing, begin by creating a deal or quote (see the [Cisco Commerce Deals and Quotes User Guide](#)). For more information, see [Order Notification Order Notifications](#) that you receive through email will display Service Information in a consistent, standardized format showing Start Date, End Date, Duration, Target Contract Number, and Original Contract Number. This will apply to Order submission notifications for regular orders and auto-orders and will apply to success and failure notifications.

Note: Based on the notification setting in CCW user profile, you will be receiving the notification(s) for Order Submitted, Invoice, Billing Status, Shipping Status and RMA.

Using a Reusable Nonstandard Discount.

Follow the given steps to review discounts:

1. From the Discount tab, click the View By drop-down arrow and click the appropriate option.
The status can display by: Unit Net Price, Discount Type, Discount Details, Summary, or Product and Service Totals. The information on the page redistributes according to what display you select.
2. Click the edit icon to change the Intended Use. Select the appropriate option from the drop-down menu and click Update. The discounts may change based on the intended use of the order.
3. Click **Continue**. The Shipping and Install tab displays.

Order Page: Discounts Tab

6.17 Setting the Shipping and Installation Information

The Shipping and Install tab displays the default information from My Profile and Preferences section and the Order page.

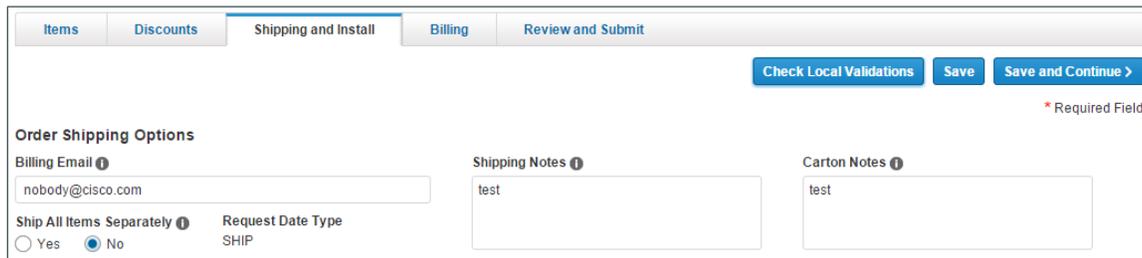
6.17.1 Setting Order Shipping Options



Under the Order Shipping Options section, set shipping and install site related options as applicable. Click the information icon () corresponding to each section for more information.

- **Billing e-mail:** To enter a billing email address, click the Billing Email field. Enter the appropriate email address. To enter multiple email addresses, enter the addresses in a list separated by a comma.
- **Ship All Items Separately:** Indicate whether it is acceptable for Cisco to ship the items separately. Click the appropriate Ship All Items Separately radio button. If items are shipped separately then separate invoices will be generated. Please note that even in cases when you select NO, items will be shipped and invoiced separately if they originate from different manufacturing locations.
- **Request Date Type:** This field is automatically populated. If the field states “SHIP”, then Cisco will inform you of when your order is due to ship from our logistics center. If the field states “ARRIVAL”, then we will let you know when your order will arrive at the assigned destination. See the [Delivery Based Scheduling QRG](#) for more information.

- Shipping Notes: Click the Shipping Notes field and enter any information that should display on all packing slips and invoices.
- Carton Notes: Click the Carton Notes field and enter any information that should display on the carton label.

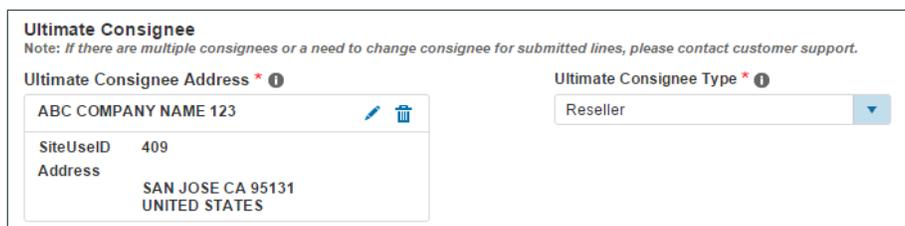


Order Page: Shipping and Install Tab

6.17.2 Adding Ultimate Consignee Details

To comply with U.S. federal regulations and track all shipped products to their ultimate install site, Cisco must capture ultimate consignee (UC) information for all orders (with at least one shippable good) that are being physically exported from Cisco (US).

Before submitting orders, you are required to populate the UC Address and UC Type fields. UC Address will default to the Ship To address and a separate entry will be required for each Ship To on an order. UC Type will be defaulted to Reseller. You will have the option of editing either of these fields. In addition, in the Review and Submit tab you will need to select an explicit agreement checkbox to allow Cisco to use the UC information displayed on your order (see [Submitting the Order](#)).



Order Page: Shipping and Install Tab – Ultimate Consignee



Note: This information ensures accurate UC reporting, and you are required to populate the UC information regardless of your region. Non-compliance with the UC reporting requirements carries potential fees and penalties.

To add UC information, complete the following steps:

1. Click **Add Address** in the Ultimate Consignee Address section. The Address Search dialog box displays.
2. Click the radio button for the appropriate address.
3. Click **Use Selected Address**.
4. To change the address, see [Adding or Changing the Shipping Address](#).

5. Click the Ultimate Consignee Type drop-down and select the appropriate option.
6. Hover over the information icon () for more information.

6.17.3 Managing Shipping Groups

From the Shipping Groups section of the Shipping and Install tab, you can:

- Create and rename a shipping group (see [Creating a Shipping Group](#))
- Move items among different shipping groups (see [Moving Items Between Shipping Groups](#))
- Delete a shipping group (see [Deleting a Shipping Group](#))

6.17.3.1 Creating a Shipping Group

The system automatically creates a Default Shipping group, with the addresses defaulting from the order header information. Newly added items are automatically assigned to this default shipping group.

You would create a new shipping group to provide different shipping or install site information for lines within an order.

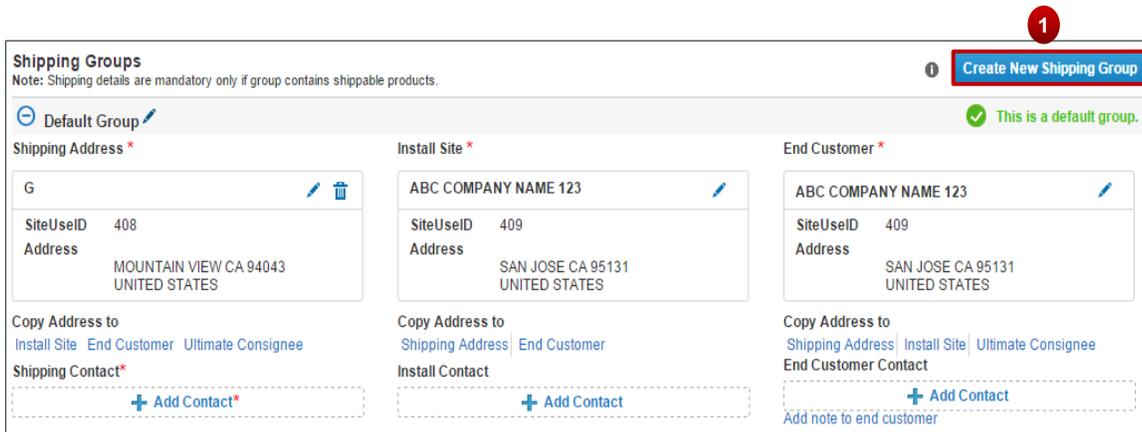
Best Practice:



- Fixed Scope Consultancy products (SKUs that begin with ASF) should be in their own unique shipping group with the install site contact information for the Fixed Scope Consultancy service correctly identified. It is likely that this information will not be the same as the product install site information. See [Adding Fixed Scope Consultancy SKUs](#).
- If you create a new shipping group and move only the Fixed Scope Consultancy products to the new group, then the shipping preference, routing option, and shipping service options will not be required. Note that this is applicable to service-only orders as well.
- EXCEPTION: In cases where you add hardware AND a Fixed Scope Consultancy SKU to an order, and in the same shipping group (see [Moving Items Between Shipping Groups](#)), system will require the shipping preference, routing option, and shipping service options for the hardware product.
- Place remanufactured and new products in separate shipping groups.

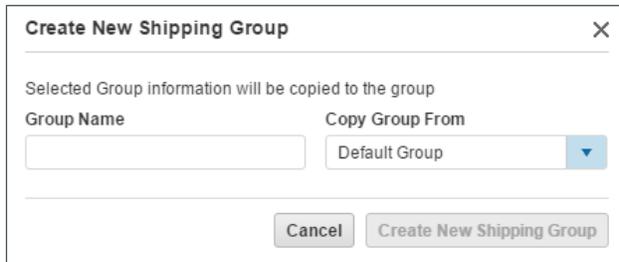
To create a new shipping group, complete the following steps:

1. From the Shipping Groups section, click **Create New Shipping Group**. The Create New Shipping Group dialog box displays.



Order Page: Shipping and Install Tab – Shipping Groups Section

2. Click the Group Name field and enter a new group name.
3. Optionally, click the Copy Group From drop-down arrow and select an appropriate option.



Create New Shipping Group Dialog Box

The items currently under the shipping group selected will be moved into the new shipping group being created. For moving items from shipping groups, see [Moving Items Between Shipping Groups](#).

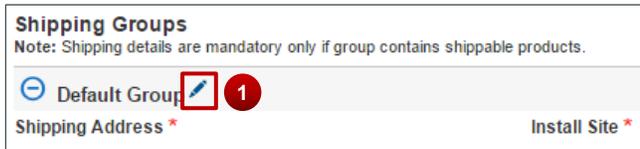
4. Click **Create New Shipping Group**. The group is added below the Default Shipping Group.
5. Repeat these steps as necessary to create the required shipping groups.
6. Review the shipping group information. The default addresses display in the Shipping Group Addresses section. Change or copy addresses as previously indicated (see [Adding or Changing the Shipping Address and Contact](#)).



Best Practice: Name the shipping group based on the logical choice of grouping, for example: purchase order, install site country, or end customer.

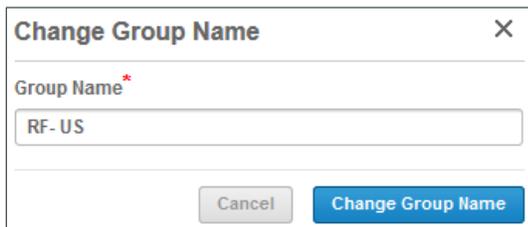
To change the name of a shipping group, complete the following steps:

1. Click the edit icon next to the group name. Change Group Name dialog box displays.



Order Page: Shipping and Install Tab – Shipping Groups Section

2. Click the Group Name field and enter a new name.
3. Click **Change Group Name**. The Shipping Groups section refreshes to display the new shipping group name.

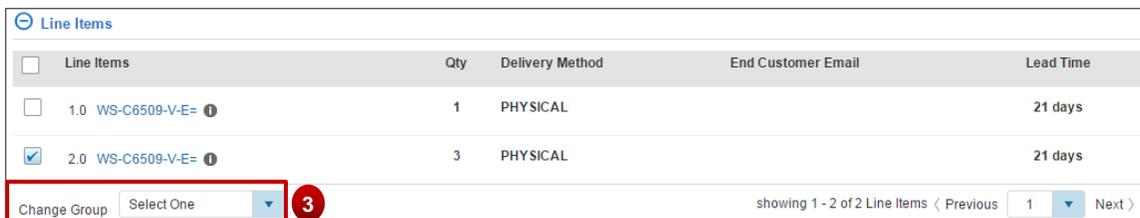


Change Group Name Dialog Box

6.17.4 Moving Items Between Shipping Groups

To move items from one shipping group into a different shipping group, complete the following steps:

1. From the Shipping and Install tab, go to the shipping group from where you need to move products or services to a different shipping group. Click (+) to expand the Line Items section.



Order Page: Shipping and Install Tab – Shipping Group Section

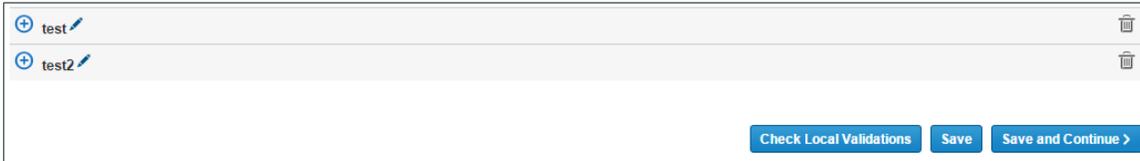
2. Check the appropriate checkbox(s) to indicate which items will be moved to another shipping group.
3. Click the Change Group drop-down arrow and select the appropriate shipping group. The Moving Lines Confirmation dialog box displays.
4. Click **OK**. The items no longer display in the Default Shipping Group.
5. Repeat the above steps for all items that must be moved to other shipping groups.

6.17.5 Deleting a Shipping Group

You can delete any shipping group, except the default shipping group created by the system.

To delete a shipping group, complete the following steps:

1. Click the delete icon. The icon is only visible for added shipping groups. It is not visible for the Default Shipping Group. The Delete Group dialog box displays.

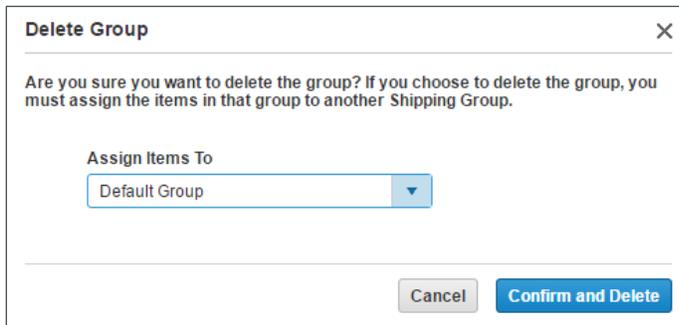


Order Page: Shipping and Install Tab – Shipping Groups Section

If the group to be deleted has items assigned to it, you would need to move the items to a different group before deleting it.

2. Click the Assign Items To drop-down arrow and select a group to which you wish to move items to.
3. Click **Confirm and Delete** to delete the group and move the line items to the chosen group.

For managing a shipping group in Cisco Commerce Change Order, see [Changing Shipping Attributes](#).



Delete Group Dialog Box

6.17.6 Populating Shipping Information

In the Shipping Information section, the Request Date, Routing Option, and Shipping Service Options are mandatory drop-down menus.

Delivery options will be available for you to select specific delivery preferences and add additional delivery information.

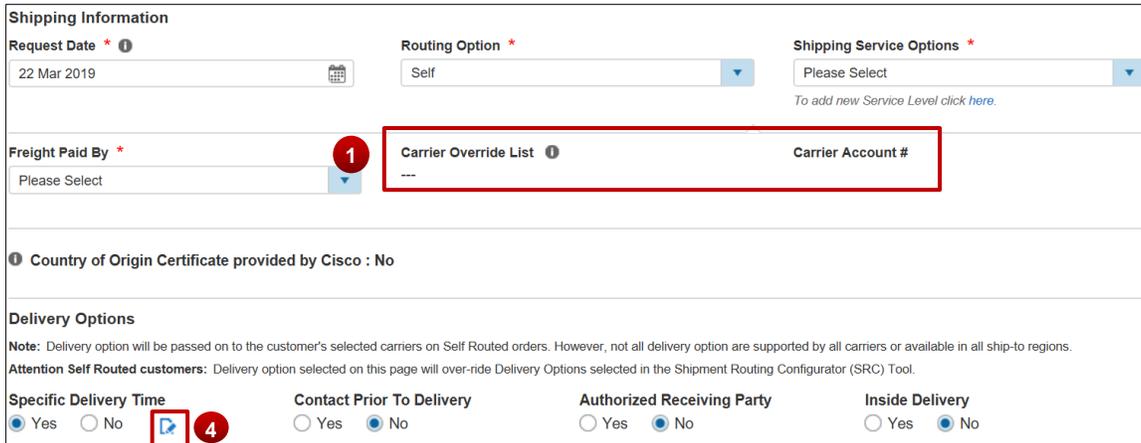
- The options displayed are based on a routing option selected in the drop-down menu (Cisco routed or Self routed), the type of order created, and the user ID's CCO ID credentials.
- These options will only be available for orders that contain shippable hardware or software products. Service only orders and e-delivery only (software) orders will not display these delivery options.
- The delivery options display as Yes or No radio buttons and the default value for all options is selected as No.

6.17.6.1 Setting Cisco as Routing Option

If Cisco is the selected Routing Option, then complete the following steps:

1. The Carrier Override List and Carrier Account # display as blank fields and are not editable.

2. Select the appropriate options under Delivery Options: Pre-shipment Inspection and Special Transport.
3. If you select the Special Transport radio button as Yes, the Add a Note icon will display.
4. Click the Add a Note icon.
5. The Add Special Transport Note dialog box displays. Click the text field and enter up to 300 characters to communicate any specific requests.
6. Click **Save**.



Shipping Information

Request Date * ⓘ 22 Mar 2019

Routing Option * Self

Shipping Service Options * Please Select
To add new Service Level click [here](#).

Freight Paid By * Please Select

Carrier Override List ⓘ

Carrier Account # ---

Country of Origin Certificate provided by Cisco : No

Delivery Options

Note: Delivery option will be passed on to the customer's selected carriers on Self Routed orders. However, not all delivery option are supported by all carriers or available in all ship-to regions.
Attention Self Routed customers: Delivery option selected on this page will over-ride Delivery Options selected in the Shipment Routing Configurator (SRC) Tool.

Specific Delivery Time Yes No ⓘ 4

Contact Prior To Delivery Yes No

Authorized Receiving Party Yes No

Inside Delivery Yes No

Order Page: Shipping and Install Tab – Cisco Routed

6.17.6.2 Setting Self as the Routing Option

If you selected Self as the Routing Option then complete the following steps:

1. Select your desired service level from the Shipping Service Options drop-down menu.
2. The Carrier Override List drop-down menu is active and editable. Once you select the carrier, the Carrier Account # field activates and you can add an account number, if necessary.
3. For self-routing, the available delivery options expand to include Special Delivery Time, Carrier Will Call, Contact Prior to Delivery, Pre-shipment Inspection, Authorized Receiving Party, Remove Packaging, Inside Delivery, and Special Transport.
4. If some radio buttons are selected as Yes, the Add a Note icon displays.
5. Once clicked, a dialog box displays. Click the text field and enter extra information about the specific shipping options for the order. Enter up to 300 characters to communicate any special requests.
6. Click the information icons, where displayed, to learn more.

You will be able to modify delivery options in the change order process as well. See [Changing Shipping Attributes](#).

Country of Origin Certificate provided by Cisco : No

Delivery Options
Note: Delivery option will be passed on to the customer's selected carriers on Self Routed orders. However, not all delivery option are supported by all carriers or available in all ship-to regions.
 Attention Self Routed customers: Delivery option selected on this page will over-ride Delivery Options selected in the Shipment Routing Configurator (SRC) Tool.

Specific Delivery Time Yes No
 Contact Prior To Delivery Yes No 4
 Carrier Will Call Yes No 6 Pre-shipment Inspection Yes No
 Authorized Receiving Party Yes No
 Remove Packaging Yes No
 Inside Delivery Yes No
 Special Transport Yes No

[Line Items](#)

Order Page: Shipping and Install Tab – Self Routed

6.18 Verifying Billing Information



Click the Billing tab.

You can change the information on the Billing tab. However, changing information on the Billing tab may result in additional errors or changes in other order information. If there are red error messages at the top of the page, these must be fixed before the order can be submitted. Yellow warning messages may indicate other optional changes could be performed, or provide important status information.

Items | Discounts | Shipping and Install | **Billing** | Review and Submit

! The selected value for taxability is invalid or blank. Please select a valid value. For more information, click on the "!" icon next to the 'Taxability' field.

! Warning: Changing information on this page may impact tax, Service Pricing and Service Configuration.

i Please note: Tax status is only an estimate

Tax Information *

Billing and Contacts Information *

Payment Information *

Taxability * !

Select ▼

Your Tax Status

Order Page: Billing Tab

6.18.1 Verifying Tax Information

The tax information section displays the taxability and your tax status. To select the taxability option, click the Taxability drop-down arrow on the Billing tab and select the appropriate option.

- **Internal Use:** If the purchases in this transaction are to be used internally, not to be resold, and do not qualify for a state exemption, select Internal Use. The appropriate tax will be charged.
- **Resale:** If the purchases in this transaction are for resale purposes, select Resale. In order to select this option, you must be registered as a wholesaler, reseller, or leasing company. If a valid (current)

resale certificate has not been provided to Cisco, the appropriate tax will be charged and added to the invoice.

- **State/Federal or Direct Pay Permit Exemption:** Applicable for a federal government entity that qualifies for a state regulation exemption (for example, home office exemption, non-profit organization, school, state agency) or is a direct pay permit holder. If the purchases in this transaction are for export, select State/Federal or Direct Pay Permit Exemption. If a valid (current) exemption certificate or copy of the direct pay permit has not been provided to Cisco, the appropriate tax will be charged and added to the invoice.



Order Page: Billing Tab – Tax Information Section

Note: A tax note field displays for you to enter additional tax instructions for orders containing the following information:

- The ship-to state is MA, MS, RI, or TN.
- The taxability is resale.
- The tax status is non-exempt.



If not all the requirements above are met, then the Tax Note field will not display on the Billing tab.

The order is placed on hold until the third-party certificate is received and confirmed. To enter special instructions in the Tax Note field, click the Tax Note field and enter the desired information.

6.18.2 Populating the Billing Information Section

The billing information section displays the billing address and various contact information. Updating the billing address and contacts is the same as populating and changing any other address and contact, see [Changing the Billing Address and Contact](#). Use the edit icon to change the address or contact and the delete icon to remove the contact.

Order Page: Billing Tab - Billing Information Section

6.18.3 Populating the Payment Information Section

If your billing ID (BID) is US or Canada and you are eligible for the credit card payment method, the option to select the credit card payment displays on the Payment Information tab.



Best Practice: The credit card information defaults from your My Profile and Preferences section. Refer to the [Getting Started with Cisco Commerce User Guide](#) to add a credit card to your profile.

If the BID is not from the US or Canada, you will not be eligible for credit card payment method, and the credit card payment option does not display.

To select a credit card as the payment method, complete the following steps:

1. Click the Payment Information tab.
2. Under the Payment Information section, click the Credit Card radio button.
3. Under the Credit Card Information section, a checkmark indicates the default credit card, which will be charged for the order. To select a different card from the profile, click the desired card.
4. You can add a new credit card by clicking **+ New Card**. Enter all required information and click **Save**.

Order Page: Billing Tab – Credit Card Option

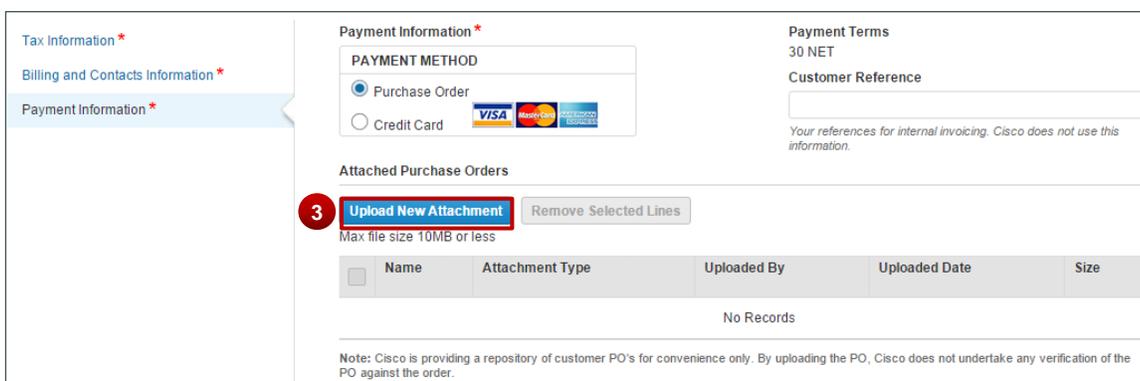
6.18.3.1 Using a Purchase Order (PO) Payment

If the BID is not from the US or Canada, you will not be eligible for credit card payment method, and the credit card payment option does not display.

If eligible for credit card payment, but purchase order is preferred, select purchase order as the payment method.

To select purchase order as the payment method, complete the following steps:

1. Click the Payment Information tab.
2. Under the Payment Information section, click the Purchase Order radio button.
3. To attach a copy of the Purchase Order, click Upload New Attachment. The Upload Files dialog box displays.



The screenshot shows the 'Payment Information' section of the order page. It includes a 'PAYMENT METHOD' section with radio buttons for 'Purchase Order' (selected) and 'Credit Card'. Below this is an 'Attached Purchase Orders' section with a red '3' next to the 'Upload New Attachment' button. A table below shows 'No Records'.

Name	Attachment Type	Uploaded By	Uploaded Date	Size
No Records				

Order Page: Billing Tab – Attach Purchase Order Section

4. Browse and select the appropriate file and click **Attach**.
5. To remove the purchase order attached, click the appropriate checkbox and click **Remove Selected Lines**.

Attaching a PO is for your convenience and record, Cisco does not undertake any verification of the PO against the order.

6.19 Reviewing and Submitting the Order



There are cases when some of the tab icons may display in red with error messages on top.

You can review the financial summary, order summary and modify, if required, the order submission notification on the Review and Submit tab.

If all tabs are correctly populated, you have checked the box indicating that you accept the terms and conditions, and have confirmed ultimate consignee information, then the Submit Order button will be enabled.

Order Page: Review and Submit Tab

Note: The Submit Order button will not be displayed if:



- You are not eligible to submit orders in Cisco Commerce
- You have not checked the box to accept the Terms and Conditions
- You have not confirmed the Ultimate Consignee Information

Click on the respective tab icons to resolve issues in order to submit the order.

Order Page: Review and Submit Tab – Error Messages

- Blue: If there are no errors for a specific tab, the corresponding icon displays as blue in color.
- Yellow: Warnings displayed in yellow may be fixed but are not required to be fixed. However, if errors are not fixed before submission, then delays in booking and scheduling of the order may result.
- Red: All errors displayed in red must be fixed prior to submitting an order. The icon corresponding to the tab in which the error has occurred also appears red.



Best Practice: Click **Save and Continue** in each tab before proceeding to Review and Submit tab. This reduces the number of errors displayed during order submission.

6.19.1 Adding Landing Costs and Freight Charges

On the Review and Submit tab, you will be prompted to add a landing SKU to the order in the following cases:

- Order shipping country is Canada
- Order billing ID is other than 28949 (Cisco Canada)
- Price list on the order is other than Global Canada Price List in Canadian Dollars, Global Canada Legacy Price List in Canadian Dollars, or Wholesale Canada Price List in Canadian Dollars
- Order is a standard order

Landing cost SKUs are applicable to standard orders shipped to Canada using non-Canadian price lists. You can search and add these SKUs on the Items tab and review Discounts tab to price the SKU.

See [Adding Landing Cost SKUs](#) for more information on landing costs and [Adding Freight Charge SKUs](#) for more information on freight charges.

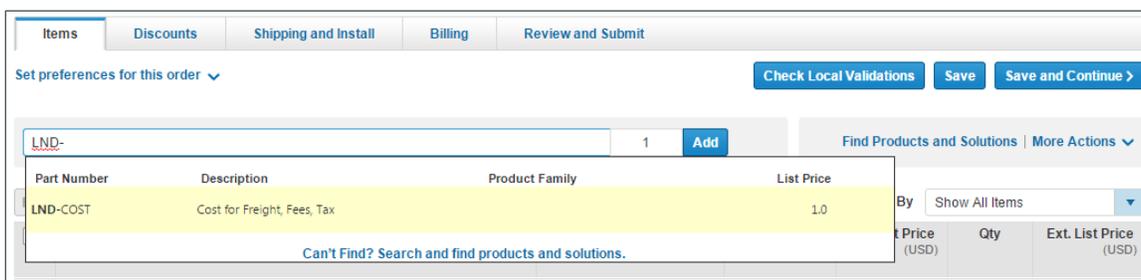
6.19.1.1 Adding Landing Cost SKUs

Review the conditions for adding a landing cost SKU (See [Adding Landing Costs and Freight Charges](#)). Landing cost SKUs will be 10% of the total product order. There will be no discounts on landing cost SKUs. The order total and respective discounts will update with the new price calculated for the landing cost SKU.

You can add only one landing cost SKU per order. If you add more, the system will not allow you to submit the order.

To add a landing cost SKU, complete the following steps:

1. On the Order page: Items tab, click the Add Product Item field and enter LND-COST.
2. Click **Add**. The SKU is added to the list of items.
3. Continue to [Adding Freight Charge SKUs](#).



Order Page: Items Tab – Landing Cost SKU

6.19.1.2 Adding Freight Charge SKUs

You can search for the freight charge SKU on Items tab and can modify the quantity. You can add only a quantity of one per freight charge SKU, but there is no restriction to the number of freight charge SKUs that can be ordered.

Freight charge SKUs are treated as miscellaneous lines. There will be no discount on these SKUs.

To add a freight charge SKU, complete the following steps:

1. On the Order page: Items tab, click the Add Product Item field and enter FREIGHT.
2. Click **Add**.
3. Click **Save and Continue** until you reach the Review and Submit tab to submit the order.

Part Number	Description	Product Family	List Price
FREIGHT CHARGES	FREIGHT CHARGES		0.0
FREIGHT_CHARGE_RF	FREIGHT CHARGES REMANUFACTURED PRODUCTS		1.0
LND-COST	Cost for Freight, Fees, Tax		1.0

Order Page: Items Tab – Freight Charge SKU

6.19.2 Submitting the Order

When submitting the order, you can populate the order note, order notification details, and order submission confirmation e-mail.

1. Click the Order Note field to add any instructions for those who have access to the order. Cisco does not review this note for the ordering.

All prices shown in USD		
If Mandatory service are attached they will be taxable		
Total List Price		39,980.00
Discounts	(32.00%)	.00
Product Discount	(32.00%)	12,793.60
Service Discount	(.00%)	.00
Credits		.00
Total Effective Discount	(32.00%)	12,793.60
Order Total		27,186.40
Max. Estimated Lead Time		21 days

Order Page: Review and Submit Tab

2. Populate the Order Submission Notification details for Cisco to contact, if need be. This section is not required, but it is recommended. These fields are not search fields; all of the information should be entered completely and accurately. It is not necessary to complete all fields.

3. Enter email contacts in the blank field separated by a comma to send order submission notifications.
4. Check the box to indicate that you accept the Terms and Conditions.
5. Click **Submit Order** when done.

Once the order is submitted, the Submission Confirmed page displays. You can view the submitted order by clicking **View Submitted Order**.

Submission Confirmed

Thank you for placing Web Order ID #67687074 with Cisco.
You will be notified according to your notification preferences once Cisco begins processing your order.

testordermwl		Active Price List Global Price List US Availability	
Purchase Order #	1234	Total List Price	39,980.00
Deal ID	N/A	Discounts	32.00% (12,793.60)
Web Order ID	67687074	Credits	(.00)
Created by	ma on 01-Mar-2016	Total Effective Discount	32.00% (12,793.60)
Submitted by	ma on 02-Mar-2016	Order Total	27,186.40
		Max. Estimated Lead Time	21 days
		All prices shown in	USD

[View Submitted Order](#)

Order Submission Page

6.19.3 Order Notification

Order Notifications that you receive through email will display Service Information in a consistent, standardized format showing Start Date, End Date, Duration, Target Contract Number, and Original Contract Number. This will apply to Order submission notifications for regular orders and auto-orders and will apply to success and failure notifications.

Note: Based on the notification setting in CCW user profile, you will be receiving the notification(s) for Order Submitted, Invoice, Billing Status, Shipping Status and RMA.

Fri 8/17/2018 8:24 AM

Cisco Commerce Workspace <donotreply@cisco.com>

Order Submitted Notification for Web Order: 86158158

To: ccw_notif_test_oc(mailer list)

Cc: Nitin Nimase -X (nnimase - ZENSAR TECHNOLOGIES INC at Cisco); Nirav Dave (hadave)

If there are problems with how this message is displayed, click here to view it in a web browser.

Default Group						
Items						
Item Name	Qty	Unit List Price	Discount	Credits	Unit Net Price	Extended Net Price
1.0 CISCO1921-SEC/K9 Cisco1921/K9 with 2GE, SEC License PAK, 512MB DRAM, 256MB FI PHYSICAL	1	1,695.00	966.15 (57.00%)	0.00	728.85	728.85
1.0.1 CON-SNT-1921SEC SNTC-8X5XNBD Cisco1921/K9 with 2GE, SEC License PAK	1	73.00	27.74 (38.00%)	0.00	45.26	45.26
Duration: 12.00 Months Target Contract Number: SYSTEM GENERATED						

7 Using a Reusable Nonstandard Discount

A Cisco Account Manager (AM) might provide a Reusable Nonstandard Discount (RNSD) to a partner. Unlike regular quotes that have to be collaborated, you can use an RNSD directly in Cisco Commerce after the Cisco AM provides you the deal ID and approved discounts.



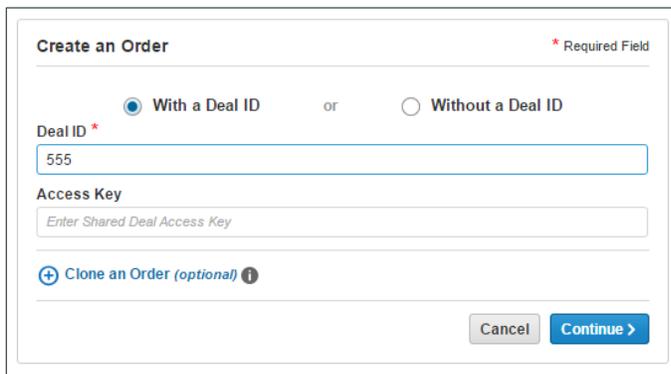
Best Practice: Reference the RNSD deal ID at the beginning of the order process. However, if your order will include Try and Buy, trade-in items, and/or distribution fulfillment, you must start with a quote. See the [Cisco Commerce Deals and Quotes User Guide](#) for information on applying an RNSD to a quote. These must be provided to you by a Cisco AM.

Note that you cannot search for RNSDs using Cisco Commerce Search options.

Only Cisco sales teams can create an RNSD. Once approved, a Cisco AM must communicate the deal ID and discount information to you so the order can be created with the appropriate discounts.

To create an order that references an RNSD, complete the following steps:

- Create an order with a deal ID (see [Converting Quotes to Orders](#)). Enter the RNSD deal ID provided by the Cisco AM in the Deal ID field on the initial Order page and click Continue.



The screenshot shows a web form titled "Create an Order" with a red asterisk indicating a required field. There are two radio buttons: "With a Deal ID" (selected) and "Without a Deal ID". Below the radio buttons is a text input field for "Deal ID" containing the value "555". Underneath is another text input field for "Access Key" with the placeholder text "Enter Shared Deal Access Key". At the bottom left, there is a link "Clone an Order (optional)" with an information icon. At the bottom right, there are "Cancel" and "Continue >" buttons.

Create an Order Page: RNSD Deal ID



Note: You can apply discounts to spare equivalents. See [Adding a Spare](#). 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=.

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.

1. Once the RNSD is applied, follow the standard steps for ordering by entering all necessary information (including any additional SKUs) and submit the order (see [Verifying the Order Initiation Page](#) Details).

Depending on how the Cisco AM sets up the RNSD, you may see one of two things:

- Discounts may auto-apply to approved line items (products or service).
- An editable discount field will display where the discount information should be entered.

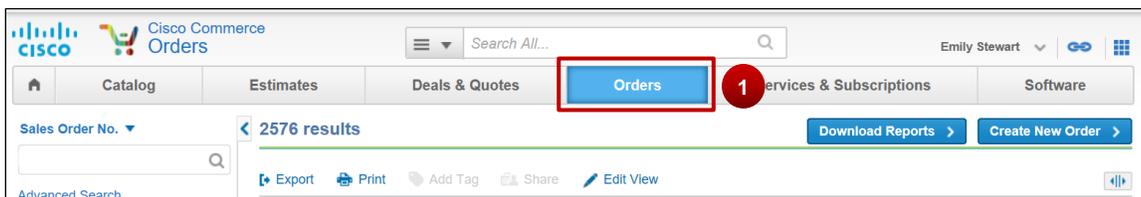
If the discount entered is greater than the amount provided by the AM, an error message displays. If this occurs, you should contact the AM to confirm the agreed-upon discount and try again.

If the product or service is not included on the RNSD, only the standard contractual discount will auto-populate. You should contact the Cisco AM if you believe the items should be receiving a discount not reflected on the order or quote.

8 Creating Service Only Orders

You can create a service-only order within Cisco Commerce by either creating a standalone order, or converting an approved quote to an order. How the quote was created will determine the exact steps needed to complete the service only order. See the [Cisco Commerce Service Only Quick Reference Guide](#) for step-by-step instructions on how to detach, and subsequently order, services.

For quote-converted orders, if you detach services from your order after May 22, 2016, those service lines will contain all necessary product information and will be automatically added to the original quote. You can then order those services separately at a later time without having to search for the original product information (e.g., serial numbers, sales order numbers). See the [Detached Services User Guide](#) for more information.



Cisco Commerce Orders Tab

9 Viewing the Order Status



You can view the status of an order on the Orders tab.

Home Catalog Estimates Deals & Quotes Orders Services & Subscriptions Software						
Sales Order No. <input type="text"/>		4183 results		Download Reports >		Create New Order >
Advanced Search						
Export Print Add Tag Share Edit View						
2						
<input type="checkbox"/>	Order Name	Sales Order No.	Web Order ID	Customer Smart Account Status	Status	Submitted Date
<input type="checkbox"/>	QuoteToOrderSyn...	102273717	68224619 3		ORDER PROCESSING	06 May 2016
<input type="checkbox"/>	QuoteToOrderSyn...	102273443	68191715	ASSIGNED	ORDER PROCESSING	05 May 2016
<input type="checkbox"/>	QuoteToOrderSyn...		68354653		UNSUBMITTED	
<input type="checkbox"/>	Order-67851597	102270502	67851597		BOOKED	28 Apr 2016

Cisco Commerce Orders Tab: View All

- Click the Cisco Commerce Orders tab. You can view all your orders here, including Try and Buy orders, submitted product and service leasing orders, among others.
The order information; such as purchase order number, web order ID, and sales order ID; displays. To edit the information to display and use some of the utilities on Orders tab, refer to [Getting Started with Cisco Commerce User Guide](#) and [Using the Common Utilities](#).
- Review the status of orders.
- Click the appropriate order to view. The Order Details page displays.
- Review the overall order status at the top for the submitted order.
- You can also access other related tools from the Order Details Page. Click Other Related Tools drop-down menu and access links to Customer Service Central Portal, Invoice Tool, Print Shipping Documents, among others.

QuoteToOrderSync - Detach Test Order In Process Change Order | Cancel Entire Order

Submitted → In Process → Booked → In Progress → Closed 4

Order Details Other Related Tools & Links 5

SALES ORDER ID 102273717	PURCHASE ORDER # FOR CISCO QuoteToOrderSync		ACCOUNT MANAGER View Info	DEAL ID 22586899 !	PROGRAM TYPE Standard	WEB ORDER ID 68224619
DPAS/TA	SUBMITTED BY Ma on 06-May-2016	CREATED BY	TRADE-IN QUOTE # ---	PERIODIC BILLING ---	SHIPPING PRIORITY ---	REMARKETING ---

Export Share Delete Print Add Dispute

Items Discounts Shipping & Install Billing and Invoice Order History

Federal Government

US Federal Government Order No

Line Item Status Summary Order Status Definitions

Submitted 0 line item(s)	Order Processing 2 line item(s) Show Me	Booked 0 line item(s)	Scheduled 0 line item(s)	Production 0 line item(s)	Logistic Warehouse 0 line item(s)	Shipped to Customer 0 line item(s)	Subscription fulfillment 0 line item(s)	Invoiced 0 line item(s)	Closed 0 line item(s)
--------------------------------	---	-----------------------------	--------------------------------	---------------------------------	---	--	---	-------------------------------	-----------------------------

Order Details Page

If your order is a Change Subscription order (as opposed to a Base Order), you will be able to identify it when viewing the order status.

Catalog Estimates Deals & Quotes **Orders** Services & Subscriptions Software

Order-67209883 Order Closed (Change Subscription) Change Order | Cancel Entire Order

Submitted → In Process → Booked → In Progress → Closed

Order Details Other Related Tools & Links

SALES ORDER ID 102827923	PURCHASE ORDER # FOR CISCO 67209883		ACCOUNT MANAGER View Info	DEAL ID 22965234 !	PROGRAM TYPE Standard	WEB ORDER ID 67209883
DPAS/TA	SUBMITTED BY Bernard.Bieke on 12-Aug-2016	CREATED BY BERNARD.BIEKE	TRADE-IN QUOTE # ---	PERIODIC BILLING ---	SHIPPING PRIORITY ---	REMARKETING ---

Export Share Delete Print Add Dispute

Items Discounts Shipping & Install Billing and Invoice Order History

Federal Government

US Federal Government Order No

Line Item Status Summary Order Status Definitions

Submitted 0 line item(s)	Order Processing 0 line item(s)	Booked 0 line item(s)	Scheduled 0 line item(s)	Production 0 line item(s)	Logistics Warehouse 0 line item(s)	Shipped to Customer 0 line item(s)	Subscription fulfillment 0 line item(s)	Invoiced 0 line item(s)	Closed 1 line item(s) Show Me
--------------------------------	---------------------------------------	-----------------------------	--------------------------------	---------------------------------	--	--	---	-------------------------------	---

Items Expand All Collapse All All Serial Numbers All PAK Numbers Hide \$0 All Contract Numbers

9.1 Viewing the Order Details

The Order Details Page allows you to review Items, Discounts, Shipping & Install, Billing and Invoice, and Order History tabs.

9.1.1 Viewing the Items Tab

The Order Details page displays the Items tab by default. To review the status of line items, complete the following steps:

1. Review the Line Item Status Summary of the order and all of the information from the order tabs. The Order History tab is one of the most important tabs in the Order Details page.
The Line Item Status Summary displays the count of lines at each given status. It also displays information on the shipment preparation status of each line item.
2. Review the line item status detail by clicking Show Me below each status. Line items that are in Shipment Preparation display.
3. Click Order Status Definitions to view the definitions of the order status.
4. The Order Details page: Items tab also displays the list of bundles, major and minor lines, ship date, serial numbers, price information, and the order status at the major line level.

Order Details Page: Items Tab

5. Click All Serial Numbers and All PAK Numbers to view serial numbers and Product Access Key (PAK) numbers.
6. Click **Export Serial Data** to export the serial numbers to a Microsoft Excel file and save.
7. Else, click Serial Numbers for each line item to view the serial numbers for only that line item. You can also select and copy the serial numbers to paste into a document.



Note: You can view the International Mobile Equipment Identity (IMEI) number and the SIM Serial Number (ICCID) along with the Serial Number. Export the IMEI and/or ICCID numbers as soon as the product ships to reduce downtime for modem or cellular service activation.

9.1.1.1 Viewing Status of Remanufactured Items

The status of remanufactured products or Refresh displays separately from the status of new products since the fulfillment is through a third party. Click Remanufactured Status. The Remanufactured Status dialog box displays.



Order Details Page

Remanufactured Status				
Line Number	Item Name	Quantity	Status	Serial Numbers
1.0	ME-C3750-24TE-M-RF	1	Processing	
2.0	ME-C3750-24TE-M-RF	10	Processing	
3.0	ME-C3750-24TE-M-RF	10	Processing	

Remanufactured Status Dialog Box

The status of the remanufactured equipment order displays as one of the following:

Status	Description
Processing	Order has been submitted in Cisco Commerce but is waiting for inventory to become available at the warehouses
Scheduled	Inventory is available at the appropriate shipment site, but the order has not yet shipped
Shipped	The order has been shipped and is eligible for invoicing in Cisco Commerce. Invoices can be seen on the Billing and Invoice tab in View Status
Error	There was a technical error while processing the order. Cisco’s technical support has been notified

9.1.2 Viewing the Discounts Tab



Click the discounts tab. All of the discounting details from multiple sources are listed on one page. If there are any price differences in a Business-to-Business order, the price is captured as an amount associated with a tag: Other - Unverified Charge or Other - Unverified Discount.

- Other - Unverified Discount displays when the partner submits a net price less than the system calculated net price.
- Other - Unverified Charge displays when the partner submits a net price greater than the system calculated net price.

Items																																				
Discounts																																				
Shipping & Install																																				
Billing and Invoice																																				
Order History																																				
<p>Intended Use Internal Business Use</p> <p>Expand All Collapse All Hide \$0</p> <p>View By: Unit Net Price</p> <table border="1"> <thead> <tr> <th rowspan="2">Hardware, Software and Service</th> <th rowspan="2">Unit List Price</th> <th colspan="3">Total Discounts</th> <th rowspan="2">Unit Net Price</th> <th rowspan="2">Qty</th> <th rowspan="2">Extended Net Price</th> </tr> <tr> <th>%</th> <th>Amount</th> <th>Credits</th> </tr> </thead> <tbody> <tr> <td> 1.0 CISCO290116TSK9-RF C2901 w/ HWIC-16A + 2 CAB-HD8-ASYNC Term Svr Bun REFURBISHED </td> <td>2,411.00</td> <td>0.00</td> <td>0.00</td> <td>0.00</td> <td>1,667.74</td> <td>1</td> <td>1,667.74</td> </tr> <tr> <td colspan="2">Core Category - SI - Internal - USD</td> <td>32.00</td> <td>671.04</td> <td>--</td> <td colspan="3"></td> </tr> </tbody> </table>										Hardware, Software and Service	Unit List Price	Total Discounts			Unit Net Price	Qty	Extended Net Price	%	Amount	Credits	1.0 CISCO290116TSK9-RF C2901 w/ HWIC-16A + 2 CAB-HD8-ASYNC Term Svr Bun REFURBISHED	2,411.00	0.00	0.00	0.00	1,667.74	1	1,667.74	Core Category - SI - Internal - USD		32.00	671.04	--			
Hardware, Software and Service	Unit List Price	Total Discounts			Unit Net Price	Qty	Extended Net Price																													
		%	Amount	Credits																																
1.0 CISCO290116TSK9-RF C2901 w/ HWIC-16A + 2 CAB-HD8-ASYNC Term Svr Bun REFURBISHED	2,411.00	0.00	0.00	0.00	1,667.74	1	1,667.74																													
Core Category - SI - Internal - USD		32.00	671.04	--																																
<p>Active Price List Global US Price List in US Dollars</p> <table border="1"> <tbody> <tr> <td>Total List Price</td> <td>2,411.00</td> </tr> <tr> <td>Discounts</td> <td>743.26</td> </tr> <tr> <td>Credits</td> <td>0.00</td> </tr> <tr> <td>Total Effective Discount</td> <td>743.26</td> </tr> <tr> <td>Order Total</td> <td>1,667.74</td> </tr> <tr> <td>Total Estimated Lead Time</td> <td>14 days</td> </tr> </tbody> </table> <p>All prices shown in USD</p>										Total List Price	2,411.00	Discounts	743.26	Credits	0.00	Total Effective Discount	743.26	Order Total	1,667.74	Total Estimated Lead Time	14 days															
Total List Price	2,411.00																																			
Discounts	743.26																																			
Credits	0.00																																			
Total Effective Discount	743.26																																			
Order Total	1,667.74																																			
Total Estimated Lead Time	14 days																																			

Order Details Page: Discounts Tab

9.1.3 Viewing the Shipping and Install Tab



Click Shipping & Install tab. This tab lists the various shipping options chosen, such as preferred carrier, shipping date, carton details, shipping/packing notes, and Ultimate Consignee details.

- If the shipping cost is zero, N/A displays.
- The shipping priority is not displayed.
- The Shipping and Install tab tracks ordered items that have been shipped by listing the tracking numbers and the shipping details.

Items Discounts **Shipping & Install** Billing and Invoice Order History

Order Shipping Options

These shipping options apply to the whole order.

Ship All Items Separately No Expected Ship Date --

Note: Invoices will be generated for each item shipped separately.

Carton Notes test Shipping/Package Notes test

Note: These will appear on the carton labels. Note: This will appear on packaging slips, bills of lading, and invoices. This information will not be viewed by Cisco Shipping Center Personnel.

Requested Date Type ARRIVAL

Ultimate Consignee

Ultimate Consignee Address 1

AL

Address

BENTON ROGERS AR
727588191
US

Ultimate Consignee Type 1

Reseller

Ship Sets Expand All | Collapse All | All Tracking Numbers **Remanufactured Shipping Details** Commercial Invoice

Order Details Page: Shipping & Install Tab

To view the shipping details of remanufactured items, click [Remanufactured Shipping Details](#).

Remanufactured Shipping Details

Line Number	Item Name	Ordered Quantity	Shipped Quantity	Status	Estimated Ship Date	Shipped Date	Routing Options	Carrier	Carrier Account Number	Tracking Number	Dist. Center Location
1.0	CISCO290116TSK9-RF	1		Processing	01-Apr-2016		Cisco				GDGI

Remanufactured Shipping Details Dialog Box

9.1.4 Viewing the Billing and Invoice Tab

The billing and invoice tab displays the billing, taxability information, and invoice for the order, depending on its status.

Click the Invoices tab to view, export, and print an invoice, if available.

Items Discounts Shipping & Install **Billing and Invoice** Order History

Billing Information Invoices

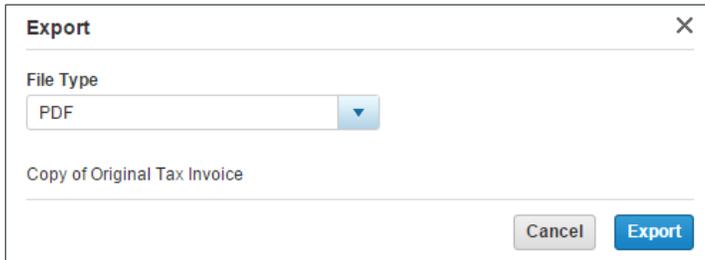
Invoices in this order Choose Any Terms & Conditions

Invoice 22352769 **Export | Print | Email** 1

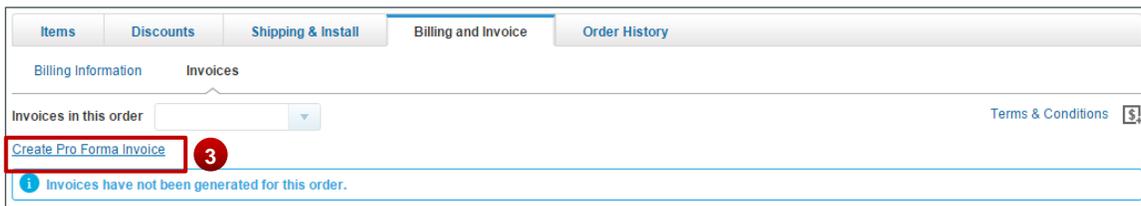
Billing Address Ship to Address

Order Details Page: Billing and Invoice Tab – Invoices

1. Use the common utilities to export, print or, email an Invoice.
2. In the resulting dialog box, select the appropriate option and click **Export, Print, or Email** as appropriate.



Export PDF Dialog Box



Order Details Page: Billing and Invoice Tab – Invoices

For cases where the invoice is not generated, the system displays Create Pro Forma Invoice.

3. Click Create Pro Forma Invoice. The Pro Forma Invoice page displays.
4. Make a selection from the drop-down menu, enter the purchase order number or sales order number, and then click **Create Invoice**.



Pro Forma Invoice Dialog Box

The PDF displays, but does not include tax or freight. The pro forma invoice is an estimate before the actual invoice is generated and cannot be used for payment, legal, or customs purposes.

Refer to [Managing Invoices](#) for more information on managing invoices.

				Number	Purchase Order Number	Date	Page
PO BOX 91232 CHICAGO, IL 60693-1232 United States		1949	P0110	22 Feb 2014	1/2		
		Reference Number	Sales Order Number	Customer Number	Location Number		
			5389	407514	4184		

BILL TO		SHIP TO	
COPY INVOICE			

Terms	Due Date		
45 NET	08 Apr 2014		
Customer Contact	Ship Date	Carrier/ Service Level	Shipping Reference
	21 Feb 2014		0

PO Line #	Item #	Invoice Description	Quantity		TAX	Unit Price	Extended Amount
			Ordered	Shipped			
	5.1	C3945-CME-GRST/K3 3945 Voice Bundle w/PVDM3-64, FL-CME-GRST-25 UC Lic, FL-CUBE25 CLE No.: IFRAN3 100RA Shipment #: 1069035540 Serial #: FTX1808AKUY.	1	1	Y	5,622.10	5,622.10
	5.1.11	FL-CME-GRST-25 Communication Manager Express or GRST - 25 seat license	2	2	Y	247.00	494.00
	5.1.12	FL-CME-GRST-100 Cisco Communication Manager or GRST-100 seat license	9	9	Y	874.00	7,866.00
	5.1.14	MLM-1000-100 MLR 100 In 400 DRAM Upgrade	1	1	Y	180.00	180.00

Sample Invoice

9.1.5 Viewing the Order History Tab



Click the Order History tab. The Order History tab records all the change requests and the details of the changes made to the order, including the requester’s name and date of change request.

Use the export and print functionalities on the Order History tab to retrieve any version of an attached purchase order. Click [View Details](#) to see a comparison of what’s changed from the previous version of the order.

Items	Discounts	Shipping & Install	Billing and Invoice	Order History
-------	-----------	--------------------	---------------------	---------------

Date Requested	Version	Action	Attached Files	Change Summary
29-Feb-2016 Export Print Copy	2	View Details		Change Submitted by Cisco Customer Support
29-Feb-2016 Export Print Copy	1	View Details		Order Submitted by Cisco Customer Support

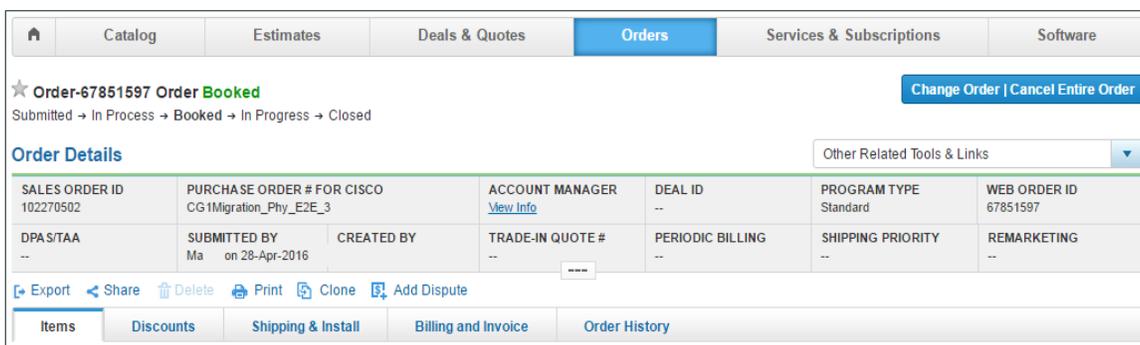
Order Details Page: Order History Tab

10 Updating or Cancelling a Submitted Order

You can use the self-serve Change Order functionality to make changes and cancellations on both quote-converted and standalone orders using Cisco Commerce. The Change Order functionality mirrors the look and feel of the initial order creation in Cisco Commerce.



Submitted orders are available for users to view on the CCW Order Details page. For orders that are eligible for cancellation requests (see [Cancelling the Order](#)) or change requests (see [Initiating Change Order](#)), **Change Order | Cancel Entire Order** displays on the Order Details page.



Order Details		Other Related Tools & Links	
SALES ORDER ID 102270502	PURCHASE ORDER # FOR CISCO CG1Migration_Phy_E2E_3	ACCOUNT MANAGER View Info	DEAL ID --
PROGRAM TYPE Standard	WEB ORDER ID 67851597	PERIODIC BILLING --	REMARKETING --
DPAS/TAA --	SUBMITTED BY Ma on 28-Apr-2016	CREATED BY	TRADE-IN QUOTE # --
Export Share Delete Print Clone Add Dispute			

Order Details Page

Change Order functionality is not available in the following scenarios:

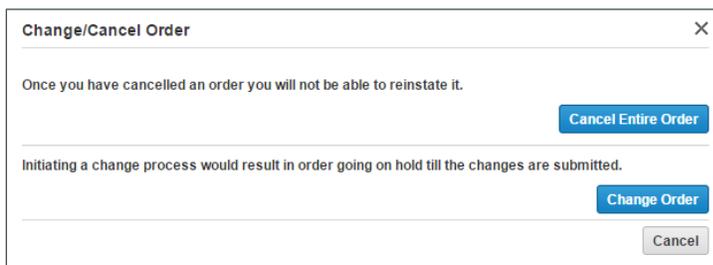
- An order cancellation request is in progress and the change request is not yet submitted.
- A previous change order request is still open and in Unsubmitted status.
- There is already a submitted change order that has placed the order on hold.
- Another user is making a change.
- Price impacting changes are not allowed for trade-in orders, or orders with the following payment types: DOC, PREPAYMENT, CASH AGAINST DOCUMENTS, or COD.
- All lines / ship set status have reached the point of no return (PONR). There is a single PONR for each line.
 - Product lines are eligible for change until the line reaches Production in Progress status. When manufacturing has started, no more changes are allowed to any attributes related to the line.
 - Service lines with entitlement status of Awaiting Fulfillment will be eligible for changes. When a service contract gets created, you will no longer be allowed to make any changes to the line.
 - Lines with the delivery option for electronic delivery and with status eDispatch Eligible can be changed. Beyond this point, you cannot modify or cancel any part of the line.

10.1 Cancelling the Order

If none of the lines on an order have passed the PONR, the entire order can be cancelled. Once an order is cancelled, it cannot be reinstated. AMs will receive a notification for all cancellation requests (either lines on an order or an entire order).

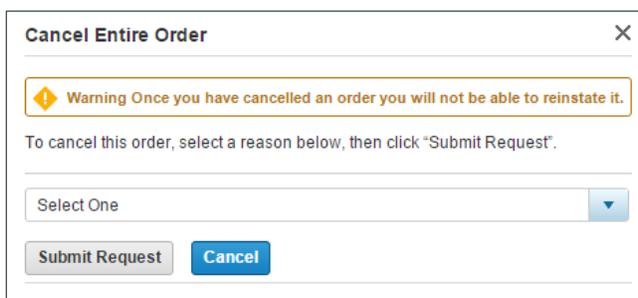
To cancel an entire order, complete the following steps:

1. Open a submitted order. To perform a search using the Cisco Commerce Search functionality, refer to the [Getting Started with Cisco Commerce User Guide](#).
2. From the Order Details page, click **Change Order | Cancel Entire Order**. The Change/Cancel Order confirmation dialog box displays.



Change/Cancel Order Dialog Box

3. From the Change/Cancel Order dialog box, click **Cancel Entire Order**. The Cancel Entire Order dialog box displays. A reason for cancellation is required.
4. Click the drop-down arrow and click one of the reasons:
 - Duplicate PO
 - Customer Cancelled Order
 - Other
5. Click **Submit Request**.



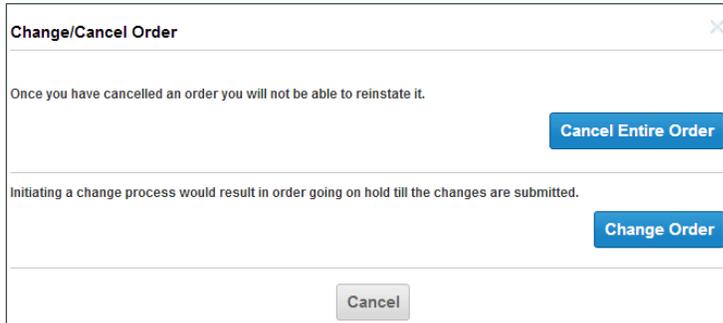
Cancel Entire Order Dialog Box

10.2 Initiating Change Order

To initiate a change order request, complete the following steps:

1. Open a submitted order. To perform a search using the Cisco Commerce Search functionality, refer to the [Getting Started with Cisco Commerce User Guide](#).

- From the Order Details page, click **Change Order | Cancel Entire Order**. The Change/Cancel Order confirmation dialog box displays.

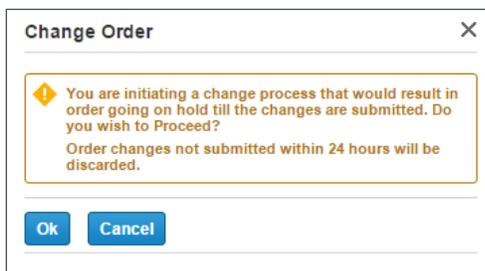


Change/Cancel Order Dialog Box

- From the Change/Cancel Order dialog box, click **Change Order**. The Change Order dialog box displays with a message informing that the order will be placed on hold. A change order hold will remain on the order until the change request is cancelled or change has been submitted and applied to the order.
- Click **OK** to proceed to Cisco Commerce Change Order.



Note: If you do not submit changes on the order within 24 hours, then the change order request will be discarded.



Change Order Dialog Box

You can make the following changes through Cisco Commerce Change Order:

- Change Attributes on the Items Tab (see [Changing Attributes on the Items Tab](#))
- Review Discounts (see [Viewing the Discounts Tab in Change Order](#))
- Change Shipping Attributes (see [Changing Shipping Attributes](#))
- Change Attributes on the Billing Tab (see [Changing Attributes on the Billing Tab](#))
- Change Credit Card Orders (see [Changing Credit Card Orders \(US and Canada\)](#))

10.2.1 Changing Attributes on the Items Tab

From the Order Details page: Items tab, several attributes can be changed.

Note: For government orders, the Government Order flag and TAA compliance selection cannot be modified.



For existing items that are on the order as a bundle, you cannot cancel the major lines within a bundle. You can cancel the entire bundle if it has not passed the PONR. You cannot make changes to any attribute for lines that have passed the PONR

10.2.1.1 Updating the Purchase Order Number

You can update the purchase order number by clicking the edit icon. The field becomes editable. Enter the new purchase order number and click Update.

The screenshot shows the 'Order Details' page for 'testordermwl'. The 'PURCHASE ORDER #' field is highlighted and contains the value '1234'. Below the field is an 'Update/Cancel' link. Other fields include 'WEB ORDER ID' (67687074), 'STATUS' (CHANGE IN-PROGRESS), 'SMART ACCOUNT' (Assign Smart Account), 'CREATED BY m on 01-Mar-2016', 'LAST UPDATED BY m on 02-Mar-2016', 'DEAL ID' (Not Applicable), 'DEAL NAME' (Not Applicable), and 'QUOTE STATUS' (Not Applicable). Navigation tabs at the bottom include 'Items', 'Discounts', 'Shipping and Install', 'Billing', and 'Review and Submit'.

Order Details Page: Purchase Order Number

10.2.1.2 Modifying the Existing Lines

To modify existing lines, complete the following steps:

1. Click Modify Configuration. The configuration expands with additional functionalities. Once the configuration expands, you can opt to make changes to many attributes.

<input type="checkbox"/>	Hardware, Software and Services	P.O. Line Reference	Lead Time	Unit List Price (USD)	Qty	Ext. List Price (USD)
<input type="checkbox"/>	1.0 CISCO2911/K9 CP Cisco 2911 w/3 GE,4 EHWIC,2 DSP,1 SM,256MB CF,512MB DRAM,IPB ECCN 5A002.A.1 Valid as of 03-Mar-2016 08:42 EST Modify Configuration		21 days	3,148.00	1	3,148.00

Order Details Page: Items Tab – Modify Configuration

2. Select Options and/or Services: see [Choosing Options and Resolving Issues](#).
3. Add or change P.O. Line Reference by line, if applicable: see [Populating the Purchase Order Line Reference](#).
4. Adjust the Quantity: see [Setting Quantities for Products](#).

Order Details Page: Items Tab of a Quote-Converted Order

10.2.1.3 Cancelling a Line

You can cancel the lines from the order that have not yet passed the PONR. Lines past the PONR will be grayed out and will not have checkboxes. A cancellation reason will be required for all cancellation requests.

To cancel a line on an order that is in the process of being changed:

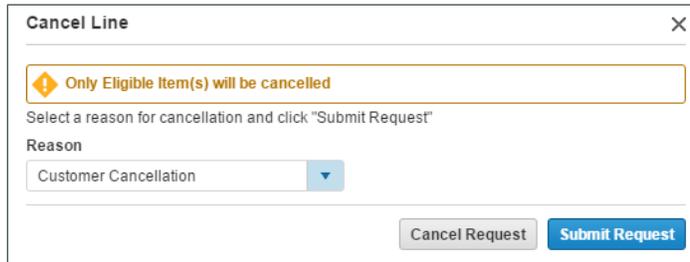
1. From the Order Details page: Items tab, click Modify Configuration.
2. Check the appropriate checkbox(es) for lines that need to be removed from the order.



Note: You can also check the checkbox next to a newly added line and click **Remove from Order** to delete the line item.

Order Details Page: Items Tab – Cancel a Line

3. Click **Cancel Lines**. The Cancel Line dialog box displays.
4. Click the Reason drop-down arrow and click one of the cancellation reasons.
5. Click **Submit Request**.



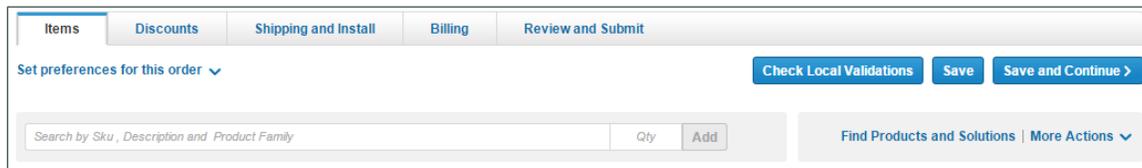
The dialog box is titled "Cancel Line" and contains a warning message: "Only Eligible Item(s) will be cancelled". Below the message, it instructs the user to "Select a reason for cancellation and click 'Submit Request'". There is a "Reason" dropdown menu currently set to "Customer Cancellation". At the bottom, there are two buttons: "Cancel Request" and "Submit Request".

Cancel Line Dialog Box

10.2.1.4 Adding a New Line

You can add new lines to an order being changed in three ways, just as with any other order (See [Adding Items to the Order](#)):

1. Use the Find Products and Solutions functionality to search for and add products by SKU, description, or product family: see [Finding Items Using a Search](#)
2. Import a saved configuration: see [Importing an Estimate](#)
3. Enter an full or partial SKU: see [Adding Items by SKU](#)



The screenshot shows the "Items" tab in the Order Details page. It features a search bar with the placeholder text "Search by Sku, Description and Product Family" and buttons for "Qty" and "Add". To the right, there are buttons for "Check Local Validations", "Save", and "Save and Continue >". A "Find Products and Solutions | More Actions >" link is also visible.

Order Details Page: Items Tab - Adding Items

10.2.1.5 Modifying Other Service Line Information

You can modify the Service Contract Number ([Identifying Target Contract Numbers](#)) for the services in the items tab, change the service start date for service-only lines when eligible, and change the FSSD value when eligible (see [Identifying Flexible Service Start Delay \(FSSD\) Value](#)).

10.2.2 Viewing the Discounts Tab in Change Order

From the Discounts tab, review the discounts for the order.

- Discounts are populated based on the linked deal ID or per standard contractual discounts.
- Discounts cannot usually be modified.
- For new or existing lines that are linked to an RNSD, depending on how the Cisco AM has set up the deal, discounts may be applied to the order, or there could be a discount box where you can enter the discount communicated by the Cisco AM.



Note: If you have converted the order from a quote, new lines added from the quote will receive approved quote pricing. New lines added to an order that are not on the original quote will be priced with standard contractual discounts.

If the changes requested on the order result in nonstandard discounts that are beyond what is approved on the quote, the order will remain on hold while the quote undergoes re-approval.

Items Discounts Shipping and Install Billing Review and Submit							
Continue >							
✔ Your order has been priced successfully							
Intended Use: <input type="text" value="Internal Business Use"/>		View By: <input type="text" value="Unit Net Price"/>		Filter By: <input type="text" value="Show All Items"/>			
Hardware, Software and Services	Unit List Price (USD)	Total Discounts		Credits (USD)	Unit Net Price (USD)	Qty	Extended Net Price (USD)
		%	Amount (USD)				
1.0 CISCO2911K9 Cisco 2911 w/3 GE,4 EHWIC,2 DSP,1 SM,256MB CF,512MB DRAM,IPB	3,148.00	30.70	966.59	0.00	2,181.41	1	2,181.41
Core Category - SI - Internal - USD		32.00	862.40				

Order Details Page: Discounts Tab

10.2.3 Changing Shipping Attributes

You can modify all header level shipping fields from the Shipping and Install tab. The following changes are allowed in the Order Shipping Options section (see [Setting Order Shipping Options](#)):

- Add, remove, or edit billing emails
- Add, remove, or edit shipping notes
- Add, remove, or edit carton notes



Note: The attributes on the Shipping and Install tab can be changed until the order header level status reaches “Logistics Warehouse”.

10.2.3.1 Editing a Shipping Group in Change Order

You can move the existing lines to new shipping groups or the default shipping group, but not to other existing shipping groups.

For each shipping group, you can modify the following fields (see [Managing Shipping Groups](#)):

- Address and contact information
- Requested ship date
- Routing option
- Shipping service option
- Carrier (editable field not shown, only available for Self Routed option)
- Carrier account number (editable field not shown, only available for Self Routed option)
- Delivery options (specific fields will vary based on routing option selected). See [Populating Shipping Information](#).



Note: You cannot make changes to shipping groups that have passed the PONR.

Shipping Groups
Note: Shipping details are mandatory only if group contains shippable products.

ⓘ [Create New Shipping Group](#)

+ Default Group ✔ This is a default group.
+ Shipset-1
+ Shipset-2

Order Details Page: Shipping and Install Tab – Shipping Groups

10.2.3.2 Placing New Lines in Shipping Groups

New lines added to the order are automatically placed in the default shipping group. You can move them to a newly created shipping group, but not into existing shipping groups (see [Moving Items Between Shipping Groups](#)).



Note: You cannot move a line whose status displays as “Production in Progress”.

10.2.4 Changing Attributes on the Billing Tab

Changing information on the Billing tab may impact tax, service pricing, and service configuration on the order. The following changes are allowed on the Billing tab in change order:

- Change the taxability. System validations performed for this change will mirror those done in the place order process. See [Verifying Tax Information](#).
- Attach or remove purchase orders.

Items
Discounts
Shipping and Install
Billing
Review and Submit

Check Local Validations
Save
Save and Continue >

⚠ Warning: Changing information on this page may impact tax, Service Pricing and Service Configuration.

ⓘ You designated this order for internal use. Taxes may be applied to the invoice.

ⓘ Please note: Tax status is only an estimate

Tax Information *

Billing and Contacts Information *

Payment Information *

Taxability * ⓘ

Internal Use ▼

Your Tax Status

NON-EXEMPT

Order Details Page: Billing Tab – Tax Information Section



Note: You cannot modify billing address, payment terms, and payment types.

10.2.4.1 Changing Credit Card Orders (US and Canada)

If you had marked the original order with payment option as credit card, then you can change the selected credit card. The currently selected card will be highlighted with an orange checkmark.

If the preferred credit card is not available, add the credit card information in your My Profile and Preferences. See [Populating the Payment Information Section](#).

10.2.5 Reviewing and Submitting the Change Request

The Review and Submit tab displays a link to a summary of the changes made to the order. System validations will update the status of each section of the order. See [Reviewing and Submitting the Order](#). Follow the guiding messages to address any errors in each tab. Click **Submit Order** to submit the change request.

The change order hold will be removed from the order once the change request is processed and approved.



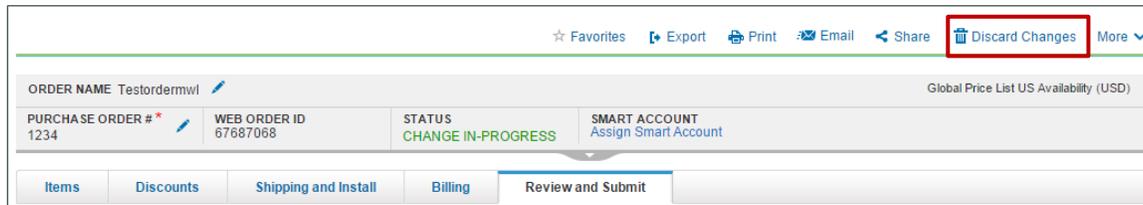
Order Details Page: Review and Submit Tab



Order Details Page: Review and Submit tab - Change Order Summary

10.2.6 Discarding Changes

To discard changes at any given time, click **Discard Changes**. The Discard Changes dialog box displays. Select **Submit Request** to revert the Order to its previous version.



Common Utilities bar: Discard Changes

11 Managing Invoices

If the system has generated an invoice, then you can use exported invoices for payment / legal / customs purposes. If there is not a system-generated invoice, you can create a pro forma invoice which cannot be used for legal purposes but can serve as an estimate prior to the availability of the actual invoice.

Invoices will be printed in English for Japan and Quebec.

Note:

- The same tax data elements display directly on the Invoice Details page and the PDF invoice copy.
 - Canada theater only displays the Cisco Systems Canada Corp. Canadian GST registration number will be displayed on all Canadian transactions (credit memo / debit memo / invoices).
 - 
 • EMEA theater only displays the following tax attributes: Customer VAT Number, VAT Amount, Tax Code, Tax Rate, Exchange Rate used to convert VAT Amount to local currency, Tax Message, Service Reference Message, Doc Sequence Number.
 - All theaters display the freight amount as “Freight,” not as “Shipping and Handling”.
 - All theaters display trade-in amounts at line level.
 - For all theaters, the original tax data elements will be maintained to ensure that those elements do not change after the invoice has been generated.
-

11.1 Viewing Invoices

You can access invoices in two ways:

- From an open order:

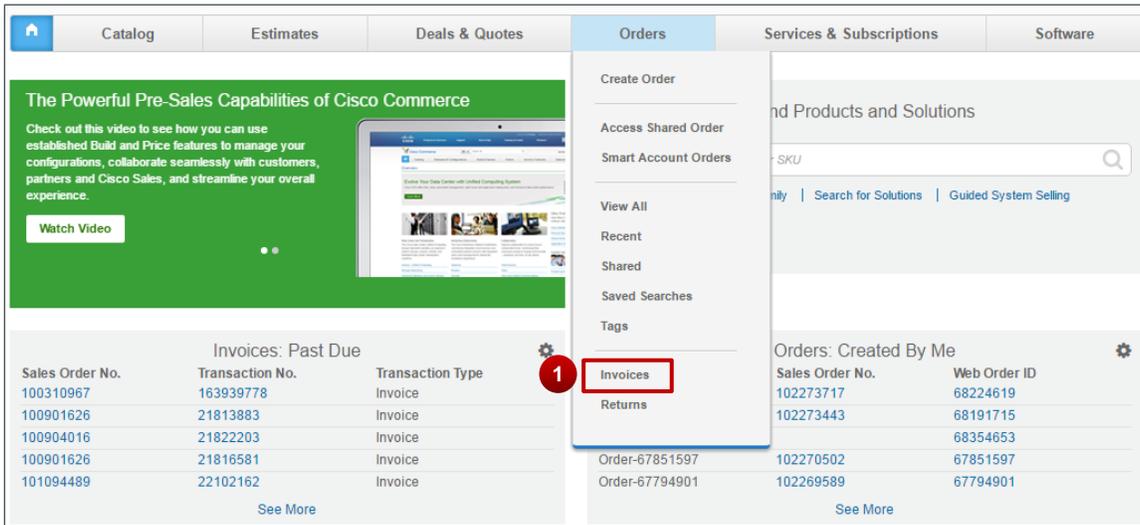
1. Open a submitted order.
2. Click the Billing and Invoice tab.

You can access the Invoice information from this page, if it is generated. Else, create a Pro Forma Invoice as needed. See [Viewing the Billing and Invoice Tab](#).

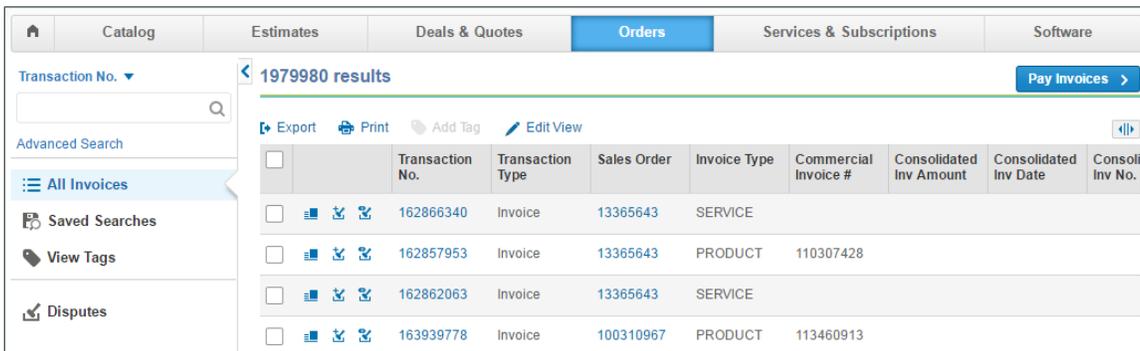
- From Cisco Commerce Orders tab:

1. From Cisco Commerce Orders tab drop-down menu options, click **Invoices**.

You can access all invoices on the Invoices page. Search, export, print, or tag invoices using the common utilities available here (see [Getting Started with Cisco Commerce User Guide](#)).



Cisco Commerce Orders Tab: Invoices

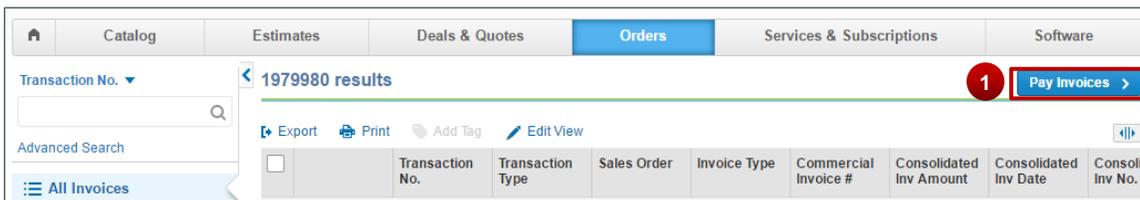


Cisco Commerce Invoices Page

11.2 Searching for Invoices

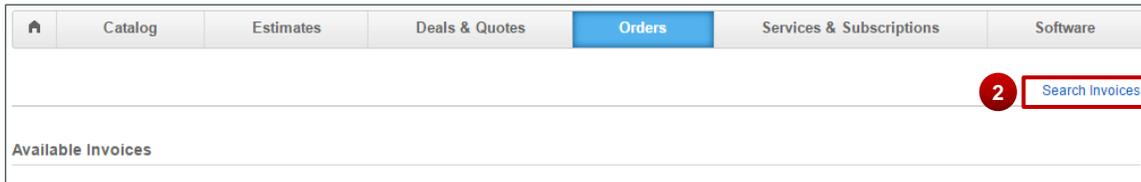
To search for specific invoices using the Cisco Commerce search options (see [Getting Started with Cisco Commerce User Guide](#)). Additionally, if the Invoices page does not display invoices to pay, complete the following steps:

1. From the Invoice records page, click **Pay Invoices**.



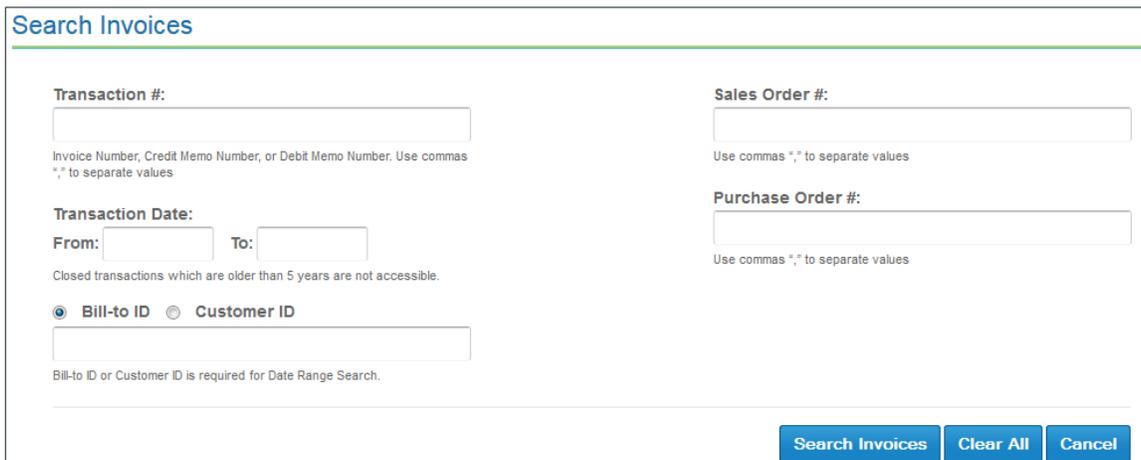
Cisco Commerce Invoice Records page

2. From the Available Invoices page, click Search Invoices.



Available Invoices Page

3. Type the available criteria, such as Sales Order number or transaction date, to search for a specific invoice.
4. Click **Search Invoices**. The results display.



Search Invoices Page

11.3 Paying Invoices

To pay open invoices with a credit card, complete the following steps:

1. Ensure the credit card is enabled as a valid payment method in Cisco Commerce My Profile and Preferences (see [Getting Started with Cisco Commerce User Guide](#)).
2. From the Invoices page, click **Pay Invoices**. The list of available invoices displays.
3. To pay part of an invoice, click the fields in the Amount to Pay column. Enter the partial amount for that line item. Portions of multiple invoices can be paid at one time.
4. Alternatively, to pay the full amount of an invoice, check the Pay in Full checkbox that corresponds to the desired invoice line. Multiple invoices can be paid at one time.
5. Alternatively, in order to pay all of the outstanding invoices, check the Pay in Full checkbox at the top of the column.

Available Invoices										
Transaction #	Transaction Type	Sales Order #	Purchase Order #	Transaction Date	Due Date	Currency	Original Amount	Balance	Amount To Pay	<input type="checkbox"/> Pay in Full
22358222	INVOICE	101158648	111768	21 Nov 2015	21 Dec 2015	USD	\$10,939.09	\$10,939.09	Payment is in progress.	
22331064	INVOICE	900019797	WQ005785	15 Nov 2015	15 Dec 2015	USD	\$89.32	\$89.32	89.32	<input checked="" type="checkbox"/>
22330820	INVOICE	900019797	WQ005785	15 Nov 2015	15 Dec 2015	USD	\$3,972.45	\$3,972.45	Payment is in progress.	
22316520	INVOICE	100498357	106622	11 Nov 2015	11 Dec 2015	USD	\$1,200.00	\$1,200.00	Payment is in progress.	
22311080	INVOICE	100928353	109949	10 Nov 2015	10 Dec 2015	USD	\$10,341.45	\$10,341.45	Payment is in progress.	
22296044	INVOICE	900019876	110142	06 Nov 2015	06 Dec 2015	USD	\$9,178.35	\$8,138.35	5000.00	<input type="checkbox"/>
22298594	INVOICE	900019876	110142	06 Nov 2015	06 Dec 2015	USD	\$2,152.92	\$2,152.92		<input type="checkbox"/>
22271642	INVOICE	101226201	112264	01 Nov 2015	01 Dec 2015	USD	\$990.00	\$990.00		<input type="checkbox"/>
Total Amount									5089.32	
6 Continue to Pay										

Available Invoices Page: With Selections

Note: It is important to note that there are three different options for paying invoices.



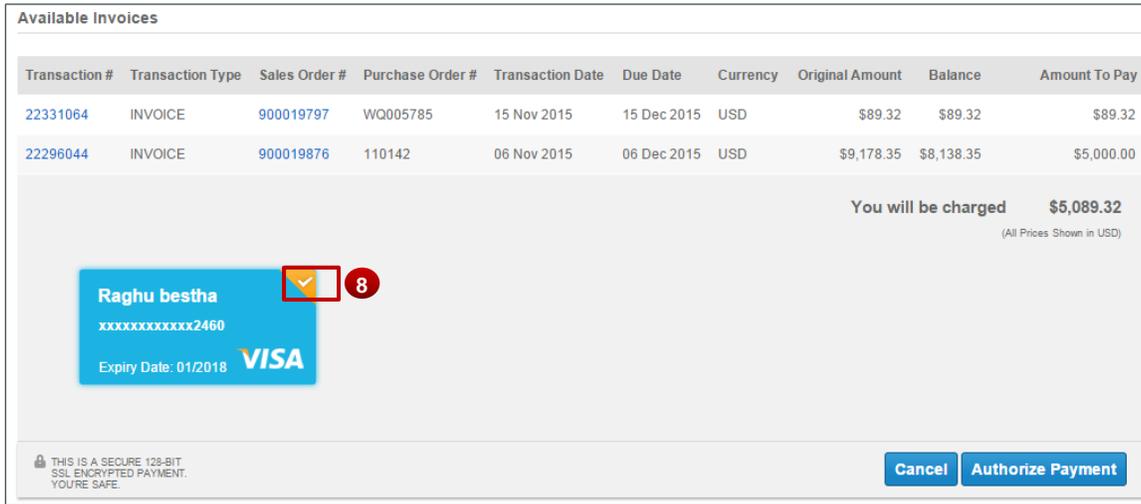
- Checking the Pay in Full checkbox at the top of the column will result in payment of all the outstanding invoices.
- Checking the Pay in Full checkbox on the appropriate line(s) will result in payment of that/those specific invoice(s).
- Entering a portion of the remaining balance of an invoice in the Amount to Pay field on the desired line(s) will result in payment of that dollar figure against that/those specific invoice(s).

6. Click **Continue to Pay** to proceed with authorization. The page refreshes. The default credit card displays in color. Alternate credit cards display in grey.
7. Verify the invoice(s) and the amount(s) to be paid.
8. To select a credit card other than the default, click the desired card. The selected card becomes the default card. For more information on credit cards, see [Populating the Payment Information Section](#).



Note: You can add a new card only under My Profile and Preferences (see [Getting Started with Cisco Commerce User Guide](#)).

9. Click **Authorize Payment**. The Confirm Payment dialog box displays.



Available Invoices

Transaction #	Transaction Type	Sales Order #	Purchase Order #	Transaction Date	Due Date	Currency	Original Amount	Balance	Amount To Pay
22331064	INVOICE	900019797	WQ005785	15 Nov 2015	15 Dec 2015	USD	\$89.32	\$89.32	\$89.32
22296044	INVOICE	900019876	110142	06 Nov 2015	06 Dec 2015	USD	\$9,178.35	\$8,138.35	\$5,000.00

You will be charged \$5,089.32
(All Prices Shown in USD)

Raghu bestha  8

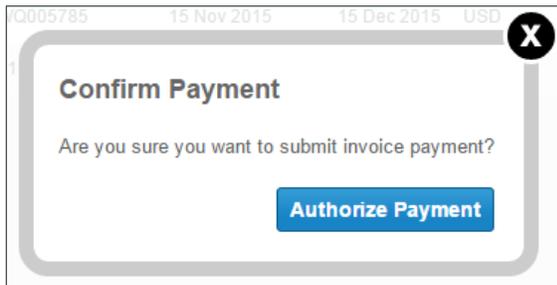
xxxxxxxxxxxx2460

Expiry Date: 01/2018 

THIS IS A SECURE 128-BIT SSL ENCRYPTED PAYMENT. YOU'RE SAFE.

Available Invoices Page: Refreshed

10. Click **Authorize Payment** in the Confirm Payment dialog box. Once the payment has gone through, a confirmation message displays at the top and "Payment is in progress" displays on each appropriate line.



Q005785 15 Nov 2015 15 Dec 2015 USD 

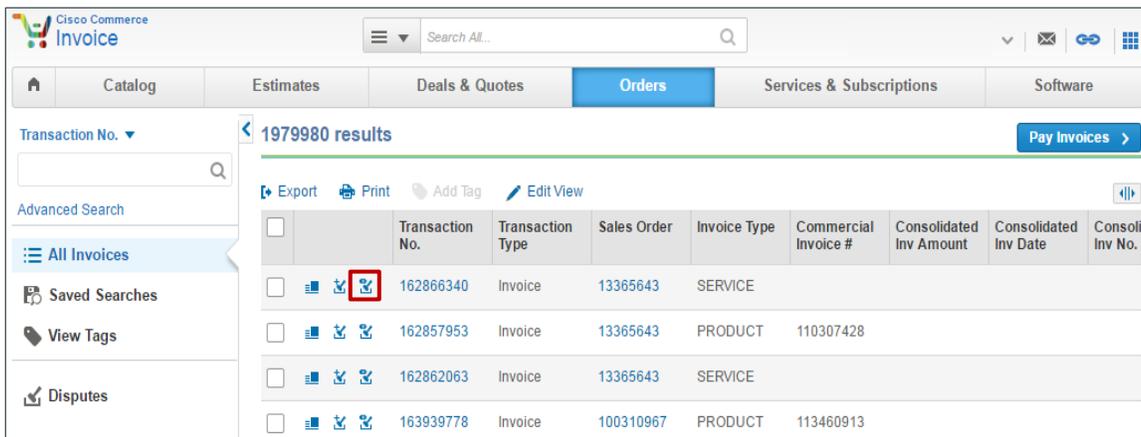
Confirm Payment

Are you sure you want to submit invoice payment?

Confirm Payment Dialog Box

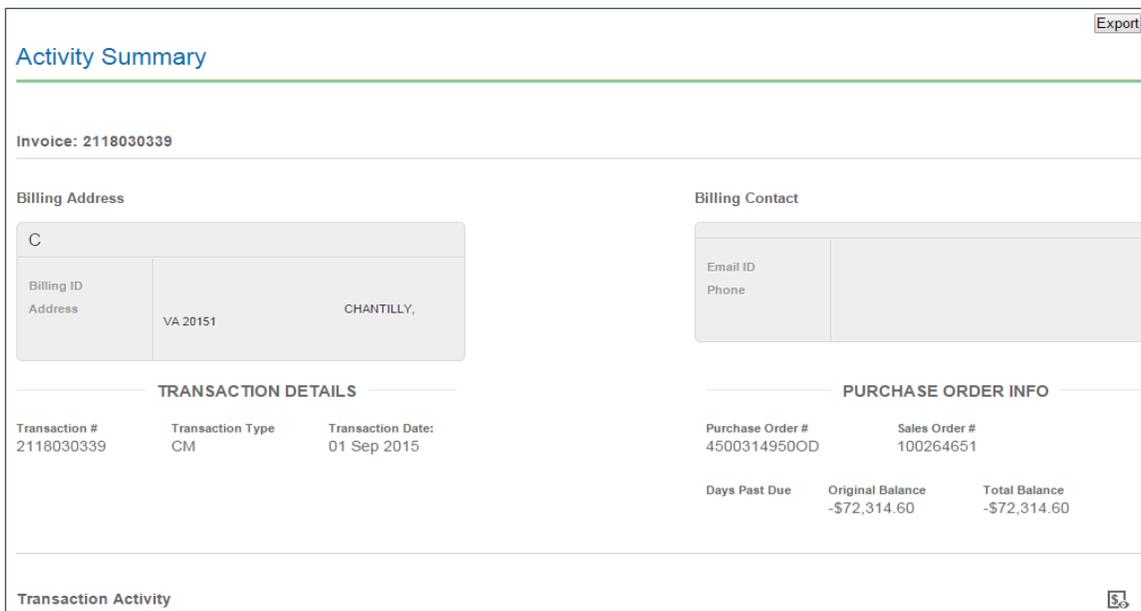
11.3.1 View Activity

To view activity from the Invoices page, click the View Activity icon ().



Invoices Page: View Activity Icon

The Activity Summary page displays. Any activity on the account displays under the Transaction Activity section.



Activity Summary Page

11.3.2 Searching for Disputes

You can access disputes from several locations within Cisco Commerce:

1. On the Order Details page: Items tab, Add Dispute is an option in the common utilities. Selecting this icon will take you to the disputes page where all invoices associated with the Sales Order will be displayed. You will be able to add invoices or remove any invoices that are not in dispute. You will be able to create a dispute at the order, invoice, or invoice line level.

- From the Invoices: Activity Summary page, click the Search Dispute icon to raise a dispute at the invoice or invoice line level. You will be taken to the dispute page where you can enter the dispute amount and reason. Depending on the selected dispute reason, additional fields will be displayed that will need to be completed.

Activity Summary

Invoice: 18093684

Billing Address

REGRESSION TEST DO NOT SHIP

Billing ID	1121070
Address	170 W TASMAN DRIVE SAN JOSE, CA 95134

Billing Contact

Email ID	
Phone	

TRANSACTION DETAILS

Transaction #	Transaction Type	Transaction Date:
18093684	INV	08-Sep-2013

PURCHASE ORDER INFO

Purchase Order #	Sales Order #	Days Past Due
US2456	52871616	-20
Original Balance	Total Balance	
\$252.00	\$252.00	

Transaction Activity

Activity Date	Transaction Type	Activity Amount	Identifier	Reason
3				

Activity Summary Page: Search Disputes Icon

- From the Invoices Page within the Cisco Commerce Orders tab, click Disputes to view all disputes.

Invoices Page

- Search for a dispute using Purchase Order #, Sales Order #, Transaction #, Dispute #, or Dispute Status (see [Getting Started with Cisco Commerce User Guide](#)). Dispute details will be displayed for the specific dispute. The comments section of the dispute details will be read only.

Dispute No.	Transaction No.	Sales Order No.	Dispute Reason	Purchase Order No.	Amount	Requested Date	Status
364552	10553914	46399404		018010	\$-2193.75	02 Aug 2007	COMPLETE
364553	10553907	46399407		018010	\$-1449	02 Aug 2007	COMPLETE

Dispute records page: Search for a dispute

Internal users with appropriate access level will be able to view all dispute data and account summary data for any BID.

To search for a dispute, complete the following steps:

5. Click the Search by drop-down arrow.
6. Select the appropriate search criteria (Purchase Order #, Sales Order #, Transaction #, or Dispute #) or enter search information.
7. Click the Sales Order number to view the Order details.
8. Click the Transaction number to display the Invoice details.
9. Click the Dispute number to display the Invoice Disputes page.

Invoice Disputes

Dispute #:1451807

DISPUTE INFO			CUSTOMER INFO		
Sales Adjustment Form #:	Date	Dispute Amount	Customer ID	Phone Number	Email
944867	16 Jan 2013	-\$156.00	36823	408-434-	
Status	Credit Memo #	Debit memo #	Submitted By	Collector	
COMPLETE	205513541		SOK	✉ US- .com	
Bill-to ID				☎ 408-434-	
134					

Comments

-Closed by CP or WF: Req.ID:-1

Dispute Reason: Write Off Related Order #

Invoice Disputes Page

10. On the Invoice Disputes page, the Comments box is read only; it displays the comments entered when the dispute was created.
11. Click **Back** to return to the Search Results page.

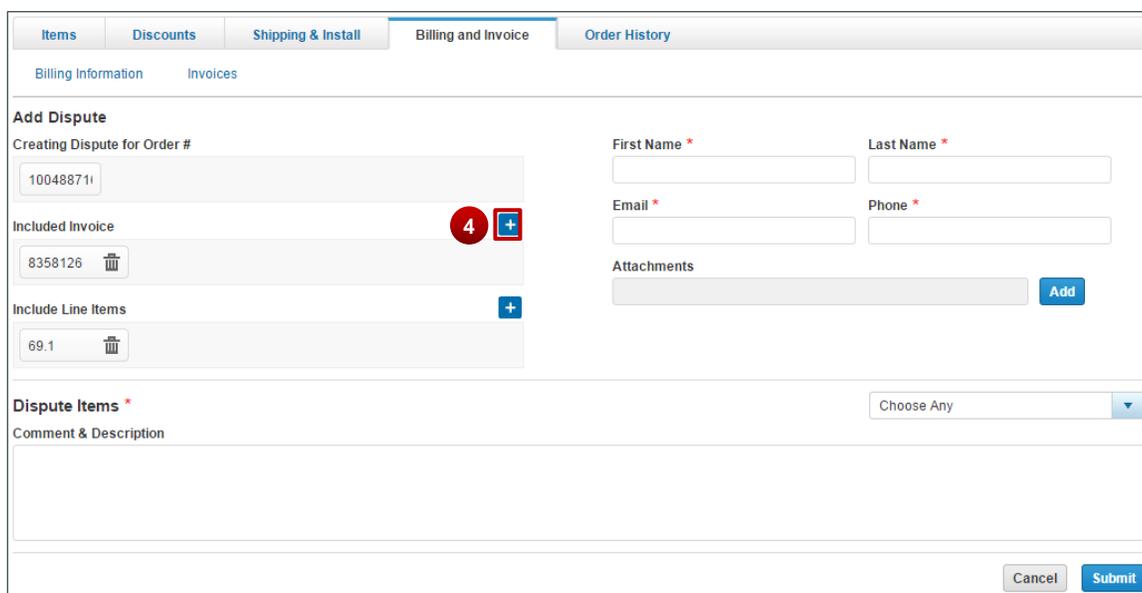
11.3.3 Creating a Dispute Request

To create a dispute, complete the following steps:

1. From the Cisco Commerce Invoices page, click the Create Dispute icon for a particular order.
2. Alternately, from the Billing and Invoice tab: Invoice Sub-tab click the Add Dispute icon to raise a dispute at the invoice or invoice line level. The Dispute page displays.

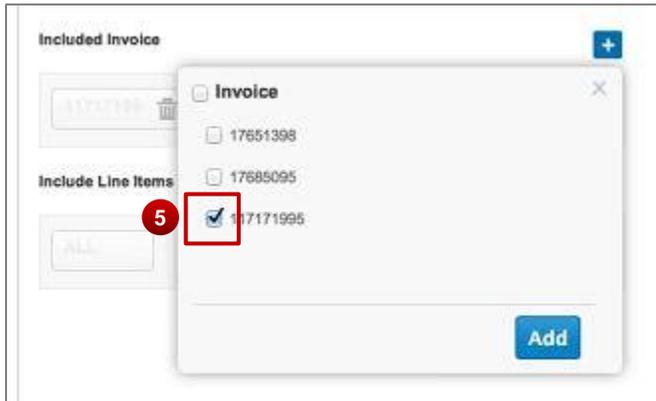
Depending on the selected dispute reason, additional fields are displayed that will need to be completed.

3. Complete the required fields, indicated with a red asterisk (*).
4. To add additional invoices, click the Included Invoice icon (). The Invoice pop-up window displays.

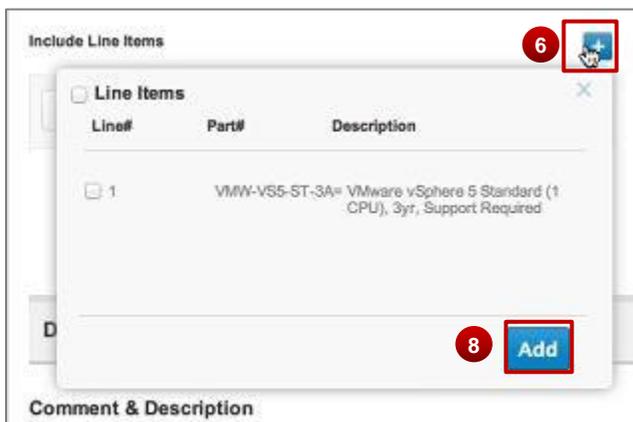


Billing and Invoice Tab: Invoices Page: Add Dispute Form

5. If applicable, check the checkbox for particular invoices to include that invoice in the dispute.
6. To add a line item, click the Include Line Items ().
7. If applicable, check the checkbox (s) corresponding to the desired line(s) to add additional line items to the dispute.
8. To add attachments, click **Add** and select the appropriate file.



Included Invoice Section: Invoice Pop-up Window



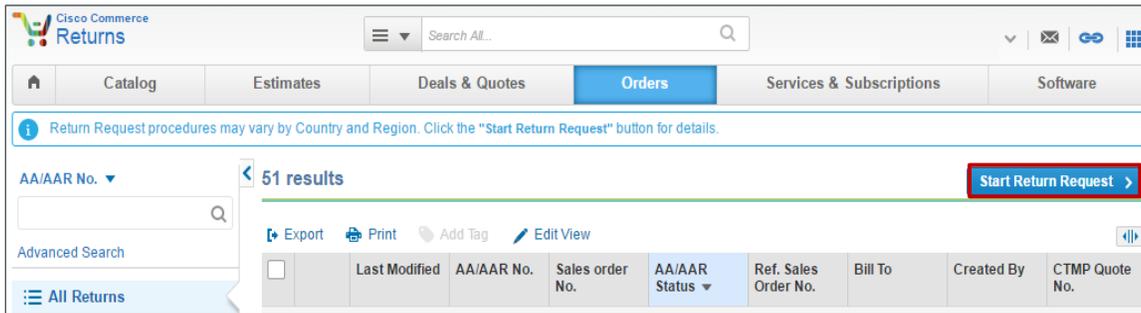
Include Line Items

9. Click the Choose Any drop-down arrow in the Dispute Items section.
10. Choose a reason for the dispute. Depending on which option is selected, different fields display to provide additional info.
11. The Comment & Description field is optional. Any information entered here displays when the dispute is viewed.
12. Click **Submit**. A service request number is sent via e-mail. Once the request is validated, a Dispute/SAF number is sent via e-mail.

12 Managing Returns

You can view and manage your returns through Cisco Commerce Returns option on the Orders tab. To view more information on returning a product, see the [Returns page](#).

On the Returns page, you can search for returns using Cisco Commerce search functionality (see [Getting Started with Cisco Commerce User Guide](#)).



Cisco Commerce Returns Page

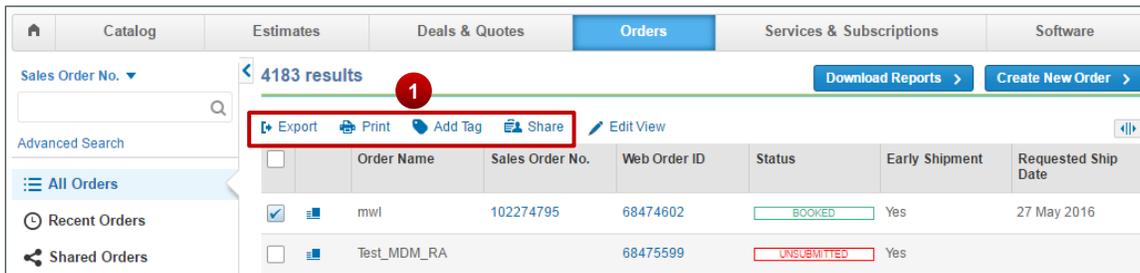
To initiate a return request, click **Start Return Request**. The Returns Request page displays.

Returns request procedures may vary depending on country or region. (see [Return a Product - Cisco.com Order Support](#))

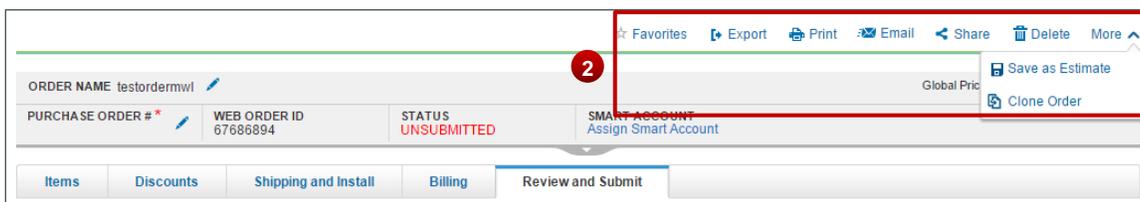
13 Using the Common Utilities

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

1. The Orders tab
2. Within an order: Order Page



Cisco Commerce: Orders Tab



Orders Page: Common Utilities



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

See the [Getting Started with Cisco Commerce User Guide](#) to export, print, share, or email an order. The process is same as exporting, printing, sharing, or email multiple orders at once.

13.1 Searching for an Order

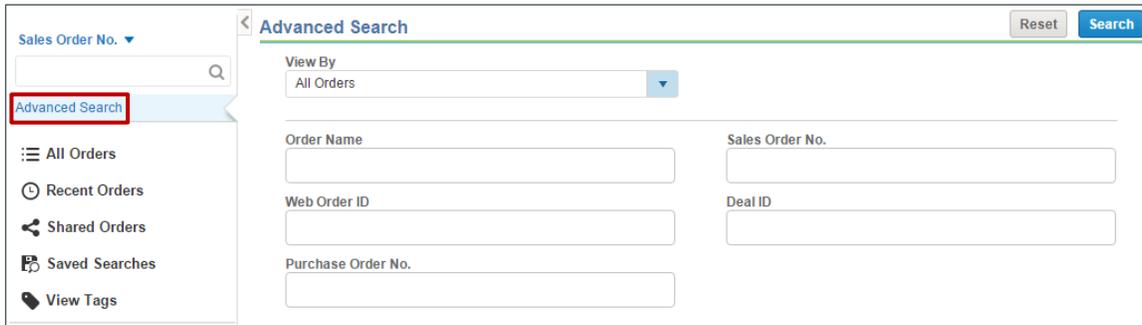
You can search for orders using the Cisco Commerce search functionality (see [Getting Started with Cisco Commerce User Guide](#)).



Note: Orders with “Closed” status remain searchable for 15 months from the date of closing. Once archived, open a case through [Customer Service Central](#) to access them.

Other orders that are not closed remain searchable indefinitely.

You can also search for your favorite orders using Advanced Search functionality (see [Getting Started with Cisco Commerce User Guide](#)).

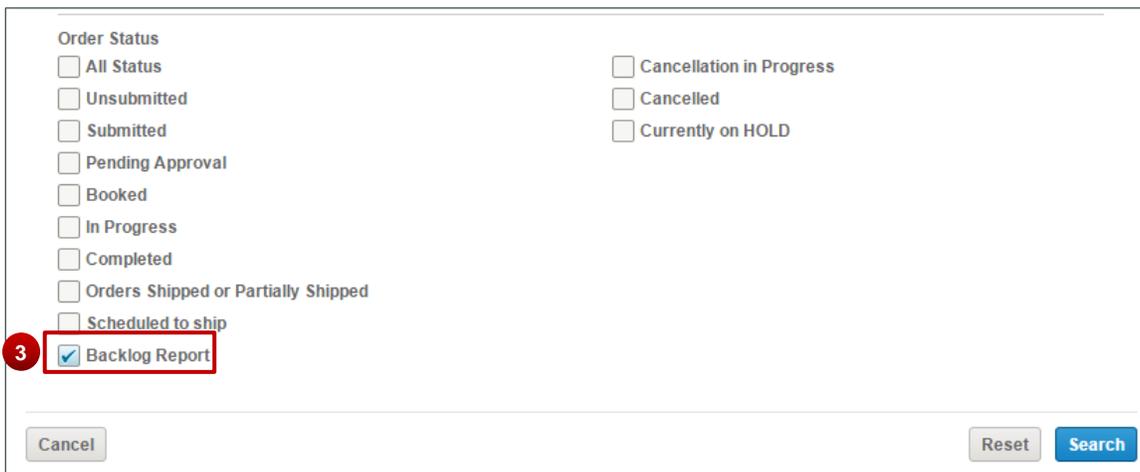


Cisco Commerce Orders Tab: Advanced Search

13.1.1 Viewing and Creating a Backlog Report

You can view the status and related information of a large number of orders in Cisco Commerce. The backlog reports can be accessed for up to a year. To view reports, complete the following steps:

1. Click Advanced Search in the Cisco Commerce Orders tab. The advanced search for orders section displays.
2. To narrow the search, select dates in the Submit Date Range.
3. In the Order Status field, check the checkbox for Backlog Report.
4. Click **Search**. The search results display.



Advanced Search Page

5. Check the box next to the rows for which the backlog report needs to be generated. To select all rows, check the box at the header level.
6. Click **Export**. The Export Options window displays.
7. Using the Add and Remove buttons, select the columns to include in the report.
8. In the file type drop-down menu, select CSV Entire Order (Comma Separated Values).

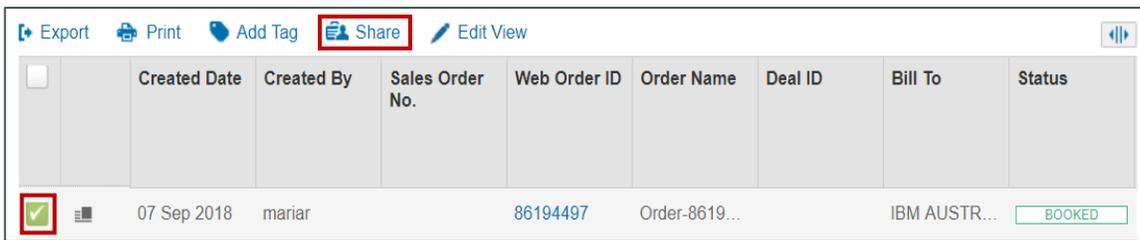
- Click **Export**. The report is generated and you will receive an email once it's ready. You can then click **Download Reports** to access the report.

13.1.2 Subscribe and Generate SaaS Backlog Order Reports

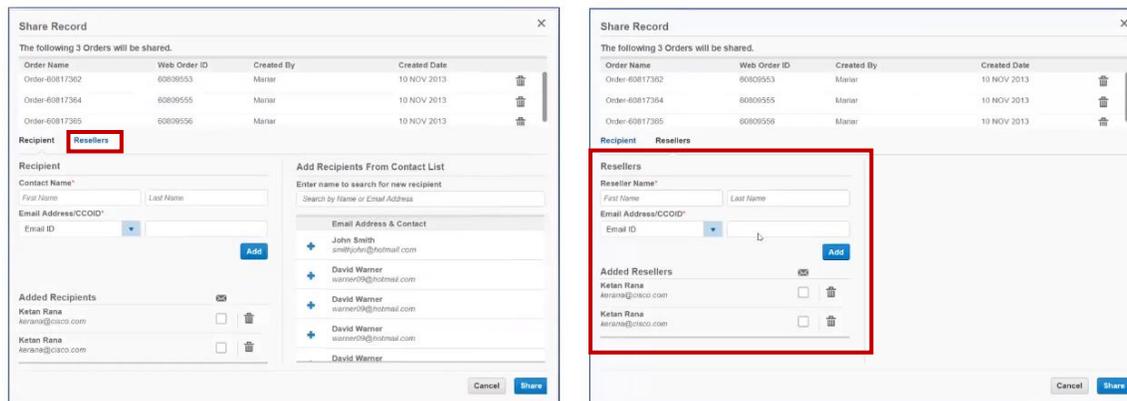
You can generate and subscribe to the SaaS Backlog Orders report in Cisco Commerce. With the help of the report, you will be able to take action on the orders not in End Complete or Cancelled status. For more information, refer [SaaS Backlog Reporting in Cisco Commerce User Guide](#).

13.2 Share an Order

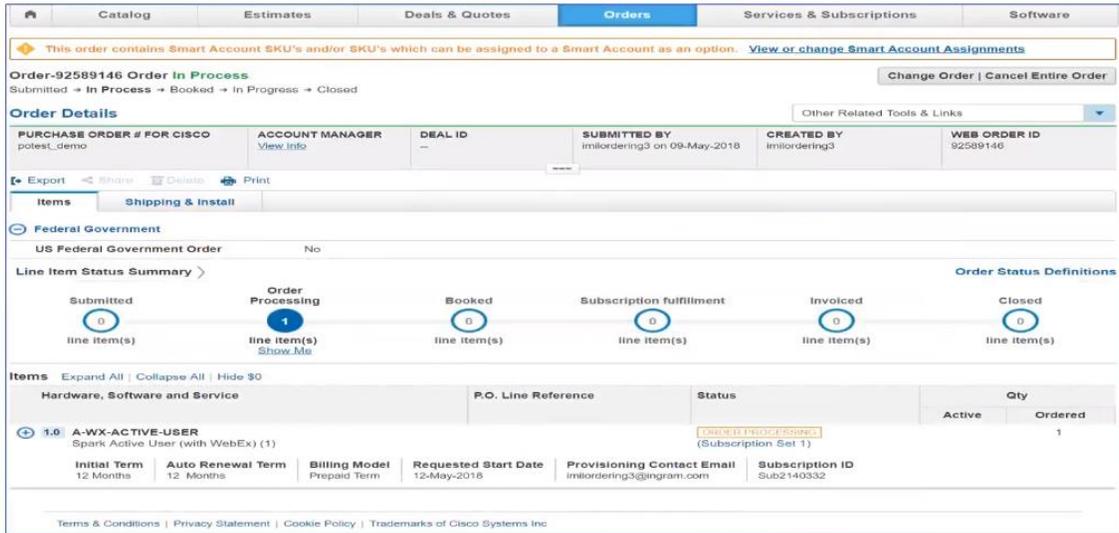
Distributors will have the option to share a single submitted Order or multiple Orders with their Resellers. Resellers will have the ability to view the items and their shipping information. No pricing or billing information will be shared. This is a time saver for Resellers and for Distributors.



The Distributor will see a “Resellers” Tab within their CCW “Share Record” view. The Distributor can add Reseller information and share the Order.



Resellers will see the Order status information shown below within their standard CCW View Order Status.

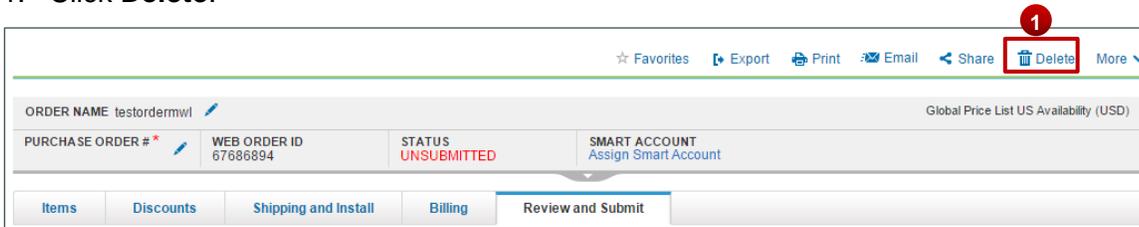


13.3 Deleting an Order

Only unsubmitted orders can be deleted. Deleting an order permanently removes the record and all related data. Be advised that once deleted, it cannot be retrieved.

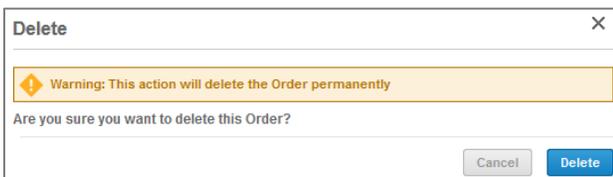
To delete an order, complete the following steps:

1. Click **Delete**.



Order Page: Delete

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



Delete Dialog Box

3. To permanently delete the order, click **Delete**.
4. To cancel and return to the Order Page, click **Cancel**.

13.4 Saving an Order as an Estimate

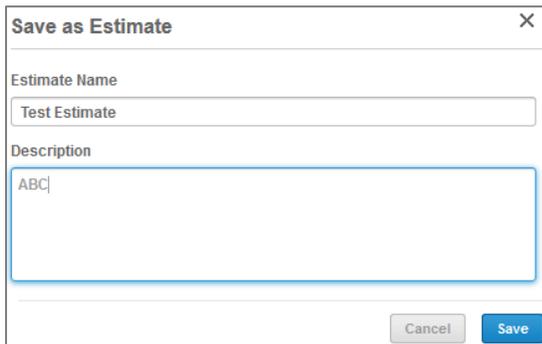
When you create and configure an order, the configuration can be named and saved to be reused. The system will save the configuration as an estimate and you will receive an estimate ID.



Note: The Save as Estimate icon does not display on RNSD orders.

To save the configuration set, complete the following steps:

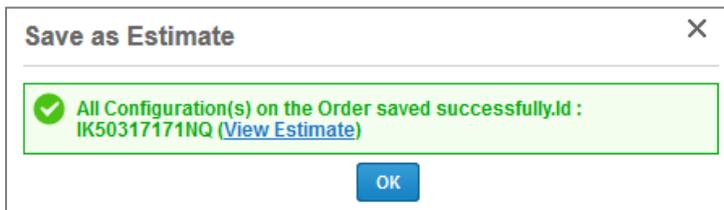
1. From the Order page: Items tab, click **Save as Estimate**. The Save as Estimate dialog box displays.



The dialog box titled "Save as Estimate" has a close button (X) in the top right corner. It contains two input fields: "Estimate Name" with the text "Test Estimate" and "Description" with the text "ABC". At the bottom, there are "Cancel" and "Save" buttons.

Save as Estimate Dialog Box

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



The dialog box titled "Save as Estimate" now displays a green success message: "All Configuration(s) on the Order saved successfully.Id : IK50317171NQ (View Estimate)". There is an "OK" button at the bottom.

Save as Estimate Dialog Box



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

5. Click **OK**. The dialog box closes, and the Order page: Items tab displays.

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

13.5 Cloning an Order

When you create and configure an order, the order can be cloned and edited. **Clone Order** in the Common Utilities bar begins the Order process by cloning the open order (see [Creating a New Order by Cloning an Order](#)).

Clone an Order * Required Field

With a Deal ID or Without a Deal ID

[Clone an Order](#) (optional) ⓘ

Order Name [View your Favorite Orders](#) ⓘ

You may clone and edit the selected order: tender_test(86284911) Click Continue × to proceed.

IMPORTANT: You can only clone Favorite Orders in this view. Cloning doesn't duplicate Order Discounts and Ship Dates.
