Cisco Commerce

Companion Guide for Distributors

User Guide

Cisco Proprietary

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

TABLE OF CONTENT

Click a topic or sub-topic name below to move directly to that section.

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.

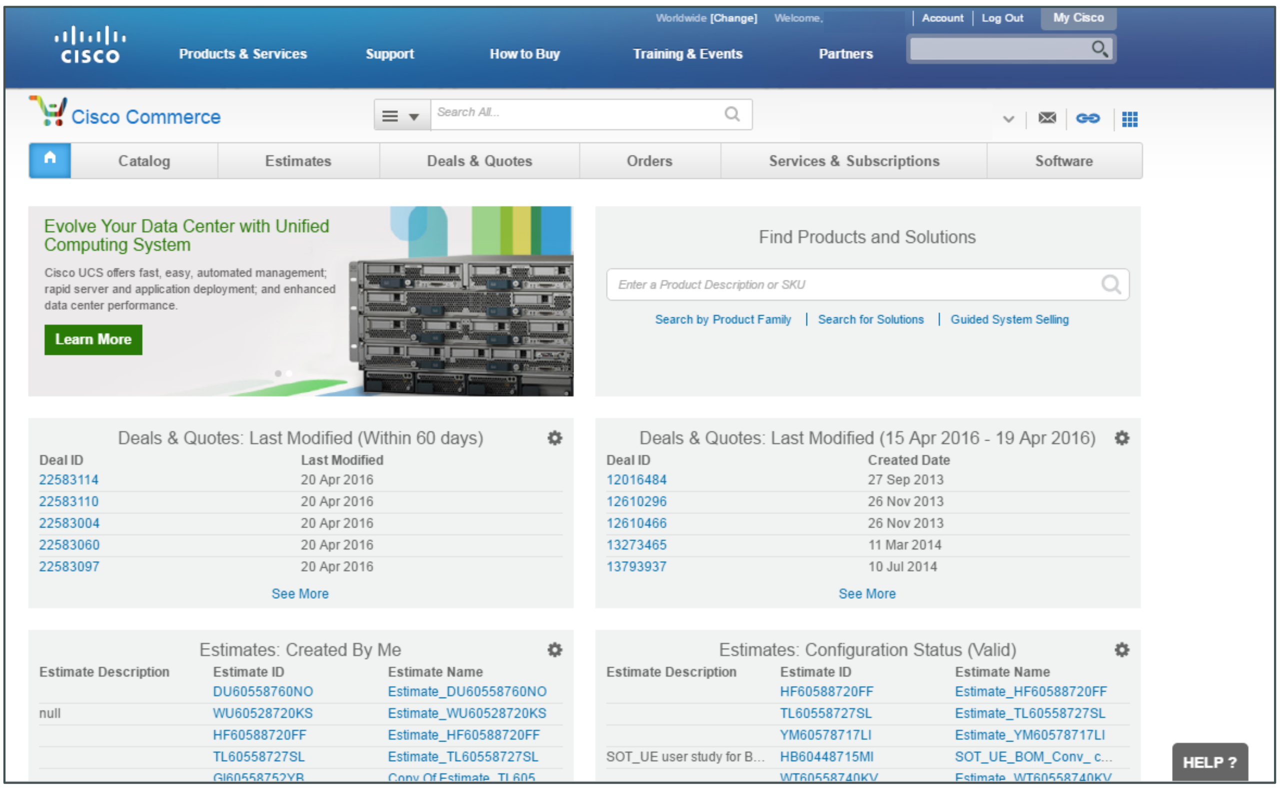
- Active hyperlinks to other documents or within the same document are shown in blue (RGB: 0, 0, 255) and underlined. Example: “Additional information is available in the Getting Started with Cisco Commerce User Guide.” or “See Creating a Deal for more details.”
- In sections describing a process that starts from somewhere other than the Cisco Commerce homepage, a process flow indicates how to get there. For example, you link an estimate to a deal ID on the Estimates page, which means you would have already created an estimate. The following illustration would therefore display at the beginning of the Link the Estimate to a Deal ID section.

2 Cisco Commerce Workflow

Cisco Commerce, a Cisco sales platform, allows you to register deals, browse through the rich catalog, configure and price products, software, and related services, and submit orders.

Cisco Commerce also interacts with Cisco's internal sales tool, Salesforce.com (SFDC), to share opportunities resulting in quotes and orders.

To understand how the quote to order process fits within Cisco Commerce and the Cisco sales structure, and to navigate through the Cisco Commerce functionalities, see Getting Started with Cisco Commerce User Guide.



Cisco Commerce Homepage

Note: Options that are not available for you will be grayed out.

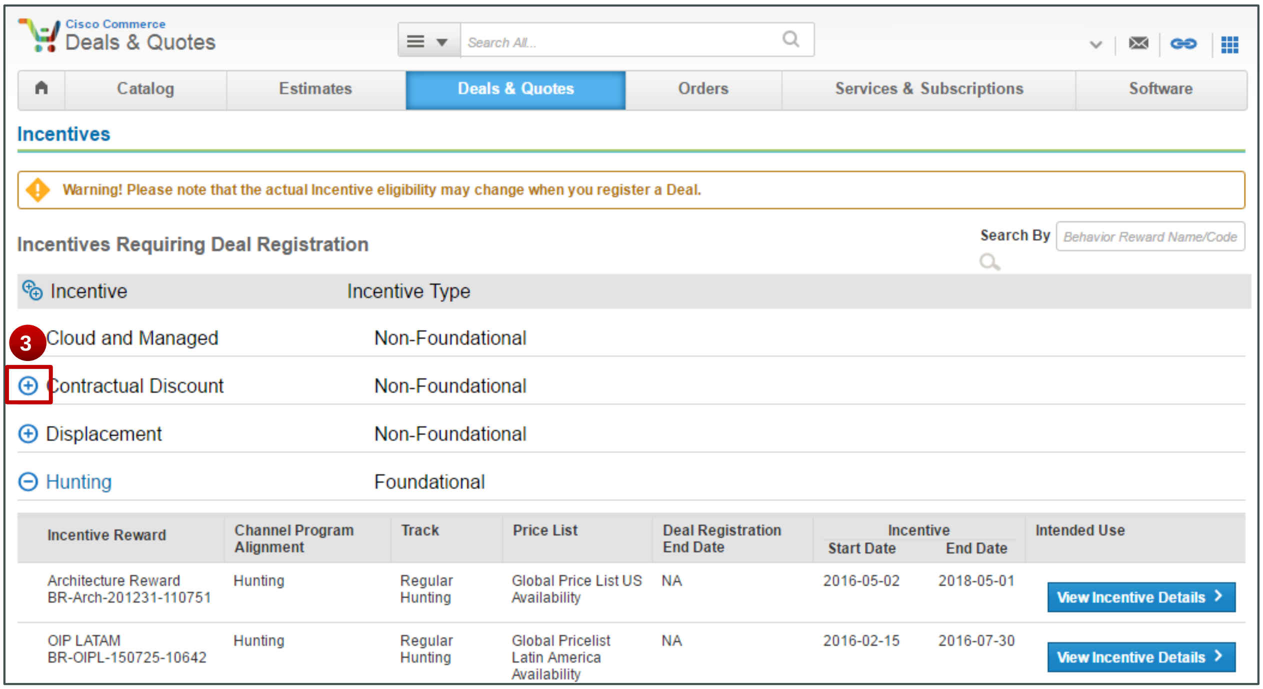
2.1 Viewing Incentive Details

Register deals to take advantage of Cisco's pricing model with stackable, incremental discounts that allow multiple incentives (programs and promotions) on a single deal, and reduce your dependency on nonstandard transactions. See Creating a Deal.

Note: As a distributor, you can view the hardware and software SKUs for every incentive.

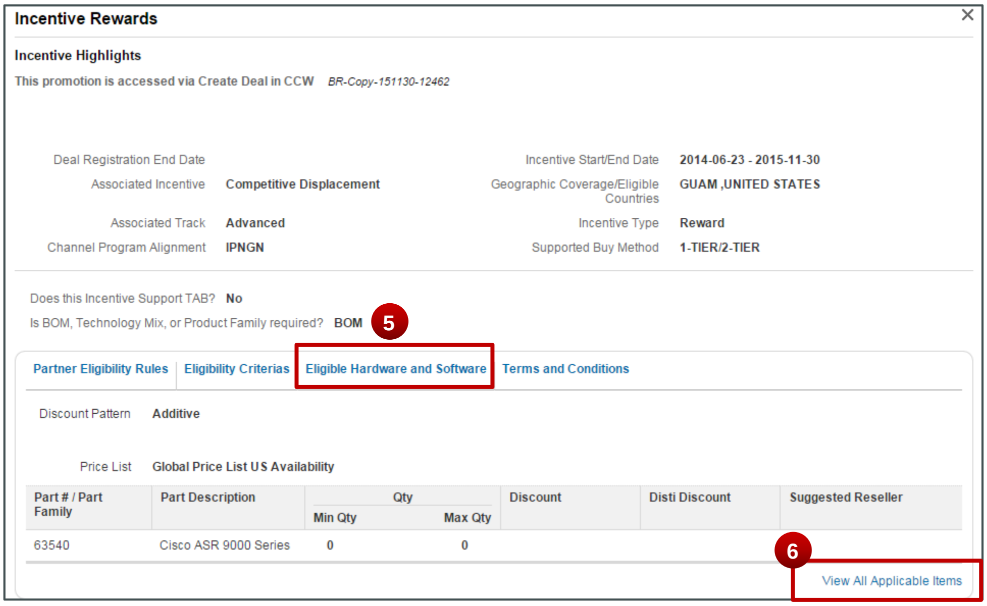
To view incentive details, complete the following steps:

1. Click or hover over the Quick Links icon ( ). A flyout displays.
2. Select Incentives. The Incentives page displays with a list of incentive types and details.



Incentives Page

3. Click the plus sign to view information about each incentive.
4. Click **View Incentive Details**. The Incentive Rewards modal window displays.



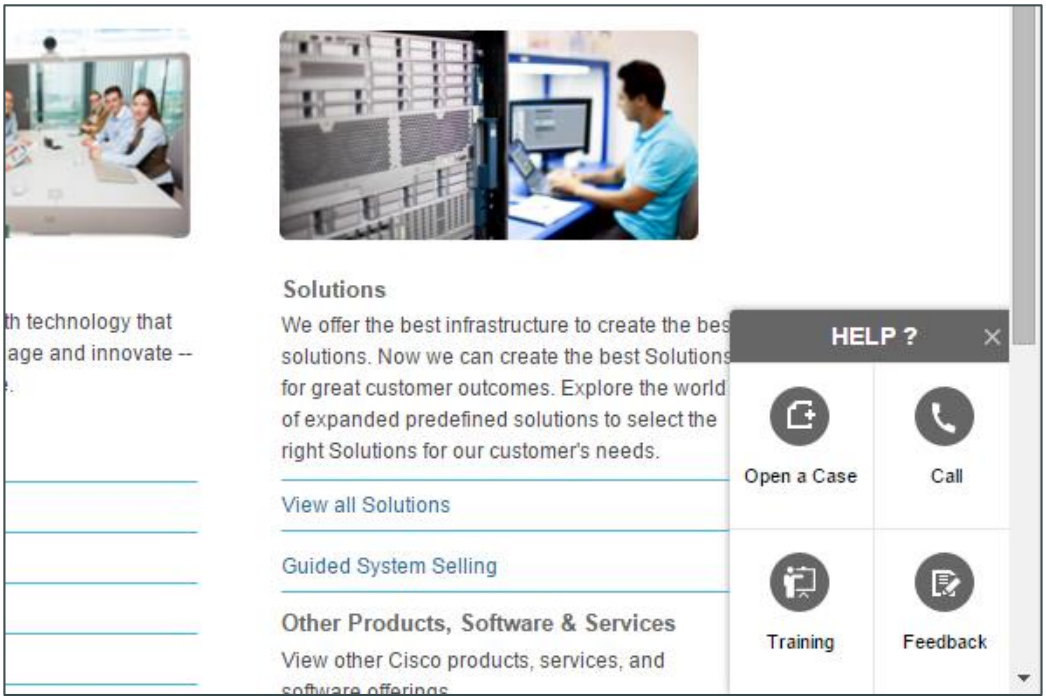
View Incentive Details: Incentive Rewards Page

From the Incentives Reward page you can view eligibility criteria, eligible hardware and software, and terms and conditions for each incentive.

5. Click Eligible Hardware and Software to view eligible items.
6. Additionally, click View All Applicable Items to view and save a local copy of the full list of applicable items.

2.2 Accessing Support

You can access training and support information from any Cisco Commerce page by opening the Help widget anchored to the bottom of your web browser.



Cisco Commerce Help

Refer to the [Getting Started with Cisco Commerce User Guide] to view additional sites and channels for self-serve training and support information.

3 Managing Estimates

In Cisco terms, an estimate is a pre-configured collection of products and/or services that form a solution. This collection can be validated and saved for reuse, shared with others, and ordered.

As part of Cisco Commerce's pre-sales capabilities, you can create an estimate and add products and services to a shopping cart, without having to provide the detailed customer information needed to create a quote or an order in Cisco Commerce. This process enables seamless collaboration between end customers, Cisco partners, Cisco resellers, and Cisco sales using the share functionality of their estimate.

3.1 Creating and Building Estimates

The steps for browsing the Cisco catalog and creating an estimate are the same for partners and distributors. Begin the process as indicated in the Cisco Commerce Estimates and Configurations User Guide.

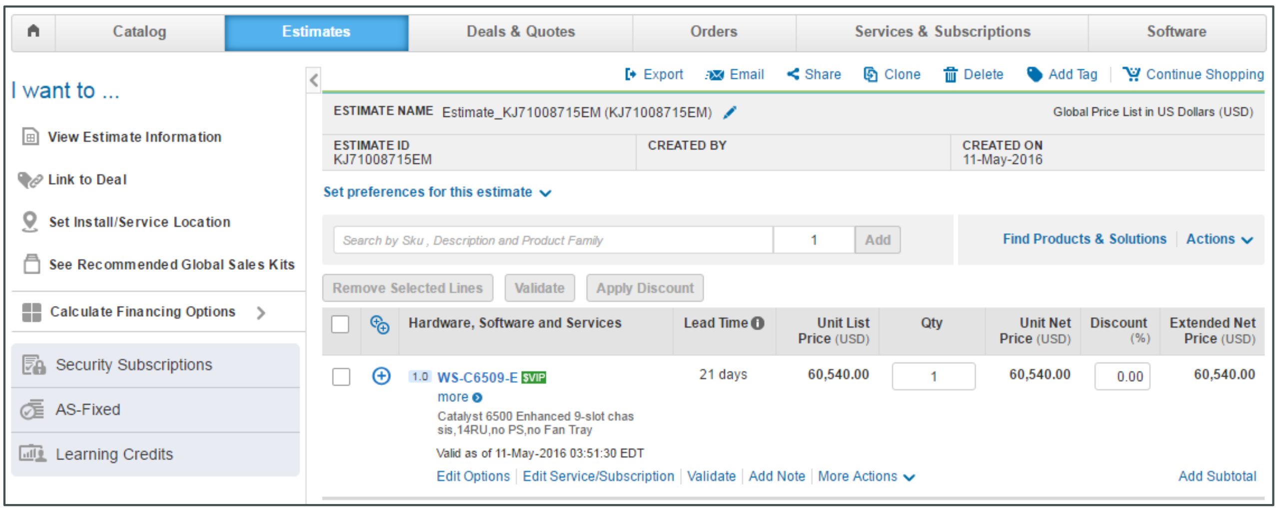
- Set default estimates preferences using My Profile and Preferences.
- Create an estimate using the Catalog tab or use **Create Estimate** option on the Estimates tab.
- Add items to the estimate:
  - Finding items using the search functionality.
  - Adding items by SKUs.
  - Importing an estimate.
- Use additional options on the Items tab
  - Reordering lines.
  - Previewing distributor-equivalent SKUs.

Note: When a partner sends a Unified Computing Service (UCS) configuration to you for fulfillment, you must translate the product SKUs from the Global Price List (GPL) used by partners to the Wholesale Price List (WPL) that reflects the SKUs in your (distributor's) inventory.

The Preview BTO Configuration link automatically performs the translation for you. You can export a configuration as an XML or XLS file while retaining the build hierarchy.

  - Setting install and/or service locations to a line item.
  - Using additional options for each line items.
- Select options and resolve issues.
- Set quantities for items.
- Add services
  - Set default service preferences.

- Adding services to multiple items.
- Adding services to individual items.
- Manage an estimate
  - Claiming an estimate.
  - Perform price modeling for end customers.
  - Calculating financing options.
  - Importing an estimate into a quote or an order.
  - Linking an estimate to a deal ID.



Estimates Cart Page

- Use common utilities available for estimates
  - Viewing and searching for estimates.
  - Tagging estimate(s).
  - Cloning an estimate.
  - Exporting, printing, and e-mailing estimates.
  - Sharing estimates.
  - Deleting estimates.
  - Saving as an estimate.

4 Managing Deals and Quotes

In Cisco terms, deal is the overall agreement between you and Cisco that enables you to purchase goods or services at a discounted price. The quote is the “output” (the compilation of configured products and services with applicable discounts including programs and promotions) that you can convert to an order for purchase.

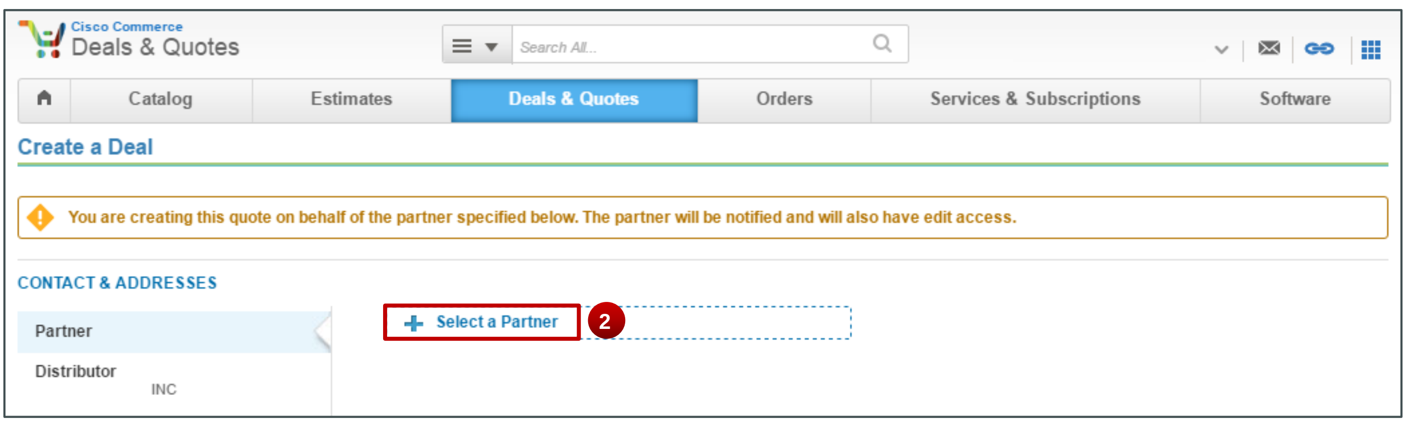
Best Practice: Register deals to take advantage of Cisco’s pricing model with stackable, incremental discounts that allow multiple incentives (programs and promotions) on a single deal, and reduce your dependency on nonstandard transactions.

- Create a deal when you need to apply incentives that require additional approval.
- Create a quote for standard discounts or pre-approved promotions (requiring no additional approval). In this case, the quote will be automatically approved.
- Create a transaction quote if the order will be fulfilled through distribution.
- Create different types of quotes in cases where pricing or freight charges need to be adjusted. See Creating Quote Types.

4.1 Creating a Deal

To create a deal, work with the steps below along with the Cisco Commerce Deals and Quotes User Guide.

1. From the Deals & Quotes tab on Cisco Commerce homepage, click **Create Deal**. The Create a Deal page displays.

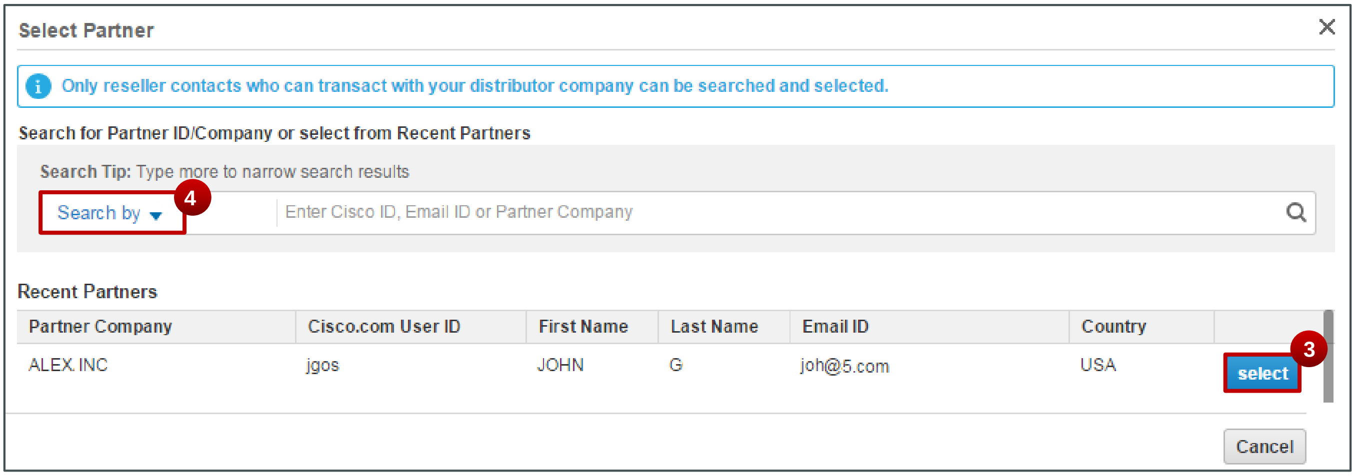


Deals & Quotes Tab: Create Deal - Create a Deal Page

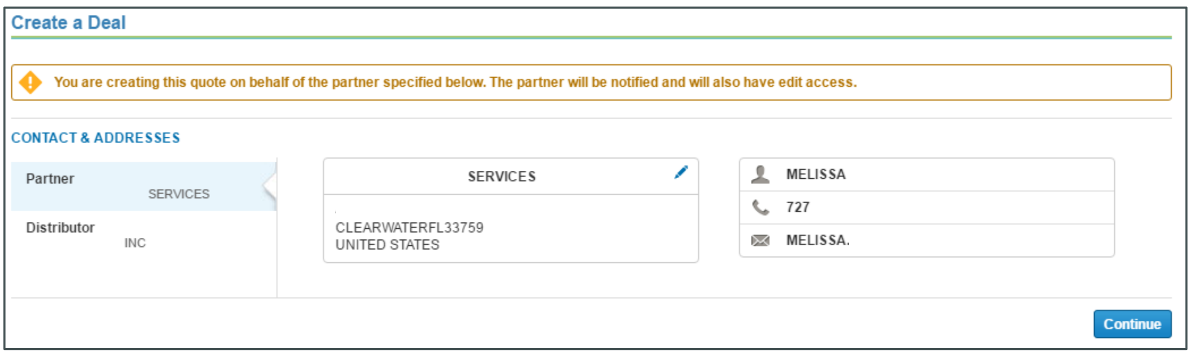
2. Click **Select a Partner**. The Select a Partner dialog box displays.
3. Select the appropriate Partner by clicking **Select** from the list displaying below Recent Partners.
4. Alternatively, use the search field to associate a Partner with the deal. Filter the search using the Search by: drop-down menu to search a Partner by Cisco.com User ID, Email ID, or Partner Company.

When you search a Partner using the Partner Company, you have to select a site to associate with that Partner and appropriate Partner contact.

The Partner section populates.



Select a Partner Dialog Box

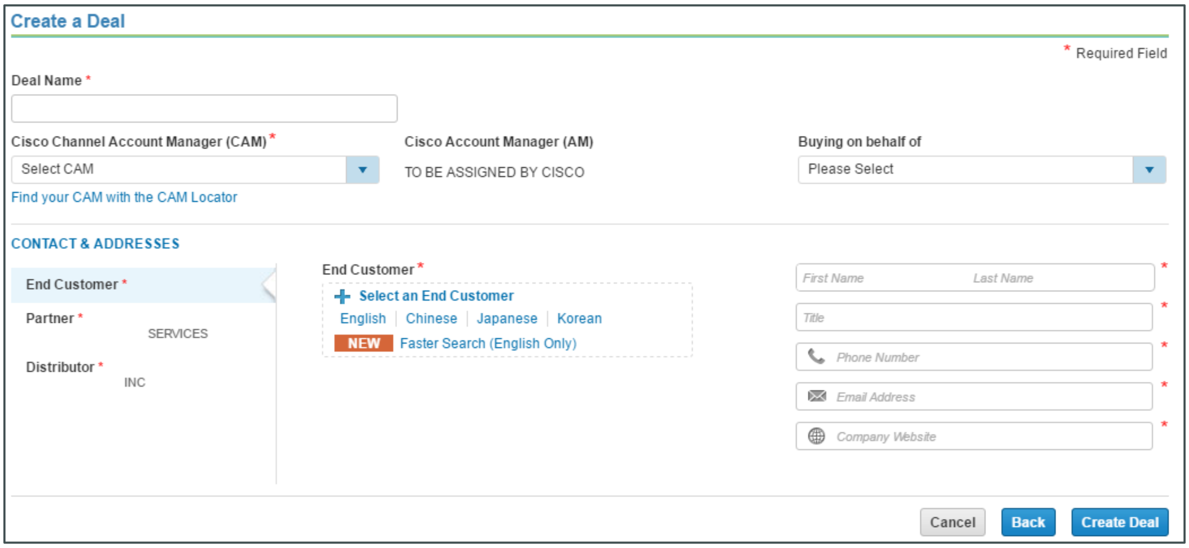


Create a Deal Page: Partner Details Populated

Note: From the populated Partner details, click the edit ( ) icon to change the Partner details.

5. Click **Continue**. Create a Deal page expands.
6. Enter the deal name.
7. Select the Channel Account Manager (CAM). If you don't find the appropriate option from the drop-down, then select Other and type the Cisco ID for the required CAM.

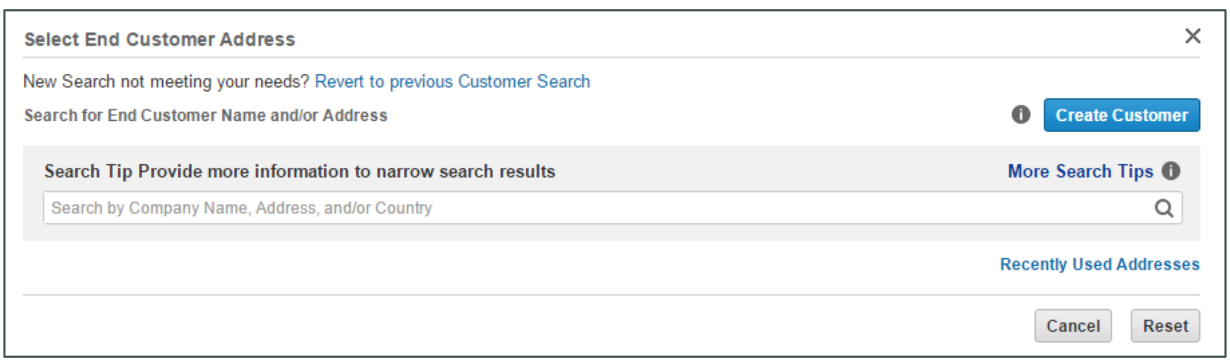
   Alternatively, you can also find a CAM using the Find your CAM with the CAM Locator option.



Create a Deal Page: Expanded View

8. You can add an end customer in the following ways:
   - Search the Cisco Directory in a preferred language, that is, English, Chinese, Japanese, or Korean.
     - View and select from the recent end customers.
   - Create an end customer address.

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



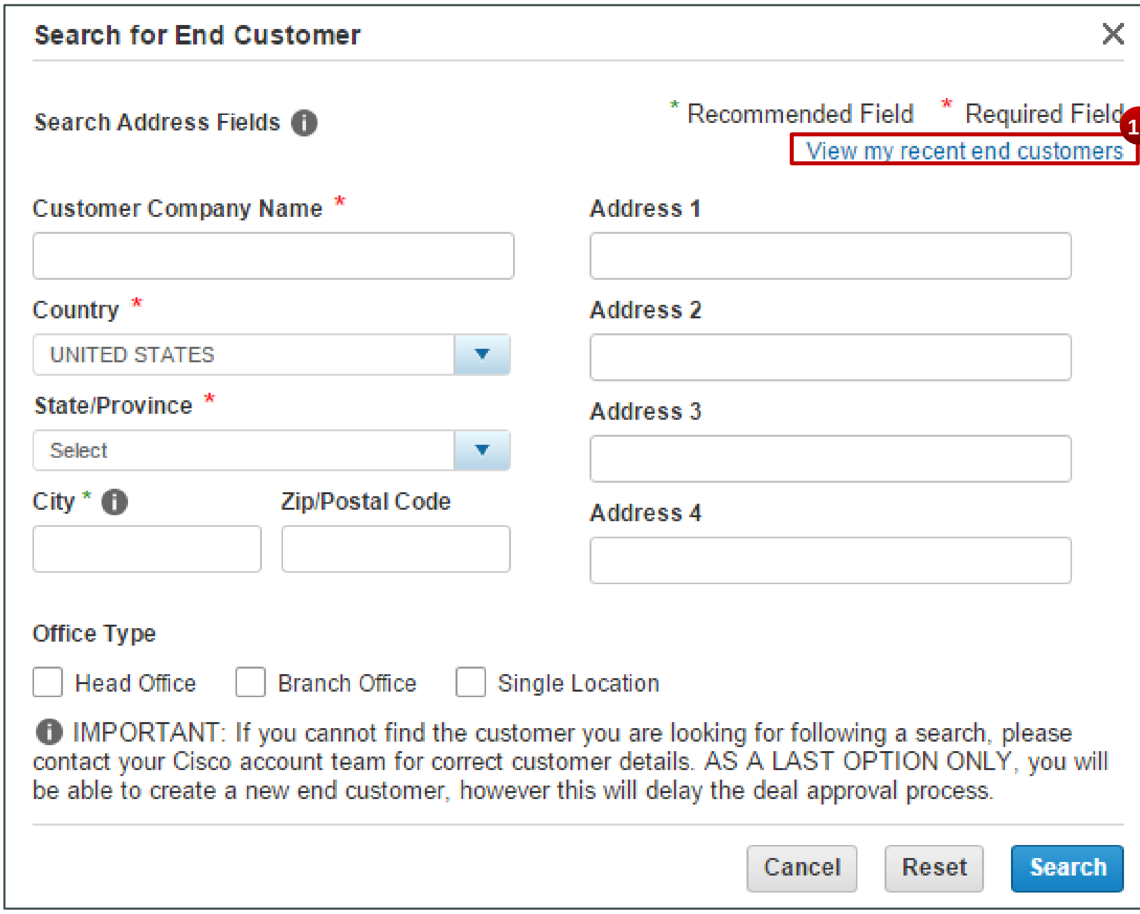
Faster Search Dialog Box

9. From the End Customer section, click English, Chinese, Japanese, or Korean to search the Cisco directory in the respective language.
10. If you select Chinese, the system will translate addresses entered in Chinese to English and you will have to confirm or modify the translation. The Search for End Customer dialog box displays with search fields. There are two options for finding an end customer.
    - View my recent end customers.

- Search by customer company name, country, city (optional), and state or province.

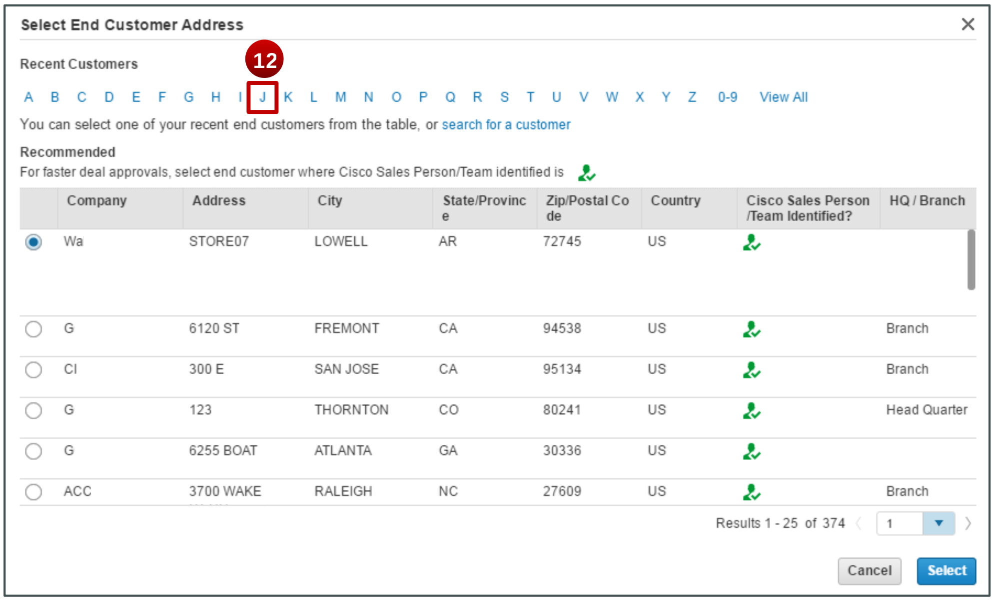
Note: The billing country automatically populates in the Country drop-down menu.

If the desired address does not display as a result of a search, the option to create a new address displays on the Search for End Customer dialog box.



Search End Customer Dialog Box

11. To populate the fields using end customer information recently used in Cisco Commerce Deals & Quotes tab, click View my recent end customers. Use this link if the end customer has been used before on a deal or a quote. The Select End Customer Address dialog box displays.



Select End Customer Address Dialog Box

12. Click the appropriate radio button. The list can be narrowed by clicking the letter link that corresponds to the first letter of the company name.

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

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13. Click **Select**.

    The address populates in the End Customer section.

14. Alternately, fill the appropriate parameters in the Search for End Customer dialog box, such as customer company name, country, city (optional), and state or province.
15. Click **Search**. The Select End Customer Address dialog box displays.
16. Click the radio button next to the appropriate customer.
17. Click **Select**. The address populates in the End Customer section.

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

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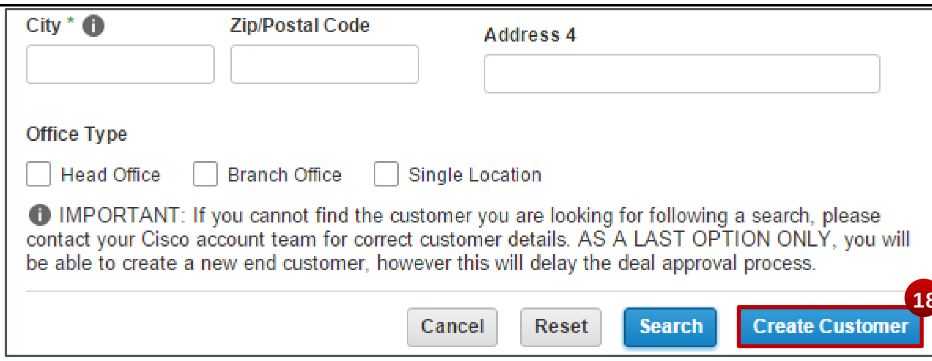
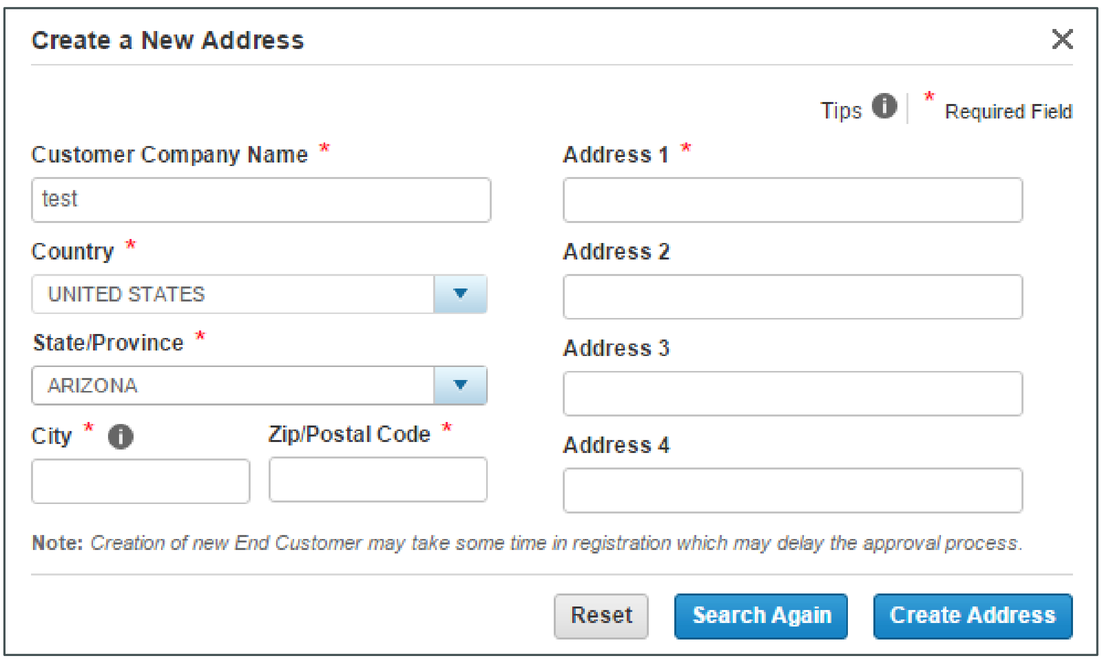
18. To create a Customer Address, from the Search for End Customer dialog box that displays after a search, click **Create Customer**. The Create a New Address in the Cisco Directory dialog box displays.

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



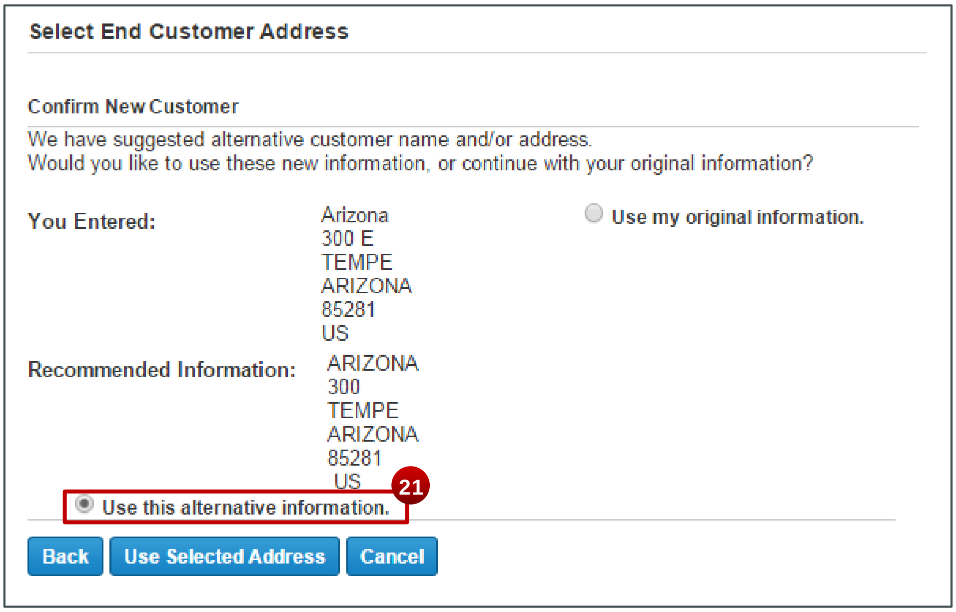
Search for End Customer: Create Customer

19. Populate the appropriate information in the fields. Some of the fields are automatically populated from the original search. Click the appropriate fields and make changes if applicable.



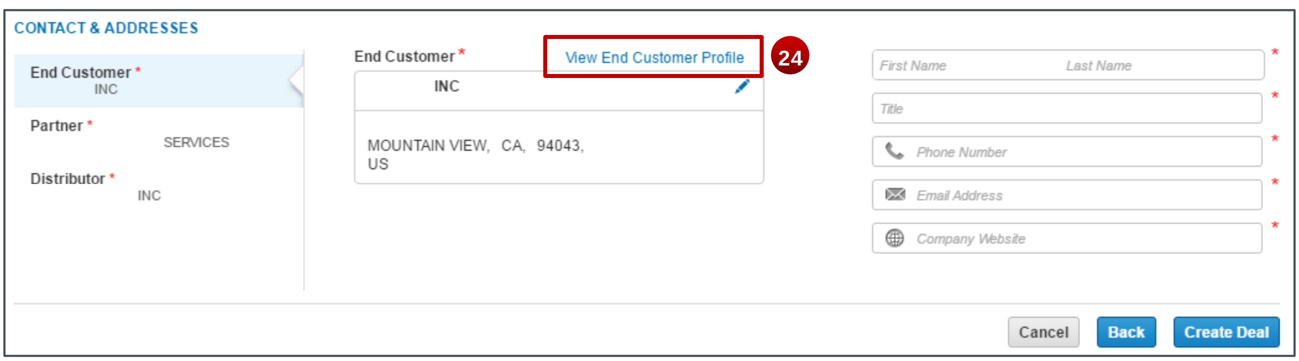
Create a New Address Dialog Box

20. Click **Create Address**. The Select End Customer Address dialog box displays. Cisco Commerce may generate a recommended address based on the information provided by you.
21. Click the radio button to use the original information or the information provided by the system.
22. Click **Use Selected Address**. The address populates.



Select End Customer Address

23. To change the End Customer, click the edit icon.
24. Click View End Customer Profile to view end customer details.
25. Populate the end customer contact details.



Create a Deal page: Contact Addresses

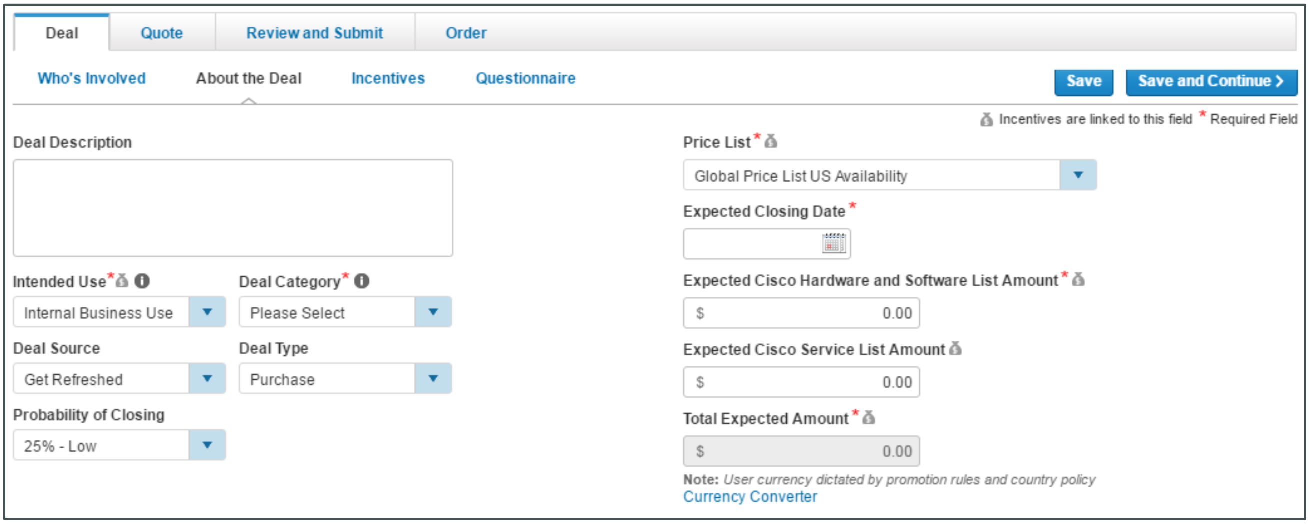
26. Click **Create Deal**. The Deal page displays.

4.1.1 Populating the Deal Tab

The Deal Page contains multiple tabs. Refer to the Cisco Commerce Deals and Quotes User Guide to populate information in each tab.

- Under the Deal tab, the Who's Involved sub-tab is automatically populated from details furnished on the Create a Deal page.
- Populate the details in the About the Deal sub-tab.

Note: Some of the incentives can be price list specific. Refer to the [Getting Started with Cisco Commerce User Guide] to view the price list and subscribe to price list changes.



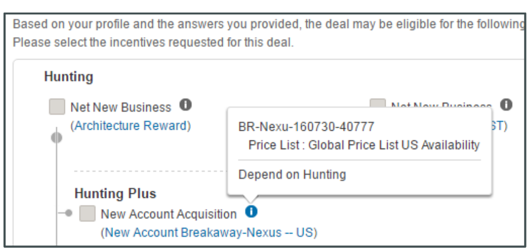
Deal Tab: About the Deal Sub-Tab

- Click **Save and Continue** to proceed to the next tab. The Incentives sub-tab displays.
- From the Deal tab: Incentives sub-tab, scroll down to view the available incentives.

  Select appropriate incentive(s) under the given categories. Incentives that you are not eligible for will display but are not selectable.

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

  Hover over the information icon to view the reason for ineligibility for an incentive type. Additional incentive details can be found by clicking the hyperlink next to a given incentive.

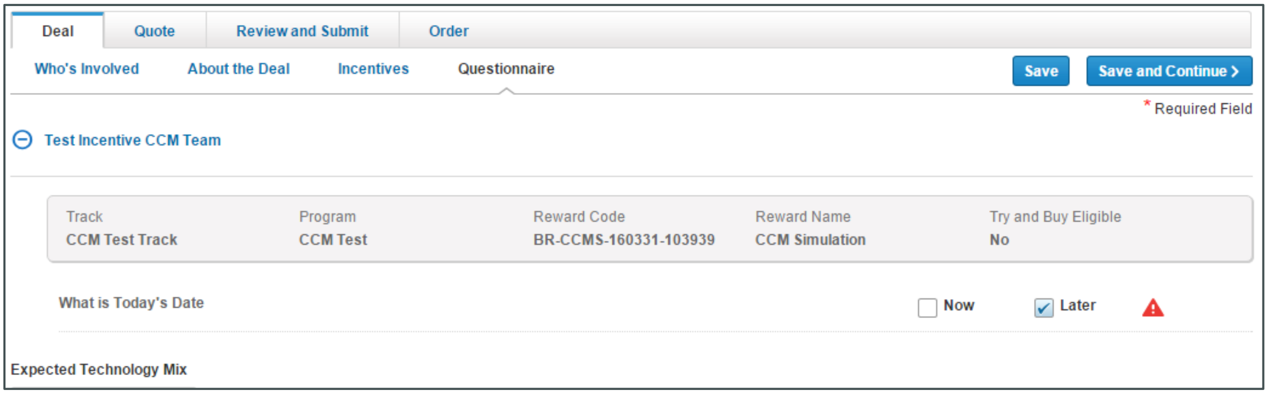


Incentive Sub-Tab

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

- Click **Save and Continue**. The Questionnaire sub-tab displays.
- Based on the incentive(s) selected, the Questionnaire sub-tab displays information to be filled in for initial validation.

Note: A red error icon displays if your answer does not meet the criteria required for the question.



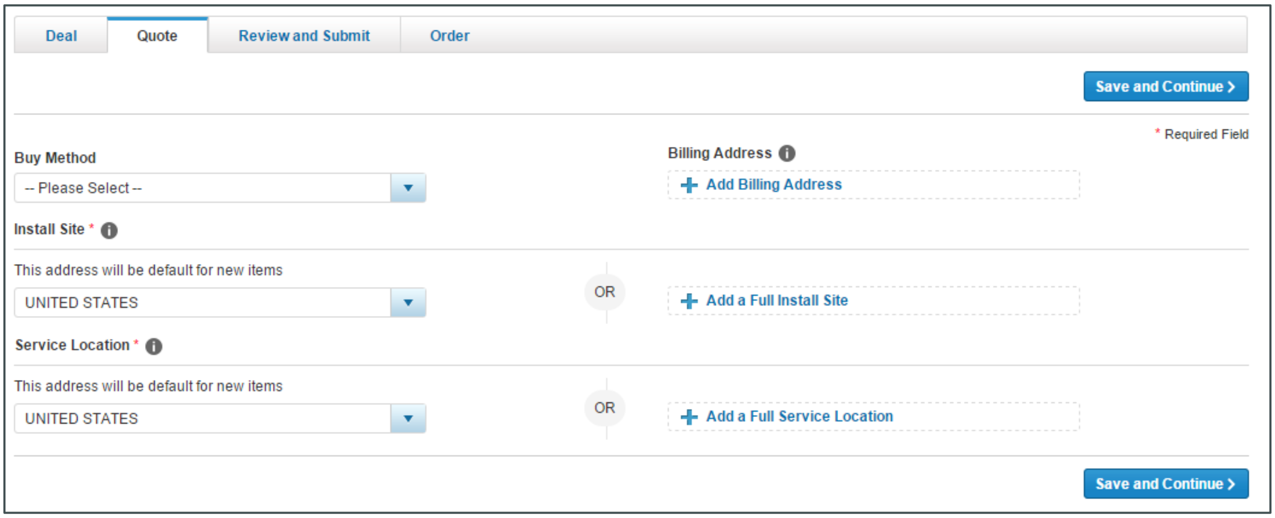
Deal Tab: Questionnaire Sub-Tab

If you have selected multiple incentives, click (⊕) to view questions for each incentive type.

4.1.2 Populating the Quote Tab

There are three sections on the Quote tab: billing information, buy method, and install location. Specify the Service To information if you are transacting SaaS Subscriptions. Populate the fields using the Cisco Commerce Deals and Quotes User Guide.

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



Quote Tab

4.1.3 Building and Submitting the Deal

To build the deal, add items, review discounts and then submit the deal, see [Cisco Commerce Deals and Quotes User Guide].

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

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

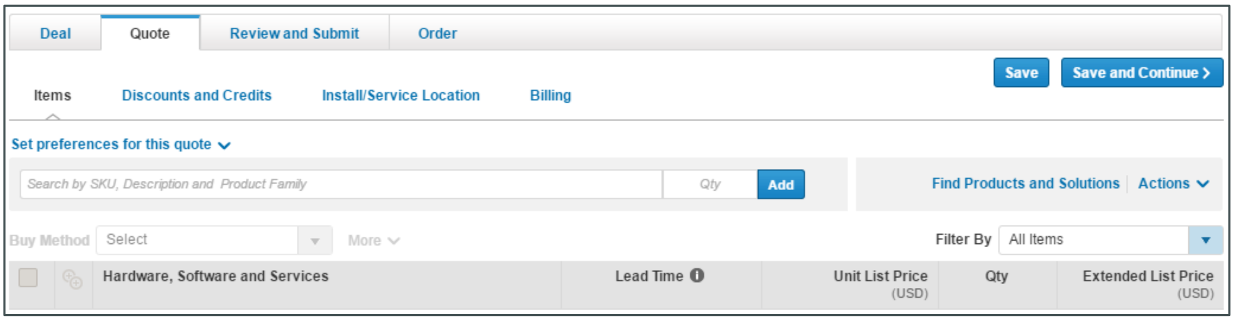
- Add products and services

Note: If you remove a service from a product on a quote, the product configuration will be preserved. If you add a service-only line to the same quote, the product information will be saved.

- Use optional functions for line items
- Choose options and resolve issues
- Set quantities for items
- Renew software subscriptions
- Add Trade In items
- Review discount and credit
    - Format quote
    - View financial details

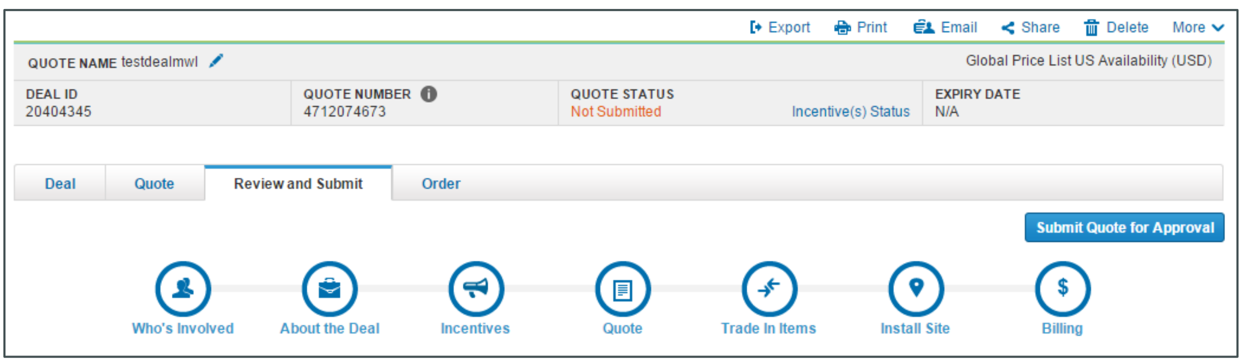
Note: As a distributor, the product and service lease orders are not available to you.

- View or change install site information
- View or change billing information



Quote Tab: Items Sub-Tab

- Submit the deal for qualification depending on the incentive (program and promotion) chosen. When the deal is qualified, you can choose to add items and services. Else, submit the quote for approval.



Review and Submit Tab

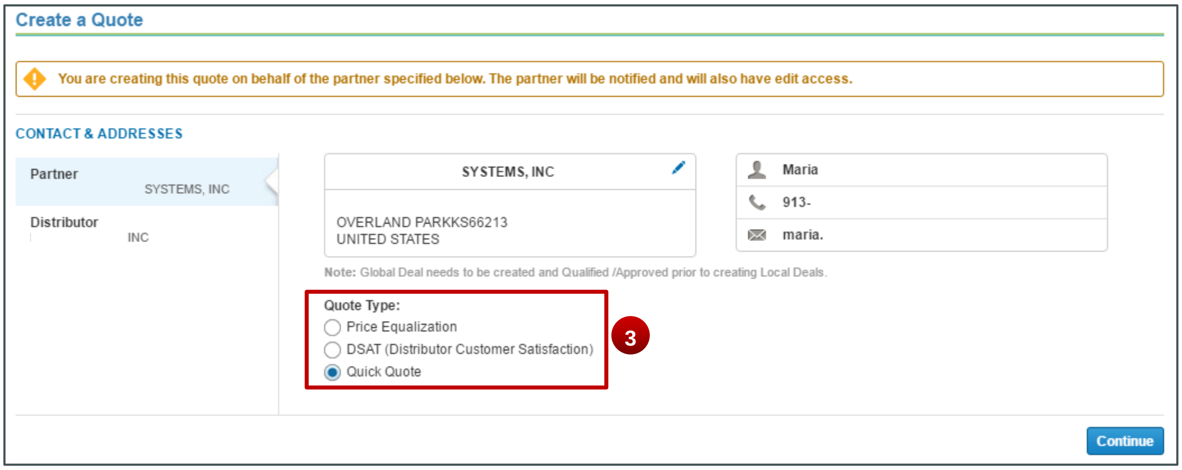
4.2 Creating a Quote

Create a quote when only pre-approved programs and promotions are required.

You also create different quote types in certain cases to accommodate price and freight charges. See Creating Quote Types.

Work with the steps in the Cisco Commerce Deals and Quotes User Guide.

1. From the Deals & Quotes tab on Cisco Commerce homepage, click **Create Quote**. The Create a Quote page displays.
2. Populate the Partner details. See Creating a Deal.



Create a Quote Page

3. When logged in as a Distributor, there is a Quote Type section which displays on the Quote page when a Partner is selected. See Creating Quote Types.
4. Verify and/or change the applicable information and click **Continue**.

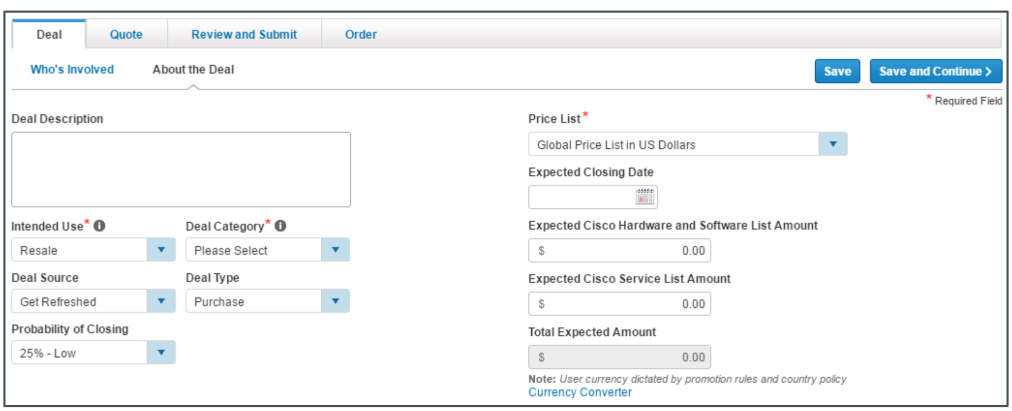
Note: To create a Not For Resale (NFR) quote, choose yourself as the partner and the end customer.

5. Populate the quote information, such as quote name, CAM, and end customer details.
6. Click **Create Quote**. The quote is created and the Deal tab displays.

4.2.1 Populating the Deal Tab

In the deal tab, the Who's Involved sub-tab is auto-populated from the details you furnished on the Create a Quote page.

In the About the Deal sub-tab, populate the appropriate information. See Populating the Deal Tab.



Quote Page: Deal Tab

Click **Save and Continue** to progress ahead in the tabs.

4.2.2 Populating the Quote Tab

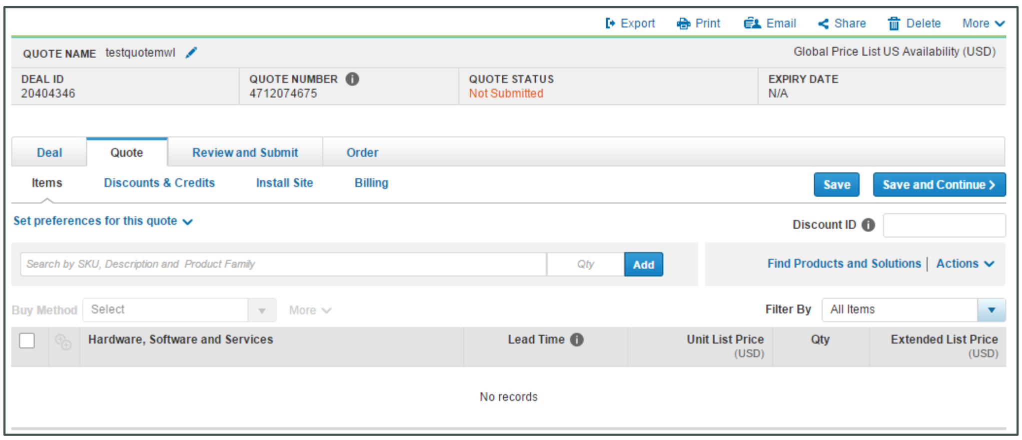
There are three sections on the Quote tab: Buy Method, Billing Information, and Install Information. Specify the Service Location if you are transacting SaaS Subscriptions.

Populate the appropriate information in the Quote tab. The steps are the same as when populating this section for a deal. See Populating the Quote Tab.

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

Click **Save and Continue**. The Quote page refreshes to the Items page.

4.2.3 Building and Submitting the Quote



Quote Tab: Items Sub-Tab

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

- Apply a Discount ID to the quote for Reusable Nonstandard Discount (RNSD) eligible items.

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

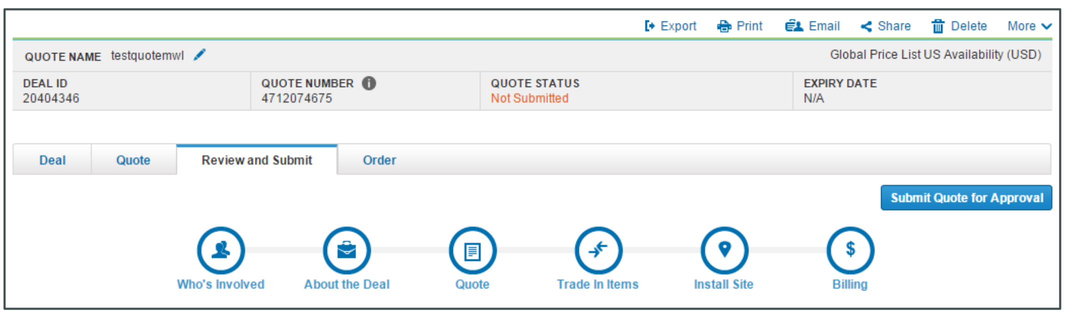
Best Practice: Go straight to ordering and reference the RNSD discount ID (see Cisco Commerce Order User Guide), rather than starting with a quote, unless the order will be fulfilled through distribution.

- Add items
- Add services
- Renew software subscriptions

- Add trade-in items
- Use optional functions for line items
- Choose options and resolve issues
- Set quantities for items
- Renew software subscriptions
- Add Trade In items
- Review discount and credit
    - Format quote
    - View financial details

Note: As a distributor, the product and service lease orders are not available to you.

- View or change install site information
- View or change billing information
- Click **Save and Continue** to continue. The Review and Submit tab displays.

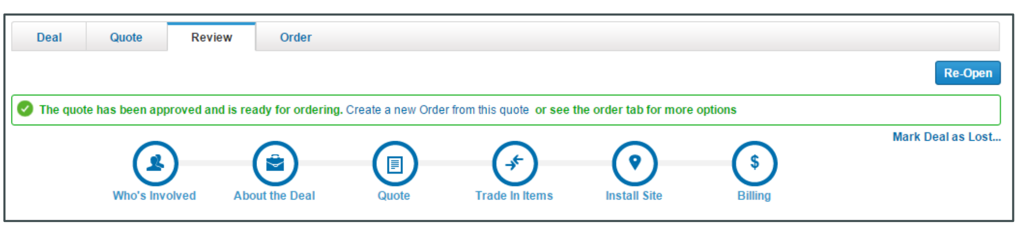


Review and Submit Tab

- Review the information sections on the Review and Submit tab.

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

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



Approved Quote

4.2.4 Creating Quote Types

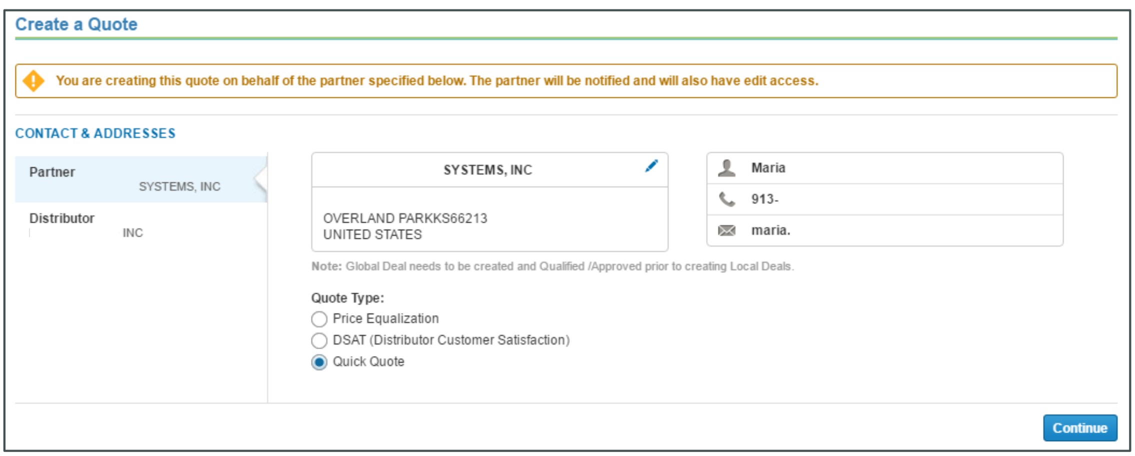
You can create different types of quotes in Cisco Commerce for all external field approved deviations (FADs). Upon approval of the quote, an autoDART will be generated.

There are four options:

- Price Equalization compensates you for the cost difference between the configurable SKUs available through Cisco Commerce and the spare equivalent that you would use to fulfill orders from stock. See Price Equalization Quote Type.
- Distributor Customer Satisfaction (DSAT) enables you to request compensation for missing products or extend deals for additional quantities within the spirit of the deal, without reopening the deal. See DSAT Quote Type.
- Disti to Disti Stock Transfer allows you to transfer inventory between distributors and compensates you for incurred freight costs. This option is shown only when the same or another distributor is selected as the Partner. See Distributor-to-Distributor Stock Transfer Quote Type.
- Quick Quote enables you to create a quote without using one of the above quote types. See Creating a Quote.

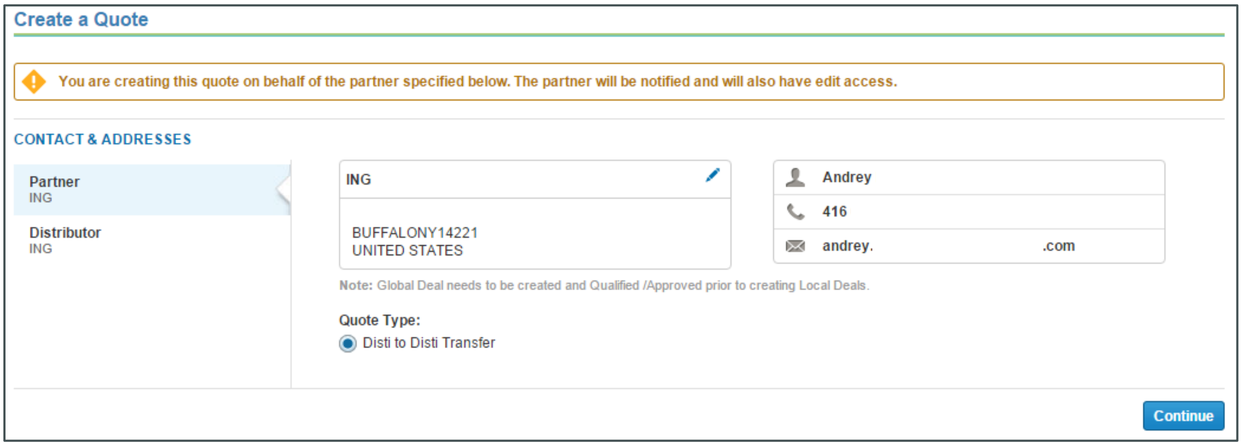
To create a quote type, complete the following steps:

1. From the Deals & Quotes tab on the Cisco Commerce homepage, click **Create Quote**. The Create a Quote page displays.
2. Populate the Partner details.



Create a Quote Page

3. Select the appropriate Quote Type. If you want to create a quote without these types, select the Quick Quote radio button.
4. Alternatively, if the partner selected is the same distributor or another distributor, the Disti to Disti Transfer radio button will be selected by default under the Quote Type section.



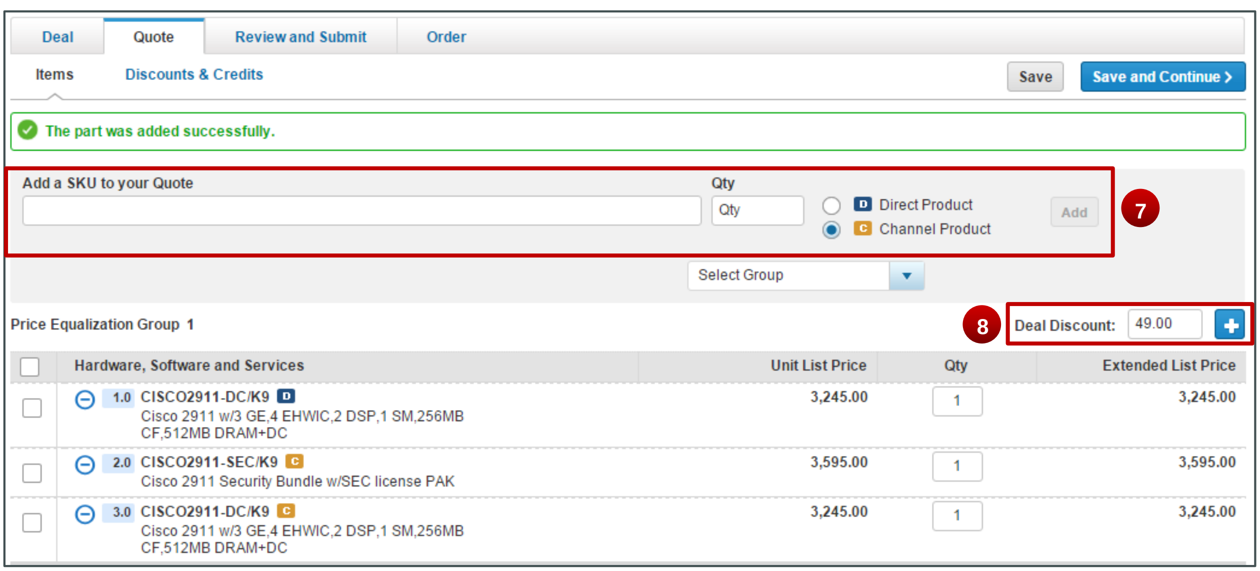
Create a Quote Page: Quote Type

4.2.4.1 Price Equalization Quote Type

To create a Price Equalization quote, complete the following steps:

1. Create a quote, and select a partner (not a distributor or themselves). See [Creating a Quote](#).
2. Under the Quote Type section, click the Price Equalization radio button.
3. Click **Continue**. A new page displays for populating the quote information.
4. Enter the appropriate information about the quote.
5. Click **Create Quote**. The Quote page displays.
6. Populate the Deal tab and Quote tab until you reach the Items sub-tab in the Quote tab.

   For the Price Equalization Quote type, the Items sub-tab displays products in Price Equalization groups.



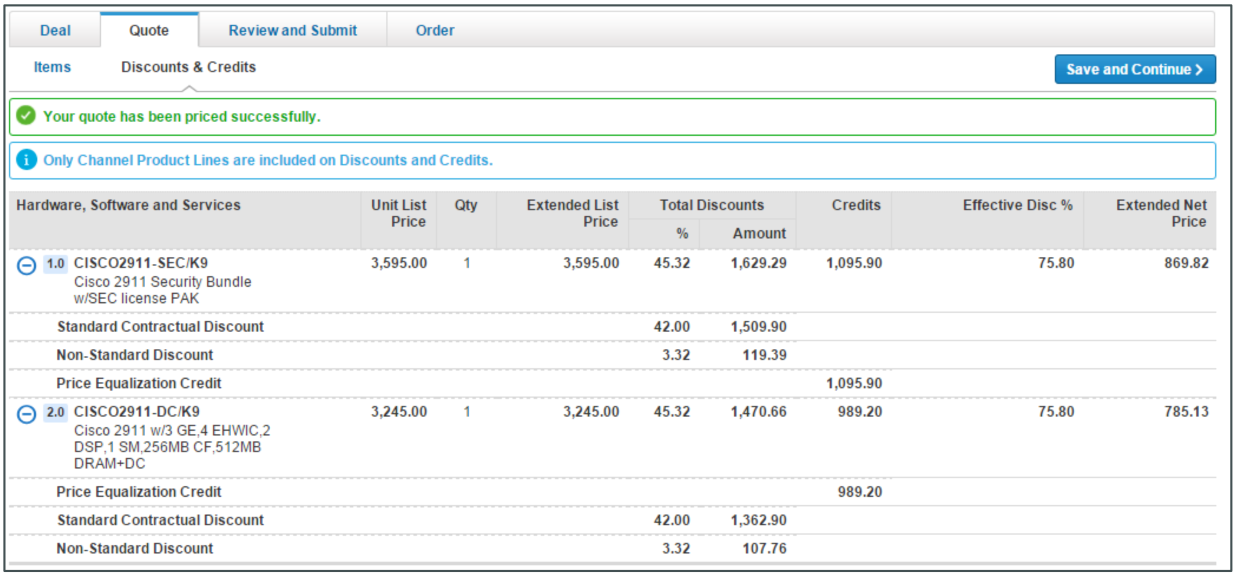
Quote Tab: Items Sub-Tab

7. Add the direct product and the corresponding channel product into new or existing Price Equalization groups by:
    - Entering an SKU.
    - Entering the Quantity.
    - Selecting the Direct Product or the Channel Product radio button.
    - Selecting a new or existing group.
    - Clicking **Add**.

Note: Each Price Equalization group is only allowed to have one direct product. An error message displays if you try to add another.

Each Price Equalization group must contain a direct product AND a channel product. If either is missing from a group, the system displays an error message.

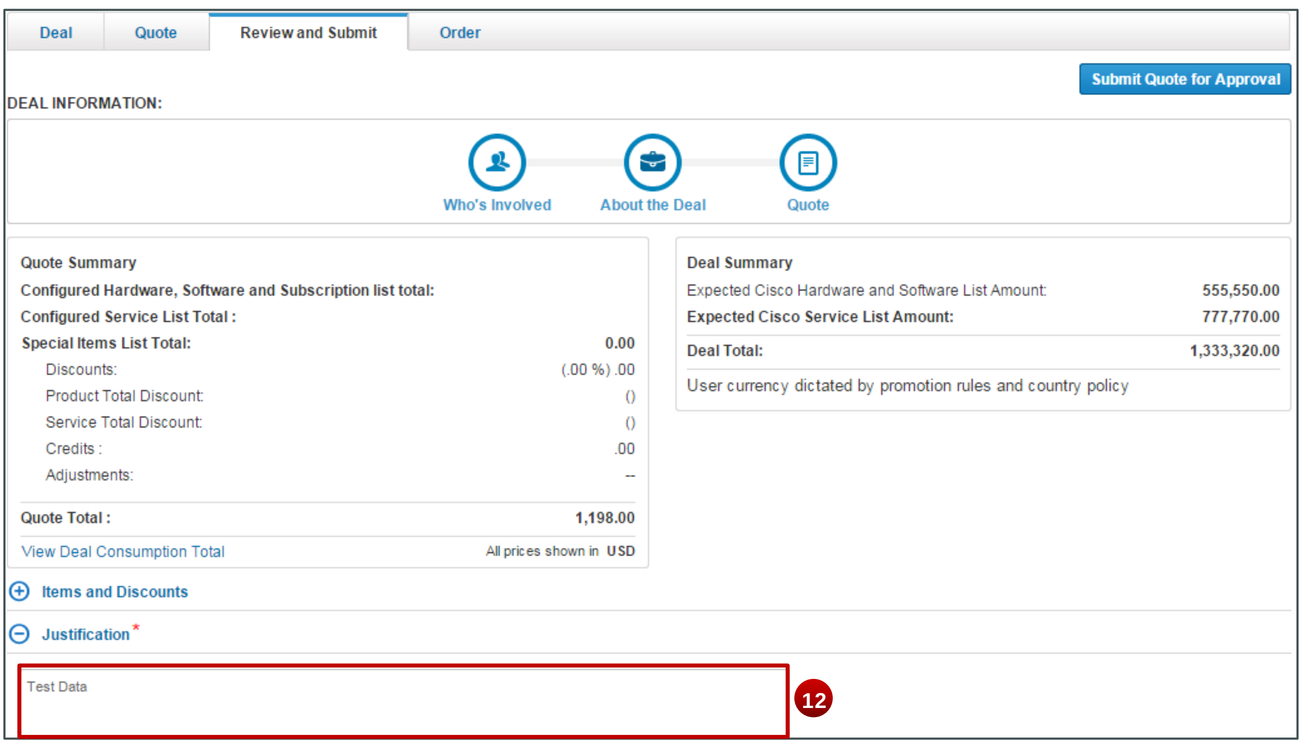
8. At each Price Equalization group level, you can enter a pre-approved deal discount from a source quote. If this field is left blank, your contractual discounts are applied by default.
9. Click **Save and Continue** to go to the Discounts & Credits sub-tab.
10. Review the values on the Discounts & Credits sub-tab.
    - The system calculates the nonstandard discount at each spare equivalent in addition to the Price Equalization credits based on the price difference between configuration and the spare equivalents.
    - For a Price Equalization exceptional quote, only the Channel Products display on the Discounts & Credits sub-tab.
    - There are no Filter by and View by selections.
    - Format Quote Option is not available.
    - Install site and Billing options do not display.
    - Calculate Payment Option is not required.
    - There is no Lead Time section under the Items list.
    - The discounts are calculated from the price equalization credit information entered on the Items sub-tab. The discount fields are not editable.



Hardware, Software and Services	Unit List Price	Qty	Extended List Price	Total Discounts %	Total Discounts Amount	Credits	Effective Disc %	Extended Net Price
1.0 CISCO2911-SEC/K9 Cisco 2911 Security Bundle w/SEC license PAK	3,595.00	1	3,595.00	45.32	1,629.29	1,095.90	75.80	869.82
Standard Contractual Discount				42.00	1,509.90			
Non-Standard Discount				3.32	119.39			
Price Equalization Credit						1,095.90		
2.0 CISCO2911-DC/K9 Cisco 2911 w/3 GE,4 EHWIC,2 DSP,1 SM,256MB CF,512MB DRAM+DC	3,245.00	1	3,245.00	45.32	1,470.66	989.20	75.80	785.13
Price Equalization Credit						989.20		
Standard Contractual Discount				42.00	1,362.90			
Non-Standard Discount				3.32	107.76			

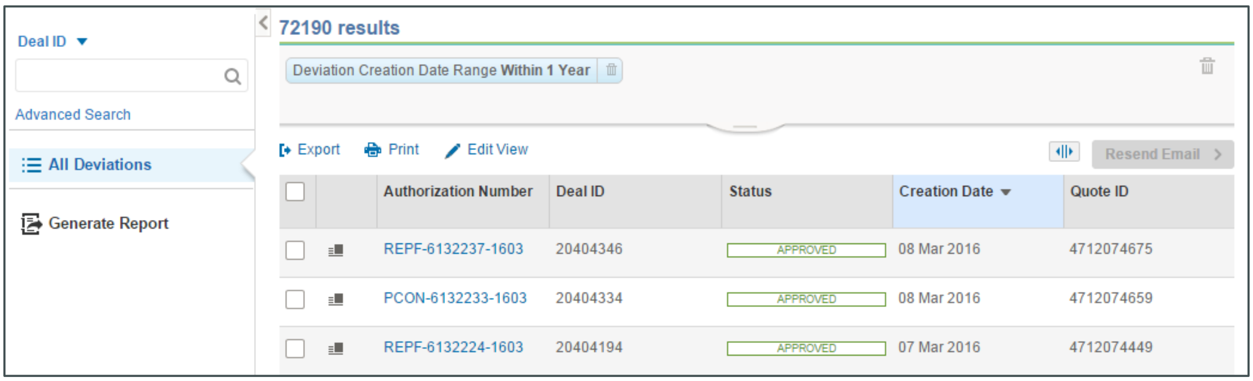
Discounts & Credits Sub-Tab: Price Equalization

11. Continue to the Review and Submit tab.
12. On the Review and Submit tab, type a justification for the quote type. This is a mandatory field. If you do not enter a justification, the system displays an error message. Enter any deal ID that needs to be associated.



Review and Submit Tab: Price Equalization – Justification Box

13. Submit the quote for an approval by clicking **Submit Quote for Approval**. The system automatically populates nonstandard information based on the quote type.
14. Once approved, an autoDART is generated and a notification e-mail is sent to you.
15. Re-open the quote.
16. On the Order tab of the quote, you can:
    - Manage the autoDARTs for all relevant line items.
    - Manage deviations (see Managing Deviations)

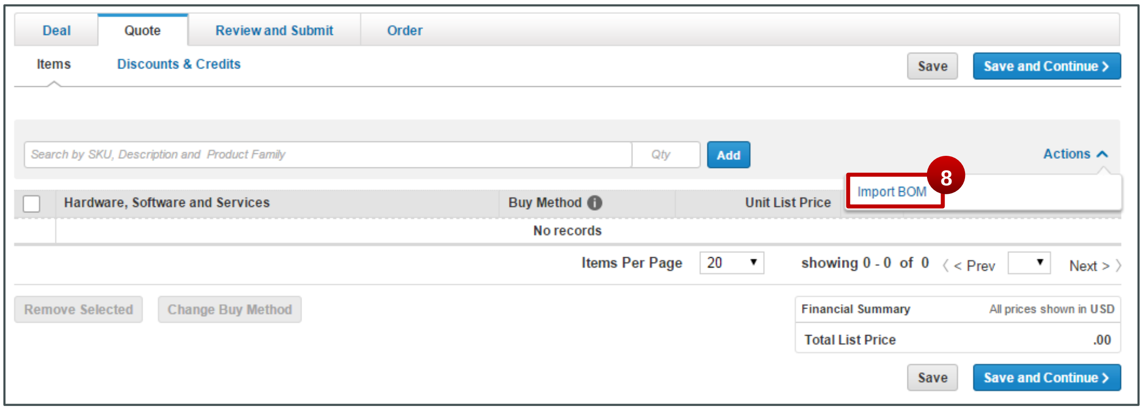


Deviations Page

4.2.4.2 DSAT Quote Type

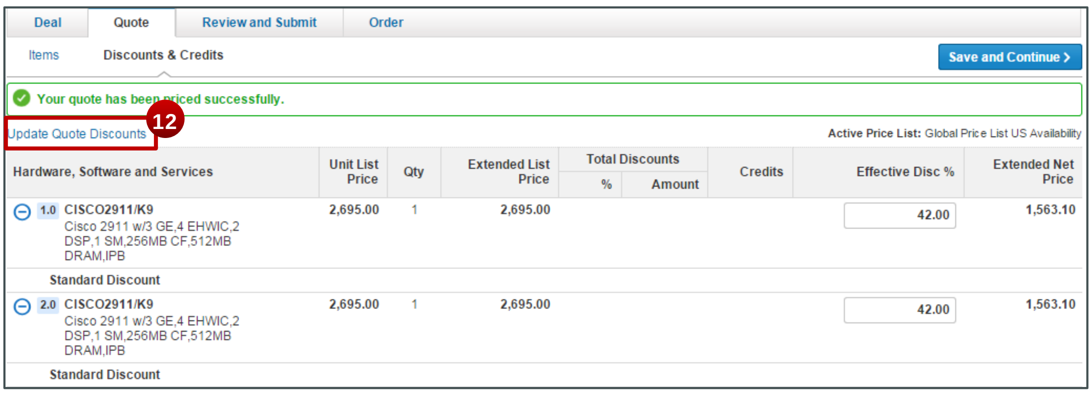
To create a Distributor Customer Satisfaction (DSAT) quote type, complete the following steps:

1. Create a quote and select a partner (not a distributor or themselves). See Creating a Quote.
2. Under the Quote Type section, click the DSAT (Distributor Customer Satisfaction) radio button.
3. Click **Continue**. A new page displays for populating the quote information.
4. Enter the appropriate information about the quote.
5. Click **Create Quote**. The Quote page displays.
6. Populate the Deal tab and Quote tab till you reach the Items sub-tab in the Quote tab.
7. In the Items sub-tab, add SKUs as appropriate.
8. You can also import multiple line items at one time; click to expand the Action menu and then click Import BOM (see the appropriate steps under the Importing a BOM section of the Cisco Commerce Deals and Quotes User Guide).



Quote Tab: Items Sub-Tab

9. Click **Save and Continue** to proceed to the Discounts & Credits sub-tab.
10. The system calculates the nonstandard discount at each line level.

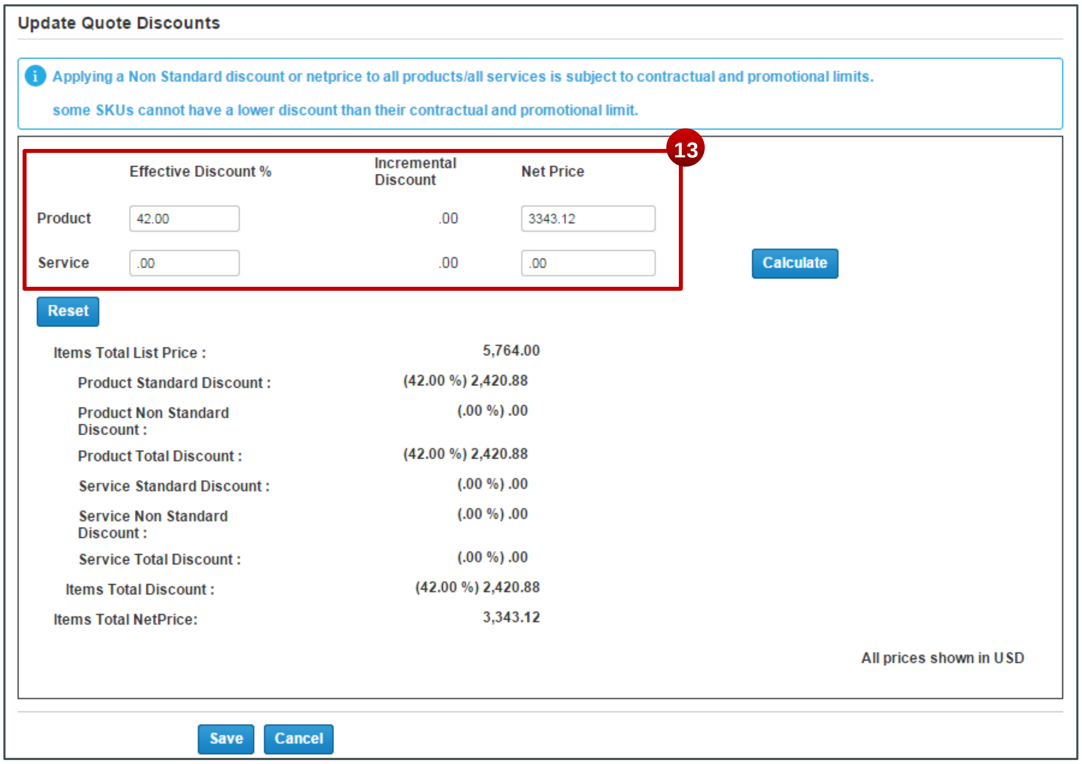


Discounts & Credits Sub-Tab

11. You can request additional nonstandard discounts at each line level. For DSAT quotes, you can request the discount needed to resolve the situation at the quote level.

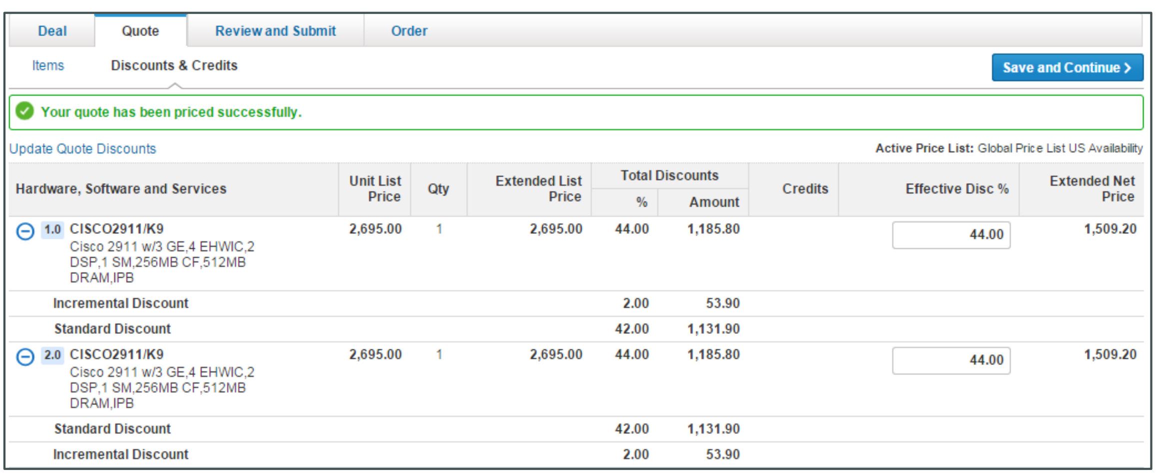
    For example, if the exception is that a product that was ordered was left out of the box and you did not receive the product, you can request a 100% discount to compensate.

12. Click Update Quote Discounts. The Update Quote Discounts dialog box displays.



Update Quote Discounts Dialog Box

13. The discount can be updated at the header level by entering the effective discount % or the net price.
14. Click the Product field or Service field and enter the appropriate information.
15. Click **Calculate**. If the effective discount percentage is changed, the net price gets re-calculated. If the net price is changed, the effective discount percentage is re-calculated.
16. Click **Save**. The Update Quote Discounts dialog box closes.



Update Quote Discounts Dialog Box: An Example

17. Continue to the Review and Submit tab.
18. Enter the justification for the quote type in the Justification field. If you do not enter a justification, the system displays an error message and you will not be able to continue. Enter any deal ID that needs to be associated.
19. Submit the quote for an approval. The system automatically populates nonstandard information based on the exception selected.
20. Once approved, an autoDART is generated and a notification e-mail is sent to you.
21. Re-open the quote.
22. On the Order tab of the quote, you can:
    - Manage the autoDARTs for all relevant line items
    - Manage deviations (see Managing Deviations)

4.2.4.3 Distributor-to-Distributor Stock Transfer Quote Type

To create a distributor-to-distributor stock transfer quote type, complete the following steps:

1. Create a quote, selecting yourself or another distributor as the partner.
2. Under the Quote Type section, the Disti to Disti Transfer radio button will be selected by default.
3. Click **Continue**. A new page displays for populating the quote information.
4. Enter the appropriate information about the quote.
5. Click **Create Quote**. The Quote page displays.
6. For a distributor-to-distributor stock transfer quote:
    - Select the price list of the receiving distributor.
    - Select a buy method; it can be an option other than themselves.
7. Click **Save and Continue**. The Quote page displays on the Quote tab: Items sub-tab.
8. Enter the appropriate information on the Quote tab: Items sub-tab.
9. You can import multiple line items at one time; click to expand the Action menu, then click Import BOM.
10. Continue to the Discounts & Credits sub-tab. The system calculates the nonstandard discount at each line level.
11. You can request additional nonstandard discounts at each line level. For distributor-to-distributor stock transfer quotes, you can request the discount needed to resolve the situation at the quote level.

    For example, if the exception is that a product that was ordered was left out of the box and the distributor did not receive the product, you can request a 99% or 100% discount to compensate.
12. Click Update Quote Discounts. The Update Quote Discount dialog box displays.

13. The discount can be updated at the header level by entering the effective discount % or the net price.
14. Click the Product field or Service field and enter the appropriate discount percentage or net price for all applicable fields.
15. Click **Calculate**. If the effective discount percentage is changed, the net price gets re-calculated. If the net price is changed, the effective discount percentage is re-calculated.
16. Click **Save**. The Update Quote Discount dialog box closes.
17. Continue to the Review and Submit tab.
18. Enter the justification for the quote type in the Justification field.
19. Submit the quote for an approval. The system automatically populates nonstandard information based on the exception selected.
20. Once approved, an autoDART is generated and a notification e-mail is sent to you.
21. Re-open the quote.
22. On the Order tab of the quote, you can:
    - Manage the autoDARTs for all relevant line items
    - Manage deviations (see Managing Deviations)

4.3 Reopening an Approved Quote

You can search for a deal or a quote and reopen it. See Cisco Commerce Deals and Quotes User Guide.

Process is same for the following:

- Editing a quote
- Modifying Discounts

Additional functionalities include:

- Split lines between CBN and stock
- Confirm, unconfirm, or split CBN lines

4.3.1 Applying RNSD

Only Cisco sales teams can initiate the creation of a reusable nonstandard discount (RNSD). A Cisco AM creates a nonstandard deal and flags it as RNSD. Most often, a Cisco AM creates an RNSD at the product family level, though this is not always the case. If created at the product family level, an autoDART is not generated since deviation must be created at the SKU level. After the nonstandard deal is flagged as RNSD, the Cisco AM communicates the RNSD deal ID to you. You can then apply the discount to a quote and obtain the reusable nonstandard discount.

- To apply a Reusable Nonstandard Discount (RNSD) to a quote, complete the following steps:

Note:

- RNSDs cannot be transacted against an expired deal.
- You cannot also search RNSDs using the Cisco Commerce search options.
- When quoting products included on an RNSD, no additional concessions, other than trade-in credits, can be requested on the product/service lines.
- If the total dollar amount of the quote exceeds $100,000, excluding services, and meets all program guidelines, the quote can be marked as Channel Booking Neutrality (CBN) confirmed (see Using Channel Booking Neutrality (CBN)).

There are two possible discounting scenarios depending on how the Cisco AM sets up the RNSD:

- An editable Effective Disc % field displays. Enter the percentage discount provided by the AM. If the entered discount is greater than the one provided by the AM, an error message displays. Contact the AM to confirm the discount and try again.
- The RNSD has been automatically applied in the Total Discounts column and is not editable. If a different discount than expected displays, contact your Cisco Account Manager to resolve the issue and obtain the correct discount.

Click **Submit Quote for Approval**. The quote is automatically approved. Once the quote is submitted and approved, an autoDART is generated and an e-mail notification is sent.

4.4 Using Channel Booking Neutrality (CBN)

Cisco Commerce quoting allows you to confirm a line (that is the minor line) of a configuration or bundle as Channel Booking Neutrality (CBN), as long as the existing CBN quote eligibility is met.

A quote must:

- Represent a reseller’s project and is not for stock or an aggregation of multiple orders.
- Be placed using a Direct Value Add Distributor (DVAD) account and in its entirety on Cisco as a single purchase order.
- Meet a minimum value threshold of $100,000 net product, excluding services (threshold is adjusted to local currency guidelines).
- Be submitted as net-price (pricing and discounting to be ‘up-front’).
- Have the end user information disclosed.
- Have an approved deal ID attached.

Once a quote is approved, you can re-open the quote and view or confirm CBN lines, remove CBN confirmation, split lines between CBN and stock, or convert the CBN quote to a CBN order. CBN quotes and orders can be product only or product and service, but not service only.

4.4.1 CBN – Reopening an Approved Quote

If a Channel Booking Neutrality (CBN) quote is reopened, the system checks if the quote meets CBN criteria at resubmission. If CBN criteria are met, the CBN flag is preserved on all lines (ordered and non-ordered), and no DARTs are re-triggered. The quote continues to be CBN confirmed.

If CBN criteria are not met for all the lines which have not been ordered through CBN, the CBN flag is reset for those unordered lines, and DARTs are created or revised based on BOM updates.

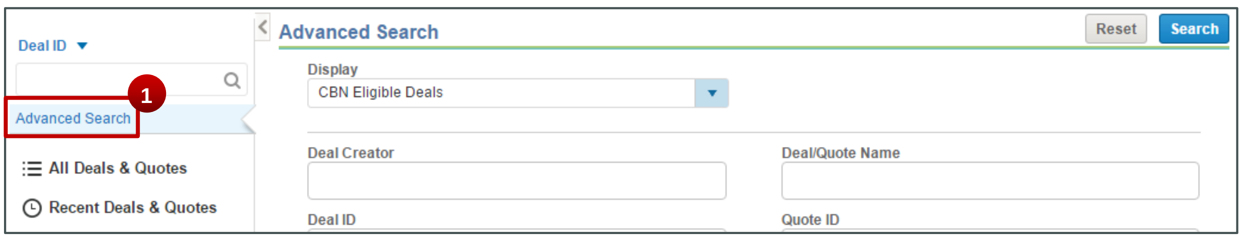
If there is CBN consumption, the quote continues to be CBN confirmed. If not, the quote is marked as CBN ineligible, and the lines are moved to the Select Items to confirm as CBN section.

Re-open the quote or complete the following steps:

1. From the Deals and Quotes page, click Advanced Search. Search for CBN Eligible Deals (see Getting Started with Cisco Commerce User Guide to use the search functionality in Cisco Commerce).

   Ensure the quote status is approved. Only approved quotes can be confirmed for CBN. CBN-eligible deals display on the page.

   Cisco Commerce allows you to confirm a line (that is the minor line) of a configuration or bundle as CBN, as long as the existing CBN quote eligibility is met.



Advanced Search

2. Click the deal ID corresponding to the appropriate deal. The Review tab for the quote displays.
3. If the quote is not approved, click **Submit Quote for Approval**.

   The Quote page displays a message that the quote has been approved.
4. Click **View Submitted Quote**. The Review tab displays.

4.4.2 Confirming Product at CBN

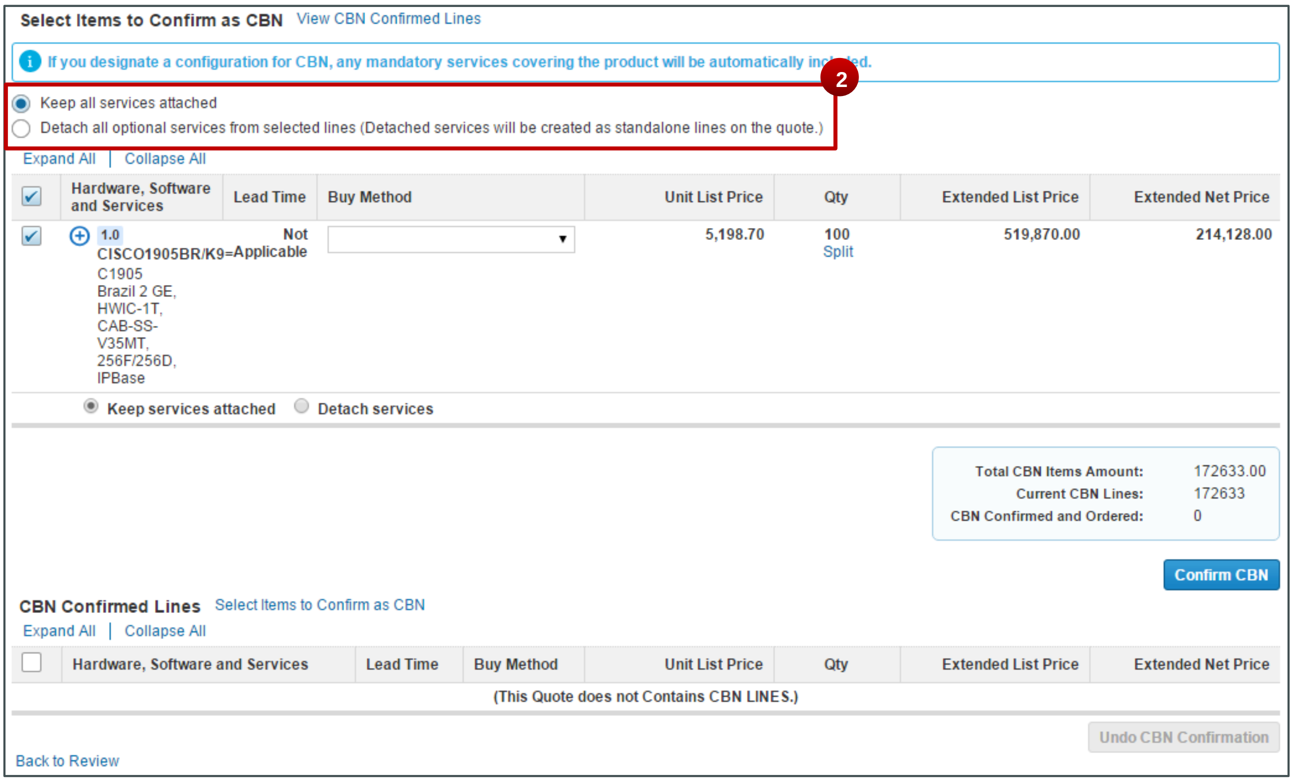
Note: If you detach a service in CBN confirmation, the system stores the service with reference to the product.

To confirm the CBN, complete the following steps:

1. From the Channels Booking Neutrality section of the Review tab, click View/Confirm CBN Lines.

Review and Submit Tab: CBN Section

2. Click the appropriate radio button corresponding to service attachment. Mandatory service lines cannot be detached; they are automatically included.



View/Confirm CBN Lines

3. Check the checkbox corresponding to the items that need to be confirmed. Choose one or many items.

   There is a totals box on the right on the page, giving a running total so that you can track the total and ensure they are within threshold. Chosen items must total $100,000.

4. Alternatively, lines can be split between CBN and stock (see Splitting Lines between CBN and Stock).

5. Click **Confirm CBN**. The Confirm CBN dialog box displays.

If the chosen lines do not meet the CBN criteria, the following message displays: 'The sum of selected lines does not meet CBN order threshold. Please refine your selection'.

If the chosen lines meet the CBN criteria, the following message displays: 'The selected lines will be confirmed as CBN. Are you sure you want to continue?'

6. Click **Confirm**. The dialog box closes.
7. A success message displays in green; the chosen lines have been confirmed.

   The confirmed items are separate from the other items on the quote.
8. Check the checkbox corresponding to confirmed line item. The line item expands.

Learning credits are added as standalone service lines and are therefore eligible to be flagged as CBN. SMS3 services and Smartcare services are not eligible for CBN; therefore, Cisco Commerce will not make these lines available for selection as CBN.

4.4.3 Removing CBN Confirmation

To undo CBN confirmation, complete the following steps:

1. From the Channels Booking Neutrality section of the Review and Submit tab, check the appropriate checkbox.
2. Click **Undo CBN Confirmation**. The system checks for the following criteria:
   - Quote status is Approved or Ordered
   - Chosen line is already CBN Confirmed
   - Chosen line is not present on a quote-converted order (submitted or un-submitted)
3. If the eligibility criteria are met, the Undo CBN Confirmation dialog box displays. The following message displays: 'The selected lines will no longer be CBN confirmed. Are you sure you want to continue?'
4. If the remaining un-ordered lines do not fulfill CBN threshold rules, the following message displays: 'The remaining lines on the quote do not meet CBN threshold rules. This action will remove CBN confirmation for all lines. Are you sure you want to continue?'
5. Click **Continue**. The following message displays: 'Your selected lines have been Unconfirmed as CBN. Return to the Review & Submit page'. The lines are moved to the Select to Confirm CBN lines section.
6. Click **Return**. The CBN page closes, and the Review and Submit tab displays. The system creates a DART for de-selected lines if there is no DART, revises the DART if there is only one DART, or revises the latest DART in the case of more than one DART.

4.4.4 Splitting Lines between CBN and Stock

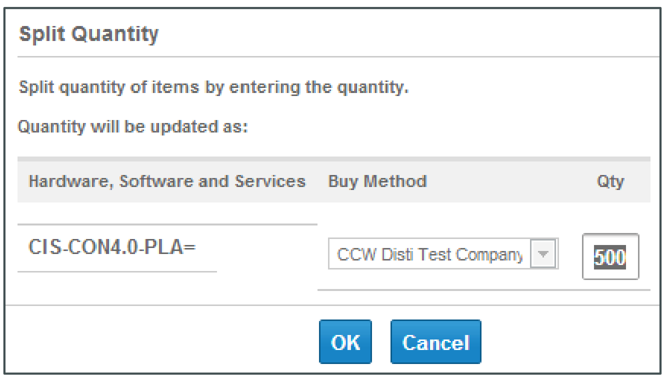
To split lines between CBN and stock, complete the following steps:

1. From the Deals and Quotes tab, click the appropriate deal ID. The Deals and Quotes page displays.
2. Click View/Confirm CBN Lines. The deal displays.

3. Scroll down to view the CBN confirmed lines. To split a CBN line, the following criteria must be met:
   - The quote status is Approved or Ordered.
   - The line being split is the major product line in the quote.
   - The line being split is not present on a quote-converted order (submitted or un-submitted).
   - The line being split meets POS criteria.
4. Click Split corresponding to the appropriate line item. The Split Quantity dialog box displays.

   The current, un-split quantity displays under Qty.
5. Click the Qty field and enter the divided quantity.
6. Click **OK**.

   As long as the criteria are met, the line splits. The newly created line will be associated with a DART if the original line already had one. The same unit list price and discounts are applied to the newly created line.



Split CBN Lines

4.4.5 Converting a Quote with CBN Lines to an Order

Note: You cannot submit a CBN order that has services without identifying the reseller.

To convert a quote with CBN lines to an order, complete the following steps:

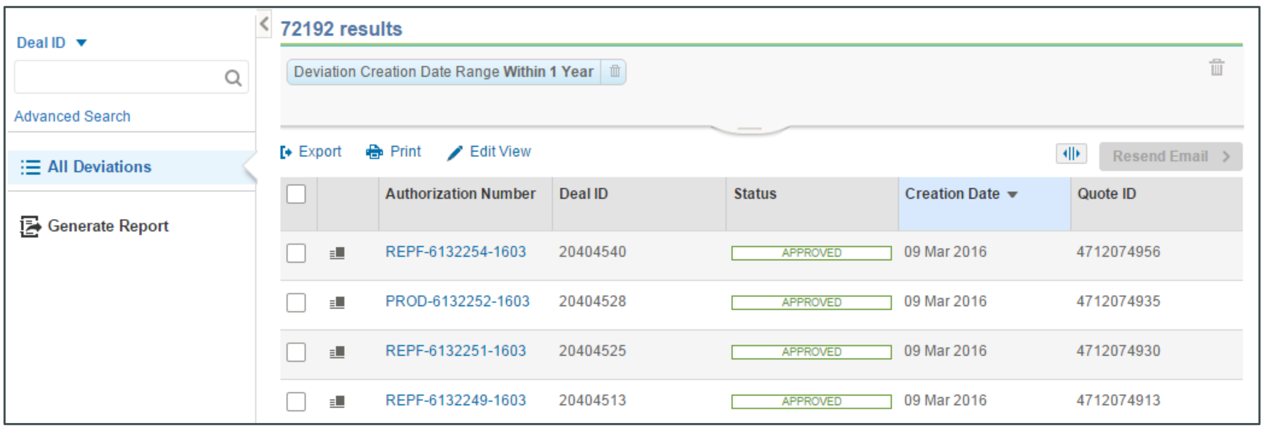
1. Search for an approved quote that is eligible for CBN using advanced search in Cisco Commerce Deals & Quotes tab.
2. Click the deal ID. A deal opens in the Review tab.
3. Scroll down to the Channel Booking Neutrality section. The green flag indicates that this is a CBN deal. It has been confirmed in its entirety.
4. Click View/Confirm CBN Lines.
5. To view the individual lines, click View lines confirmed as CBN.
6. After reviewing, click Back to Review.

7. On the Review tab, click Create a new Order from this quote within the green message. The Order page displays.
8. If a billing address is not selected, add a billing address. A billing address must be added before a shipping address.
9. A DVAD shipping address must be added. Click Add a Shipping Address (see Adding an Address).
10. Complete the remaining information on the Order page.
11. Click **Order Entire Quote**.

4.5 Managing Deviations

You can view and manage the deviations using the Deviations option on the Deals & Quotes tab.

Export, Print and open the deviations from the Deviations page, like any other record. See Getting Started with Cisco Commerce User Guide.

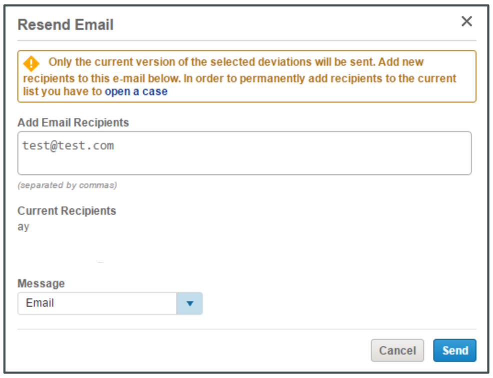


Deviations Page

4.5.1 Resending Email Notification

To receive the most recent version of the deviation, complete the following steps:

1. Select the appropriate deviation and click **Resend Email**. The Resend Email dialog box displays.
2. Click the Add Email Recipients field and enter the appropriate e-mail address(es). Separate multiple addresses with a comma.
3. Click the Message drop-down menu and select the appropriate option.
4. Click **Send**



Resend Email Dialog Box

4.5.2 Viewing Deviation Details

To view the details of the deviation, complete the following steps:

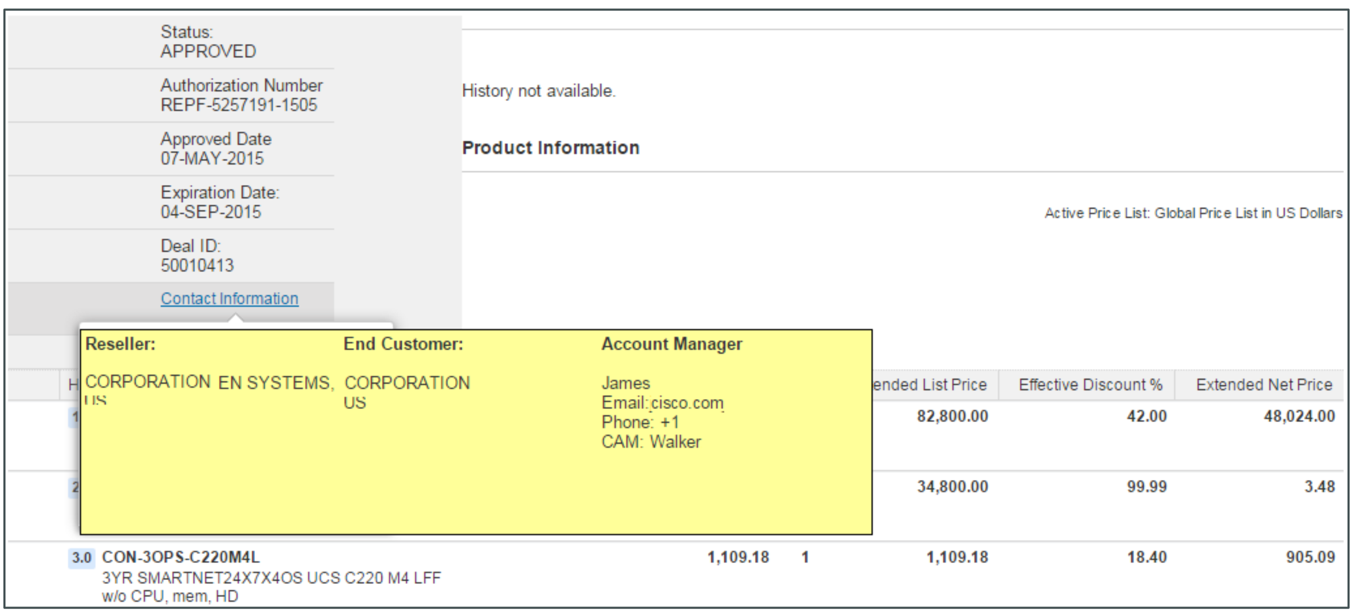
1. From the Deviations page, click the authorization number of the appropriate deviation. The Deviation page displays.

   The History section displays the revisions that have been made to the deviation.

   The Product Information section displays the applicable line item(s).

2. Mouse over Contact Information.

   The reseller, end customer, and Cisco Account Manager (AM) contact information displays as applicable in a fly out.



Viewing a Deviation

4.6 Lead Traceability

Cisco Commerce integrates with the Leads and Prospects system. P360 partner users have access to leads information from CCW, automatically updating statuses when leads are converted to deals in CCW, and sharing Deal ID and other deal details in the Leads and Prospects system when generated in CCW.

For more information, see the Partner Lead Traceability Quick Reference Guide.

4.7 Remaining Sections of the Deals and Quotes User Guide

The following document sections are the same for partners and distributors. See the Cisco Commerce Deals and Quotes User Guide.

- Creating a Quote for Service-only Order
- Sharing Quotes
- Re-opening an Approved Quote: See Reopening an Approved Quote
- Common Utility Functions
- How to Create and Run Reports

5 Managing Orders

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. See Cisco Commerce Order User Guide.

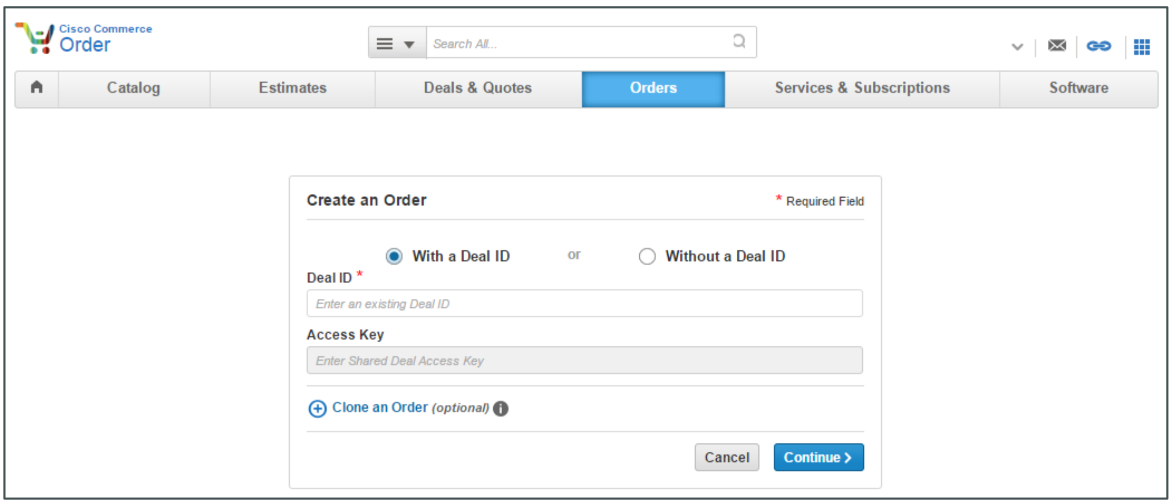
Note: Partner-initiated Customer Access and Internet Commerce Agreement does not pertain to you.

In Cisco Commerce, you can create 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



Cisco Commerce: Create Order Page

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

   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.

5.1 Converting Quote to an Order

Begin the process as indicated in the Cisco Commerce Order User Guide.

Create the new order from the quote. The Order page displays.

Note: For stocking orders, the Install Site and End Customer columns under the Addresses section are grayed out.

The processes for converting a quote to an order are the same for partners and distributors with the following exceptions:

Product and service lease orders are not available for you.

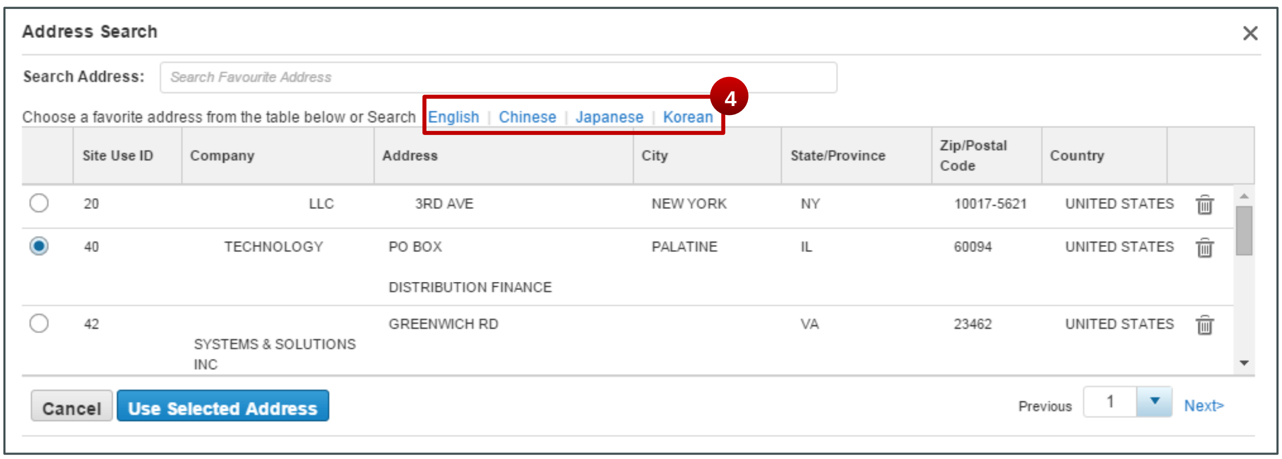
You can convert a quote with CBN lines to an order ([Converting a Quote with CBN Lines to an Order]).

5.1.1 Adding an Address

Note: The billing ID number (BID) populates as part of the reseller/partner address under the Reseller Information section of the Quote page. The BID is the same as the site ID referred to as part of the address search criteria.

To add an address, complete the following steps:

1. To add the appropriate reseller/partner address to associate with the service contract, click the icon to add an address, depending on the addresses already entered. The Address Search dialog box displays.

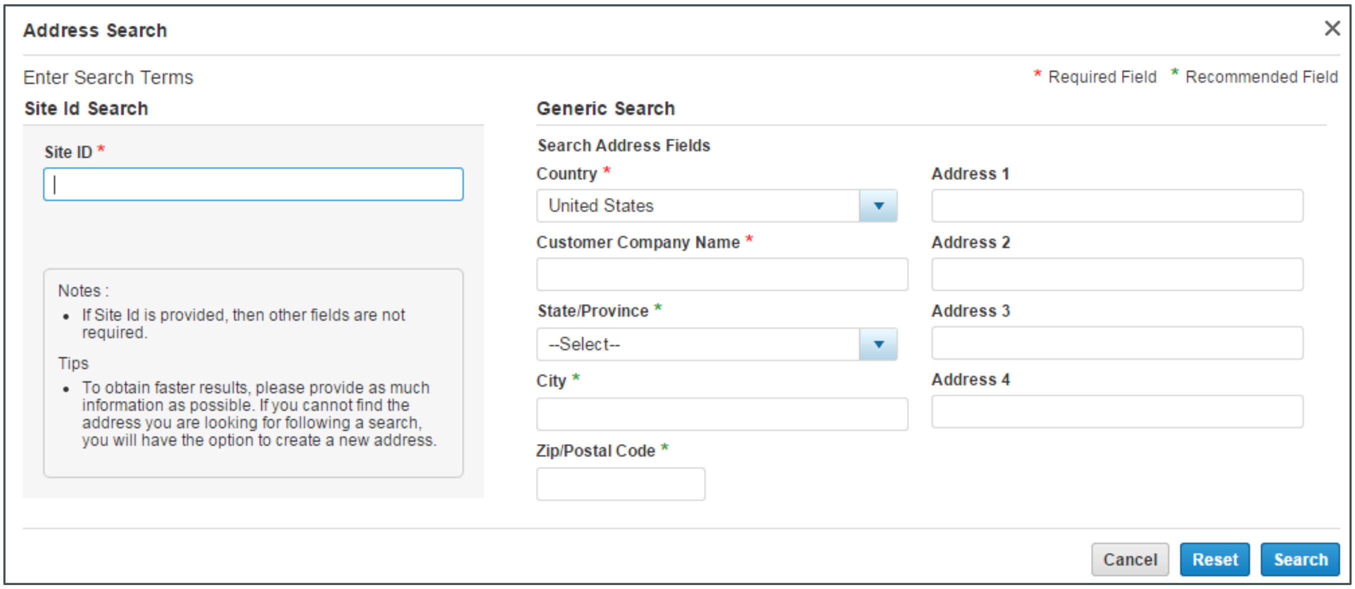


Address Search Dialog Box

2. To choose a favorite address, click the radio button next to the address.
3. Click **Use Selected Address**.
4. Alternatively, to search for a partner click English, Chinese, Japanese, or Korean depending on the language.

   The Address Search dialog box refreshes with search fields.
5. Populate the required fields, indicated with a red asterisk (*).

6. If preferred, use the Site ID Search. If the Site ID is provided, then other fields on the Address Search dialog box are not required.



Address Search Dialog Box: Refreshed

7. Click **Search**.
8. Click the radio button corresponding to the desired address.
9. Click **Select** or **Select And Add as Favorite**.

Select Address Dialog Box

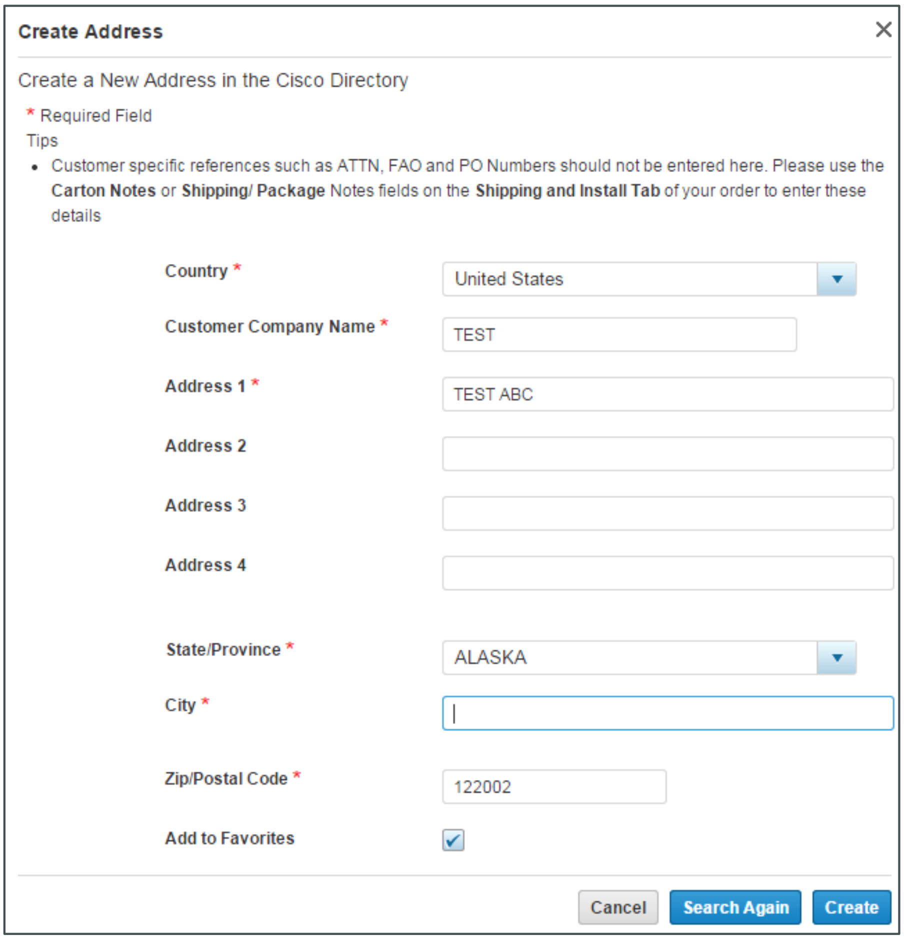
If the desired address does not display as a result of a search, the option to create a new address displays on the Address Search dialog box (see Creating an Address).

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

5.1.2 Creating an 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 dialog box. To create an address, complete the steps that follow:

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

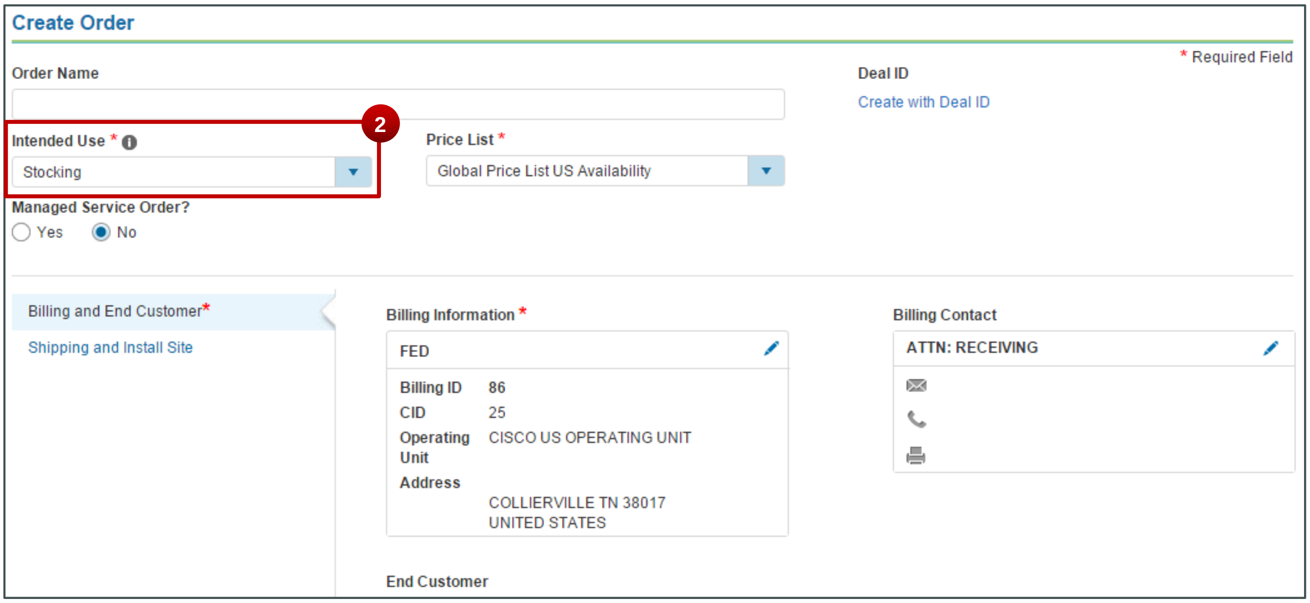


Create Address Dialog Box

5.2 Creating a Standalone Order

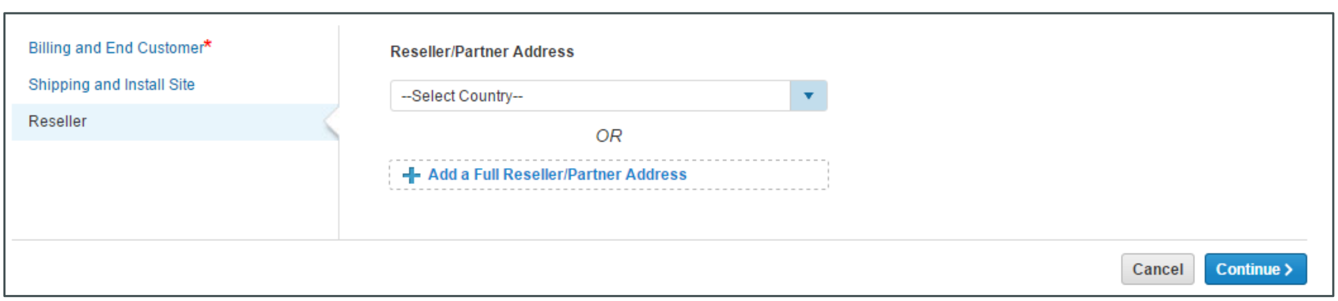
Begin the process as indicated in the [Cisco Commerce Order User Guide].

1. Create the new order. The Order page displays.
2. To create a stocking order, click the Intended Use drop-down arrow on the Order page and select Stocking.



Order Page

3. For stocking orders, the Install Site and End Customer fields are grayed out and the Reseller/Partner Address field does not display.
4. To create a resale order, click the Intended Use drop-down arrow on the Order page and select Resale.
5. For resale orders, the Install Site and End Customer fields are NOT grayed out and the Reseller/Partner Address field DOES display.
6. The entire process for creating an order is the same for partners and distributors with the following exception:
   - Under the Addresses section, there is an additional field for the Reseller/Partner Address. Providing reseller or partner details is required for services.



Order Page: Resale Order

5.2.1 Additional Sections only for Distributors

5.2.1.1 Reseller/Partner Address Section

To populate the Reseller/Partner Address section, complete the following steps:

1. To enter a reseller/partner country only, click the Select Country drop-down. Then click the appropriate country from the drop-down menu.
2. To add a full reseller/partner address, click Add a Full Reseller/Partner Address.
3. The Address Search dialog box displays. The steps are the same as in the Adding an Address section.

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

4. To create an address, see Creating an Address.

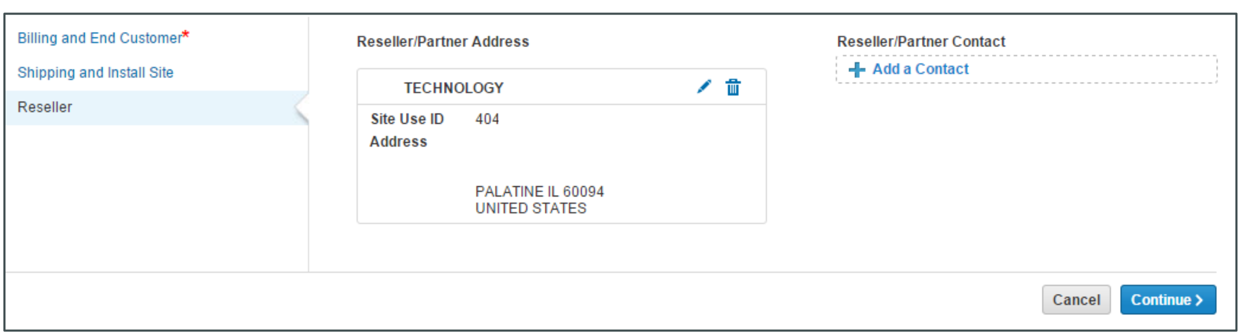
   Once a full reseller/partner address has been entered, the options to change the address, remove the address, and add a contact are enabled.
5. To change the reseller/partner address, click the edit icon.
6. The Address Search dialog box displays. The steps are the same as for adding a reseller/partner address.
7. To remove the reseller/partner address, click the delete icon.
8. To add a contact, see Adding a Contact.

5.2.1.2 Adding or Changing a Contact

5.2.1.2.1 Adding a Contact

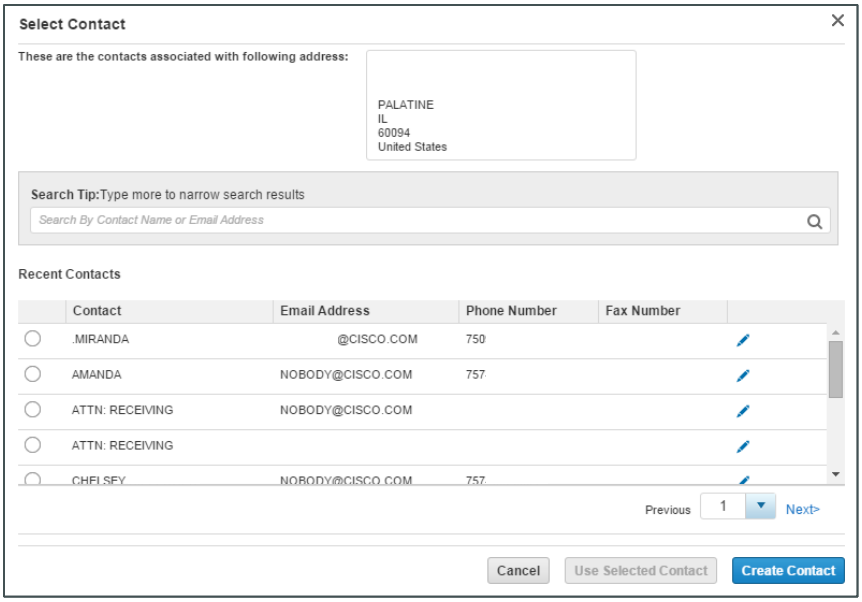
To add a contact, complete the following steps:

1. Click **Add a Contact** in the Billing Address and Contact, Shipping Address, Install Site, and Reseller/Partner Address sections, if applicable.



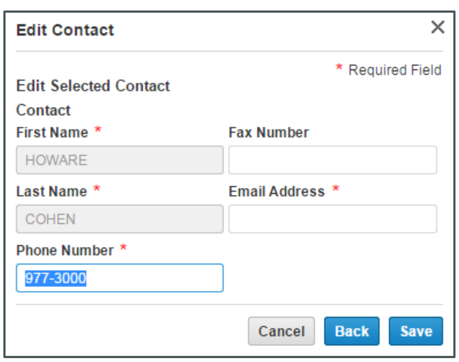
Add a Contact

2. The Select Contact dialog box displays.



Select Contact Dialog Box

3. To associate a displayed contact with the address, click the appropriate radio button.
4. Click **Use Selected Contact**.
5. To edit existing contact information, click the edit icon corresponding to the contact. The Edit Contact dialog box displays.
6. Only the phone number, fax number, and e-mail address can be changed. Click the appropriate field(s) and edit as necessary.
7. Click **Save**.



Edit Contact Dialog Box

Alternatively, to create a contact for the reseller/partner address, complete the following steps:

8. Click **Create Contact**.
9. The Create Contact dialog box displays.

10. Populate the required fields, indicated with a red asterisk (*). These are not search fields; they must be completed fully and accurately.
11. Click **Create**.
12. The dialog box closes, and the contact information displays on the Order page.

5.2.1.2.2 Changing a Contact

To change the contact information, complete the following steps:

1. Click the edit icon corresponding to the contact.
2. The Select Contact dialog box displays.
3. Ensure the appropriate radio button is selected.
4. Click **Use Selected Contact**.
5. The dialog box closes, and the Order page displays.

5.2.2 Completing the Order Page

Ensure that the Shipping Address, Install Site, End Customer, and Reseller/Partner Address sections have been populated as applicable.

Click **Continue**. The order is created. The order number/name and the web order ID number display at the top of the page.

5.3 Creating Orders from Existing Orders

You can create new orders from existing orders in Cisco Commerce. See the Cisco Commerce Order User Guide.

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.

5.4 Populating the Order Details

The processes are same for partners and distributors. See the Cisco Commerce Order User Guide.

- Header Content
- Adding Items to the Order: Items Tab
- Adding Different Types of SKUs

Note: The Fixed Scope Consultancy SKUs are fixed price, fixed scope, and fixed duration. Fixed Scope Consultancy Services will always be purchased at net price, and the point-of-sale, or POS, will be submitted

- Choosing Options/Resolving Issues

- Cisco Feature Navigator Option
- Populating the PO Line Reference
- Setting Quantities for Products
- Adding Services

Note: Setting Default Services Options (Creating an Order without a Deal ID only): This section does not display when an order is created using a deal ID. The default service settings are established as part of preparing the quote.

- Renewing Software Subscription
- Identifying Target Contract Numbers
- Item Notes/Comments
- Saving a Configured Order
- Remove from Order
- Reviewing Discounts

Note: If you have indicated Stocking as the intended use on the Create Order page, Stocking is locked as the intended use and cannot be changed.

- Setting the Shipping and Installation Information
- Verifying Billing Information
- Reviewing and Submitting the Order
- Submitting the Order

5.5 Remaining Sections of the User Guide

The remaining sections of the Cisco Commerce Order User Guide are the same for partners and distributors:

- Reusable Nonstandard Discount
- Services Only Order
- Viewing Status of an Order

Note: Leasing order information will not display under View Status for you.

- Updating or Cancelling a Submitted Order
- Common Utility Functions
- Access shared order

- View all or specific orders
- Tag orders
- Manage invoices
- Manage returns

5.6 Partial Service Ordering

You can purchase services without providing all the information required for the contract creation. The service is ordered, booked, and invoiced – but not entitled. Missing information could be:

1. Complete Install Site (install site country is needed) and/or
2. Serial Number or (Sales Order Number for non-serialized product)

Within the required timeframe, register the services by providing complete information required for contract creation. Contract is created after required information is provided.

For more information, see Cisco Commerce Partial Service Order and Cisco Commerce Registering Services and Entitlement.