



# Cisco Commerce



## Software Subscriptions and Services (CCW-R)

### Reseller User Guide

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





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## 1 Introduction

This user guide provides detailed instructions for using Cisco Commerce to manage software subscriptions and services renewals. It includes instructions for initiating renewal quotes, managing renewals through the Quote Manager, and reviewing discounts and pricing information on the renewal quotes.

**PRO TIP** Review your user profile before using Software Subscriptions and Services in Cisco Commerce. See the document list below for how to ensure your user profile is set up correctly.

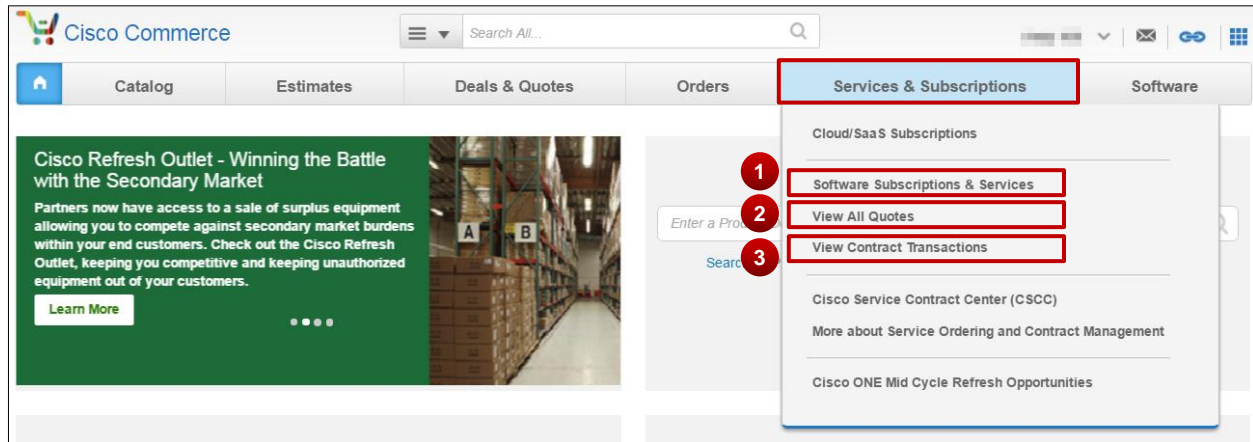
For more details on basic and complex quoting and other existing functionalities in the software subscriptions and services tool in Cisco Commerce, refer to the following links:

Document	Description
<a href="#">Getting Started with Cisco Commerce</a> (English only)	Review Chapter 5 (Personalizing and Setting Preferences) before you begin using Cisco Commerce.
<a href="#">Job Aid: Getting Access to Cisco Commerce</a> (English only)	
<a href="#">Landing Page Guide</a>	A detailed guide to the landing page of CCW-R.
<a href="#">QRG: Open a Case</a>	Step-by-Step instructions on how to open a case to get assistance from Cisco. If you need to add a Bill-To ID to your CPR profile, look here.
<a href="#">Job Aid: Contract Administration</a>	Detailed instructions on how to manage contracts.
<a href="#">Job Aid: Takeovers</a>	Detailed instructions on how to create a takeover quote.
<a href="#">QRG: Creating and Managing Renewal Quotes</a>	Overview for creating and managing a renewal quote.
<a href="#">QRG: Export Quote</a>	A 1-page document on how to export your quote.
<a href="#">QRG: Federal Quoting and Ordering</a>	How to apply U.S. Federal government pricing and taxation to a quote.
<a href="#">QRG: Working With Multiple Service Attachments</a>	A guide to making minor line edits for MSA enabled offers.
<a href="#">QRG: Share Quote</a>	A 1-page document on how to share your quote, when necessary.
<a href="#">QRG: Searching, Filtering, and Sorting Renewal Quote</a>	Get details on how to search for, filter, and sort your renewal opportunities.
<a href="#">QRG: Applying Deal ID to a Quote</a>	How to apply a Deal ID to a quote.
<a href="#">QRG: Co-Terming and End Date Alignment</a>	A quick reference guide on how to Co-Term and align end dates.
<a href="#">User Guide: Smart Accounts in Software Subscriptions and Services</a>	A detailed walk through of Smart Accounts in Software Subscriptions and Services
<a href="#">QRG: Creating a Quote by Import</a>	How to upload a quote from a spreadsheet.
<a href="#">QRG: Activity Logs</a>	How to see activity logs on quotes.



## 1.1 Software Subscriptions and Services Overview

Within the Services and Subscriptions area of Cisco Commerce, resellers can view upcoming renewal opportunities (based on login and account permissions), can manage and renew technical services and software subscriptions, and add compatible lines to existing contracts.



1. Click on the **Software Subscriptions and Services** link to:
  - View information about your active, overdue and upcoming software subscriptions and services (based on your login and account permissions).
  - Search and filter your current subscriptions and services.
  - Initiate and submit quotes.
2. The **View All Quotes** link takes you to the quote manager. See the Quote Manager section for more on how to manage your quotes.
3. The **View Contract Transactions** link is discussed in the [Contract Administration Job Aid](#).



## 1.2 Guided Help

If you need help, try our guided help to find answers before searching [Operations Exchange](#) or [Opening a Case](#). The guided help is an embedded tool in Cisco Commerce where you can find answers to your questions with either quick links to training documents or detailed walkthroughs of common processes. Check out our [Guided Help QRG](#) for more information.

To directly access the Guided Help tool:

1. Click the **HELP?** tab at the bottom of your screen.
2. Select **Guided Help** from the menu that pops up.
3. Enter your question in the search bar and suggested solutions will appear.



## 2 Software Services and Subscriptions Landing Page

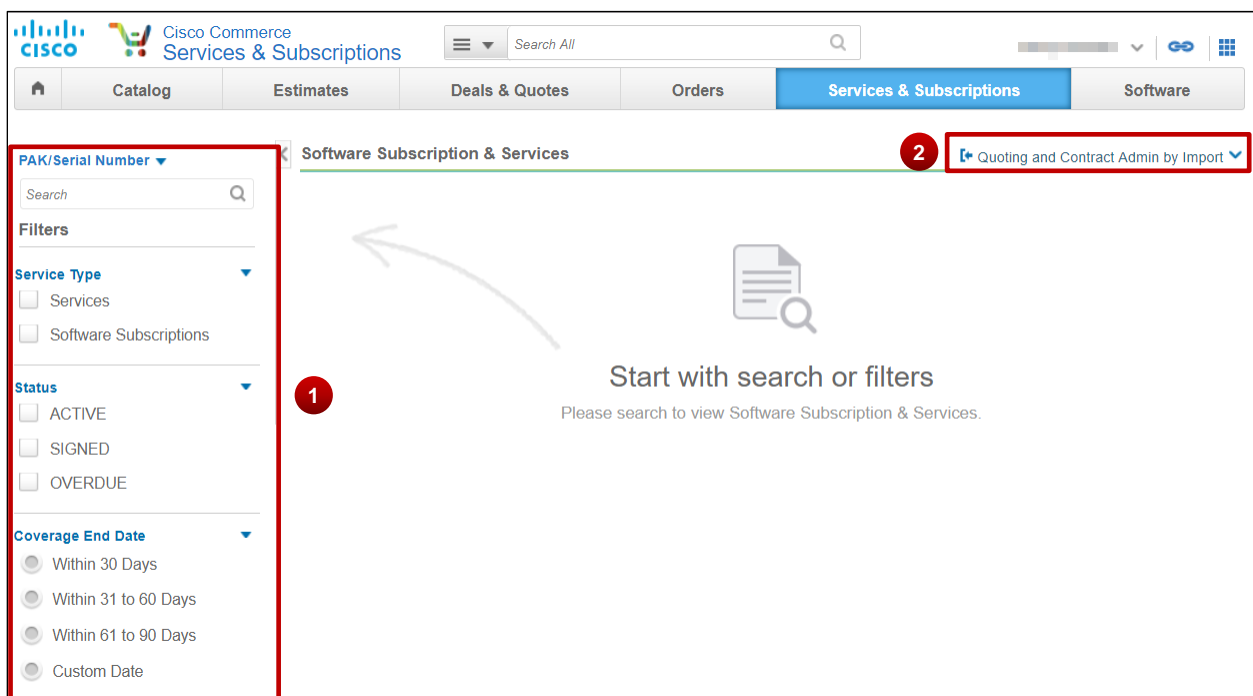
The Software Services and Subscriptions landing page displays service and subscription details in a view you can customize, enabling you to find the lines you want to select quickly and easily.

### 2.1 Landing Page Basics

For a detailed guide to the Landing Page, see the [Landing Page Guide](#).

When you first reach the landing page, you will only see the filters on the left. There are two ways to get started with your quote:

1. Search or select any filter options to see your items.
2. Create a quote or estimate by importing a file. See the [Create Quote By Import Quick Reference Guide](#) or [Contract Administration Guide](#) for more information.





There are four main sections visible on the page.

The screenshot shows the Cisco Commerce Services & Subscriptions interface. The top navigation bar includes 'Catalog', 'Estimates', 'Deals & Quotes', 'Orders', 'Services & Subscriptions' (highlighted), and 'Software'. The main content area is titled 'Software Subscription & Services' and shows 33884 results. A search box is located at the top left of the filters panel. The filters panel includes sections for 'Service Type' (Services and Software Subscriptions), 'Status', 'Coverage End Date', 'End of Support', 'Contract Bill To Country', 'End Customer Country', 'End Customer GU', 'End Customer Name', 'Contract Number', 'Service Level', and 'Product Number'. The main content area displays a table of results with columns for 'Product Number/ End of Support', 'End Customer', 'Service/Offer Type', 'PAK/Serial/Instance Number', and 'Start'. The table shows several rows of data, including product numbers like CP-7937G= and VMW-VSP-STD-3A=, and end customer names like B. BF AG, INTU INC, BARC, and SAFE. The page also includes buttons for 'Quoting', 'Contract Administration', 'Export', 'Print', 'Create Estimate', and 'Create Quote'.

1. A Search box.
2. A filter bar.
3. The status area, showing search filters chosen, downloadable results, and next steps.
4. The search results area, displayed based on the searches and filters selected.

For more information on the Landing Page, see the [Landing Page Guide](#).





## 2.2 Managing Your Quotes

You can review, monitor, and view the status of your quotes by clicking on the View All Quotes link in the Cisco Commerce toolbar at the top of the page.

### 2.2.1 View Software Service Quotes

1. A drop-down menu allows you to choose the quote attribute for your search. The default attribute is **Quote Number**. Choose **Search All** to search by any field on the quote header.

The screenshot shows the Cisco Commerce Services & Subscriptions interface. At the top, there is a search bar with a dropdown menu set to 'Quote Number' (labeled 1) and a search icon. Below the search bar is a navigation bar with tabs for Catalog, Estimates, Deals & Quotes, Orders, Services & Subscriptions (selected), and Software. The main content area is titled 'Software Subscriptions & Service Quotes' and shows 425 results (labeled 3). On the left, there is a 'Filters' sidebar (labeled 2) with a 'My Quotes/ Estimates' checkbox checked. Below the filters, there is a toolbar with 'Export', 'Share', 'Clone', and 'Delete' options (labeled 4). The main table lists quotes with columns for 'Quote Number/ Price Protection Ends', 'End Customer(s)', 'Bill To', 'Reseller Bill To', 'Status', and 'Quote Name'. The first row is highlighted, and its 'Quote Number' '2430211202' is circled (labeled 5). The status of this quote is 'VALID'.

2. Apply filters as desired to find the quote you are looking for. If you don't see an option, there are no quotes satisfying that criteria. Select **My Quotes/Estimates** to view only those quotes you have created. **My Quotes** and **Last 30 Days** will be selected by default.
3. Your active filters will display above the results. Click the **trashcan icon** to remove a filter or **Clear All** to remove all filters.
4. This toolbar allows you to:
  - a. **Export** a quote (see the [Export Quote QRG](#) for detailed quote exports).

**Note:** You can export ineligible products (LDoS, DNR, etc.) and eligible products within the same export file from the Landing Page. Additionally, you will see an Ineligible Products Report link for a given quote within the Items Tab messaging, when applicable.

The 'Export Options' dialog box shows a message: 'You are about to download 25 selected Line(s)'. Below this, there is a 'File Type' dropdown menu set to 'XLSX'. There are three checkboxes: 'Include Minors' (unchecked), 'Include Address Details' (unchecked), and 'Include Quoting Ineligible Items' (unchecked). At the bottom right, there are 'Cancel' and 'Export' buttons.



- b. **Clone** a single selected quote. You will be asked for a name for the copied quote and be taken to the View Quote page.
  - c. **Delete** a quote, as described below.
5. Click on a quote to view its details or proceed to purchase.
- If you select a valid quote, you will navigate to the Review and Submit tab.
  - If you select an invalid quote, you go to the Items tab, where you can edit the quote.

**Note:** You can only edit quotes with a status of **Valid** or **Invalid**. You will not be able to edit quotes with a status of **Order Submitted**, **Order in Progress**, **Conversion in Progress**, or **Conversion Failed**. You will only be able to view those quotes in a read-only mode.

## 2.3 Quoting, Estimate, Contract Administration, and Renewal Readiness Alerts

An Alerts (bell) icon displays on the top right of all CCW-R pages to alert you when your quotes or transactions are ready for your review or action. Each alert displays a hyperlinked Quote Number/Transaction ID, which will direct you to the respective Quote/Transaction page for your review or action. An alert will only display to the individual who triggered the alert event. The logic for these alerts displays in the table at the end of this section.

### 2.3.1 View and Manage Alerts

6. Click **the Alerts icon** to see your alerts.

**Note:** The red count at the top right of the bell indicates the number of new alerts not unread alerts.

The screenshot shows the Cisco Commerce Services & Subscriptions interface. The top navigation bar includes 'Catalog', 'Estimates', 'Deals & Quotes', 'Orders', 'Services & Subscriptions', and 'Software'. A search bar is located in the top right. The main content area displays 'Software Subscriptions & Services' with 10 results. A table of results is shown with columns: Product Number/End of Support, End Customer, Service/Offer Type, PAK/Serial/Instance Number, Start/End Date, and Contract Number. A red bell icon with a '15' notification count is visible in the top right corner of the interface.

Product Number/ End of Support	End Customer	Service/Offer Type	PAK/Serial/ Instance Number	Start/ End Date	Contract Number
SMA-WMGT-LIC= 07-JUN-2017	[REDACTED]	SMA-EMGT-3Y-S3= Email Security Anti-...	[REDACTED]	28-NOV-2012 27-NOV-2015	[REDACTED]



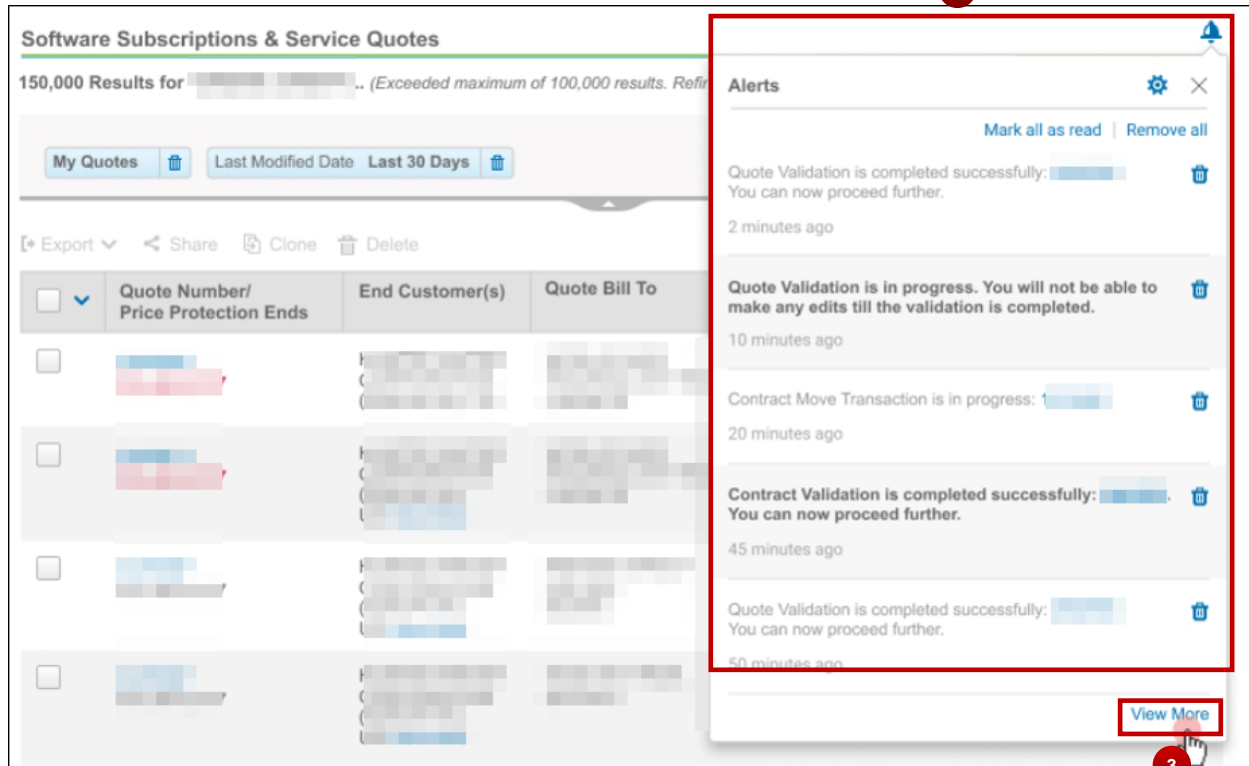
2. A dropdown will show your most recent alerts.

**Note:** The dropdown menu will display the 100 most recent read/unread alerts chronologically starting with most recent.

**Note:** Any alert older than 7 days will auto-delete from the alerts list.

**Note:** An unread alert has bolded text with a gray background. A read alert has unbolded text with a white background.

3. Click **View More** to display all alerts.





- All alerts will display with a scroll bar.  
**Note:** Each alert will display a clickable hyperlinked Quote Number/Transaction ID which, upon click, will redirect to the Quote/Transaction page.
- You can click **Mark all as read** to mark alerts as read or **Remove all** to delete all alerts.  
**Note:** You can click the Trash icon next to each alert to individually delete.
- Click the **Manage Alerts (Gear) icon** to manage your alerts.

The screenshot displays the 'Software Subscriptions & Service Quotes' interface. On the left, a table lists quotes with columns for 'Quote Number/ Price Protection Ends', 'End Customer(s)', and 'Quote Bill To'. On the right, an 'Alerts' panel is open, showing a list of notifications such as 'Quote Validation is completed successfully' and 'Contract Move Transaction is in progress'. A red box labeled '6' highlights the 'Manage Alerts' gear icon in the top right of the alerts panel. Another red box labeled '5' highlights the 'Mark all as read' and 'Remove all' buttons below the gear icon. A third red box labeled '4' highlights the entire alerts list. At the bottom of the alerts panel, a red box labeled '4' highlights the pagination controls.



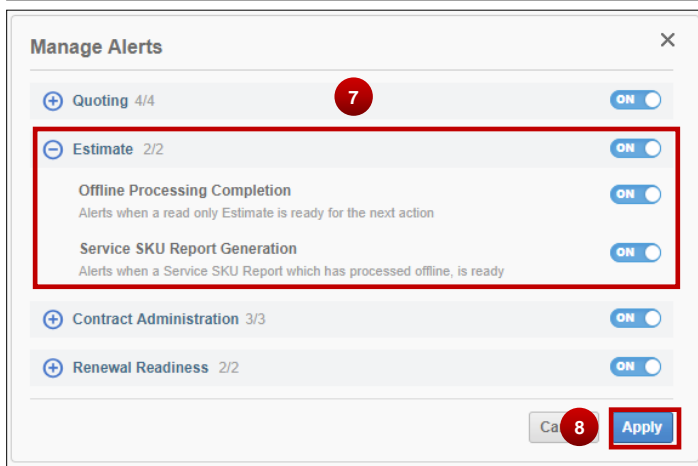
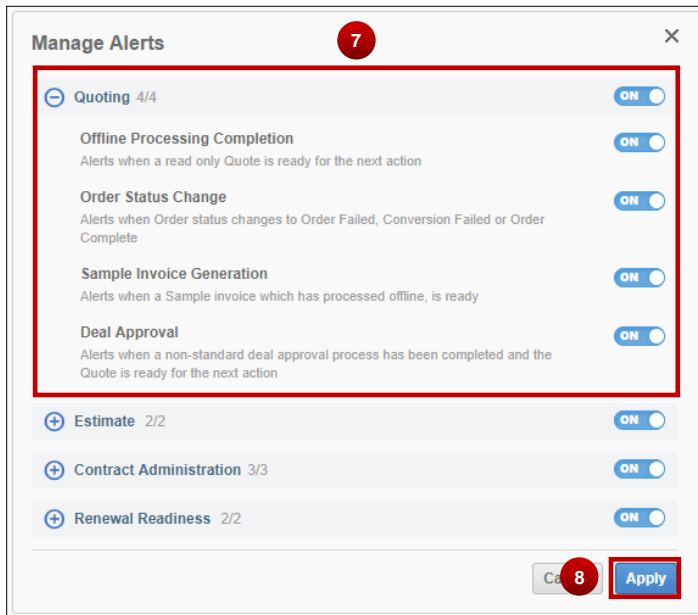
7. You have four categories of alerts available for configuration: Quoting, Estimate, Contract Administration, and Renewal Readiness.

**Note:** If you have not configured your alerts previously, all alerts will default to On.

**Note:** You can use the +/- icon to expand and collapse each section.

**Note:** You can toggle each alert On/Off or toggle the whole category On/Off.

8. Click **Apply** when you are finished configuring.





**Manage Alerts**

Quoting 4/4

Estimate 1/1

**Contract Administration 3/3**

- Offline Processing Completion   
Alerts when a read only transaction is ready for the next action
- Transaction Completion   
Alerts when the transaction status changes to Completed, Partially Completed or Failed
- Activity log Generation   
Alerts when a Contract activity log, which has processed offline, is ready

Renewal Readiness 2/2

Cancel Apply

**Manage Alerts**

Quoting 4/4

Estimate 2/2

Contract Administration 3/3

**Renewal Readiness 2/2**

- Offline Processing Completion   
Alerts when a read only transaction is ready for the next action
- Associated Transaction completion   
Alerts when a contract administration transaction initiated within the Renewal Readiness has been completed

Cancel Apply

9. If you have no alerts, the below dropdown will display.

**Software Subscriptions & Service Quotes**

150,000 Results for "... (Exceeded maximum of 100,000 results. Refine your search to have all

My Quotes Last Modified Date Last 30 Days

Export Share Clone Delete

Quote Number/ Price Protection Ends End Customer(s) Quote Bill To Reseller Bill To

**No Alerts**  
Use the Manage Alerts option to customize your alerts.



**Table 1: Alerts Logic**

Bucket	Alert Type	Triggering Events	Alert should be shown to
Quoting	Offline Processing Completion	Large Quote - Upload / UI Add More Lines (Large no of line) Validations	User who last updated the Quote
	Order Status Change	Order Complete Order Failed Conversion Failed	User who submitted the order
	Sample Invoice Generation	Sample Invoice generation for large data (Offline)	User who submitted Sample Invoice Generation request
	Deal Approval	Offline Deal Creation process	User who submitted Deal Creation request
Estimate	Offline Processing Completion	Large Quote - Upload / UI Add More Lines (Large no of line)	User who last updated the Estimate
	Service SKU Report Generation	Service SKU Report generation for large data (Offline)	User who submitted Service SKU Report Generation request
Contract Management	Offline Processing Completion	Transaction status changed from In Progress to Entered (Large transactions - upload/ UI Offline flow)	User who submitted the transaction
	Transaction Completion	Transaction status changed from In Progress to Completed/Failed/Partially Completed	User who last updated the transaction
	Activity log Generation	Offline Activity log generation	User who submitted Activity log generation request
Renewal Readiness	Offline Processing Completion	On completion of any intermediate transaction (Like Delink, Terminate etc)	User who submitted the intermediate transaction (last updated by)
	Associated Transaction completion	Large transactions - upload/ UI Offline flow	User who last updated the transaction

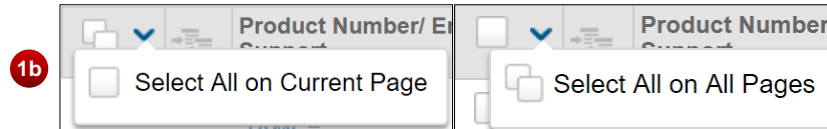


### 3 Software Subscriptions and Services Quotes

#### 3.1 Selecting Lines for Renewal

The landing page allows you to select eligible line items and proceed to quoting.

1. Select the items you wish to renew and click **Create Quote** to proceed to quoting. Users may select line items as follows:
  - a. The header checkbox either selects all items on this page or all items on all pages.
  - b. The dropdown gives the option to select all on this page or across all pages. You can only select on all pages if results are less than 100,000.

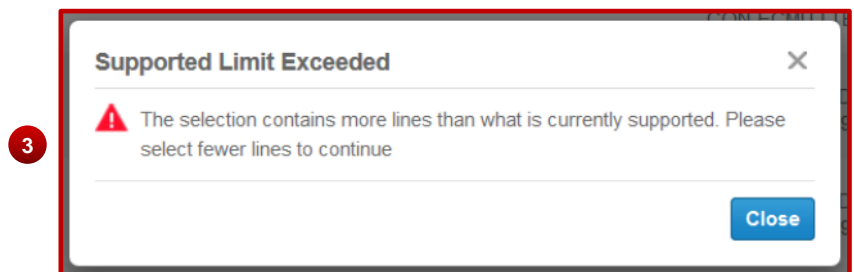


- c. Individual items are selected/deselected with the checkbox next to the item *except* when selecting items across all pages.
  - d. If you have minor items displayed, and use select all, the minor items will be replaced by their major items and those items will be selected.
2. The line items that are non-orderable, whose last date of support has passed, or that cannot be quoted for any other reason, appear in gray and are not selectable for renewal quote creation. Hover over the grayed out checkboxes for the reason why the product lines are not selectable.

**Note:** You can renew software subscription line items that are expired or terminated.

<span>Export</span> <span>Print</span> <span>Email</span> <span>Tags</span> <span style="float: right;"> <span>1</span> <span>Create Quote &gt;</span> </span>							
<input type="checkbox"/>	Product Number/ End of Support	End Customer	Service/ Offer Type	PAK/Serial Number	Start/ End Date	Contract Number	
<input checked="" type="checkbox"/>	SMA-BMGT-LIC= 22-APR-2015	SYSTEMS (4 ██████████)	ISV1 UC ISV L1 + L2 24X7 CON-ISV1-VSXEPL3A	██████████ ██████████	NOV-2012 NOV-2015	9 ██████████ ACTIVE	
<input type="checkbox"/>	SMA-CMGT-LIC= 13-NOV-2016	BANK (2 ██████████)	ECMU SWSS UPGRADES CON-ECMU-UCFND5 5	██████████ ██████████	28-NOV-2012 27-NOV-2015	9 ██████████ SIGNED	
<input type="checkbox"/>	SMA-DMGT-LIC= 07-JUN-2017	SYSTEMS (4 ██████████)	ISV1 UC ISV L1 + L2 24X7 CON-ISV1-VSXEPL3A	██████████ ██████████	NOV-2012 NOV-2015	9 ██████████ ACTIVE	

3. If you select more items than the system currently supports, you will see this message. Select fewer items and try again.



**Note:** You can quote up to 100,000 major lines.





- If you select a line for renewal that received a recent system modification to service level or SKU, you will see an information icon within the quote, a notification message will display, and all historical order information will connect to current renewal.

The screenshot displays the 'Items' tab of a quote management interface. A red box highlights an information icon (a lowercase 'i' in a circle) on the left side of a quote line. A tooltip window titled 'Information on this Line' is open, showing the text: 'Service Level System has auto adjusted subscription for the licence based on current availability'. The quote line itself is highlighted in yellow and includes the following details:

Customer	Start/ End Date	Unit List Price	Quantity	Ext
FAMILY CENTER INC	19-MAR-2019 18-MAR-2020	1285	2	2

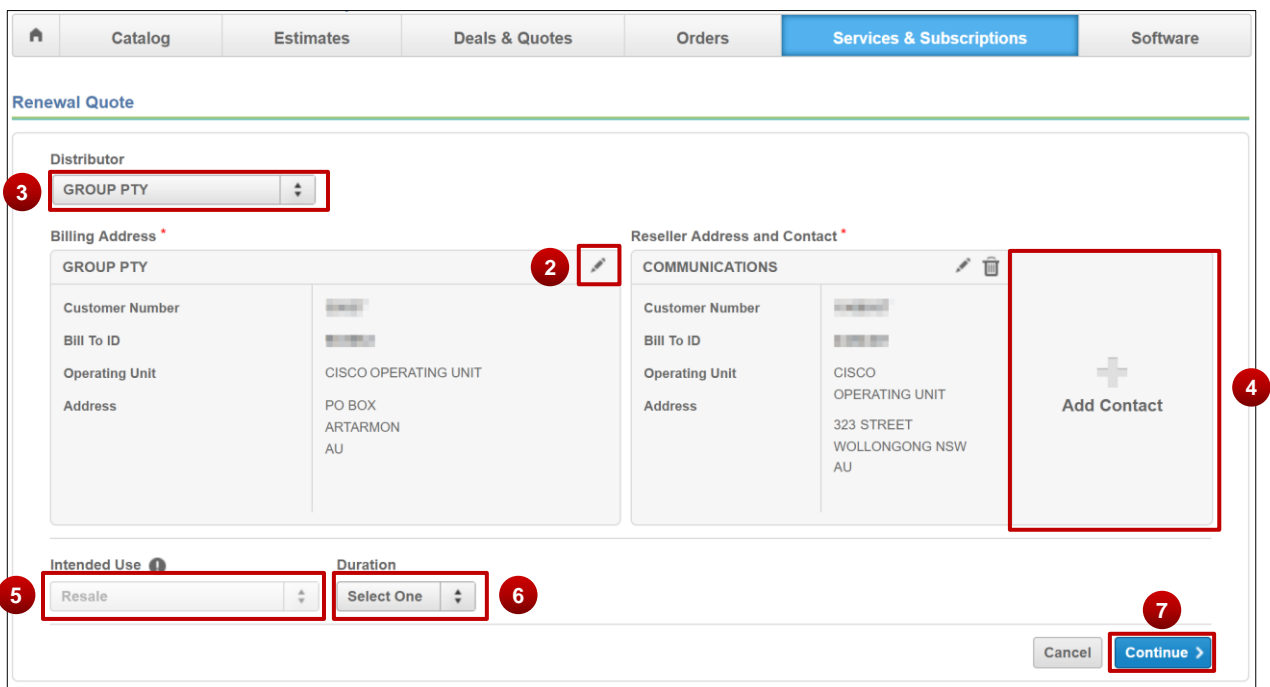
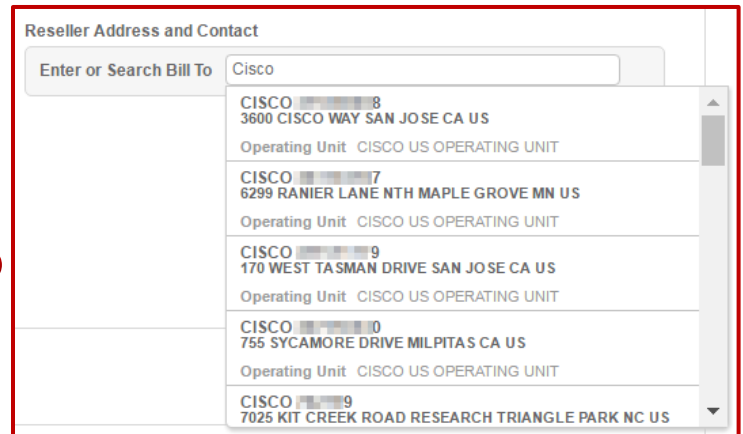
Below the table, the 'Smart Account' is listed as '--'. At the bottom of the interface, there are controls for 'Items Per Page' (set to 25), pagination (Page 1 of 1), and buttons for 'Remove From Quote', 'Edit Lines', and 'Assign Smart Account'.



### 3.2 Initiate Quote and Verify Billing Information

After clicking the Create Quote button on the landing page, verify the billing information. If you selected uncovered lines or lines with different Bill-To IDs, the Bill-To ID from your user profile will appear here.

1. Use the drop down menu to choose the Reseller ID if multiple options are available.
2. Click on the edit or pencil icon to edit the Bill-To ID.
3. Use the drop down menu to select the distributor if multiple options are available. Selecting a distributor is required to proceed.



4. Click here to add a contact to the quote. See **Add Contact**, for how to add a contact.
5. The intended use will be “Resale” and is not editable.
6. Select the duration of the quote.
7. Click **Continue** to proceed.

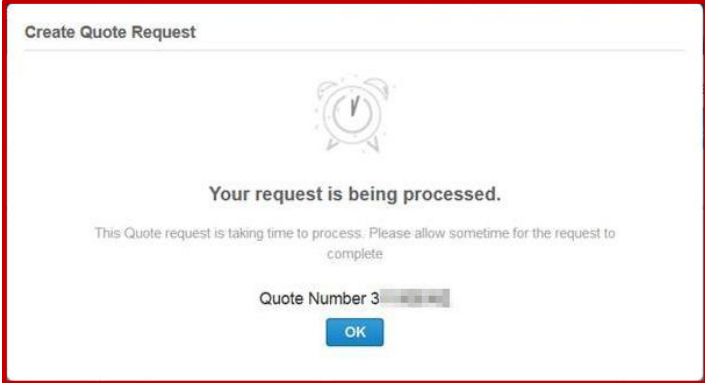


8

**i** Quote request is submitted for processing. Quote will be read only until the quote processing is completed.

8. During periods of high system demand, you may see this message. If you do, you can continue working on other quotes while your quote processes. Find your quote in the quote manager.
9. While you wait, can view your quote in a read-only status. After a few minutes, you will be able to edit your quote.

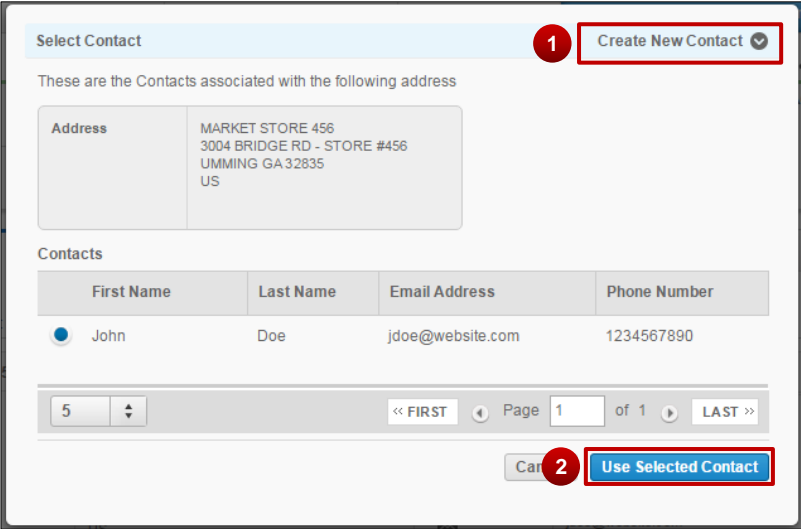
8



### 3.2.1 Add Contact

Click the large **plus** symbol (as per above) to add a contact. This process is identical in the shipping section and the billing section.

1. A pop-up window will appear. You can choose an existing contact, or click **Create New Contact**.
2. Click **Use Selected Contact** to add that contact.





### 3.3 Quoting Basics

This is the quote view page.

1. On the top is the Quote Header.

The screenshot displays the Quote Header and the Items section. The Quote Header is highlighted with a red box and a red circle containing the number 1. The Quote Header contains the following information:

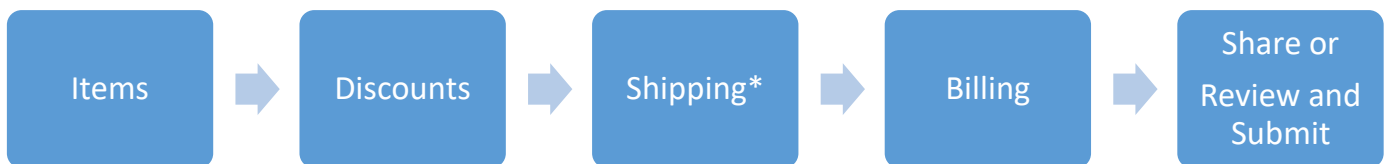
QUOTE NUMBER 2	BUY METHOD Distribution	INVOICE SKU Dollar Adjustable SKU	CREATED BY On 12-Feb-2018
QUOTE NAME	STATUS Invalid	PRICE PROTECTION ENDS 12-Feb-2020	LAST UPDATED BY On 12-Feb-2018

The Items section shows a table with the following columns: Product Number, Service/Offer Type, PAK/Serial Number, End Customer, Start/End Date, Unit List Price, and Quantity. The table contains one item:

Product Number	Service/Offer Type	PAK/Serial Number	End Customer	Start/End Date	Unit List Price	Quantity	Ext List
CP-7937G=	CON-SNT-CP7... SNT Target Contract		CITY COUNCIL	17-JUL-2018 31-MAR-2019	135.68	1	

A summary box at the bottom right shows 'Total Extended List Price' of 95.91. All Prices shown in AUD.

2. Information about your quote appears below the Quote Header in a series of tabs. These tabs lead you through a basic flow.



\*Shipping will only appear on those quotes that have subscription line items.



### 3.3.1 Quote Header

The quote header shows general quote information and is available as you view any of the tabs.

Export Share Clone Cancel Delete More			
QUOTE NUMBER 2	BUY METHOD Distribution	INVOICE SKU Dollar Adjustable SKU	CREATED BY On 12-Feb-2018
QUOTE NAME	STATUS Invalid	PRICE PROTECTION ENDS 12-Feb-2020	LAST UPDATED BY On 12-Feb-2018

1. The Quote Number is populated in the top left of the header.
2. The status of the quote will appear here.

Export Share Clone Cancel Delete More			
QUOTE NUMBER 2	BUY METHOD Distribution	INVOICE SKU Dollar Adjustable SKU	CREATED BY On 12-Feb-2018
QUOTE NAME	STATUS Invalid	PRICE PROTECTION ENDS 12-Feb-2020	LAST UPDATED BY On 12-Feb-2018

3. This toolbar allows you to:
  - a. **Export** a quote (see the [Export Quote QRG](#)).
  - b. **Share** a quote (see the [Share Quote QRG](#)).
  - c. **Clone** a single selected quote. You will be asked for a name for the copied quote and be taken to the View Quote page.
  - d. **Delete** a quote, as described below.
  - e. **More** utility options are provided, including viewing an Activity Log for the quote.
4. Click the **pencil icon** to update the quote name. The Invoice SKU will appear by default as Dollar Adjustable for APJC distributors and Fixed Dollar for all others. Using the pencil icon, you can manually select Fixed Dollar, Enterprise, or Dollar Adjustable.
5. The price protection field specifies how long the net price of your quote is valid. We provide price protection, also known as quote protection, once your quote becomes valid. It will remain until the deal expires, the date expires, or major changes are made to the deal. Price protection works as follows:
  - a. Quotes have 60 days of price protection after validation. This protection applies to all fully validated lines. CCW-R protects the net price, which is the list price minus discounts.
  - b. The only way to change the price protection date is to change the header. Changing certain header fields (BID, Deal ID, Buy Method, Taxability, Intended Use) resets the price protection date for the quote and updates all line prices to the current price.
  - c. The price protection date is shown in the header unless the quote was created before August 14,2017. Those quotes still have price protection for 60 days from the date the quotes were created, it just does not show the date.
  - d. Deleting a line will not affect the price protection date or the price on any other lines.
  - e. Editing a line in a way that requires repricing will update that line according to the current price. For example, duration, quantity, or install site changes will be priced according to



the current price. This only affects the edited line. The price protection date does not change.

- f. Editing a line in a way that does not require repricing, like changing the target contract number, will not impact the pricing, nor the price protection date.
- g. Adding a line will use the latest price for that line only. The price protection date does not change.

## PRO TIP

When you select the 'View All Quotes/Estimates' dropdown in the Renewals menu, you can utilize the **Price Protection End Date** filter to see valid quotes ending within 7/14/21/custom days if any are available.

6. Click the **pencil icon** if you wish to update the buy method. Select "Distribution" from the dropdown menu if you wish to function as a reseller for your quote.

QUOTE NUMBER	BUY METHOD	INVOICE SKU	CREATED BY
[REDACTED]	Distribution	Dollar Adjustable SKU	[REDACTED] On 12-Feb-2018
QUOTE NAME	STATUS	Dollar Adjustable SKU	LAST UPDATED BY
	Invalid	Enterprise SKU	[REDACTED] On 12-Feb-2018

*Note: A red circle with the number 6 is placed over the pencil icon next to the BUY METHOD field.*

**Note:** You may have to revisit the Items and Discounts tabs after you change the buy method to verify information is unchanged.

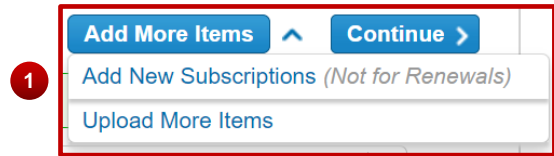


### 3.4 Quoting: Items Tab

On the items tab of a quote, you can view and filter existing product line items and add new lines.

1. The **Add More Items** button allows you to add more items manually. You may also select the dropdown to have two other options:

- a. Add new subscriptions (except for renewals) individually. See the [Add New QRG](#) for more information.
- b. The same way you create a quote. See the [Creating a Quote by Import QRG](#) for more information.



2. Click the filters icon to display advanced filters, to include any identified errors.
3. Click here to expand the Product Number, Service/Offer Type, and PAK/Serial Number columns to read or copy the entire contents of each column. Click again to collapse those columns to their original width.
4. When enabled, click here to expand and view all minor lines.
5. Click the + icon to view the minor lines on an individual major line.

The screenshot displays the 'Items' tab of a quote. At the top, there are tabs for 'Items', 'Discounts', 'Billing', and 'Review and Submit'. The 'Items' tab is active. On the right side, there is a search bar and a dropdown menu labeled 'Add More Items' (with a red circle '1' next to it) and a 'Continue >' button. Below the search bar, there are buttons for 'Remove From Quote' and 'Edit Lines'. The main area contains a table of items. The table has columns: Product Number, Service/Offer Type, PAK/Serial Number, End Customer, and Start/End Date. There are two items listed: N3K-C3172TQ-XL and UCS-HX-FI48P. A red circle '2' is next to the filters icon on the left. A red circle '3' is next to the column expand/collapse icon. A red circle '4' is next to the gear icon for column settings. A red circle '5' is next to the plus icon for expanding a line item. At the bottom right, there is a summary box showing 'Total Extended List Price' of 1982, with 'All Prices shown in USD' below it. There are also 'Add More Items' and 'Continue >' buttons at the bottom right.



6. If you select a line for renewal that received a recent modification to service level or SKU, you will see an information icon within the quote. Clicking on this icon will display a notification message with all historical order information connected to the current renewal.

The screenshot displays the 'Items' tab of a quote management interface. A red box highlights a notification icon (a circle with an 'i') and a red circle with the number '6' next to it. A pop-up window titled 'Information on this Line' is open, showing the message: 'Service Level System has auto adjusted subscription for the licence based on current availability'. Below the pop-up, a table lists quote items with columns for Customer, Start/End Date, Unit List Price, Quantity, and Ext. List Price. The first item is 'AMPMI' with a quantity of 2 and a unit price of 1285, with a start date of 19-MAR-2019 and an end date of 18-MAR-2020. The second item is 'VIOLENCE PREVENTION'. At the bottom of the interface, there are navigation controls including 'Items Per Page' (set to 25), 'Page 1 of 1', and buttons for 'Remove From Quote', 'Edit Lines', and 'Assign Smart Account'.





### 3.4.1 Add Line Items or New Subscriptions to the Quote

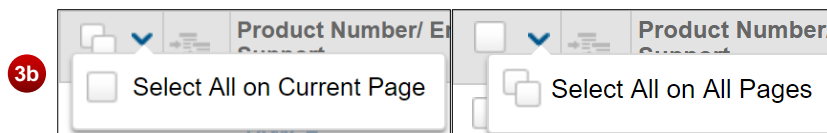
**Note:** For instructions on how to add new subscriptions to your quote, see the [Add New Subscriptions QRG](#). Read on to learn how to add additional renewal or new service lines to your quote.

#### PRO TIP

To make sure a quote can have \$0 line items and still be valid, there must be at least one mapped SKU. The \$0 items do not need to be mapped to that SKU; it just needs to be in the Quote.

After you create a quote from the landing page, you can add additional lines. Click **Add More Items** and you will go to a search page where you can choose line items to add to the quote.

1. You can search for line items by selecting and providing the search criteria.
2. If there are ineligible items, you can click **View Ineligible Items** to download a list of items not found in the search or not eligible for quoting. This list includes the reason the items are ineligible for quoting.
3. You may select line items as follows:
  - a. The header checkbox either selects all items on this page or all items on all pages.
  - b. The dropdown gives you the option to select all on the current page or across all pages.



- c. Individual items are selected/deselected with the checkbox next to the item *except* when selecting items across all pages.
  - d. If you have minor items displayed, and use select all on *all pages*, the minor items will be replaced by their major items and those items will be selected.
4. The Technical Services (TS) line, if any exist, will be added to the quote.

Please search and select line(s) to add to quote number 381012413

1 Results [View ineligible items](#) Cancel Add to Quote

Product Number/ End of Support	End Customer	Service/Offer Type	PAK/Serial Number	Start/ End Date
<input type="checkbox"/> <input type="checkbox"/> WS-C3750V2-48PS-S 31-MAY-2021	SYSTEMS SYSTEMS (1)	SNT SNTC 8X5XNBD		22-MAR-2017 21-MAR-2018

25 Items Per Page << FIRST Page 1 of 1 LAST >> Cancel Add to Quote



5. If you select an already existing line in the quote for addition, the line will not be added and a notification message will display.

The screenshot shows a web interface with tabs for 'Items', 'Discounts', 'Billing', and 'Review and Submit'. A notification banner at the top states: '1 lines that already existed on the quote were not added.' Below the banner are buttons for 'Remove From Quote' and 'Edit Lines', a 'Filters' dropdown set to 'All', and a search bar. A table below contains columns for 'Product Number', 'Service/Offer Type', 'PAK/Serial Number', 'End Customer', 'Start/ End Date', 'Unit List Price', 'Quantity', and 'Ext List Price'.



### 3.4.2 Advanced Filtering and Search Options on a Quote

You can filter your line items in a variety of ways.

1. Filter a quote by selecting the filter icon to expand or collapse all available options.

**Note:** The filter icon will turn from blue to red when line items contain errors.

2. You can expand, collapse, and select these dynamic and static filters, depending on your desired options. Selecting multiple line items, allows you to apply edits all at once more efficiently.
3. You can also filter and search by various filter criteria like ALL, PAK/Serial Number or Instance Number on the quote items page. ALL supports up to 5k characters search and PAK/Serial Number or Instance Number supports up to 10k characters.

**Note:** This filter option is available in the Estimates and Add to Contracts Items page.

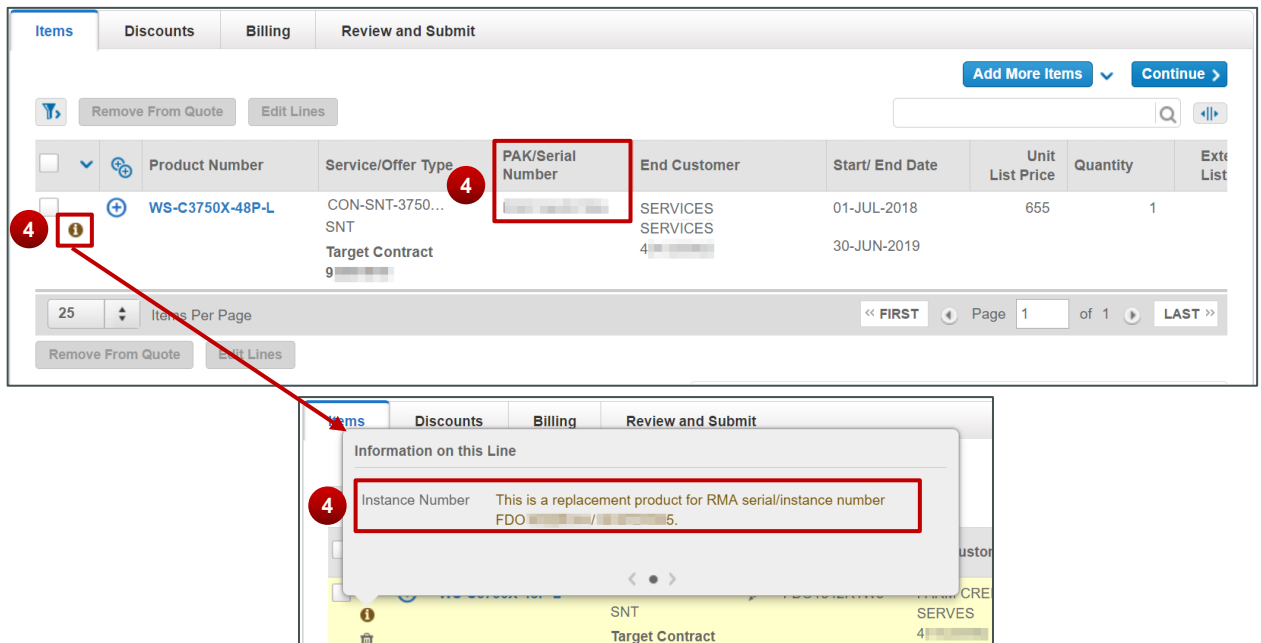
The screenshot shows the 'Items' page in the Cisco Commerce interface. At the top, there are tabs for 'Items', 'Discounts', 'Billing', and 'Review and Submit'. A red banner at the top states: 'This quote has errors on 2 lines. Use the appropriate filter to view them.' Below this, there is a search bar with a dropdown menu set to 'All'. A red box highlights the filter icon (1), the filter list (2), and the search bar (3). The filter list includes: Line Error Category, Line Error Codes, Product Number, Service/Offer Type, Start Date, End Date, End Customer Name, Contract Number, and Line Type. The table below shows two line items with error icons (red triangles with plus signs):

Product Number	Service/Offer Type	PAK/Serial Number	End Customer	Start/ End Date
ASR1002-X	CON-SNT-ASR1... SNT Target Contract NEW		LIMITED LIMITED	27-APR-2017 26-APR-2018
WS-C3850-48U-S	CON-SNT-WS35... SNT Target Contract NEW		US LLP	01-JUN-2020 31-MAY-2021

The close-up shows the search bar dropdown menu with the following options: All, PAK/Serial Number, and Instance Number. The search bar also contains a search icon and a search input field.





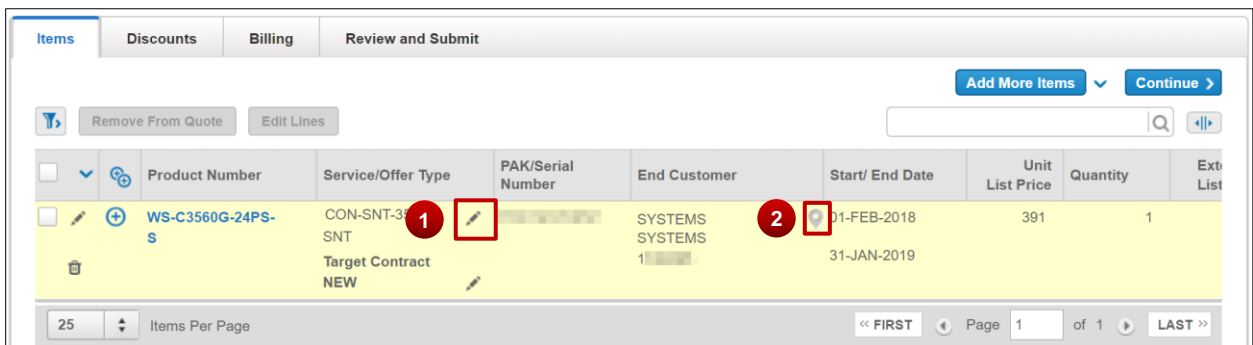
- When you search for and add an RMA item to your quote, you will see the replacement line item within the Items Tab. The replacement serial number will appear within the line and a hover over information icon will appear to share the associated RMA data.



### 3.4.3 Edit Lines on the Quote

You can edit a line item in a few ways, including editing multiple lines at a time (Multi-Line Edit).

- Select the edit or  icon.
- Click the location or  icon to view the end customer details.



- Click the individual attributes or fields, including quantity.
- Click the calendar icon to edit the dates. Make sure you choose a date when using the calendar.

**Note:** a. You can set the start date up to 90 days in the past (also known as “Backdating”), and can set the start date up to 90 days in the future.

b. You can set the duration of your quote beyond the allowed standard duration of the service level. When submitting such quotes, a Non-Standard Deal ID, that matches the service level and duration of these lines, is required.



The screenshot shows a quote management interface. At the top, there are fields for QUOTE NUMBER, BUY METHOD, INVOICE SKU, CREATED BY, and SMART ACCOUNT. Below this is a navigation bar with tabs for Items, Discounts, Shipping, Billing, and Review and Submit. The main area displays a table of items with columns for Product Number, Service/Offer Type, PAK/Serial Number, End Customer, Start/End Date, Unit List Price, and Ext. List Price. A red box labeled '3' highlights the 'End Customer' field for the first item. A calendar pop-up is visible on the right, showing the month of April 2027, with a red box labeled '4' highlighting the date 27. A vertical list of years from 2018 to 2037 is also visible on the right side of the calendar.

### 3.4.4 Edit Service Level

1. Click the **pencil icon** next to the service level to edit the service level. Depending on the type of service attached, you may see different pop-up windows. For a TS line, the change service pop-up window will appear.
2. Use the drop-down menu to choose your service type, and begin typing to search for available service level choices.

The screenshot shows a 'Change Service' pop-up window overlaid on the quote management interface. The pop-up window has a title bar 'Change Service' and a close button. Below the title bar, there is a section for 'Select Technical Services' with a search bar containing 'Hardware' and a dropdown menu showing 'SNTC 8X5XNBD (SNT)'. There are 'Cancel' and 'Apply' buttons at the bottom of the pop-up. In the background, the quote table is visible, with a red box labeled '1' highlighting the pencil icon next to the service level for the first item. Another red box labeled '2' highlights the search bar in the pop-up window.



- For a subscription, clicking the edit icon will navigate you to a different screen to make changes. Click **Edit Subscriptions**.

**PRO TIP**

This function is recommended for making quick comparisons only. If you already know how you want to change your subscription, it is faster to use the functions on the items tab, as described on the previous page.

- Edit license quantity.
- Edit start and end dates.
- Edit duration.

EDIT SERVICES/SUBSCRIPTIONS L-ASA5508-TAMC= (AUD)

Info (1):  
• This configuration qualifies for extended service duration > 60 months. (Note: Some restrictions may still apply). (C0971)

Subscription

Subscription Options

License Count 2

Subscription SKU

ASA FirePOWER Svc  
GROUP DESCRIPTION

Start Date 24-Jan-2019

L-ASA5508-TAMC-1Y  
SUBSCRIPTION SKU  
Cisco ASA5508 FirePO

Edit Subscription

Remove All Subscriptions

Subscription Options View 1-999999 Filter By All Subscriptions Key

License Count	Subscription Name	License Band	Unit Price (USD)	Product SKU	Qty	Unit List Price	Total List Price
2000	L-ASA5508-TAMC-1Y Duration: 12 Month(s)	1-999999 Users	4,077.50				
	L-ASA5508-TAMC-3Y Duration: 36 Month(s)	1-999999 Users	9,778.45				
	L-ASA5508-TAMC-5Y Duration: 60 Month(s)	1-999999 Users	16,310.00				
	L-ASA5508-TAMC-1Y SUBSCRIPTION SKU Cisco ASA5508 FirePOWER IPS, AMP and URL 1YR Subs	1-999999 Users	4,077.50	L-ASA5508-TAMC= PRODUCT SKU Cisco ASA5508 FirePOWER IPS, AMP and URL Licenses	2000	4,077.50	8,155,000.00

Start

L-ASA5508-TAMC-1Y  
SUBSCRIPTION SKU  
Cisco ASA5508 FirePOWER IPS, AMP and URL 1YR Subs 1-999999 Users | 4,077.50 |  |  |  |  ||  |  |  |  |  |  |  |  |

Edit Start Date 24-Jan-2019 Duration (Months) 19.00

Edit End Date 23-Aug-2020

**PRO TIP**

Once you change the end date, duration, or quantity for your quote, the service or subscription SKU and list price will update automatically.



### 3.4.5 Mid Term Upgrade/Downgrade

A mid-term upgrade/downgrade is when a change in Service Level is made prior to the contract end date.

1. Click the edit icon next to the service level to edit the service level.
2. Upgrade or downgrade the service level based on your preference.
3. Update the start date and end date if necessary.
  - a. A start date must be today's date or a future date.

The screenshot shows the 'Review and Submit' tab in the Cisco Commerce interface. A 'Change Service' dialog box is open, allowing the user to select technical services. The dialog has a search field for 'Software' (highlighted with a red circle 2) and a list of options: 'SWSS UPGR 3YR DIST (3ECMU)' and 'PSS SWSS UPGRADES (PSBU)'. Below the dialog is a table of items. The first row is highlighted, and its 'Service/Offer Type' column contains an edit icon (highlighted with a red circle 1). The 'Start/ End Date' column for this row shows '14-JUL-2017' and '17-NOV-2020', with a calendar icon next to the end date (highlighted with a red circle 3).

Product Number	Service/Offer Type	PAK/Serial Number	End Customer	Start/ End Date	Unit List Price	Quantity	Exti List
R-VMW-UC-FND5-K9	CON-ECMU-UC ECMU Target Contract NEW	25A45-00A47- CJAHM	620158288	14-JUL-2017 17-NOV-2020	300	1	10

4. An end date must be set to the contract end date or further into the future.

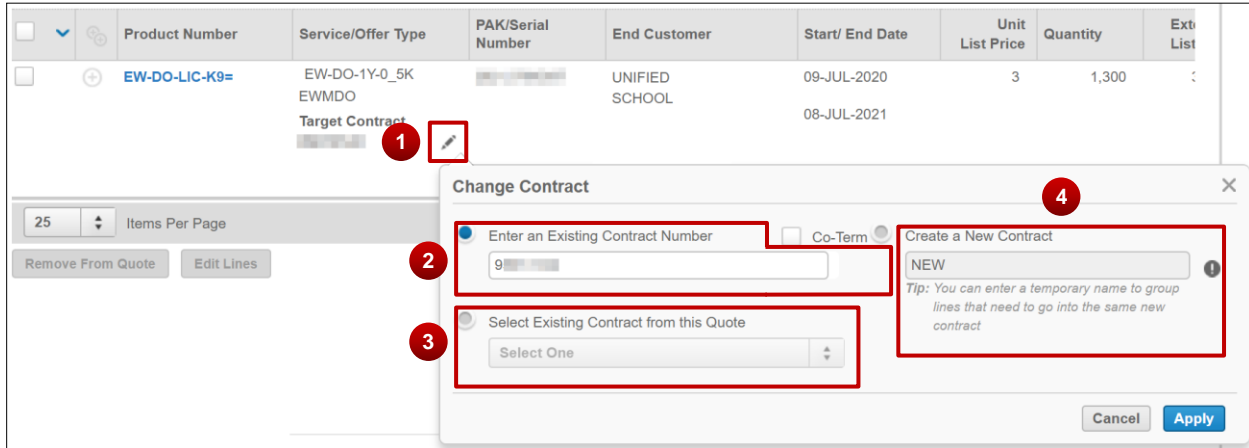
You can perform a mid-term upgrade/downgrade if:

- There is no change of Distributor BID from source contract line
- The quote currency matches the source contract currency
- The quote does not include any instances with existing signed coverage
- The mid-term upgrade does not result in a negative net amount on the quote
- The quote does not include any takeover lines



### 3.4.6 Change Contract

1. Click the **pencil** icon alongside the contract to display the change contract window.
2. Enter a specific contract number.
3. Alternatively, you can select an existing contract number from the currently displayed quote



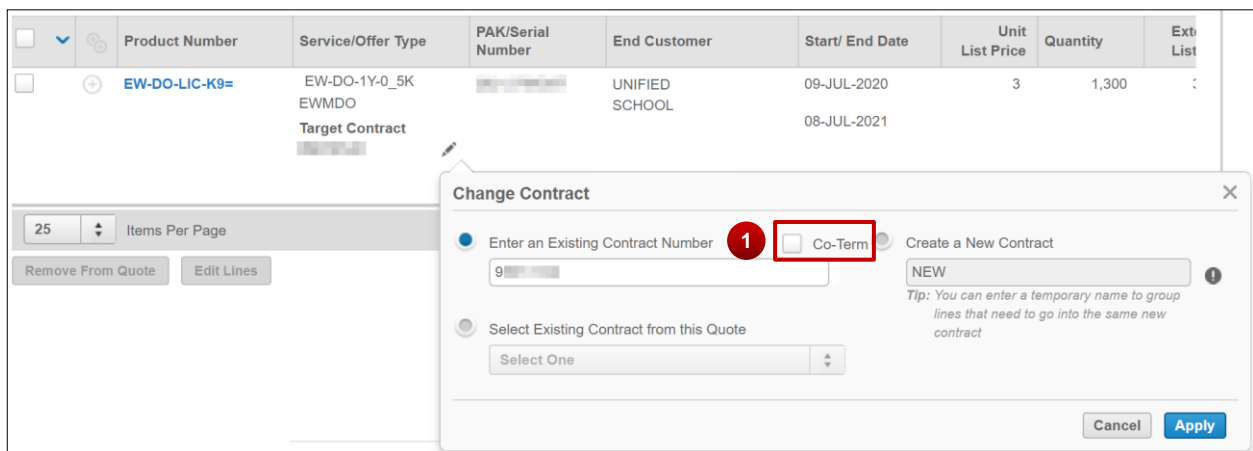
using the drop-down menu.

4. You can also create a new contract. Enter a name to identify line items within the quote on the same new contract.

**PRO TIP** Select an existing contract whenever possible, and try to avoid creating new contracts.

### 3.4.7 Co-Terming Services

1. You can align the end date to an existing compatible contract by clicking the Co-Term checkbox. For more information on Co-Term, see the [Co-Terming and End Date Alignment Quick Reference Guide](#).







### 3.4.8 Search for an End Customer at Line Item

1. You can search in the editing field with customer name, site ID, city, address, or a combination of these values.

**Note:** We are not displaying site IDs that are not appropriate for the Bill-To on the quote. If you cannot find the site ID you are looking for, you may have to create a new site ID.

2. The search results will update as you type. If the desired end customer does not appear, you can create a new site.
3. See the [Create Site ID Quick Reference Guide](#) for more details.

**Note:** If you see an error that reads, “End Customer is a drop ship site and is not valid for quoting and ordering. Edit the line to select or create a new End Customer site to use,” please follow the instructions and change the End Customer site. This error message is intended to prevent ordering errors that have occurred for some customers.

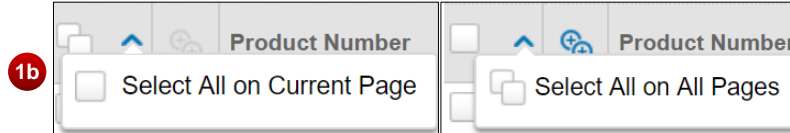
The screenshot shows the 'Items' tab in the Cisco Commerce interface. A table lists items with columns for Product Number, Service/Offer Type, PAK/Serial Number, End Customer, Start/End Date, Unit List Price, and Quantity. The first item is highlighted in yellow. Below the table, there are buttons for 'Remove From Quote' and 'Edit Lines'. A search box is visible, and a dropdown menu shows search results for 'CISCO HIGH LIFT OF TEXAS'. A 'Create New Site' button is located at the bottom of the search results. Red circles and boxes highlight the search input, the search results, and the 'Create New Site' button.

Product Number	Service/Offer Type	PAK/Serial Number	End Customer	Start/ End Date	Unit List Price	Quantity	Ext List
EW-DO-LIC-K9=	EW-DO-1Y-0_5K EWMDO Target Contract 9	2	Cisco	09-JUL-2020	3	1300	



### 3.4.9 Multi-Line Edit

1. You can also perform multi-line edits. Select multiple lines from one or more pages. To select many items, increase the numbers of items displayed on each page (up to 200).
  - a. The header checkbox either selects all items on this page or all items on all pages.
  - b. The dropdown gives you the option to select all on the current page or across all pages.



- c. Individual items are selected/deselected with the checkbox next to the item *except* when selecting items across all pages.
- d. If you have minor items displayed, and use select all, the minor items will be replaced by their major items and those items will be selected.

	Product Number	Service/Offer Type	PAK/Serial/Instance Number	End Customer	Start/ End Date	Unit List Price	Quantity
<input checked="" type="checkbox"/>	<input type="checkbox"/> CP-9971-C-K9	CON-SNT-CP99... SNT Target Contract New			27-JAN-2017 27-MAY-2017	58.99	1
<input type="checkbox"/>	<input type="checkbox"/> CP-9971-C-K9	CON-SNT-CP99... SNT Target Contract NEW			25-JAN-2017 24-JAN-2018	58.99	1
<input checked="" type="checkbox"/>	<input type="checkbox"/> CP-9971-C-K9	CON-SNT-CP99... SNT Target Contract New			27-JAN-2017 27-MAY-2017	58.99	1
<input type="checkbox"/>	<input type="checkbox"/> ESA-C670-K9	CON-SNT-C670... SNT Target Contract			01-JUL-2017 30-JUN-2018	2707.72	1
<input type="checkbox"/>	<input type="checkbox"/> ESA-C670-K9	CON-SNT-C670... SNT Target Contract			01-JUL-2018 30-JUN-2019	2707.72	1

View  Items Per Page << Previous 1 of 4 Next >>



- Click the **Edit Lines** button to open the edit lines dialog box, shown on the next page. The **Edit Lines** button is enabled when you select two or more lines.

	Remove From Quote	Edit Lines	More Actions	All	Search		
	Product Number	Service/Offer Type	PAK/Serial/Instance Number	End Customer	Start/ End Date	Unit List Price	Quantity
<input type="checkbox"/>	CP-9971-C-K9	CON-SNT-CP9... SNT			27-JAN-2017	58.99	1
		Target Contract New			27-MAY-2017		
<input type="checkbox"/>	CP-9971-C-K9	CON-SNT-CP9... SNT			25-JAN-2017	58.99	1
		Target Contract NEW			24-JAN-2018		
<input checked="" type="checkbox"/>	CP-9971-C-K9	CON-SNT-CP9... SNT			27-JAN-2017	58.99	1
		Target Contract New			27-MAY-2017		
<input type="checkbox"/>	ESA-C670-K9	CON-SNT-C670... SNT			01-JUL-2017	2707.72	1
		Target Contract			30-JUN-2018		
<input type="checkbox"/>	ESA-C670-K9	CON-SNT-C670... SNT			01-JUL-2018	2707.72	1
		Target Contract			30-JUN-2019		

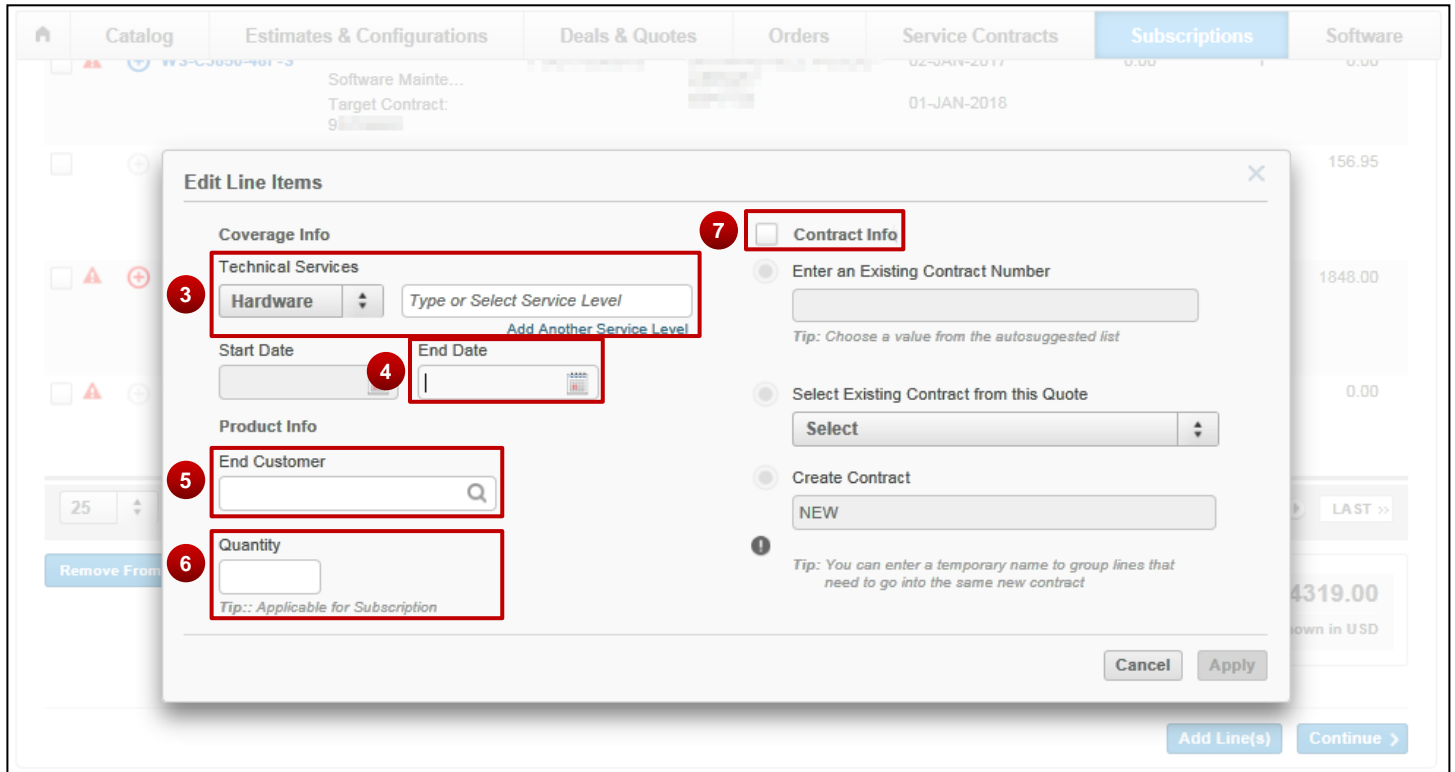
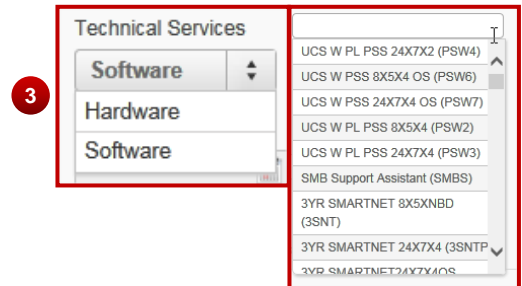
View 5 Items Per Page

Remove From Quote Edit Lines

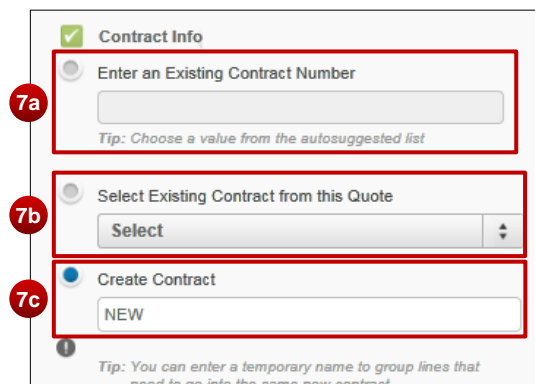
1 of 4



3. You can change the hardware or software service level. You will be shown a list of eligible service levels for the Bill-To ID.
4. You can align the end date for the selected line items.
5. You can change the end customer.
6. You can update the quantity.



7. Click the **Contract Info** checkbox if you want to change the contract. This enables you to:
  - a. Enter an existing contract number.
  - b. Select an existing contract from this quote
  - c. **Create Contract**, which enables you to create separate contract groups within your quote. The new contract will be created when the quote is ordered. Choose an existing compatible contract whenever possible, and try to avoid creating new contracts.



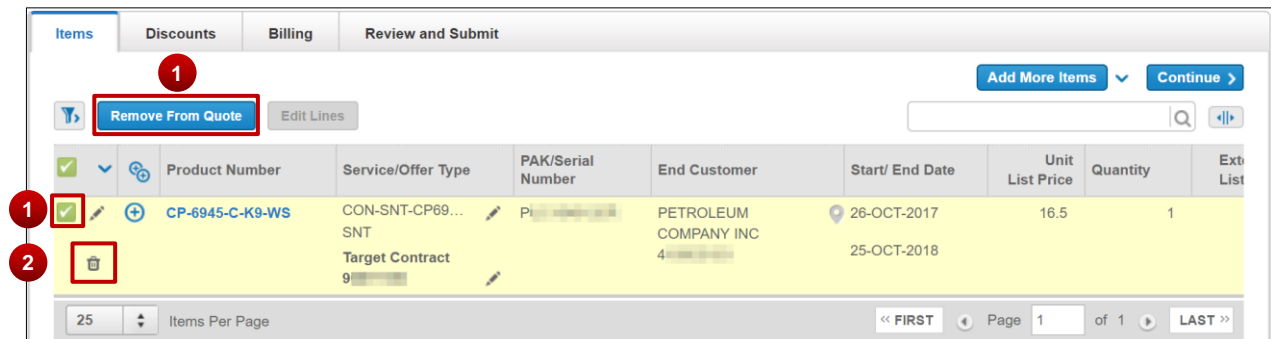
	Product Number	Service/ Offer Type	PAK/Serial Number
<input type="checkbox"/>	MC S7825I4-K9-CMD1	CON-OSP-MCS... SMARTnet Onsi...	
<input type="checkbox"/>	WS-C2960X-24PS-L	CON-OSP-WSC... SMARTnet Onsi...	

Target Contract NEW ← (7c)



### 3.4.10 Remove Line Items

1. To remove multiple line items, you can check the desired boxes, click **Remove From Quote** (at top or bottom of selected items), and confirm your deletion.
2. To delete or remove single line items (including minor lines) from the quote, hover over the line and click on the trash can icon.



3. If you have selected a minor line with a Last Date of Support (LDOS) error, you will have the option to delete all minor lines in the quote with that error.
4. Click **Delete** to confirm your choice.



### 3.4.11 Smart Accounts

You can use Smart Accounts in Software Subscriptions and Services. See the [Smart Accounts User Guide](#) to learn more.

### 3.4.12 Multiple Service Attach

For certain offers you can make independent edits at the minor line level. These offers will be marked with an “MSA” tag. You can find out more in the [Multiple Service Attach QRG](#).



### 3.4.13 Compare Prices

1. In a new estimate, select a line or all lines via the checkbox(es).
2. Click **More Actions** where you will see “Compare Prices” as a dropdown option.
3. Click **Compare Prices**.

QUOTE NUMBER: 2...  
BUY METHOD: Distribution  
INVOICE SKU: Fixed Dollar SKU  
CREATED BY: t... On 12-Apr-2018  
QUOTE NAME: ...  
STATUS: Invalid  
LAST UPDATED BY: t... On 12-Apr-2018

Items | Discounts | Billing | Review

Remove From Quote | Edit Lines | More Actions | Add More Items | Continue

Product Number	PAK/Serial Number	End Customer	Start/ End Date	Unit List Price	Quantity
CP-8821-K9-BUN SNT Target Contract 9...	FCH2110E1Z1	M...	07-APR-2018	87	1
AIR-AP18321-B-K9 CON-SNTP-AIR... SNT Target Contract 2...	KWC2110012C	A...	23-MAY-2018	45	1
C1-WS3850-48F/K9 CON-OSP-CWS... C4P Target Contract 1...	FOC2113U0Z6	H...	12-MAY-2018	1437	1
WS-C3650-48FD-S CON-SNT-WSC... SNT Target Contract 2...	FDO2121V0FX	E...	28-JUN-2018	750	1

4. Select your duration from the dropdown menu.

Compare Prices

Duration: 12 Months (dropdown menu open showing 12, 24, 36, 48, 60 Months)

Service Level:  Compare

Tip: Select up to 6 service levels for comparison.

	End Customer	Base Service/Offer Type	List Price for Base Service
FCH2110E1Z1 5104201453	M...	CON-SNT-CP88K9BN SNT	87
AIR-AP18321-B-K9 KWC2110012C 5104209987	A...	CON-SNTP-AIR2IBK9 SNTP	45
C1-WS3850-48F/K9 FOC2113U0Z6 5113756870	H...	CON-OSP-CWS48FK9 C4P	1437
WS-C3650-48FD-S FDO2121V0FX 5122329780	E...	CON-SNT-WSC365FD SNT	750

View 25 Items Per Page



5. Select up to 6 service levels from the Service Level dialog box, then click **Compare**.

**Compare Prices**

Duration: 12 Months

Service Level: NCHAG x, NCES1 x, NCI4P x, SSXCS x, SPSWA1 x, PSPNE x

IFMP - FDN MED 24X7X4  
IFMT - FDN MED NBD  
IFMU - FDN MED SAU  
PSPS2 - PSS SSPT2 24X7X2  
 PSPNE - PSS SSPT2 8X5X4  
PSPNB - PSS SSPT2 8X5XNBD  
PSPNP - PSS SSPT2 24X7X4

Compare

Product Number	End Customer	Duration	Service Level	Price	CMSN1 CMS Ntwk. Acc...	CMSR3 CMS Ntwk. Acc...
CP-8821-K9-BUN	FCH2110E121 5104201453	12 Months	PSPNE - PSS SSPT2 8X5X4	1437	N/A	N/A
AIR-AP1832I-B-K9	KWC211012C 5104209987	12 Months	PSPNE - PSS SSPT2 8X5X4	750	N/A	N/A
C1-WS3850-48F/K9	FOC2113U0Z6 5113756870	12 Months	PSPNE - PSS SSPT2 8X5X4	1437	N/A	N/A
WS-C3650-48FD-S	FDO2121V0FX 5122329780	12 Months	PSPNE - PSS SSPT2 8X5X4	750	N/A	N/A

6. You will now be able to view and select various price options for each service level.  
**Note:** You can then click **Export** to export to .xlsx or .csv reports.

Duration: 12 Months

Service Level: SPRMO x, SSSNE x, SSXS2 x, SNTP x, S2P x, SPAR4 x

Tip: Select up to 6 service levels for comparison.

Product Number	End Customer	SSSNE SOLN SUPP 8X...	SSXS2 SSPT EXP 24X...	SNTPT SNTC 24X7X4	S2P SNTC 24X7X2
CP-8821-K9-BUN	FCH2110E121 5104201453	N/A	N/A	N/A	N/A
AIR-AP1832I-B-K9	KWC211012C 5104209987	N/A	N/A	45	60
C1-WS3850-48F/K9	FOC2113U0Z6 5113756870	1280	N/A	1149	1526
WS-C3650-48FD-S	FDO2121V0FX 5122329780	1338	N/A	1200	1594

Total List Price: 2634.00  
All Prices shown in USD

Cancel Export Apply

7. Click **Apply**, then click **Continue** to update the estimate with your selected service levels.

**Update Estimate**

Your selected Service level(s) will be updated on respective line(s) on the estimate. Click continue to update the estimate.

Cancel Continue



### 3.5 Quoting: Discounts Tab

1. You may see information messaging or errors.
2. The intended use is not editable.
3. You can search for your desired products using the Generic Search. You can search by typing end customer site, service level, serial number, prorated list price, discount %, discount amount, discount modifier.
4. You can also filter your data using the filtering options available such as Product Number, Start Date, End date, etc.

#### 3.5.1 Entering an Approved Deal ID

Adding a Deal ID is optional. If you have an approved Deal ID, click the edit or pencil icon next to the Deal ID box to see the view shown here. For more information about Deal IDs, see the [Applying Deal ID to Quote QRG](#).

1. Enter your approved Deal ID and click **Update**.

### PRO TIP

Line items on the approved Deal ID must match the line items on the quote to apply non-standard discounts. These discounts are non-editable.





### 3.6 Quoting: Shipping Tab (Subscription Lines Only)

This tab is only present if your quote contains subscription items.

#### 3.6.1 Add Shipping Information to Subscription Lines

1. Search for the shipping address (using Ship-To ID, company name, etc.) to apply a shipping address for all lines.
2. Click the edit icon and search to apply a Ship-To ID to individual lines.

Product Number/ PAK Number	Qty	Delivery Method/ PAK Preference	eDelivery Email Address	End Customer	Ship To
SMA-WMGT-LIC= SMA-WMGT-1Y-S11	65000	ELECTRONIC SINGLE		GOVERNMENT (████████2)	Copy from End Customer
SMA-WMGT-LIC= SMA-WMGT-1Y-S11	65000	ELECTRONIC SINGLE		GOVERNMENT (████████2)	Copy from End Customer

3. Select a Ship-To ID from the results.
4. If you cannot find your desired site, create a new one. See the [Create Site ID Quick Reference Guide](#) for more details.

Product Number/ PAK Number	Qty	Delivery Method/ PAK Preference	eDelivery Email Address	End Customer	Ship To
SMA-WMGT-LIC= SMA-WMGT-1Y-S11	65000	ELECTRONIC SINGLE		GOVERNMENT (████████2)	Copy from End Customer

**PRO TIP** Search for an address before creating a new one. Only create a new site ID if necessary.



5. Enter the eDelivery email address here to apply it to all lines.
6. You can also edit the eDelivery address on individual lines.

**PRO TIP**

To avoid subscription fulfillment delays, make sure that you enter an accurate email address in this field.

The screenshot shows the 'Shipping' tab in the Cisco Commerce interface. It includes a 'Shipping Address and Contact' section with a search field and an 'Apply to All Lines' button. Below that is the 'Delivery Method' section, which contains an 'eDelivery Email Address' field with the value 'example@cisco.com' and an 'Apply to All Lines' button. A red box highlights this field, with a red circle containing the number '5' next to it. Below the 'Delivery Method' section is a table with columns: Product Number/PAK Number, Qty, Delivery Method/PAK Preference, eDelivery Email Address, End Customer, and Ship To. The first two rows of the table are highlighted in yellow. A red box highlights the edit icon in the first row, with a red circle containing the number '6' next to it. The table data is as follows:

Product Number/ PAK Number	Qty	Delivery Method/ PAK Preference	eDelivery Email Address	End Customer	Ship To
SMA-WMGT-LIC= SMA-WMGT-1Y-S11	65000	ELECTRONIC SINGLE	<input type="text"/>	GOVERNMENT (#.#.#.#.#2)	<input type="text"/> <a href="#">Copy all from End Customer</a>
SMA-WMGT-LIC= SMA-WMGT-1Y-S11	65000	ELECTRONIC SINGLE	<input type="text"/>	GOVERNMENT (#.#.#.#.#2)	<input type="text"/> <a href="#">Copy from End Customer</a>



### 3.6.2 Search for Shipping Address and Add Contact

Items	Discounts	Shipping	Billing	Review and Submit
Shipping Address and Contact <span>Continue &gt;</span>				
123				
Customer Number		5		
Ship To ID		6		
Address		456 CANTAY BRIDGE RD UMMING ON L5R4A1 CA		
<span>1</span> <b>Add Contact</b>				
<b>Apply to All Lines</b>				

1. Under the **Shipping** Tab, click **Add Contact** to add a contact to the shipping address.
2. Click **Apply to All Lines**, and contact and shipping information to the subscription line items.

Shipping Address and Contact	Contact
MARKET STORE 456	
Customer Number	4
Ship To ID	2
Address	3004 BRIDGE RD - STORE #456 UMMING GA 32835 US
	John Doe 1234567890 jdoe@website.com
<span>2</span> <b>Apply to All Lines</b>	

#### PRO TIP

The Ship-To assigned here on the shipping tab is the line-level Ship-To for each line. You have to assign the distributor quote-level Ship-To and contact in the billing tab.



## 3.7 Quoting: Billing Tab

### 3.7.1 Pre-Selected BID and Ship-To ID

Some Distributors will have selected a BID and Ship-To ID for you. In these cases you will see the following display.

1. Change the Distributor if you need to. If the Distributor does not have a pre-selected BID and Ship-To-ID you may see an error.

Items Discounts Shipping **Billing** Review and Submit

Continue >

**Billing Information**

Distributor

1 TECH

**Billing Address \***

**PRODUCT MANAGEMENT INC**

Customer Number [REDACTED]  
Bill To ID [REDACTED]  
Operating Unit CISCO OPERATING UNIT  
Address 5350 DRIVE  
CLEARWATER FL 33760  
US

**Reseller Address and Contact \***

**OPEN SYSTEMS**

Customer Number 1 [REDACTED]  
Bill To ID 7 [REDACTED]  
Operating Unit CISCO US OPERATING UNIT  
Address 116 DRIVE  
EAST SUITE 375  
ENGLEWOOD CO  
80112  
US

Contact [REDACTED]

US Federal Government

Yes  No

Continue >

## PRO TIP

If the distributor set up the Bill-To and Ship-To IDs wrong, by leaving out information, you will see an error. Contact the distributor to address this.



### 3.7.2 No Pre-Selected Quote Support

When a Distributor has not pre-selected a default contact, you will see the following, with errors noting what is missing.

1. **Errors will be displayed above the Billing and/or Ship-To information. You should contact the distributor to make sure they set default contacts, Bill-To, and Ship-To IDs.**
2. If you wish you can also select a new distributor to find one that has a default contact.
3. If you find a Distributor with default contact information, you will see that information here. Edit if needed.
4. **Note:** Your selected distributor must open the quote in order to add their Bill-To ID to the Quote. This is necessary for the quote to become valid.

**PRO TIP** Changing the taxability option from “Resale” will result in errors on your quote.

Items Discounts **Billing** Review and Submit

Continue >

1 Bill to ID is not specified on the quote.  
Distributor Ship To ID information is Missing

**Billing Information**

Distributor  
2 DISTRIBUTING CO

Reseller Address and Contact \*

OPEN SYSTEMS

Customer Number	1
Bill To ID	7
Operating Unit	CISCO US OPERATING UNIT
Address	

3

Add Contact

US Federal Government  
 Yes  No

Continue >



### 3.8 Quoting: Share

In Cisco Commerce you can seamlessly share your quotes. In most cases, your quotes will automatically be accessible to other users from the same partner and in the same global region as you. If you can open, edit, or order the quote, so can your co-worker. See the [Quote Share Quick Reference Guide](#) for how to share your quote with another user.



### 3.9 Quoting: Review and Submit

1. An informational message will alert you that the quote is ready to order. You must contact the distributor to order the quote.
2. If your quote contains errors, the icon corresponding to the tab with the error will appear red.

**Note:** If you see the error **QOT\_BID\_NOT\_FOUND\_H**, make sure your distributor logs in and opens the quote. See the Billing section for more details.

3. Click Sample Invoice to view and download your invoice for all your valid quotes. You can view and download a sample invoice in either XLSX or CSV format if you quote is in one of the following statuses: Valid, Order In Progress, Order Submitted, Order Booked, Conversion in Progress, Conversion Failed, Conversion Revalidated or Order Complete.
4. Enter your Reseller PO and/or a Customer Reference.
5. Enter the email address of your end customer to provide them easy access to useful information. Once the quote is converted, the email notification will be sent.

**Note:** Do not use this feature for quotes that include multiple end customers. The same notification with all the contracts will be sent to all the emails specified.

6. Click **Save** when you are finished. Your chosen distributor can now view your quote.

The screenshot shows the 'Review and Submit' tab in a software interface. At the top, there are tabs for 'Items', 'Discounts', 'Shipping', 'Billing', and 'Review and Submit'. A 'Save' button is in the top right corner, labeled with a red circle '6'. Below the tabs is a yellow notification bar with a warning icon and the text 'Quote is ready to order/being processed. Contact [redacted] for details..', labeled with a red circle '1'. Underneath is the 'Order Review' section, which contains a progress bar with four steps: 'Items', 'Discounts', 'Shipping', and 'Billing'. The 'Items' step is highlighted with a red circle '2'. Below the progress bar is a 'Financial Summary' table, labeled with a red circle '3'. The table has two columns: 'Category' and 'Value'. The rows are: 'Total List Price' (76215.1), 'Total Effective Discount' ((0%)0), and 'Order Total' (76215.1). A 'View Sample Invoice' link is next to the 'Order Total' row. Below the table is a note: 'All Prices shown in AUD'. To the right of the financial summary is a form with two input fields: 'Reseller PO' and 'Customer Reference', labeled with a red circle '4'. Below the form is a section for 'Send limited End Customer version to the following addresses', labeled with a red circle '5'. It contains a text input field with the example email 'xxx@yyy.com, aaa@bbb.com' and a note: 'Do not use this if you have multiple End Customers on this order.' At the bottom right, there is another 'Save' button, labeled with a red circle '6'.



### 3.9.1 Order Confirmation Messages

We send two email messages confirming your order.

1. We send the Order Acknowledgement message to the distributor user who submitted your order, no matter who created it, when you click **Submit Order** and the status changes to Order Submitted.
2. When your quote status changes to Order Complete, we send the Order Completion message to the distributor user who submitted your order, whoever created the quote, and to the email listed as the reseller contact on your quote. Your order completion message will have a link to an Order Completion Report. Anyone with access to that quote can download the report from the link in the message.

### 3.9.2 Download and forward Order Completion Report

1. For Quotes in Order Complete status, you can download the full order completion report (excel version) by clicking the **Download Report** from the review and submit page
2. Click **Forward** to send the limited end completion version of order completion report
3. Enter the end customer email address (multiple email addresses can be entered – comma separated)
4. Click **Send**.

The image shows two screenshots from a user interface. The top screenshot is a form titled "Additional Order Completion Email Notifications" with a red circle '1' next to the title. It has two sections: "Send full version to the following addresses" with a "Download Report" button (circled in red), and "Send limited End Customer version to the following addresses" with a "Forward" button (circled in red) and a red circle '2' next to the label. Below the second section is a text input field containing "xxx@aaa.com, yyy@aaa.com" and a note: "Do not use this if you have multiple End Customers on this order." A red arrow points from the "Forward" button to a modal dialog box below. The modal dialog is titled "Order Completion Email Notification" and has a close button (X) in the top right. It contains the text "Send limited End Customer version to the following addresses" and a text input field with "test@test.com" (circled in red) and a red circle '3' next to it. Below the input field is the same note as in the form. At the bottom right of the modal are "Cancel" and "Send" buttons, with the "Send" button circled in red and a red circle '4' next to it.





## 4 Glossary

Term	Definition
<b>Active</b> (Contract Status)	A contract that is current and enabled for TAC support.
<b>Expired</b> (Contract Status)	An expired contract status is 30 or more days after the contract ended. No TAC support.
<b>Overdue</b> (Contract Status)	A contract that has ended but is within the 30-day grace period and enabled for TAC support.
<b>Signed</b> (Contract Status)	A contract that has not started.
<b>Terminated</b> (Contract Status)	A contract that has been terminated on request from Partner/Customer. No TAC support.
<b>Co-Term</b>	Aligning the end date of a line in the quote with the end date of an existing contract. Also referred to as End-Date Alignment.
<b>GU ID (or GU Name)</b>	Global Unique Identifier (The GU ID is the data point used in Cisco's records to associate all branches of a corporation to a common, overarching entity)
<b>Host ID</b>	Host ID is an unique identifier for a particular device. For a SW Subscription line the Host/Mac ID is the HW device on which the subscription is installed and registered with Cisco via SWIFT portal.
<b>Instance Number</b>	Unique identifier for a Product in Install Base record can be used similar to serial numbers and will apply to both Serialized and Non-Serialized products
<b>MAC ID</b>	Media Access Control ID is a unique identifier assigned to network interfaces for communications on the physical network segment.
<b>PAK</b>	Product Authorization Key
<b>PO Number</b>	Purchase Order Number
<b>Product Number</b>	The unique name Cisco uses to identify the product also referenced to as Product SKU or License name for subscriptions
<b>Service Level</b>	Cisco covers many levels of service. This specifies which level is being obtained
<b>SKU</b>	Stock-Keeping Unit. A unique identifier for each distinct product and service that can be purchased in business.
<b>SO Number</b>	Sales Order Number