



SaaS Backlog Reporting in Cisco Commerce

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

SaaS Backlog Reporting

This User Guide will walk you through how to [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 orders not in End Complete or Cancelled status.

Generate a SaaS Backlog Report

To generate a manual SaaS Backlog Report, containing the list of orders that are associated with your Bill to ID(s), follow below steps:

1. From CCW homepage, [Click](#) on **Orders**

2. [Click](#) on **Advance Search**

	Order Name	Sales Order No.	Web Order ID	Submitted Date	Status
<input type="checkbox"/>	Order-93153223		93153223	05 Mar 2018	SUBMITTED
<input type="checkbox"/>	Order-93153221		93153221	05 Mar 2018	ORDER PROCESSING
<input type="checkbox"/>	demo1TierOrder		93153217	05 Mar 2018	ORDER PROCESSING
<input type="checkbox"/>	demo1TierOrder		93153118	05 Mar 2018	ORDER PROCESSING
<input type="checkbox"/>	Order-93153205		93153205	05 Mar 2018	IN PROGRESS
<input type="checkbox"/>	demo1TierOrder		93153100	05 Mar 2018	IN PROGRESS
<input type="checkbox"/>	Order-93152828		93152828	05 Mar 2018	COMPLETED
<input type="checkbox"/>	test_mar_02		93152811	05 Mar 2018	SUBMITTED
<input type="checkbox"/>	test_mar_06		93152803	05 Mar 2018	SUBMITTED
<input type="checkbox"/>	demo1TierOrder		93152705	05 Mar 2018	COMPLETED



3. In the **Advanced Search** page, enter/select the search criteria based on the list of available options
4. Under **Order Status** section, Select the **SaaS Backlog Report** and Click on **Search**

Note: The backlog report will contain orders for the Bill to IDs that are associated with your profile

The screenshot displays the 'Advanced Search' interface in Cisco Commerce. The top navigation bar includes 'Catalog', 'Estimates', 'Deals & Quotes', 'Orders' (selected), 'Services & Subscriptions', and 'Software'. The 'Advanced Search' section is highlighted with a red box and a red circle containing the number 3. This section contains various search filters and options, including 'View By', 'Order Name', 'Sales Order No.', 'Web Order ID', 'Deal ID', 'Purchase Order No.', 'Subscription ID', 'End Customer Name', 'Bill to Address ID', 'End Customer No.', 'Trade In Quote No.', 'Created By', 'Submitted By', 'Customer No.', 'Ship to Country', 'Last Modified', 'Submit Date Range', 'Requested Date Range', and 'Created Date Range'. Below this, there are checkboxes for 'Customer Smart Account Status', 'Smart Account Required', and 'Order Status'. The 'SAAS Backlog Report' option is highlighted with a red box and a red circle containing the number 4. The 'Search' button is also highlighted with a red box and a red circle containing the number 4. A 'Cancel' button is located at the bottom left, and a 'Reset' button is located at the bottom right.

5. Cisco Internal Users generating the SaaS Backlog Report on behalf of Customers/Partners are required to enter at least one of the mandatory search parameters



Advanced Search Reset Search

View By
All Orders

Order Name

Web Order ID

Purchase Order No.

End Customer Name

End Customer No.

Created By
All Records

BE GEO ID

Customer No.

Sales Order No.

Deal ID

Subscription ID

Bill to Address ID

Enter a proper Bill to Address ID, Customer ID, BE GEO ID, or GUID.

Trade In Quote No.

Submitted By

GUID

Ship to Country
Select

6. The search result will show the list of SaaS Backlog Orders on the screen

1731 results Download Reports Create New Order

View By **All Orders** | Created By **All Records** | Last Modified **All Dates** | Submitted Date **All Dates** | Requested Date **All Dates** | Creation Date **All Dates** | Status **SAASBACKLOG**

Export | Print | Add Tag | Share | Edit View

<input type="checkbox"/>	Order Name	Sales Order No.	Web Order ID	Submitted Date	Status
<input type="checkbox"/>	Order-93153223		93153223	05 Mar 2018	ORDER PROCESSING
<input type="checkbox"/>	Order-93153221		93153221	05 Mar 2018	ORDER PROCESSING
<input type="checkbox"/>	demo1TierOrder		93153217	05 Mar 2018	ORDER PROCESSING
<input type="checkbox"/>	demo1TierOrder		93153118	05 Mar 2018	ORDER PROCESSING
<input type="checkbox"/>	Order-93153205		93153205	05 Mar 2018	IN PROGRESS
<input type="checkbox"/>	demo1TierOrder		93153100	05 Mar 2018	IN PROGRESS
<input type="checkbox"/>	Order-93153310		93153310	05 Mar 2018	ORDER PROCESSING
<input type="checkbox"/>	Order-93153302		93153302	05 Mar 2018	ORDER PROCESSING
<input type="checkbox"/>	Order-93153050		93153050	05 Mar 2018	ORDER PROCESSING
<input type="checkbox"/>	Order-93153047		93153047	05 Mar 2018	ORDER PROCESSING

View 10 Items Per Page Page 1 of 174 Previous 1 Next

7. To generate the SaaS Backlog Report, Select the list of orders and Click on **Export**

8. The export output (excel) will only download the number of items that appear on the screen. To download more number of items, increase the **Items Per Page** count from the **View** drop-down



Order Name	Sales Order No.	Web Order ID	Submitted Date	Status
Order-93153223		93153223	05 Mar 2018	ORDER PROCESSING
Order-93153221		93153221	05 Mar 2018	ORDER PROCESSING
demo1TierOrder		93153217	05 Mar 2018	ORDER PROCESSING
demo1TierOrder		93153118	05 Mar 2018	ORDER PROCESSING
Order-93153205		93153205	05 Mar 2018	IN PROGRESS
demo1TierOrder		93153100	05 Mar 2018	IN PROGRESS
Order-93153310		93153310	05 Mar 2018	ORDER PROCESSING
Order-93153302		93153302	05 Mar 2018	ORDER PROCESSING
Order-93153050		93153050	05 Mar 2018	ORDER PROCESSING
Order-93153047		93153047	05 Mar 2018	ORDER PROCESSING

- The **Export Options** modal will appear and indicate the list of Orders that will be exported and also show an informational message providing additional details to access your report
- Select the **File Type** from the drop-down and Click on **Export**

Note: When SaaS Backlog Report is selected on Advance search, **File Type** on the **Export Options** page will be defaulted to Entire Order and selecting entire order will only generate the report

Export Options

You are about to export 10 Orders.

Upon click of Export your report will be generated and you will receive an email once it is ready. You can then click on 'Download Reports' to access your report.

File Type
Entire Order

Columns
Select and Order Columns to Export

All Columns: Bill To, Created By, Created Date, Customer Smart Account Status, Deal Expiration, Deal ID

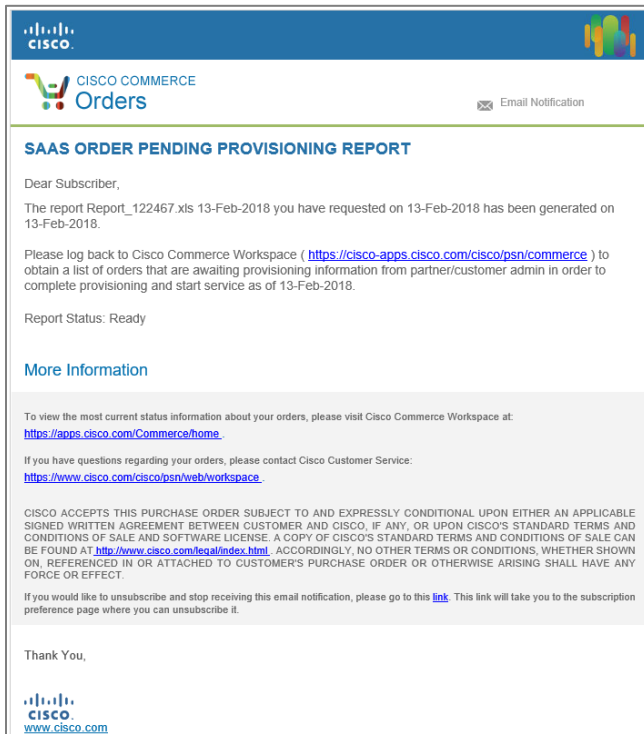
Included Columns: Order Name*, Sales Order No.*, Web Order ID*, Submitted Date, Status

*Columns must be displayed

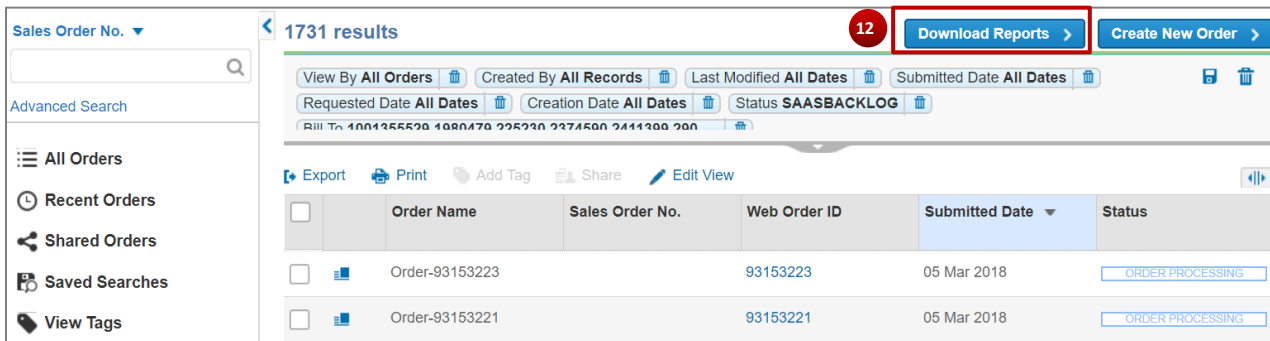
Send Report by
 Email Download Generate Report

Cancel **Export**

- You will receive an email notification confirming the report has been generated and available for download



12. Return to Cisco Commerce **Orders** page and Click on **Download Reports**



13. In the **Download reports** section,

- A. **Report ID** is the unique number assigned to the report
- B. **Report Name** is the file name and will be **hyperlinked** to download the SaaS Backlog Report when the file **Status** is **Ready**
- C. **Status - Ready** indicates the report is available and can be downloaded and **ELIGIBLE** indicates the file generation is in progress
- D. **Requested On** and **Completed On** will reflect the dates when the file was requested and completed



Reports

The "Reports" page allows you to download reports when ready. You can delete any generated report; if you do not, the system will automatically remove them after a month. An email alert will be sent to you when your report is completed and ready to download. To download a report, click on the report name hyperlink for reports in "READY" status - Reports will remain in this list for 30 days.

Download reports

Report ID	Report Name	Status	Requested On	Completed On
<input type="checkbox"/> 122509	Report_122509.xls	Ready	2/20/18	2/20/18
<input type="checkbox"/> 122516	Report_122516.xls	Ready	2/22/18	2/22/18
<input type="checkbox"/> 122536	Report_122536.xls	Ready	2/23/18	2/23/18
<input type="checkbox"/> 122554	Report_122554.xls	Ready	2/27/18	2/27/18
<input type="checkbox"/> 122558	Report_122558.xls	Ready	3/1/18	3/2/18
<input type="checkbox"/> 122562	Report_122562.xls	Ready	3/2/18	3/2/18
<input type="checkbox"/> 122565	Report_122565.xls	Ready	3/2/18	3/2/18
<input type="checkbox"/> 122567	Report_122567.xls	Ready	3/2/18	3/2/18
<input type="checkbox"/> 122568	Report_122568.xls	Ready	3/2/18	3/2/18
<input type="checkbox"/> 122569	Report_122569.xls	Ready	3/5/18	3/5/18
<input type="checkbox"/> 122570	Report_122570.xls	Ready	3/5/18	3/5/18
<input type="checkbox"/> 122571	Report_122571.xls	ELIGIBLE	3/5/18	3/5/18

Refresh Remove

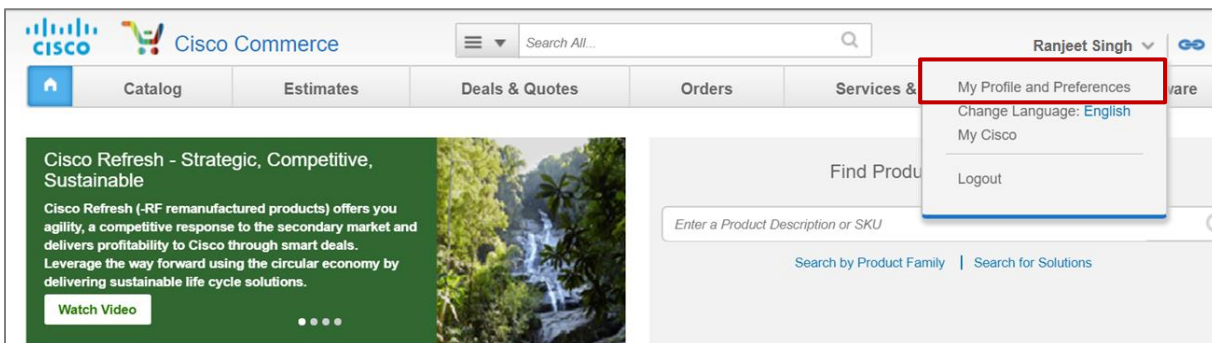
14. Sample report is shown below

A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T
1	WEB ORDER ID	ORDERED ITEM	ORDER SUBMIT	ORDER SUBMITTED BY	PROVISIONING CLOCH LINE STATUS	SUBSCRIPTION ID	REQUESTED BY	ASD AGE	DAYS TO CANCEL	BILL TO CUSTOMER NAME	SERVICE TO CUSTOMER NAME	END CUSTOMER NAME	BILL TO COUNTRY	SERVICE TO C	END CUSTOMER C	ORDER VALUE	MONTHLY RECURRING	TERM	RENDED LINE
2	13153050	A-WW-ACTIVE-USER	2018-03-05	ccwadm	Pending Approval	Sub1094	2018-04-23	48		ABCO COMMUNICATIONS INC	ABCO COMMUNICATIONS INC	ABCO COMMUNICATIONS	United States	United States	United States	1234	1234	12	Resale
3	13153047	A-WW-ACTIVE-USER	2018-03-05	ccwadm	Pending Approval	Sub1099	2018-05-01	56		DEF COMMUNICATIONS INC	DEF COMMUNICATIONS INC	DEF COMMUNICATIONS	United States	United States	United States	1234	1234	12	Resale
4	13153217	A-WW-EMP-COUNT	2018-03-05	a.dbc	ordersimp-testAuto	Pending Approval	Sub1320	2018-03-05	0	CISCO NORTH AMERICA INC	CISCO NORTH AMERICA INC	CISCO NORTH AMERICA	United States	United States	United States	1234	1234	12	Resale
5	13153302	A-WW-NAMED-USER	2018-03-05	def.jrl	Pending Approval	Sub1099	2018-05-01	56		ABCO COMMUNICATIONS INC	ABCO COMMUNICATIONS INC	ABCO COMMUNICATIONS	United States	United States	United States	1234	1234	12	Resale
6	13153118	A-WW-EMP-COUNT	2018-03-05	def.jrl	ordersimp-testAuto	Pending Approval	Sub132025	2018-03-05	0	DEF COMMUNICATIONS INC	DEF COMMUNICATIONS INC	DEF COMMUNICATIONS	United States	United States	United States	1234	1234	12	Resale
7	13153310	A-WW-ACTIVE-USER	2018-03-05	ccwadm	Pending Approval	Sub1007	2018-04-22	47		CISCO NORTH AMERICA INC	CISCO NORTH AMERICA INC	CISCO NORTH AMERICA	United States	United States	United States	1234	1234	12	Resale
8	13153205	A-WW-ACTIVE-USER	2018-03-05	a.dbc	ordersimp-testAuto	Awaiting Provisioning	Sub1315	2018-03-05	0	90 ABCO COMMUNICATIONS INC	ABCO COMMUNICATIONS INC	ABCO COMMUNICATIONS	United States	United States	United States	1234	1234	12	Resale
9	13153100	A-HCS-SUB-UC-OP	2018-03-05	def.jrl	Electronic Fulfillment	Sub1320	2018-03-05	0		90 DEF COMMUNICATIONS INC	DEF COMMUNICATIONS INC	DEF COMMUNICATIONS	United States	United States	United States	1234	1234	12	Resale
10	13153221	IND-SOFTWARE-K9	2018-03-05	a.dbc	Entered	Sub1318	2018-03-05	0		CISCO NORTH AMERICA INC	CISCO NORTH AMERICA INC	CISCO NORTH AMERICA	United States	United States	United States	1234	1234	12	Resale
11	13153223	A-HCS-SUB-UC-OP	2018-03-05	def.jrl	Entered	Sub1318	2018-03-05	0		ABCO COMMUNICATIONS INC	ABCO COMMUNICATIONS INC	ABCO COMMUNICATIONS	United States	United States	United States	1234	1234	12	Resale
12																			

Subscribe to SaaS Backlog Report

To subscribe and receive the SaaS Backlog Report of orders pending provisioning, follow steps below:

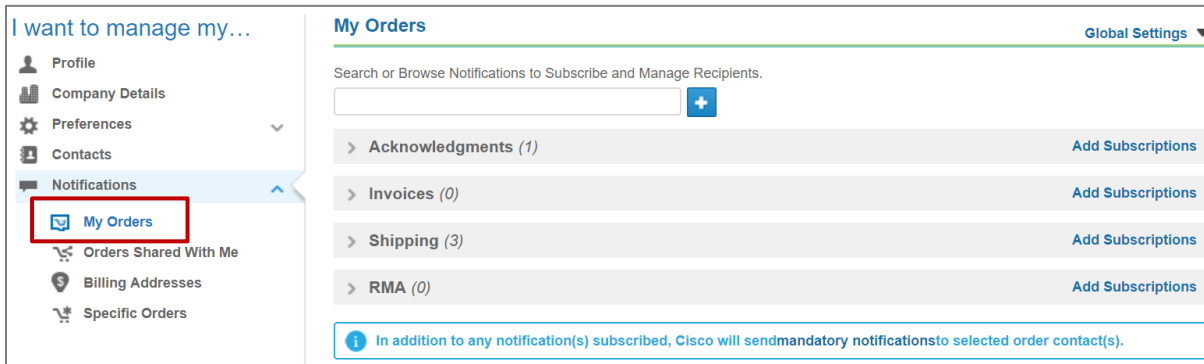
1. Click on My Profile and Preferences option available under the profile drop-down



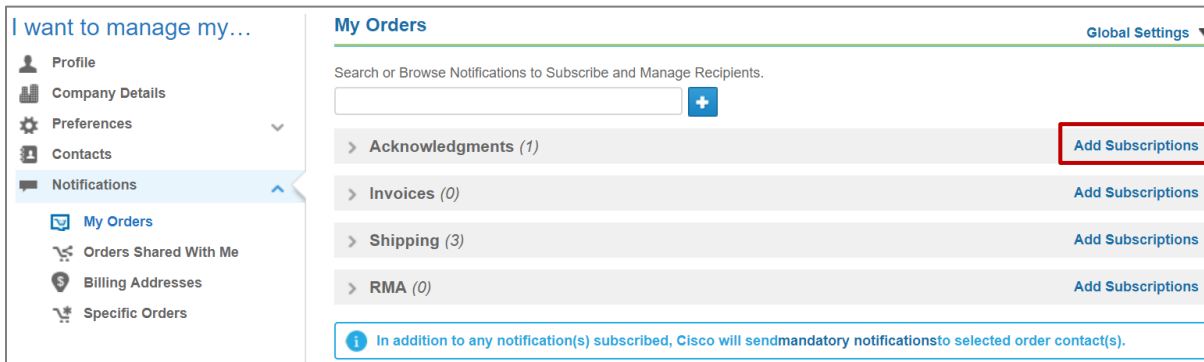
2. Click on My Orders available under Notifications

[Provide Feedback on this Training Resource](#)

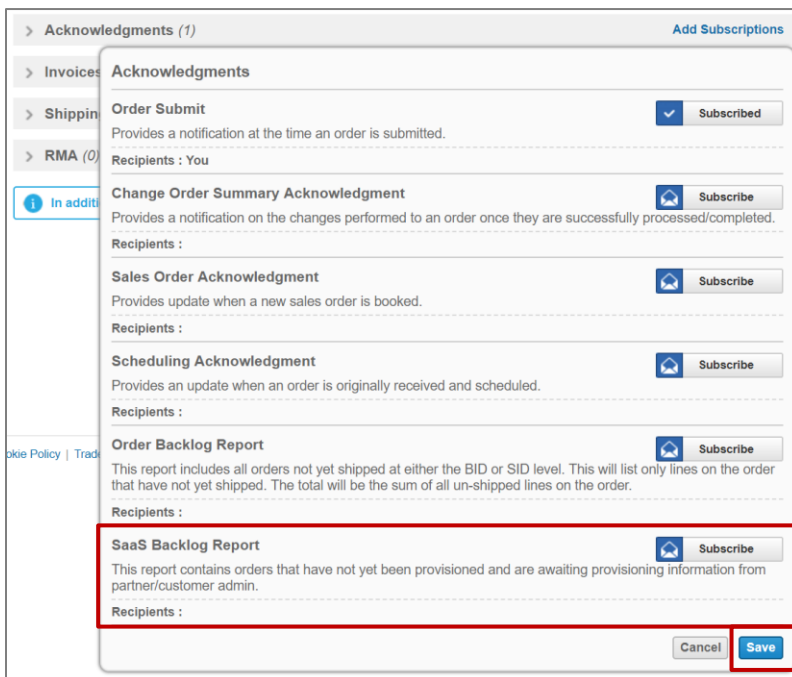




3. Under **Acknowledgements** section, Click on **Add Subscriptions**



4. On the list of available options under **Acknowledgements**, Click **Subscribe** associated with **SaaS Backlog Report** and **Save**



5. The **SaaS Backlog Report** will reflect on your list of **Acknowledgements** subscriptions



6. Additional recipients can be added to receive the **SaaS Backlog Report** by using the **Manage Recipients** feature

7. If you would like to receive the **SaaS Backlog Report** of the orders that are shared with you. Click on **Orders Shared With Me** and follow **Steps 3 to 5** above

8. To subscribe and receive the SaaS Backlog Report of orders for individual Bill-To-ID/s. Click on **Billing Addresses**
9. Select **Manage Subscriptions** available next to the Billing Address



The screenshot shows the Cisco Commerce user interface. At the top, there are navigation tabs: Catalog, Estimates, Deals & Quotes, Orders, Services & Subscriptions, and Software. On the left, a sidebar menu titled "I want to manage my..." contains options: Profile, Company Details, Preferences, Contacts, Notifications, My Orders, Orders Shared With Me, Billing Addresses (highlighted with a red box and a red circle with the number 8), and Specific Orders. The main content area is titled "Billing Addresses" and includes a "Global Settings" dropdown and an "Add Billing Address from My Profile" button. Below this, there are two entries: "AMERICA INC" with address "PARKWAY PLAZA, United States" and "BILLING ID: 225", and "ARGENTINA INC" with address "BUENOS AIRES, Argentina" and "BILLING ID: 738". Each entry has a "Manage Subscriptions" button. The button for "ARGENTINA INC" is highlighted with a red box and a red circle with the number 9. At the bottom, there is an information icon and a note: "In addition to any notification(s) subscribed, Cisco will send mandatory notification to selected order contact(s)."

10. Click on **Add Subscriptions** available next to **Acknowledgements**

This screenshot shows the "Manage Subscriptions" dialog box. It has a search input field with a "+" button and a "Close" button. Below the search field, there is a list of subscription categories: "Acknowledgments (1)", "Invoices (0)", "Shipping (0)", and "RMA (0)". Each category has an "Add Subscriptions" button. The "Add Subscriptions" button for "Acknowledgments (1)" is highlighted with a red box. At the bottom, there is an information icon and a note: "In addition to any notification(s) subscribed, Cisco will send mandatory notification to selected order contact(s)."

11. From the list of available options, Click **Subscribe** associated with **SaaS Backlog Report** and **Save**



> Acknowledgments (1)

Acknowledgments

Order Submit **Subscribe**
Provides a notification at the time an order is submitted.
Recipients :

Change Order Summary Acknowledgment **Subscribe**
Provides a notification on the changes performed to an order once they are successfully processed/completed.
Recipients :

Sales Order Acknowledgment **Subscribe**
Provides update when a new sales order is booked.
Recipients :

Scheduling Acknowledgment **Subscribe**
Provides an update when an order is originally received and scheduled.
Recipients :

Order Backlog Report **Subscribe**
This report includes all orders not yet shipped at either the BID or SID level. This will list only lines on the order that have not yet shipped. The total will be the sum of all un-shipped lines on the order.
Recipients :

SaaS Backlog Report **Subscribe**
This report contains orders that have not yet been provisioned and are awaiting provisioning information from partner/customer admin.
Recipients : You

12. Cisco will generate the **SaaS Backlog Report** daily at 1 AM PST and notify recipients via email

