CCW Quote User Guide

Revision B

Table of Contents

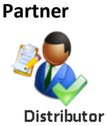
List of Figures

1 Conventions Used in this Document

- Key sequences on your keyboard that you are asked to press are in bold. For example, “Press **Tab** to move to the next field.”
- Links or options that display on the screen in blue, whether underlined or not, that you are asked to click are underlined and in bold. For example, “Click **<u>Commerce Workspace Home</u>** to return to the CCW home page.”
- Tabs that you are asked to click are not in bold. For example, “Click the Items tab.”
- Buttons that display on the screen that you are asked to click are in bold. For example, “Click **Continue**.”
- Options that you are asked to select will be from lists (either with radio buttons, checkboxes, or by clicking on the appropriate item)
- When you need to type text using your keyboard, the directions will indicate to enter the appropriate information. For example, “Enter the company name.”
- When there are multiple ways of accomplishing a specific task, preferred methods are indicated with “****Best Practice**”.
- **Page** is used in reference to the CCW home page only.
- **Window** is used to reference pop-up windows or the browser window only.
- **Screen** is used to reference all other pages, windows, screens within CCW.
- The following icons have been added to the document to indicate role-specific processes:

Internal / Cisco

External / Partner



Distributor

2 Searching for a Deal/Quote via Deals and Quotes Portlet

To search for a Deal or Quote via the Deals and Quotes portlet, complete the following steps:

1. From the CCW home page, scroll down to the Deals and Quotes portlet.
2. Click the drop-down arrow corresponding to Display and select the appropriate option.
3. Click the drop-down arrow corresponding to Deal Status and select the appropriate option. The relevant Deals/Quotes display under the Deals and Quotes portlet.

To search for a Deal/Quote using Workspace Search, see the *CCW Home Page and Portlets General Information User Guide*.

2.1 Statuses

In the Deals and Quotes portlet, the Deal status is listed. See the table below for additional information regarding the different statuses.

Table 1: Deal Status Information

Standard Deal Statuses	Automated Email sent by system?	Definition	Action
Not Submitted	No	Deal has not been submitted to Cisco for review	Submit Deal
Qualification in Progress* *Not all promotions require qualification	No	Cisco is reviewing the Deal	No action
Qualified* *Not all promotions require qualification	Yes	User has until the expiry deadline to submit the Quote and place the Order	Submit Quote
Approval in Progress	No	Cisco is reviewing the Deal	No action
Approved	Yes	User has finalized the Configuration and is ready to place the Order	Place Order
Reopened	Yes	Configuration revised; resubmit for approval	Re-submit Quote
Ordered	No	Orders are being placed against the Deal; all Orders must be placed before the Deal expires	No action
Closed	No	All items on the Deal have been consumed; Deal is no longer active	No Action
More Information Required	No	User needs to make edits and re-submit	Re-submit Deal
Rejected	No	Deal has been rejected; no longer active	No action
Expired	No	Deal is expired; no longer active	No action

3 Creating a Deal

To use a special program or promotion, follow the steps for creating a Deal. Create a Quick Quote when only *pre-approved* programs and promotions will be applied (see Section 4, Creating a Quick Quote, on page 15).

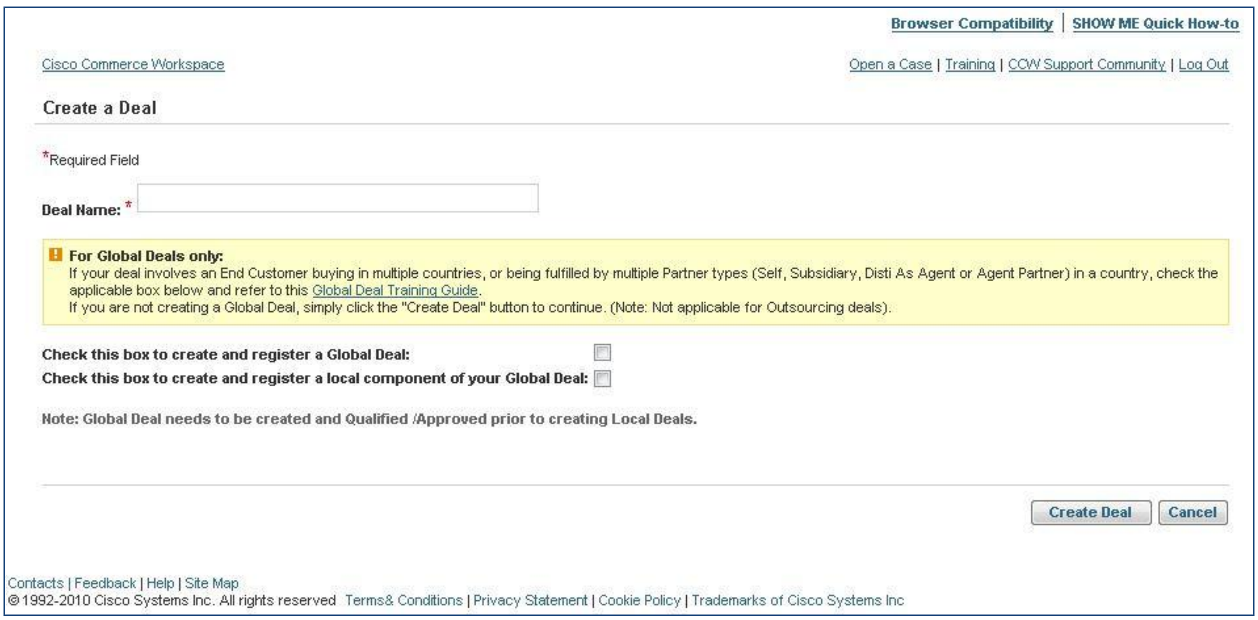
To create a Deal, under the Quick Start portlet, click **Deal** next to Create. Partners continue to Section 3.1, Creating a Deal. Distributors continue to Section 3.2, Selecting a Partner, on page 4.

3.1 Creating a Deal

Partner

When logged in as a Partner, the Create a Deal screen displays.

Figure 1: Create a Deal Screen

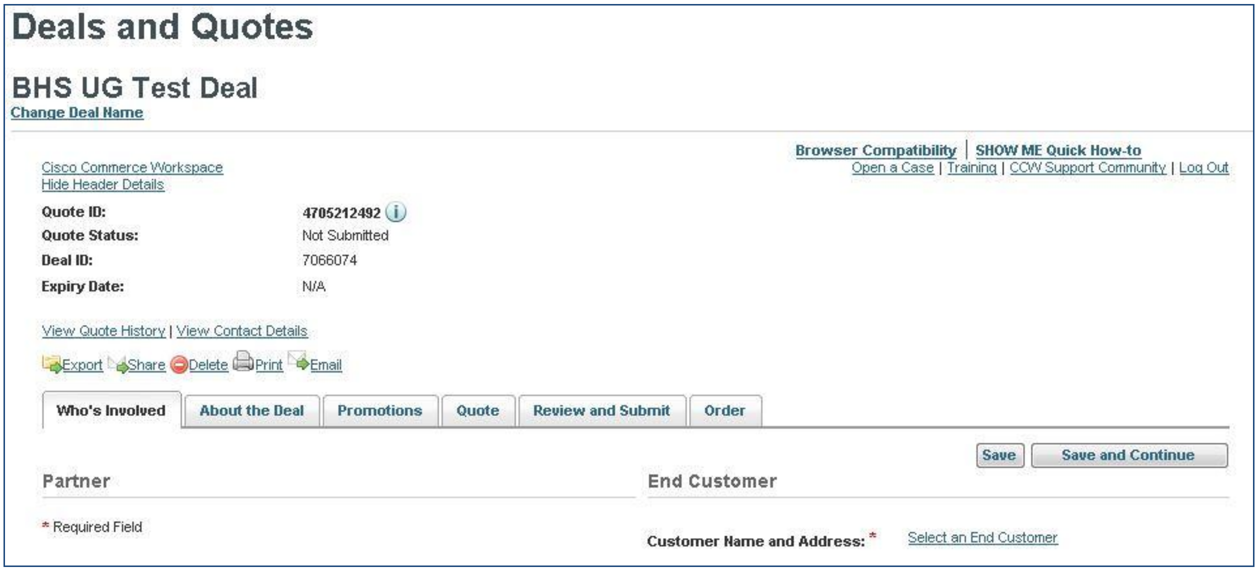


To create the Deal, complete the following steps:

1. Click in the field corresponding to Deal Name and enter a Deal name. Once created, this name displays on the Quote screen and in the View Deals and Quotes portlet.
2. If the Deal involves an End Customer buying in multiple countries or is being fulfilled by multiple Partner types (Self, Subsidiary, Disti As Agent, or Agent Partner), select the appropriate checkbox. Global Deals must be created and qualified/approved prior to creating Local Deals. Click **Create Deal**.

   If the Deal being created is not global, click **Create Deal** without selecting either checkbox. This option is not applicable for Outsourcing deals.
3. The Deals and Quotes screen displays. The Deal Name displays at the top of the screen. The Quote ID and the Deal ID also display. Continue to Section 3.5, Populating Who's Involved, on page 7.

Figure 2: Deals and Quotes Screen



3.2  Selecting a Partner

When logged in as a Distributor, the Select Partner screen displays.

Figure 3: Select Partner Screen

To select a Partner, complete the following steps:

1. Click **Select a Partner**. The Select Partner pop-up window displays with Partner contacts recently used at the bottom of the screen.

There are three ways to identify the Partner for this Quote.

- Search for the contact from the Partner company by Cisco.com User ID.
- Search for the Partner contact by searching the Partner company name.
- Select from the Recent Partners list shown at the bottom of the screen.

3.2.1 Search by Cisco.com ID

To search by Cisco.com ID, complete the following steps:

1. On the Select Partner pop-up window, click in the field corresponding to Cisco.com User ID.
2. Enter the user ID and click **Search**. The Associate a Partner Contact pop-up window displays.
3. Click **Select** corresponding to the appropriate Partner. The pop-up window closes. The selected Partner information populates on the Select Partner screen.

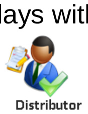
3.2.2 Search by Partner Company Name

To select a partner by searching by Partner Company Name, complete the following steps:

1. On the Select Partner pop-up window, click in the field corresponding to Partner Company and enter the name.
2. Click **Search**. The Partner Company pop-up window displays.
3. Select the radio button corresponding to the appropriate partner and click **Associate a Site**. Alternatively, if the appropriate partner information does not display, click **Search Again** and repeat the above steps, entering different information for the Partner Company Name. The Associate a Site pop-up window displays.
4. Select the radio button corresponding to the appropriate partner name and address and click **Lookup a Partner Contact**. The Associate a Partner Contact pop-up window displays.
5. Select the radio button corresponding to the appropriate contact and click **Select Partner Contact**. The pop-up windows close, the previous screen displays, and the Partner Company Site Address and Contact have been added to the Quote as one of the parties involved with this Deal.

3.2.3 Select from the Recent Partners list

To select from the Recent Partners list, click **Select** corresponding to the appropriate Partner Company displayed at the bottom of the window. The pop-up window closes, and the Select Partner screen displays with the appropriate partner information.

3.3 

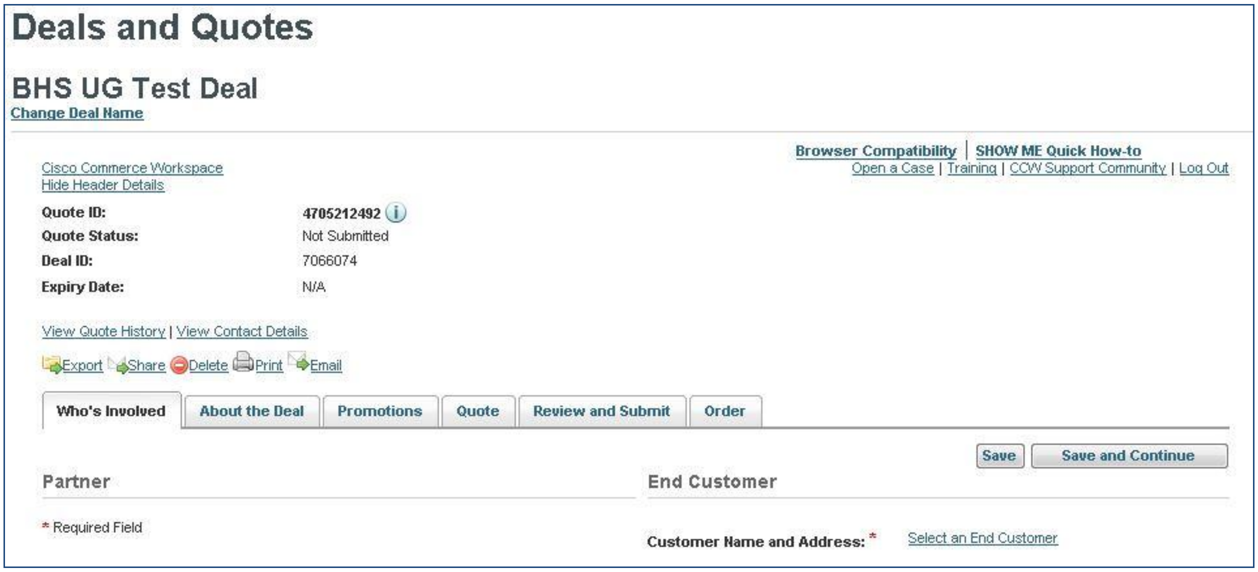
Naming the Deal

Once the Partner has been selected, continue with the following steps:

1. Click **Continue**. The Create a Deal screen displays.
2. Click in the field corresponding to Deal Name and enter a Deal name. Once created, this name displays on the Quote screen and in the View Deals and Quotes portlet.

3. Click **Create Deal**. The Deal and Quote screen displays. The Deal Name displays at the top of the screen. The Quote ID and the Deal ID also display. Continue to Section 3.5.2.1, Adding the End Customer, on page 8.

Figure 4: Deals and Quotes Screen



3.4 Optional Actions from the Deals and Quotes Screen

3.4.1 Changing the Deal Name

To change the Deal name, complete the following steps:

1. Click **Change Deal Name**. The Change Deal Name pop-up window displays.
2. Click in the Deal Name field.
3. Enter the new Deal name.
4. Click **Save**. The pop-up window closes.

3.4.2 Hiding or Showing Header Details

To hide the header details, click **Hide Header Details**. The information in the box under the Quote ID no longer displays.

To show the header details, click **Show Header Details**. The Quote Status, Deal ID, and Expiry Date display under the Quote ID.

3.4.3 Viewing the Quote History

To view the Quote History, click **View Quote History**. The Quote History pop-up window displays the Date and Time, the User, and the Activity for the Quote.

From the Quote History pop-up window, the user can opt to compare versions of the Quote. To compare two versions, select two of the versions and click **Compare Selected Versions**. The changes display.

3.4.4 Viewing Contact Details

To view the Contact Details, Click **View Contact Details**. The End Customer, Partner, Cisco CAM, Cisco AM, and Created by information display in a pop-up screen. Click **close** to close the screen.

3.4.5 Additional Links in Quote

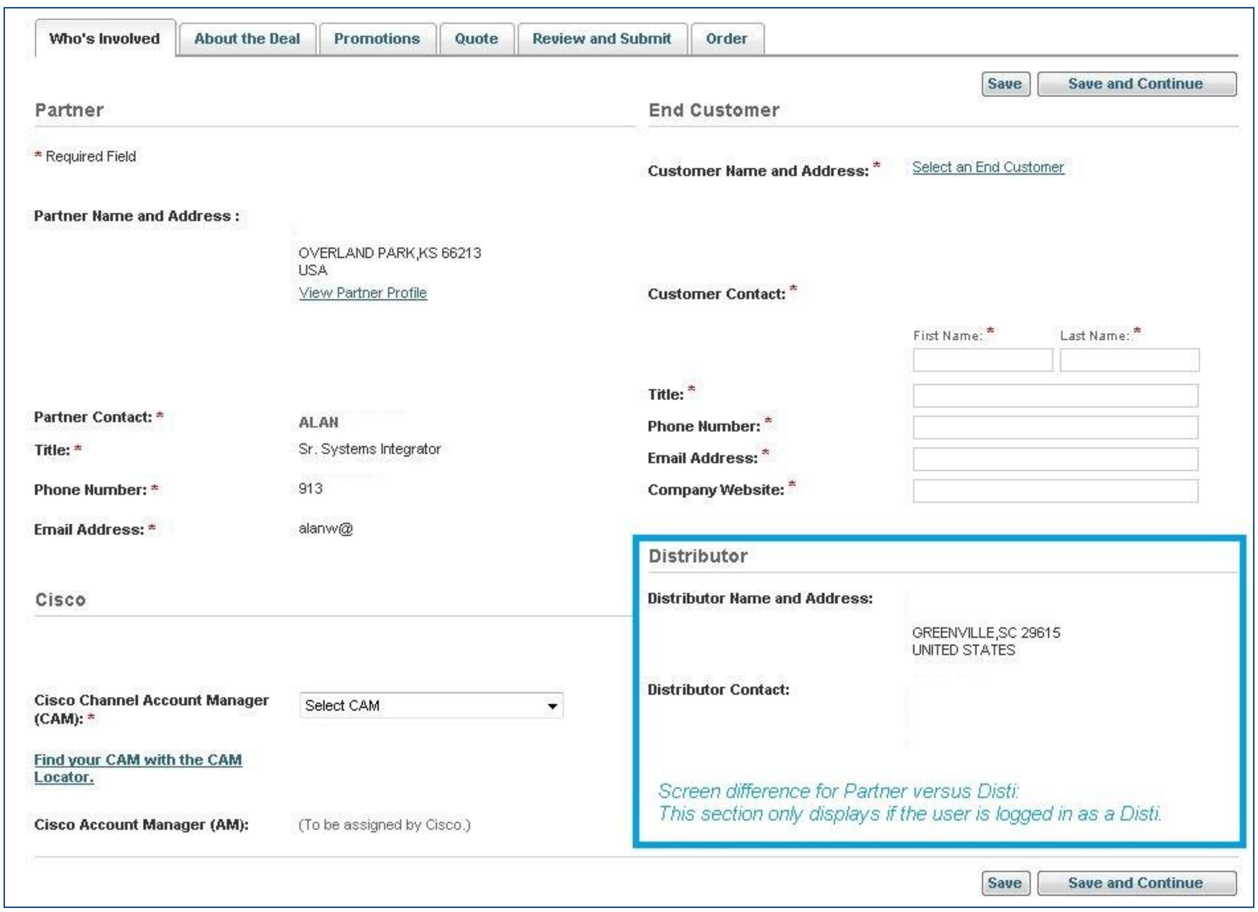
Click **Browser Compatibility**. A drop-down screen displays which internet browser and operating platform are most compatible with CCW. Click **Close** to close the screen.

Click **SHOW ME Quick How-to**. A drop-down screen displays additional links for Videos on Demand, html documents, and acrobat files. Click **Close** to close the screen.

3.5 Populating Who's Involved

Scroll down to view the information under the Who's Involved tab. The Who's Involved tab brings together the parties on the Deal: the Partner, the End Customer, and the Cisco Channel Account Manager (and the Distributor if the Deal is fulfilled by a Distributor). Use the information below to populate the Who's Involved tab.

Figure 5: Who's Involved Tab



3.5.1 Partner Section

3.5.1.1 Viewing and Changing the Partner Profile

The Partner Name and Address are populated by the system. To view or edit the partner information, click **View Partner Profile**. The Partner Profile window displays. To edit information, click **Partner Self-Service**. The Partner Self-Service Tool displays.

3.5.1.2 Viewing and Adding the Partner Contact

Distributors, the Partner Contact information is populated by the system.

Partners, click the checkbox corresponding to Use the Contact Details in my User Profile to automatically populate the Partner Contact section. Alternatively, click in each field and enter the appropriate information.

3.5.2 End Customer Section

3.5.2.1 Adding the End Customer

To add the End Customer, complete the following steps:

1. Click **Select an End Customer**. There are two options for finding the End Customer.
   - View my recent end customers link
   - Search by Country, Customer Company Name, and State or Province
2. Click **View my recent end customers**. Use this link if the End Customer has been used before on a Quote. The Select End Customer Address pop-up window displays. Select the radio button next to the appropriate Customer. Click **Select**.

   Alternatively, click the drop down arrow corresponding to Country and select the appropriate country. Click in the field corresponding to Customer Company Name and type the appropriate information. Click the drop-down arrow corresponding to State/Province and select the appropriate information. Click **Search**. The Select End Customer Address pop-up window displays. Select the radio button next to the appropriate Customer. Click **Select**.

3.5.2.2 Adding the End Customer Contact

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

3.5.3 Cisco Section

3.5.3.1 Adding the Channel Account Manager (CAM)

The Channel Account Manager (CAM) is also referred to as the Partner Account Manager (PAM), for Partners or a Distributor Partner Account Manager (DPAM) for Distributors. If the Quote needs to be approved, an email will be sent to the CAM.

There are several ways to add the CAM.

- If the CAM is known and displays in the drop-down menu, click the drop-down arrow corresponding to Cisco Channel Account Manager (CAM) and select the appropriate option.

- If the CAM is known, but not listed in the drop-down menu, select Other. Click **Find your CAM with the CAM Locator**. Click the field corresponding to Cisco Channel Account Manager (CAM) Email ID and enter the Cisco user name for the CAM.
- If the CAM is not know, click **click here** on the screen to identify the appropriate CAM.

3.5.4 

Distributor Section

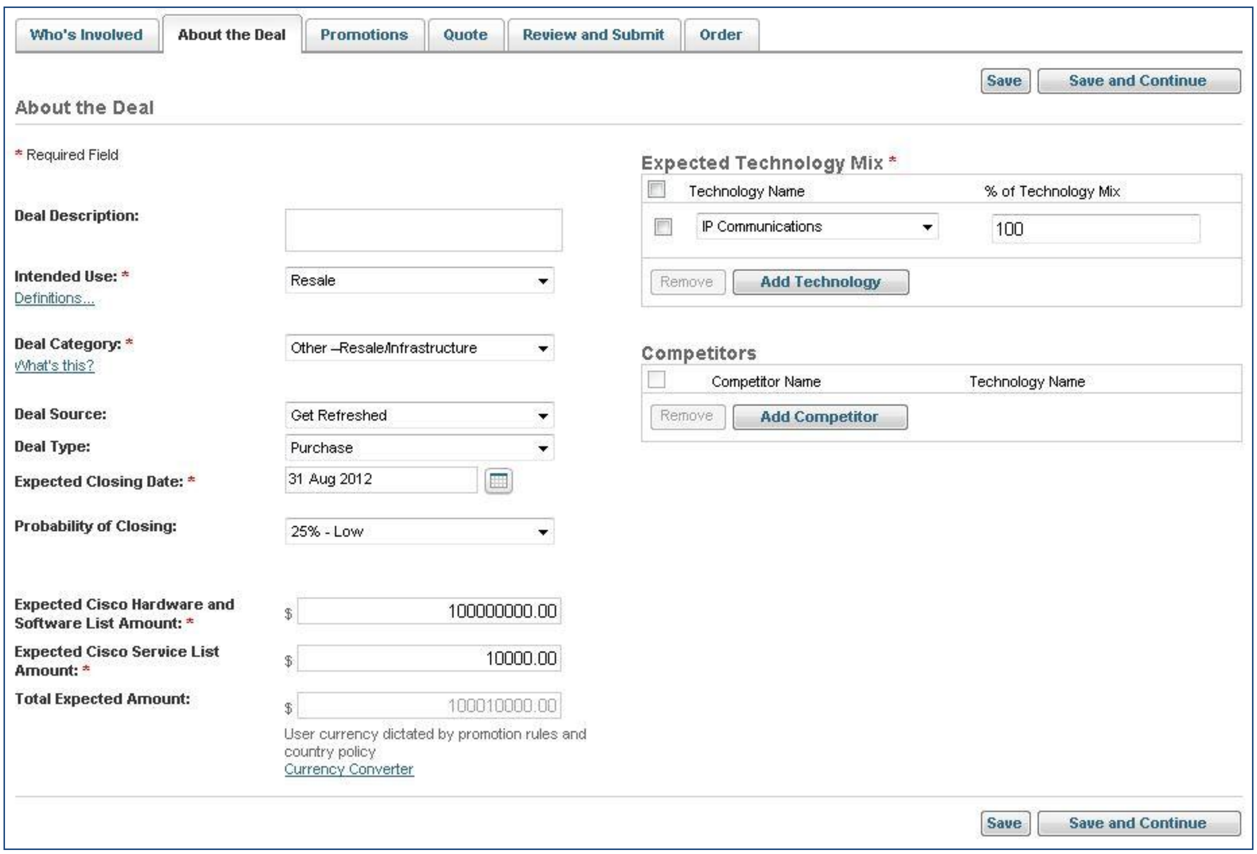
The Distributor section only displays if the user is logged in as a Distributor. The information is automatically populated.

Once the Who's Involved tab in populated, click **Save and Continue**. The About the Deal tab displays.

3.6 Populating Information about the Deal

3.6.1 About the Deal

Figure 6: About the Deal Tab



There are six required fields of information, indicated by the red asterisk (*) under the About the Deal section on this tab. Optional items can be populated at the user's discretion.

Table 2: About the Deal Section Options

Field	Action
Deal Description (optional)	Click in the field corresponding to Deal Description and enter additional information.
Intended Use*	Click the drop-down arrow corresponding to Intended Use and select the appropriate option from the drop-down menu. Resale is most used by Distributors. Promotions and programs are offered for certain Intended Use Deals, so ensure the appropriate use is listed.
Deal Category*	Click the drop-down arrow corresponding to Deal Category and select the appropriate option from the drop-down menu.
Deal Source (optional)	Click the drop-down arrow corresponding to Deal Source and select the appropriate option from the drop-down menu.
Deal Type (optional)	Click the drop-down arrow corresponding to Deal Type and select the appropriate option from the drop-down menu.
Expected Closing Date*	Click the calendar icon corresponding to Expected Closing Date and select the appropriate date from the calendar.
Probability of Closing (optional)	Click the drop-down arrow corresponding to Probability of Closing and select the appropriate option from the drop-down menu.
Cisco Account Managers, along with the Partners, formulate forecasting numbers for both revenue and shipments. The Expected Closing Date and Probability of Closing percent data contribute to forecast reporting. The following three fields, for hardware and software dollar amounts, are also reported.	
Expected Cisco Hardware and Software List Amount*	Click the field corresponding to Expected Cisco Hardware and Software List Amount and enter the estimated value.
Expected Cisco Service List Amount *	Click the field corresponding to Expected Cisco Service List Amount and enter the estimated value.
Total Expected Amount*	This field populates automatically when the above values are entered. User currency is dictated by promotion rules and country policy.
Expected Technology Mix*	To indicate the appropriate percentages, complete the following steps: • Click **Add Technology**. • Click the drop-down arrow corresponding to Select Technology and select the appropriate product family option. • Click in the field corresponding to % of Technology Mix and enter an appropriate value. • To add other technologies, repeat the above steps. Regardless of the number of technologies the total percentage can be no greater than 100%. • To remove an added technology, click the checkbox corresponding to the appropriate technology and click **Remove**. Regardless of the number of technologies the total percentage can be no greater than 100%.
Competitors (optional)	To manage competitor information, complete the following steps: • Click **Add Competitor**. • Click the drop-down arrow corresponding to Select Competitor and select the appropriate option. • Click the drop-down arrow corresponding to Select Technology and select the

Field	Action
	appropriate option. • To add additional competitors, repeat the above steps. • To remove an added competitor, click the checkbox corresponding to the appropriate competitor and click **Remove**.

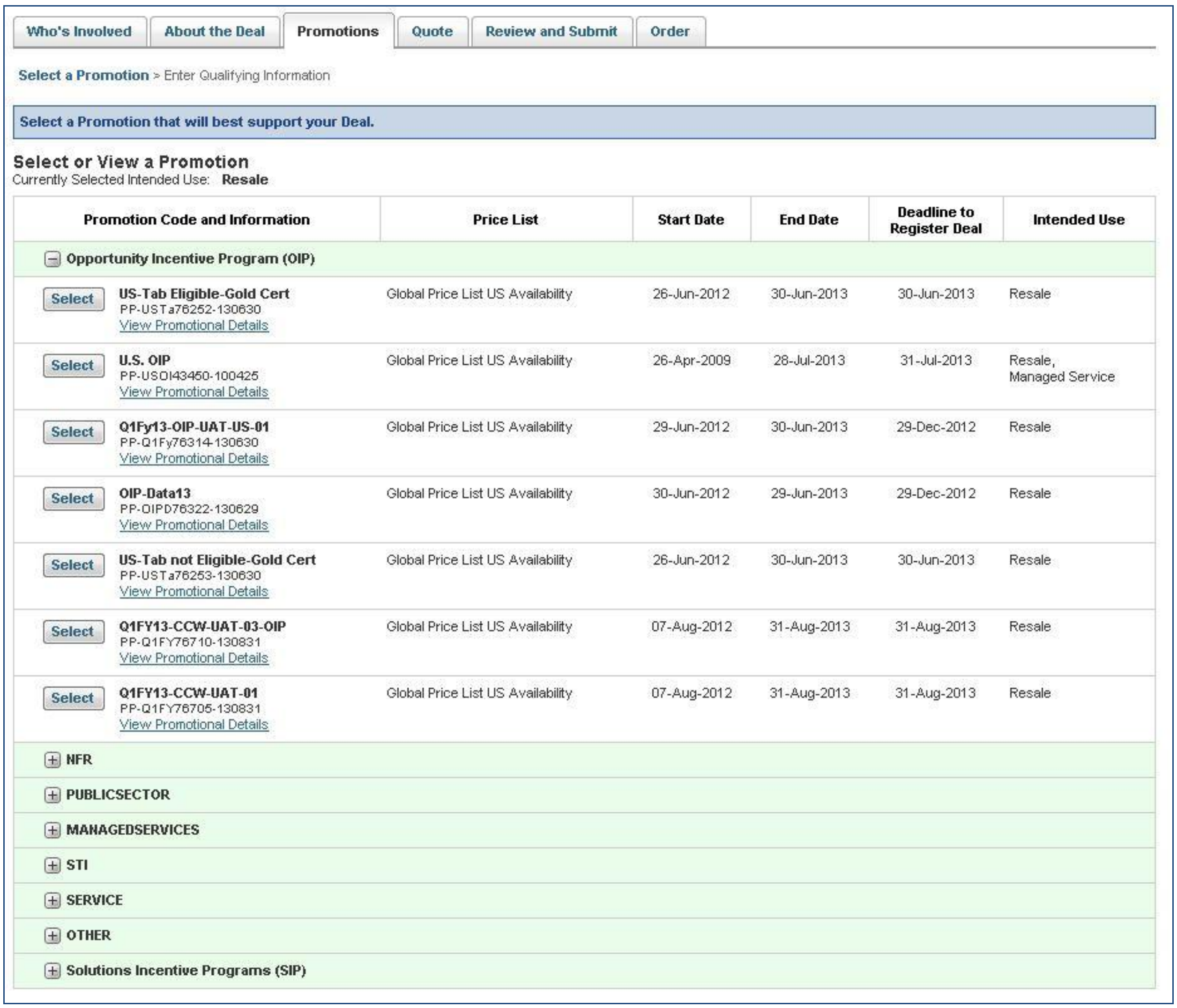
Click **Save and Continue**. The Promotions tab displays.

3.7 Viewing and Selecting Applicable Promotions

By using the Creating a Deal process, a user can take advantage of special Cisco promotions.

Not all promotions are available to all users, and some may require qualification. It is necessary to add a promotion to access the Quote tab. The user can register a Deal without adding the items to the Quote, for example, to qualify a Deal before the promotion expires.

Figure 7: Promotions Tab



To view and select applicable promotions, complete the following steps:

1. Scroll down the screen to view the available promotions.
2. Click **+** corresponding to the appropriate promotion. The field expands to display the specific options.
3. Click **Select** corresponding to the appropriate promotion. To view more information about the promotion before selecting, click **View Promotional Details**.
4. Depending on the promotion selected, various questions may display. Address all mandatory fields.
5. An attachment may be required. Click **Upload a file**. Click **Browse**. Locate the appropriate file and click **Open**. Click **Continue**.

   Alternatively, click the checkbox corresponding to the appropriate previously uploaded attachment.
6. Click **Save and Continue**.
   - If the attached promotion requires qualification, the Review and Submit tab displays. Continue to Section 6.3.1, Submitting the Deal for Qualification, on page 35. Once the Deal has been qualified by the CAM and other approvers, return to Section 5, Building a Deal or a Quick Quote, on page 21 to continue creating the Deal. Monitor the Deal Status, Next Approver, and Next Partner Action from the Deals and Quotes portlet on the CCW home page.
   - If the Deal does not require qualification, the Quote tab displays. Continue to Section 3.8, Providing Buy Method and Install Site.

When using a promotion, the Price List, Start and End Dates, Deadlines to Register the Deal, and Intended Use are verified.

3.8 Providing Buy Method and Install Site

There are three sections on the Quote tab: Billing Information, Buy Method, and Install Information. See Table 3: Quote Tab Options on page 13 to complete each section.

Figure 8: Initial Quote Tab

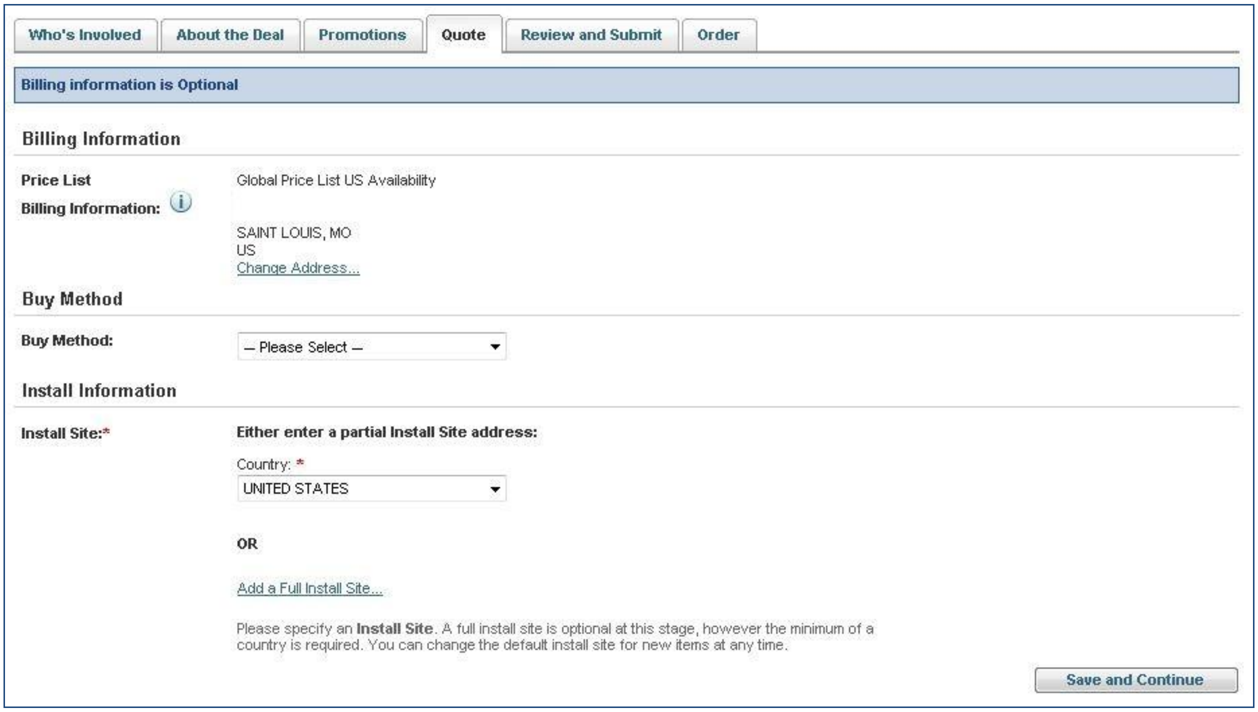
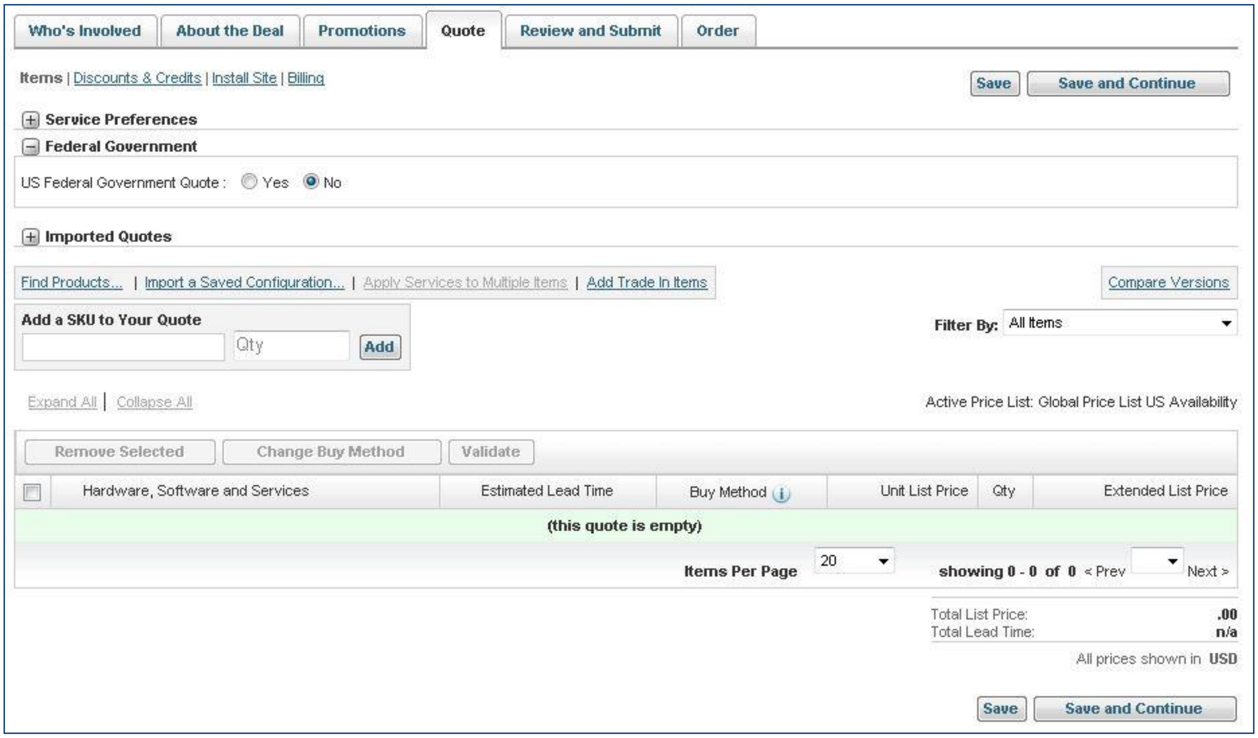


Table 3: Quote Tab Options

Section	Actions
Billing Information	The Billing Information is already populated and does not require updating on this screen. To change the billing information, click **Change Address**. The Select a Billing Address window displays. Select the radio button corresponding to the appropriate address and click **Continue**. ****Best Practice**: The billing address must be accurate to quote services correctly.
Buy Method	Click the drop-down arrow corresponding to Buy Method and select the appropriate option.
Install Information	Specify an Install Site. A full install site is optional at this stage; however, the minimum of a country is required. The default install site for new items can be changed at any time. ****Best Practice**: Adding a full install site enables validations and pricing. It is mandatory to add a full install site if services are added. Click the drop-down arrow corresponding to Country and select the appropriate country. To enter a full install site, click **Add a Full Install Site**. The Search for Install Site pop-up window displays. Populate the required fields, indicated with a red asterisk (*). Determine if populating the recommended fields, indicated with a green asterisk (*), is necessary. Click **Search**. The Select Install Site Address screen displays. Select the radio button corresponding to the appropriate install site and click **Select**. The pop-up window closes. The full install site populates.

Click **Save and Continue**. The Quote tab refreshes with four links: Items, Discounts & Credits, Install Site, and Billing. The Quote tab displays the Items screen by default. From this screen, the user will add products, services, and trade-in items. From the remaining links on this tab, the user can review discounts and credits (see Section 6, Reviewing Discounts & Credits, on page 31) and opt to review or edit the install site (see Section 6.1, Reviewing or Editing the Install Site Information, on page 32) and billing information (see Section 6.2, Reviewing or Editing Billing Information, on page 34).

Figure 9: Quote Tab: Items Screen



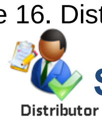
3.9 Adding Products and Services to Deal

To add products and services, see Section 5, Building a Deal or a Quick Quote, on page 21.

4 Creating a Quick Quote

Create a Quick Quote when only *pre-approved* programs and promotions will be applied. To use a special program or promotion, follow the steps for creating a Deal (See Section 3, Creating a Deal, on page 3).

From the Quick Start portlet on the CCW home page, click **Quick Quote** corresponding to Create a Quote. A new screen displays for populating the Quote information (see Figure 11: Populating the Quote Information Screen on page 16). Partners continue to Section 4.2, Populating the Quote Information, on page 16. Distributors continue to Section 4.1, Selecting a Partner.

4.1 

Selecting a Partner

For Distributors creating a Quick Quote begins with selecting a Partner.

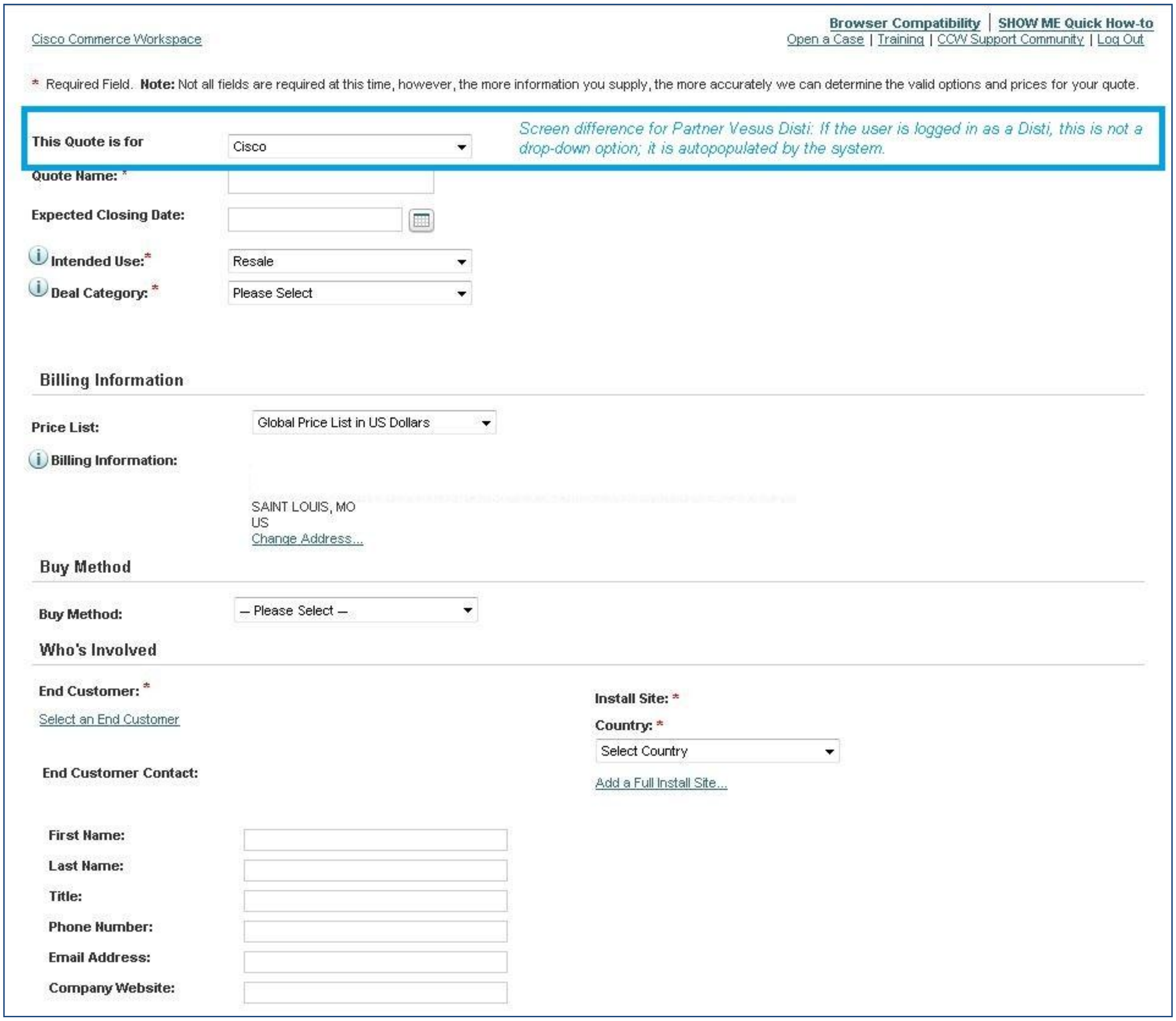
Figure 10: Select Partner Screen

To begin the Quick Quote process, click **Select a Partner**. The Select Partner pop-up window displays. The steps are the same as indicated in Creating a Deal (see Section 3.2, Selecting a Partner, on page 4).

To create a Not For Resale (NFR) Quick Quote, the Distributor selects themselves as the Partner and the end customer (see Section 4.3.3.1, Selecting an End Customer, on page 17).

Once the Partner has been selected, click **Continue**. A new screen displays for populating the Quote information. Continue to Section 4.2, Populating the Quote Information, on page 16.

Figure 11: Populating the Quote Information Screen



4.2 Populating the Quote Information

Mandatory fields are marked with a red asterisk (*) and must be completed; optional fields can be used as applicable.

Table 4: Quote Information Fields

Field	Action
This Quote is for (optional)	Partners: Click the drop-down arrow and select the appropriate option from the drop-down menu. Distributors: This is autopopulated by the system.
Quote Name*	Click in the field and enter an appropriate name for this Quote. This Quote Name displays on most view and edit pages for the Quote. Be sure to enter a meaningful name for easy recognition.

Field	Action
Expected Closing Date (optional)	Click the calendar icon and select the appropriate date from the calendar.
Intended Use*	The Intended Use field is automatically populated from the Workspace Profile. Change this information by clicking the drop-down arrow and selecting the appropriate option. Resale is most used by Distributors. Promotions and programs are offered for certain Intended Use Deals, so it is important to have the correct use listed.
Deal Category*	Click the drop-down arrow and select the appropriate option from the drop-down menu.

4.3 Populating Billing Information, Buy Method, and Who's Involved

4.3.1 Populating the Billing Information

To set the Price List for this Quote, click the drop-down arrow and select the appropriate option.

To change the Billing Information, click **Change Address**. The Select a Billing Address pop-up window displays. Select the radio button corresponding to the appropriate billing address and click **Continue**.

4.3.2 Populating the Buy Method

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

4.3.3 Populating Who's Involved

4.3.3.1 Selecting an End Customer

To identify the End Customer, click **Select an End Customer**. There are two options for finding the End Customer.

- View my recent end customers link
- Search by Country, Customer Company Name, and State/Province

Click **View my recent end customers**. Use this link if the End Customer has been used before on a Quote. The Select End Customer Address pop-up window displays. Select the radio button next to the appropriate Customer. Click **Select**.

Alternatively, click the drop down arrow corresponding to Country and select the appropriate country. Click in the field corresponding to Customer Company Name and type the appropriate information. Click the drop-down arrow corresponding to State/Province and select the appropriate information. Click **Search**. The Select End Customer Address pop-up window displays. Select the radio button next to the appropriate Customer. Click **Select**.

To create a Not For Resale (NFR) Quick Quote, the Distributor selects themselves as the Partner (see Section 4.1, Selecting a Partner, on page 15) and the end customer.

4.3.3.2 Adding End Customer Contact

The user can add the End Customer Contact Information, or the Reseller can add it later. This information is not required.

4.3.3.3 Selecting the Install Site

****Best Practice**: Adding a full install site enables validations and pricing. It is mandatory to add a full install site if services are added.

Click the drop-down arrow corresponding to Install Site Country and select the appropriate location.

To add a full Install Site, complete the following steps:

1. Click **Add a Full Install Site**. The Search for Install Site pop-up window displays.
2. Populate the required fields, indicated with a red asterisk (*).
3. Determine if populating the recommended fields, indicated with a green asterisk (*), is necessary.
4. Click **Search**. The Select Install Site Address screen displays.
5. Select the radio button corresponding to the appropriate install site and click **Select**. The pop-up window closes. The full install site populates.

Click **Change Address** to indicate a different full install site.

Click **Remove Address** to remove the indicated install site.

4.3.3.4 Reviewing the Partner Information

The partner name is automatically populated by the system.

4.3.3.5 Entering the Partner Contact

For Distributors, the Partner contact information is populated by the system.

For Partners, ensure that all mandatory information fields, indicated with a red asterisk (*), are populated. To use the contact details in the user profile to populate the Partner contact information, click the corresponding checkbox. The Partner contact information populates.

4.3.4 Creating the Quote

Click **Create Quote**. The Quote is created, and the Deal ID is issued. The Quote screen displays on the Quote tab with the Deal name in the upper left corner. The header information contains the Quote ID, the Quote Status, the Deal ID, and the Expiry Date.

Figure 12: Quote Screen

4.4 Optional Actions from the Quote Screen

4.4.1 Changing the Deal Name

To change the Deal name, complete the following steps:

1. Click **Change Deal Name**. The Change Deal Name pop-up window displays.
2. Click in the Deal Name field.
3. Enter the new Deal name.
4. Click **Save**. The pop-up window closes.

4.4.2 Hiding or Showing Header Details

To hide the header details, click **Hide Header Details**. The information in the box under the Quote name no longer displays.

To show the header details, click **Show Header Details**. The Quote ID, Quote Status, Deal ID, and Expiry Date display under the Quote name.

4.4.3 Viewing the Quote History

To view the Quote History, click **View Quote History**. The Quote History pop-up window displays the Date and Time, the User, and the Activity for the Quote.

From the Quote History pop-up window, the user can opt to compare versions of the Quote. To compare two versions, select two of the versions and click **Compare Selected Versions**. The changes display.

4.4.4 Comparing Versions

Under the Items link on the Quote tab, users have the option of comparing different versions of the same Quote. To compare versions, complete the following steps:

1. Click **Compare Versions** on the right side of the screen.
2. Click the first drop-down arrow and select a version.
3. Click the second drop-down arrow and select a different version.
4. Click **Compare**.
5. To return to the Items screen, click **Items**.

4.4.5 Viewing Contact Details

To view the Contact Details, Click **View Contact Details**. As applicable, the End Customer, Partner, Cisco CAM, Cisco AM, and Created by information display in a pop-up screen. Click **close** to close the screen.

4.4.6 Additional Links in Quote

Click **Browser Compatibility**. A drop-down screen displays which internet browser and operating platform are most compatible with CCW. Click **Close** to close the screen.

Click **SHOW ME Quick How-to**. A drop-down screen displays additional links for Videos on Demand, html documents, and acrobat files. Click **Close** to close the screen.

4.5 Adding Products and Services to a Quick Quote

To add products and services, see Section 5, Building a Deal or a Quick Quote, on page 21.

5 Building a Deal or a Quick Quote

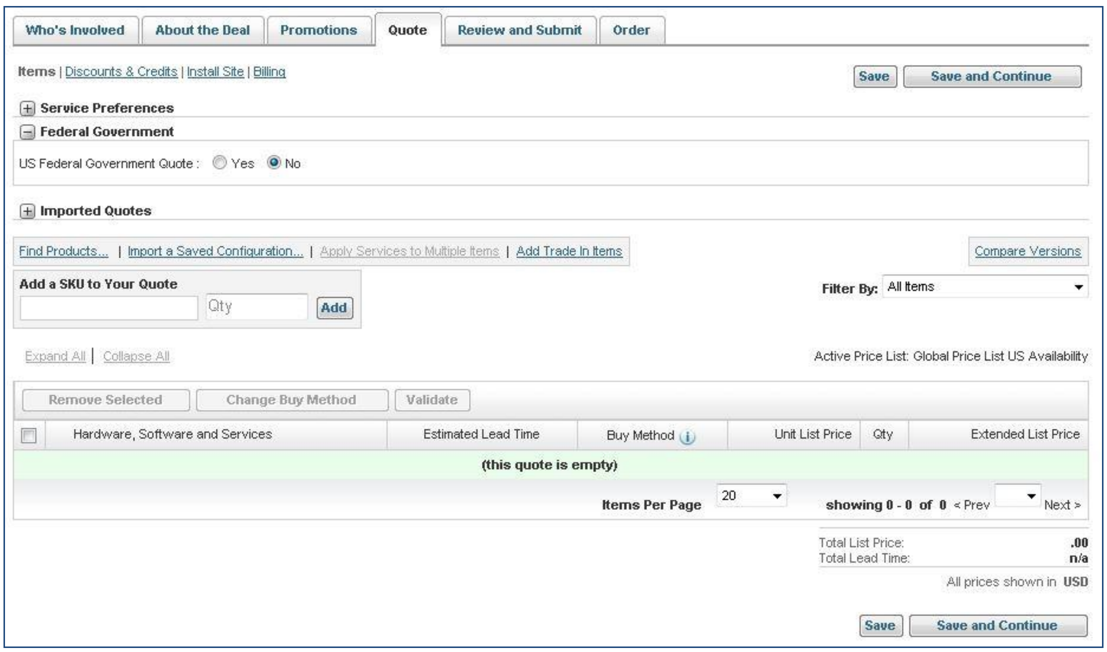
The processes involved in building a Deal or Quick Quote are similar. The following sections are from the Items page on the Quote tab. Any processes that are Deal-specific or Quick-Quote-specific are marked as such.

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

Once all work on the Items page of the Quote tab is complete, click **Save and Continue**. The Discounts & Credits page of the Quote tab displays. Once the Discounts & Credits page displays, the processes documented in this user guide split back out for Deals versus Quick Quotes.

From the Quote tab: Items screen, users can add products, services, and trade-in items. Additionally, the user can apply an RNSD to the Quote for RNSD-eligible items.

Figure 13: Quote Tab: Items Screen



5.1 Adding Products

To add products to the Quote, use one of the following four methods:

- Finding Products (see Section 5.1.1, Finding Products, on page 22)
- Adding a SKU (see Section 5.1.2, Adding a SKU, on page 22)
- Importing a Saved Configuration (see Section 5.1.3, Importing a Saved Configuration, on page 24)
- Importing a BOM (see Section 5.1.4, Importing a BOM, on page 24)

5.1.1 Finding Products

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

1. Click Find Products.
2. To search by product description or SKU, type a description or SKU in the field and click **Search**.

   To search by product family, click the radio button corresponding to Product Family. Click the drop-down arrow, select the appropriate option, and click **Search**.
3. Enter the quantity for each line item and click **Select**.
4. Repeat these steps to find multiple items to add to the Quote at one time.
5. Click **Add**. The Deals and Quotes screen displays. A new Quote line displays the added item.
6. Ensure the Buy Method is correct.
7. To continue adding lines to this Quote, click **Save**. The screen remains unchanged, and additional lines can be added by repeating the above process.

To remove a line, click the checkbox corresponding to the appropriate line item. Click **Remove Selected**.

5.1.2 Adding a SKU

To add a product, service, or software subscription to the Quote, complete the following steps:

1. Click in the field corresponding to Add a SKU to Your Quote and type at least three letters or numbers of a SKU. A drop-down menu displays items with matching SKUs.
   - To locate products that are orderable but not published on the indicated price list, enter the full SKU and press **Enter**. If the SKU is still not found, then the standard process to address errors applies. Prior to contacting support, verify that the SKUs cannot be located via the auto-populate, wild card search, or general workspace search functionalities and that the SKU in question has been published to the price list selected on the Quote.
2. Scroll down the list and select an appropriate product.
3. Click in the field corresponding to Qty and enter an appropriate quantity.
4. Click **Add**. A green message displays briefly, indicating that the part was added successfully. A new Quote line displays the added item.
5. Ensure the Buy Method is correct.
6. If the item is configurable, see Section 5.3, Selecting Options / Resolving Issues, on page 25.

   ****Best Practice**: For items that are configurable, it is best to add services as part of the Configuration. See Section 5.5, Adding Services, on page 26.
7. To continue adding lines to this Quote, click **Save**. The screen remains unchanged, and additional lines can be added by repeating the above process.

To remove a line, select the checkbox corresponding to the appropriate line item. Click **Remove Selected**.

5.1.2.1 *Adding Fixed Scope Consultancy SKUs*

Fixed Scope Consultancy SKUs can only be quoted and ordered in the Cisco Commerce Workspace. There are two types of Fixed Scope Consultancy Services.

- Installations
- Network Optimization

These 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.

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

1. Click in the field corresponding to Add a SKU to Your Quote and enter ASF. A list of Fixed Scope Consultancy SKUs display.

   Group services are identified with the prefix “ASF-XXX-G”. If a Fixed Scope Consultancy Group SKU is selected, modify the quantity as applicable.

   ASF Single SKUs do not have a G in the SKU. The quantity for a single Fixed Scope Consultancy SKU defaults to one and cannot be modified. These SKUs tend to be services that would only occur in a single instance per location. Increasing the quantity would result in the Customer being billed twice for a service Cisco could only provide once in a given location.

2. Verify the quantity is correct depending on the SKU and click **Add**.
3. Ensure the Buy Method is correct.

5.1.2.2 *Adding Cisco Integrated Customization Services (CICS) SKUs*

Silver-level SKUs (or CICS) can be added to a Quote, but the process can only be completed once the Quote is converted to an Order (and the Attach Template button becomes active). CICS require files to be attached in the Order and this step cannot happen as part of the Quote process. See the *CCW Order User Guide* for more information on completing this process.

To add a CICS SKU to a Quote, complete the following steps:

1. Click in the field corresponding to Add a SKU to Your Quote and type at least three letters or numbers of a SKU. A drop-down window displays items with matching SKUs.
   - To locate products that are orderable but not published on the indicated price list, enter the full SKU and press **Enter**. If the SKU is still not found, then the standard process to address errors applies. Prior to contacting support, verify that the SKUs cannot be located via the auto-populate, wild card search, or general workspace search functionalities and that the SKU in question has been published to the user’s price list.
2. Scroll down the list and select an appropriate product.
3. Click in the field corresponding to Qty and enter an appropriate quantity. When initially ordering CICS, the quantity can be no more than three.
4. Click **Add**. A success message displays briefly. At this point, the Configuration is not yet valid.
5. Click **Select Options** to validate and select options for this item (once this is done, the Validate line will display the item as Valid). The Option Selection screen displays.
6. Click **Cisco Integrated Customization Services (CICS)** under the Configuration Summary on the left side of the screen, in the Software section.

7. Select the radio button corresponding to the appropriate CICS Option from those displayed on the right.
8. Select other options to validate the Configuration (see Section 5.3, Selecting Options / Resolving Issues, on page 25 for information on selecting other options).
9. Click **Done**.
10. Click **Done**.

5.1.3 Importing a Saved Configuration

Another way to add products the Quote is to Import a Saved Configuration. CCW allows saved Configurations from many tools to be imported into the Quote.

To import a saved Configuration, complete the following steps:

1. From the Quote tab: Items page, click **Import a Saved Configuration**. The Import Saved Configuration pop-up window displays.
2. Click **Select** corresponding to the appropriate tool.
3. Select the radio button corresponding to the appropriate item.
4. Click **Import**. The Quote tab: Items page displays, and the imported Configuration is a new line item.
5. Ensure the Buy Method is correct.
6. Click the field corresponding to Qty in the appropriate line and enter the quantity.
7. Click **Save**. The work is saved, and the user remains on the Quote tab: Items page.

5.1.4 Importing a BOM

To import a BOM, complete the following steps:

1. From the Quote tab: Items page, click **Import a Saved Configuration**. The Import Saved Configuration pop-up window displays.
2. Click **Select** corresponding to BOM Upload or click **BOM Upload** to browse for the BOM file. The first three columns of the Excel BOM uploads: part number SKU, Duration (for services only), and quantity.
3. Click **Browse** corresponding to the Select File field. The Choose File to Upload window displays.
4. Locate the appropriate file and click **Open**.
5. Click **Upload File**. A progress bar indicates the percent complete.
6. The Quote tab: Items page displays the imported BOM as line items.
   - Click **+** corresponding to Imported Quotes to view the imported BOM.
   - Click the Config ID link to open the BOM file. The File Download window displays.
   - Click **Open**. The imported BOM file opens for review. Close the Excel BOM file to return to the Quote page.
7. Address any error messages.

8. Ensure the Buy Method is correct.
9. Click **Save**. The work is saved, and the user remains on the Quote tab: Items page.

5.2 Optional Functions for Individual Line Items

5.2.1 Adding User Notes to Line Items

To add a user note to line items, click **Add User Note** corresponding to the appropriate line item. Click in the text field. Enter up to 300 characters. Click **Save** to the right of the text field.

To change the user note, click **Update**. Edit the user note and click **Save** to the right of the text field.

To remove the user note, click **Remove**.

5.2.2 Copying Line Items

To copy a line item click **Copy**. A new, identical line item displays on the Quote.

5.2.3 Splitting Line Items

To split a quantity of items across multiple lines, complete the following steps:

1. Click **Split** under the Qty column in the appropriate line item. The Split Quantity pop-up window displays.
2. Click **Add Distributor**. A second line item displays in the pop-up window.
3. In the second line, click the drop-down arrow and select a Buy Method.
4. Click in the Qty field and enter a quantity less than the original quantity.
5. Click **OK**. A new line is added, and the quantity of the first line item resets appropriately.

5.3 Selecting Options / Resolving Issues

****Best Practice**: UCS Configurations require that the Quote Configuration be valid (i.e., power cables selected, etc.). However, even though this is not required for other products, it is highly recommended.

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

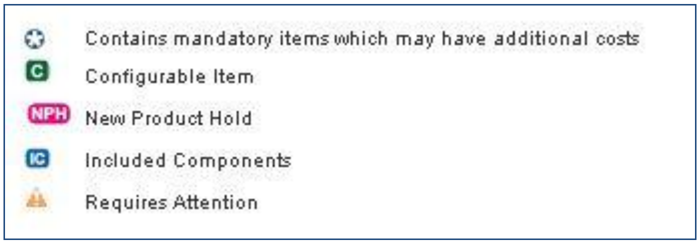
1. Click **Select Options** below one of the products. The Option Selection screen displays.

   The product list displays on the left side of the screen under Configuration Summary. Warning/error messages in a box at the top of the page indicate corrections within the Configuration that need to be addressed before the Quote can be submitted.

   Options that require attention have an orange triangle next to them.

Some of the options in the column on the left have icons next to them. These icons give additional information about the corresponding option. Hover over the icon to view the information. The icon legend is at the bottom of the screen and is reproduced in Figure 14: Product Configuration Icons on the following page.

Figure 14: Product Configuration Icons



2. Read each warning message and work through the Configuration Summary to resolve the indicated errors one at a time. The system guides the user through making the appropriate changes.

3. ****Best Practice**: Click the drop-down arrow corresponding to Country Specification and select the appropriate country. The system will then filter the products based on the country selection making it easier and faster to configure products correctly.

4. Scroll through the Configuration Summary. Using the warning messages at the top of the page as a guide, click the appropriate link to resolve each item. Make the appropriate selection(s). Continue this process until all issues have been resolved.

5. Click **Done**. If issues remain, an error message displays in the Done Messages pop-up window. Upon clicking Done in the Done Messages box, the Items tab displays, and the user will see a confirmation message indicating that the changes have been saved.

5.4 Setting Quantities for Products

To change the quantity for each of the products, click in the Qty field corresponding to the appropriate line item. Enter the desired quantity and press **Enter**. For multiple products, repeat this step for each item.

5.5 Adding Services

****Best Practice**: It is recommend that services be added as part of the product Configuration rather than as a separate service-only line item.

To add services one line at a time, see Section 5.5.1, Adding Services to Individual Lines. To add services to multiple lines, see Section 5.5.2, Cascading Services to Multiple Lines on page 27.

5.5.1 Adding Services to Individual Lines

To add services to individual lines in the Configuration, complete the following steps:

1. Click **Select Service** below the item. The Service/Subscription screen displays. A message at the top of the page indicates that changes made here may affect previous selections.

2. Click **Add Services**. The Add Services window displays. Only the appropriate services for the Configuration will be shown.

3. Click **+** to expand the Service Categories.

4. Select the radio button corresponding to the appropriate Service.

5. Click the drop-down arrow and select the appropriate Service duration.

6. Click **Update** to preview pricing and SKU. The Service Line displays below.
7. Repeat the steps as necessary.
8. Click **Ok** when finished. The Add Services window closes and the Service/Subscription Selection screen displays. The change is briefly highlighted, and the Add Services link changes to Edit Services.
9. Click **Done** when finished.
10. If applicable, click **Save**.

Services can be changed or added to any or all items in the Configuration in the same way.

5.5.2 Cascading Services to Multiple Lines

Users can apply the same service level and duration to multiple line items on a Quote at one time rather than line by line. This cascading functionality applies to *technical services only*. For UCSS and Advanced Services, see Section 5.5.1, Adding Services to Individual Lines, on page 26.

This option is enabled only when one or more serviceable items on the Quote contain a valid Configuration.

To cascade services to multiple lines in the Configuration, complete the following steps:

1. Click the **+** corresponding to Service Preferences. The Service Preferences section expands.
2. Set the default service preferences: Click the appropriate radio button to allow Cisco to attach services or to have the user add services manually.

   ****Best Practice**: click the radio button corresponding to I will add services to items myself. (Cisco will still add mandatory service where appropriate.).
3. Select the appropriate Default Services Choices as indicated in the following table.

Figure 15: Default Services Options

Option	Action
Service Program	Click the Service Program drop-down arrow and select the appropriate option.
Advanced Hardware Replacement Level	Click the Advanced Hardware Replacement Level drop-down arrow and select the appropriate option.
Onsite Field Engineer	Click the Onsite Field Engineer drop-down arrow and select Yes or No.
Software Application Upgrade	Click the Software Application Upgrade drop-down arrow and select Updates and upgrade or Updates Only.

4. Click Save Preferences.
5. Click **–** to close the Service Preferences section.
6. Click **Apply Service Options to Multiple Items**. The Apply Service Options to Multiple Items screen displays on the Quote tab.
7. Click the corresponding checkboxes for each line item to indicate which line items to apply services preference.

   Alternatively, click the checkbox in the header of the Items table to select all the lines.

8. As applicable, click the drop-down arrow(s) for Service Program, Advanced Hardware Replacement Level, Onsite Field Engineer, Software Application Upgrade, and Duration and select appropriate option(s).
9. Click **Apply**. Green success message displays.
10. Click **Done**.

5.6 Quick Quote Only: Entering Discount ID to Apply Reusable Non-Standard Deal (RNSD)

RNSDs are long-term Deals approved for a specific discount for a specific end customer. Multiple Orders can be created referencing the RNSD, with systematic application of the approved discount on the Order. Cisco Account Managers (AMs) initiate the Deal and provide the approved RNSD Discount ID to the Partner for use.

When ordering products included in the RNSD, no other discounts can be applied to that product. Other discounts can be used for other products on the Order, but will not apply to the RNSD products. The only promotion that can be used in tandem with RNSD is the trade-in promotion.

For more information on non-standard discounts and RNSD, see Section 8.4.1, Requesting and Modifying a Non-Standard Discount, on page 49 and Section 8.4.2, Working with a Shared/Collaborated RNSD Quote, on page 50.

5.6.1 Applying the RNSD

****Best Practice**: Apply the RNSD on a *Quick Quote* if there will be a trade-in item.

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

1. Click in the Discount ID field.
2. Enter the RNSD ID given by the AM into the Discount ID field.
3. Click **Add**. Once added, any RNSD product or service added to the Quote will have the discount applied automatically.
4. Click **Save**.

If there are trade-in items, continue to Section 5.7, Adding Trade-in Items.

5.7 Adding Trade-in Items

Users must be enrolled in the Technology Migration Program (TMP) to use the trade-in functionality in the workspace.

Multiple Orders cannot be created from a single trade-in Quote. A new trade-in Quote must be created for each Order.

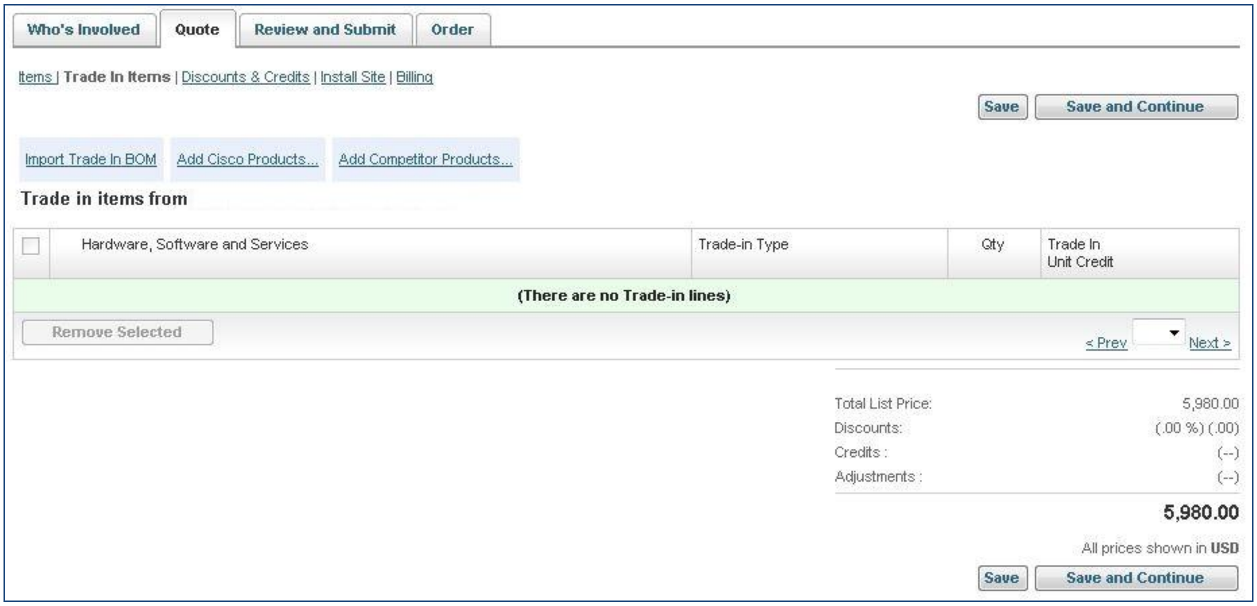
The Quote must contain only one Buy Method. To have different Buy Methods, create a new trade-in Quote for each item.

To request a trade-in credit for an end customer, complete the following steps:

1. Ensure the Buy Method is indicated prior to adding trade-in items.

2. Click **Add Trade In Items**. The trade-in credit will be approved after receipt of the trade-in item(s). The Trade-In Items screen displays.

Figure 16: Quote tab: Trade In Items Screen



3. Complete the steps under the appropriate trade-in type in the following sections.

5.7.1 Importing a Trade-in BOM

To import a Trade-in BOM, click **Import Trade In BOM**. Upload the file with the trade-in items.

5.7.2 Adding Cisco Products

1. Click Add Cisco Products.
2. Click in the field corresponding to Product Family or Part Number.
3. Enter the appropriate information. Matching items display in the drop-down window.
4. Select the appropriate option.
5. Click in the field corresponding to Qty and enter the quantity.
6. Click **Save**. The pop-up window closes. The Quote tab: Trade-in Items page displays the message that the Trade-in was added successfully to the Quote.

5.7.3 Adding Competitor Products

To add competitor products, complete the following steps:

1. Click **Add Competitor Products**. The Add Competitor Trade-In Product pop-up window displays.
2. Click the appropriate radio button. Depending on which Search Type is chosen, either drop-down options display or a Search field displays.

3. Click the drop-down arrows and make the appropriate selections or click in the Search field and enter the appropriate information. The Search results display.
4. Select the appropriate radio button.
5. Click the in Qty field and enter the quantity.
6. Click **Save**.

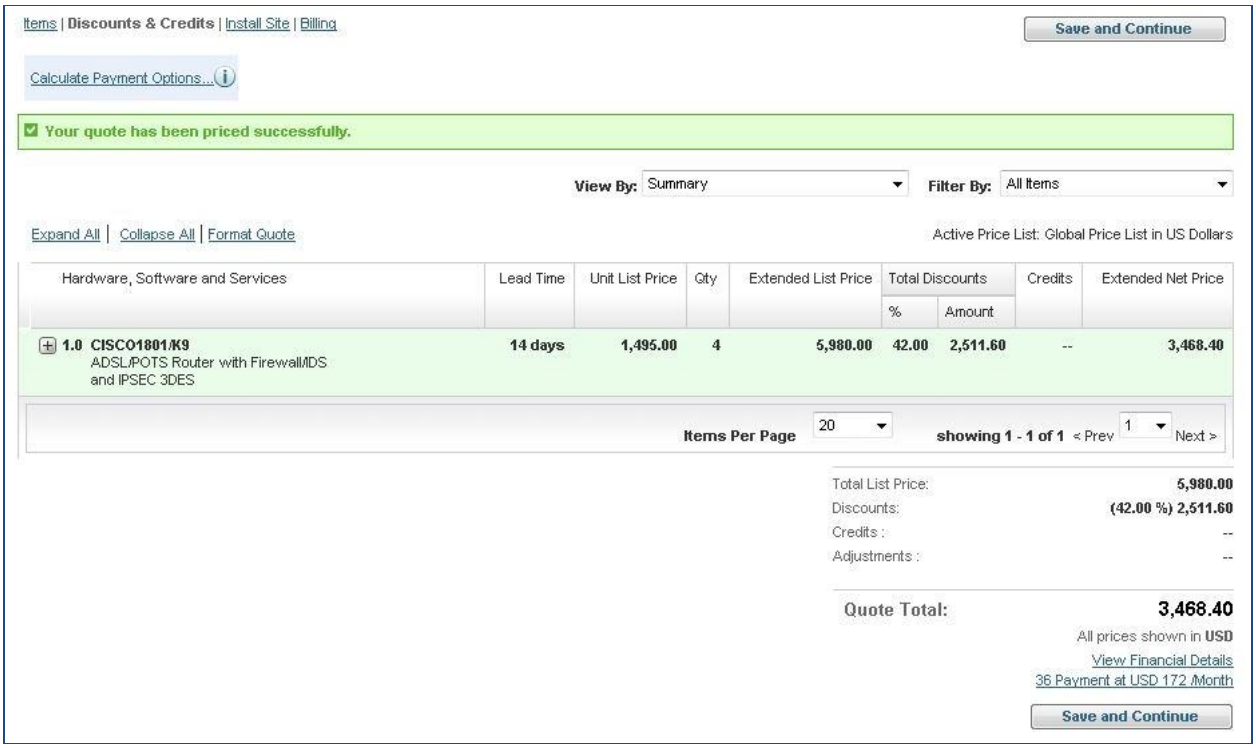
After the Trade-in information is complete, click **Save**.

Once all products and services have been added, click **Save and Continue**. The Discounts & Credits screen displays on the Quote tab.

6 Reviewing Discounts & Credits

Click **Discounts & Credits**. The Quote tab: Discounts & Credits screen displays with the lines of the Quote. The Unit List Price and Extended List Price are shown. Under Total Discounts, the user can view the total percentage of the discount as well as the Total Discount Amount. The Extended Net Price displays on the far right. When the major lines are collapsed, the discount column displays a blended discount. Expand a major line to view each individual line's discount.

Figure 17: Quote tab: Discounts & Credits Screen

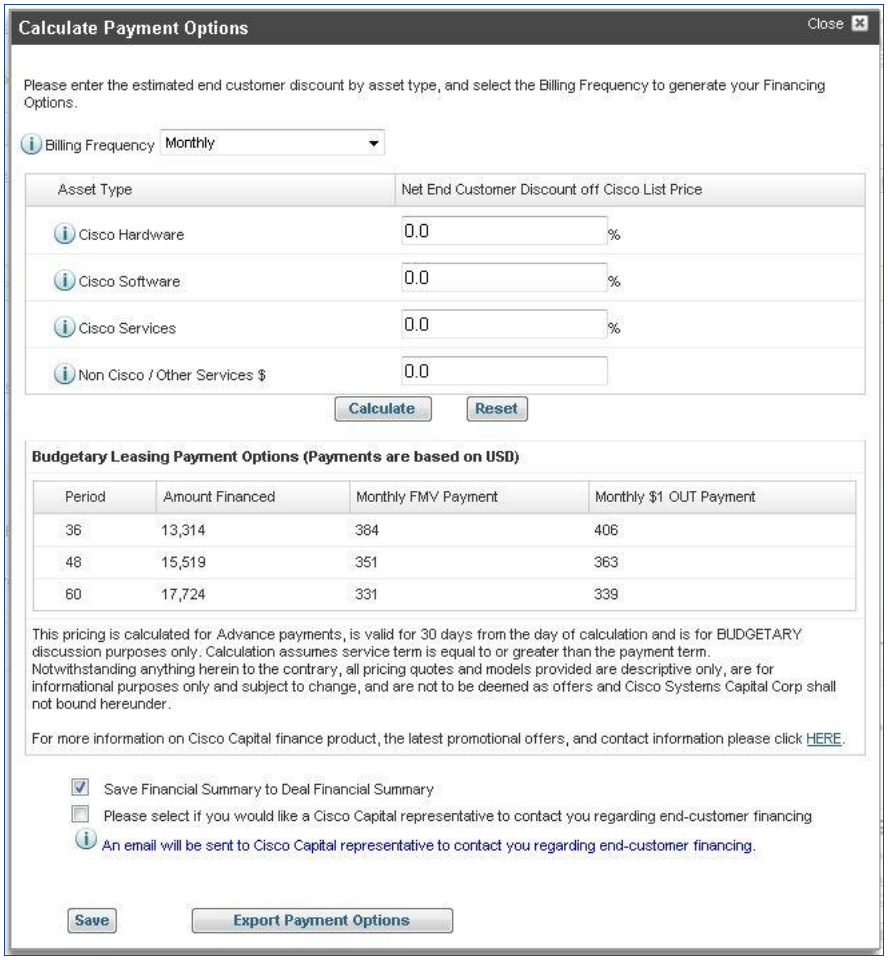


Under the Quote tab, users can opt to review or edit the Install Site and Billing information.

- To view or change Install Site information, continue to Section 6.1, Reviewing or Editing the Install Site Information, on page 32.
- To view or change Billing information, continue to Section 6.2, Reviewing or Editing Billing Information, on page 34.

To create a Cisco Capital End Customer Finance Quote, click **Calculate Payment Options**. The Calculate Payment Options pop-up window displays.

Figure 18: Calculate Payment Options Pop-up Window



Complete the form as applicable.

To continue the Quote, click **Save and Continue**. The Review and Submit tab displays.

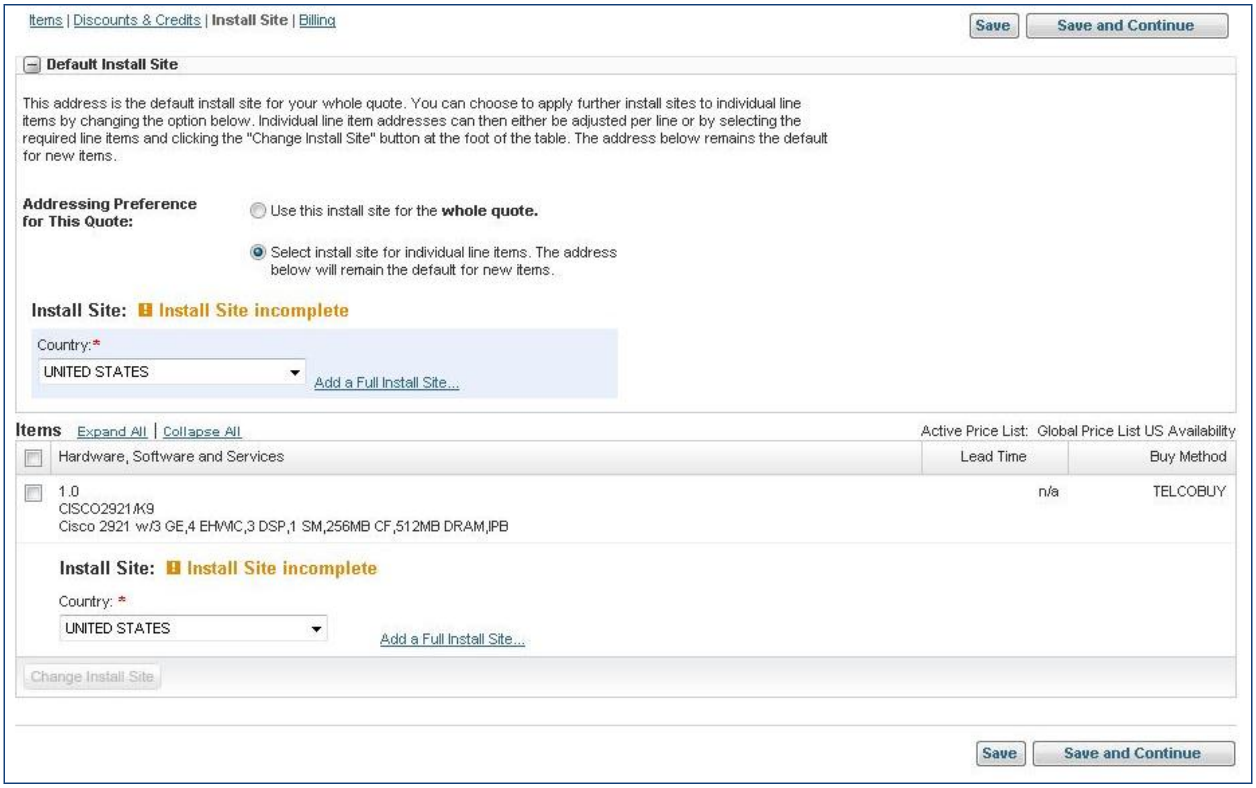
To continue the process of Creating a Deal, see Section 6.3, Reviewing and Submitting the Deal (Creating a Deal), on page 35.

To continue to process of Creating a Quick Quote, see Section 6.4, Reviewing and Submitting the Quote (Creating a Quick Quote), on page 38.

6.1 Reviewing or Editing the Install Site Information

Click **Install Site**. The user can customize the install site information for this Quote. The install site established when creating the Quote is the default site for the entire Quote. Individual line items can be installed at different locations. The original install site remains the default for any new items added.

Figure 19: Quote tab: Install Site Screen



Under Default Install Site, complete the following steps:

1. To set the original install site as the install site for the entire Quote, select the radio button corresponding to Use this install site for the whole Quote.

   To select individual install sites, select the radio button corresponding to Select install site for individual items.

2. If applicable, click the drop-down arrow corresponding to Country and select the appropriate option.

3. If applicable, click **Add a Full Install Site**. The Search for Install Site pop-up window displays. Populate the required fields, indicated with a red asterisk (*). Determine if populating the recommended fields, indicated with a green asterisk (*), is necessary. Click **Search**. The Select Install Site Address screen displays. Select the radio button corresponding to the appropriate install site and click **Select**. The pop-up window closes. The full install site populates.

If the user has indicated that separate install sites are to be used, complete the following steps:

1. Scroll down to the Items section.

2. Click the checkbox corresponding to the item(s) for one install site.

3. Click **Add a Full Install Site**. The Search for Install Site pop-up window displays. Populate the required fields, indicated with a red asterisk (*). Determine if populating the recommended fields, indicated with a green asterisk (*), is necessary. Click **Search**. The Select Install Site Address screen displays. Select the radio button corresponding to the appropriate install site and click **Select**. The pop-up window closes. The full install site populates.

To change the install site, complete the following steps:

1. Click **Change Install Site**. The Change Install Site for Multiple Lines pop-up window displays.
2. Select the radio button corresponding to Yes to only specify a partial address.

   Alternatively, select the radio button corresponding to No to specific a specific address.
3. Click the drop-down arrow corresponding to Country and select the appropriate option.
4. Click **OK**. If only specifying a partial address, the pop-up window closes and the install site information is updated. If specifying a specific address, the Search for Install Site pop-up window displays. Populate the required fields, indicated with a red asterisk (*). Determine if populating the recommended fields, indicated with a green asterisk (*), is necessary. Click **Search**. The Select Install Site Address screen displays. Select the radio button corresponding to the appropriate install site and click **Select**. The pop-up window closes. The full install site populates.

Click **Billing** or click **Review and Submit** to continue.

To continue the process of creating a Deal, see Section 6.3, Reviewing and Submitting the Deal (Creating a Deal), on page 35.

To continue to process of creating a Quick Quote, see Section 6.4, Reviewing and Submitting the Quote (Creating a Quick Quote), on page 38.

6.2 Reviewing or Editing Billing Information

Click **Billing**. The Quote tab: Billing screen displays. The information on this page is different depending on whether it is accessed from creating a Deal or creating Quick Quote. See the following figure and table to see the differences.

Figure 20: Quote tab: Billing Screen

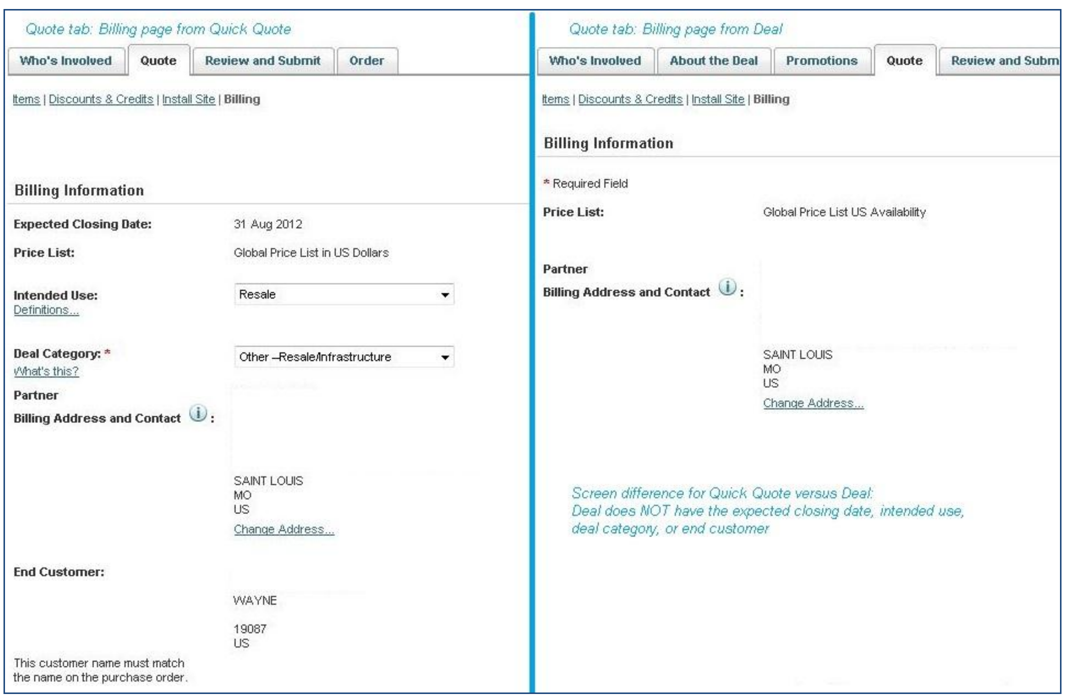


Table 5: Quote Tab: Billing Options

Field	Action	Deal / Quick Quote / Both
Expected Closing Date	No action. The expected closing date displays automatically.	Quick Quote
Price List	No action. The price list displays automatically.	Both
Intended Use	The Intended Use field is automatically populated from the Workspace Profile. Change this information if applicable by clicking the drop-down arrow corresponding to Intended Use and selecting the appropriate option. Click the drop-down arrow corresponding to Intended Use and select the appropriate option from the drop-down menu. Promotions and programs are offered for certain Intended Use Deals. Ensure that the Intended Use is accurate.	Quick Quote
Deal Category	Click the drop-down arrow corresponding to Deal Category and select the appropriate option from the drop-down menu.	Quick Quote
Partner	No action. The Partner displays automatically.	Both
Billing Address and Contact	Click **Change Address**. The Select a Billing Address pop-up window displays. Select the radio button corresponding to the appropriate billing address and click **Continue**.	Both
End Customer	No action. The End Customer displays automatically.	Quick Quote

Click **Review and Submit** to continue.

To continue the process of Creating a Deal, see Section 6.3, Reviewing and Submitting the Deal (Creating a Deal).

To continue the process of Creating a Quick Quote, see Section 6.4, Reviewing and Submitting the Quote (Creating a Quick Quote), on page 38.

6.3 Reviewing and Submitting the Deal (Creating a Deal)

Depending on the promotion selected, either the Deal will be submitted for qualification or the Quote will be submitted for approval. If the selected promotion requires qualification, see Section 6.3.1, Submitting the Deal for Qualification. If the selected promotion does not require qualification, see Section 6.3.2, Submitting the Quote for Approval, on page 36.

6.3.1 Submitting the Deal for Qualification

The Review and Submit tab displays many sections that change depending on whether this is a Deal or a Quick Quote and whether the promotion selected (in a Deal) requires qualification. The options detailed below are with respect to a Deal with a promotion that requires qualification.

If the selected promotion requires qualification, complete the following steps:

1. Click the Review and Submit tab. To make any changes to Deal Information, click **Edit** corresponding to Who's Involved, About the Deal, or Promotions as applicable from the Review and Submit tab.

2. Optionally, to view end customer budgetary finance Quote for the Deal, click **here** under Cisco Capital Finance. The Calculate Payment Options pop-up window displays. Complete the information and click **Calculate** to determine Financial Options. Alternatively, click **Close** to close the pop-up window and return to the previous screen.
3. Optionally, under the Comments sections, click **Add a Comment** to add a comment on this Deal. Click **+** corresponding to the appropriate items to show additional information for that item: Items and Discounts, Trade In Items, Who's Involved, Billing, Install Site, Show/Hide Attachments.
4. Click **Submit Deal for Qualification**. The Deal Submission confirmation page displays.

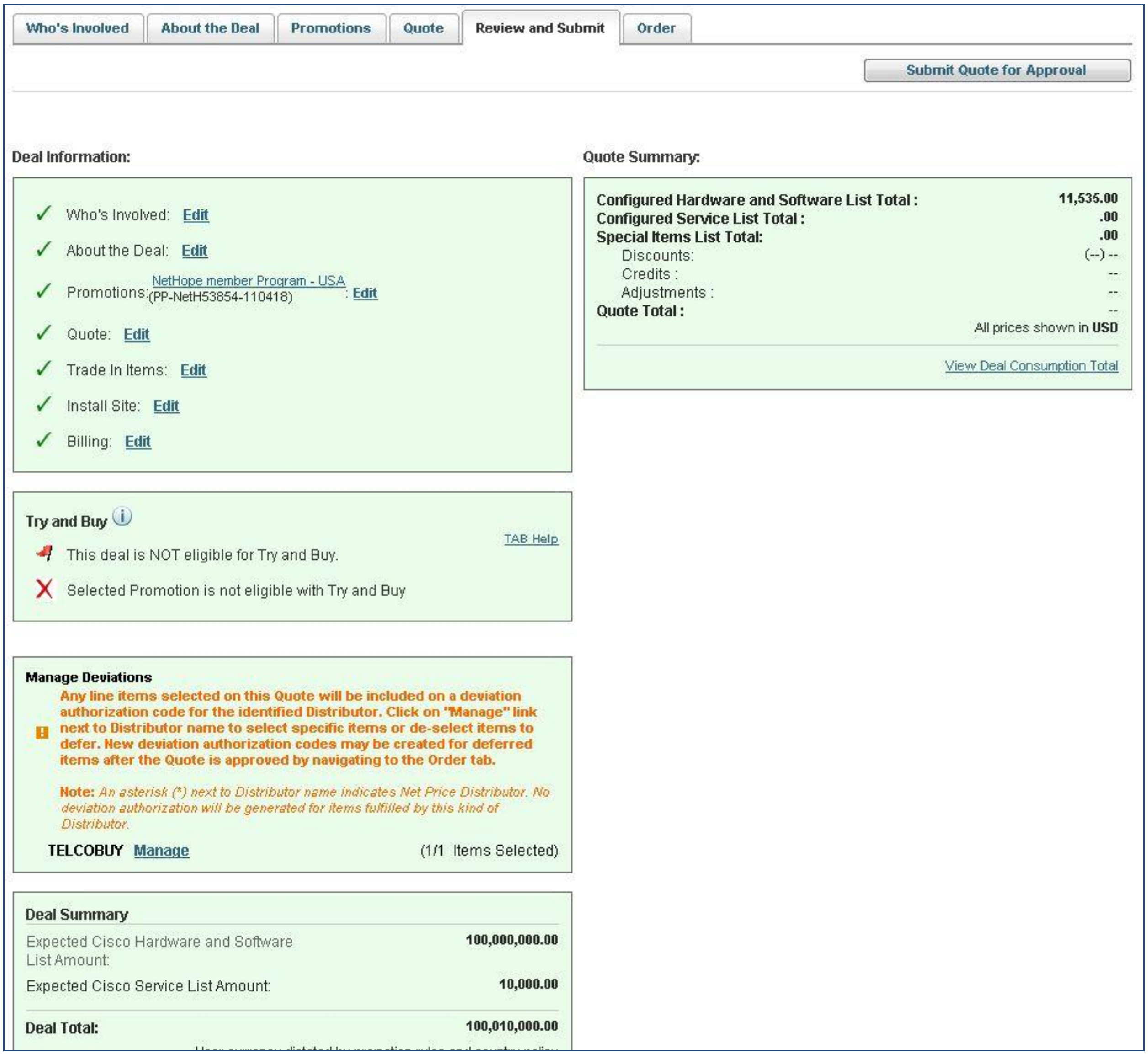
After the Qualification is approved, complete the following steps:

1. Build the Quote. See Section 5.1, Adding Products, on page 21.
2. Select **Discounts and Credits** to view the details of the promotional pricing.
3. The default view is the Summary View. Click the drop-down arrow corresponding to View By and select the appropriate option: Discount Type, Discount Details, Net Unit Price Product and Service Totals
4. To see the details of the discount, select **Discount Details**.
5. When viewing the Discounts and Credits is complete, click **Save and Continue**. The Review and Submit tab displays. Continue to Section 6.3.2, Submitting the Quote for Approval on page 36.

6.3.2 Submitting the Quote for Approval

The Review and Submit tab displays many sections that change depending on whether this is a Deal or a Quick Quote and whether the promotion selected (in a Deal) requires qualification. The options detailed below are with respect to a Deal with a promotion that does not require qualification.

Figure 21: Review and Submit Tab (Creating a Deal/Submitting Quote for Approval)



6.3.2.1 *Deal Information section*

To make any changes to Deal Information prior to submitting for approval, click **Edit** corresponding to any of the options that display as applicable.

6.3.2.2 *Quote Summary section*

The Quote Summary displays on this screen. Once the Deal/Quote is approved, click **View Deal Consumption** to view what products have been ordered/consumed. The Deal Consumption pop-up window displays. Click **Close** to close the pop-up window and return to the previous screen.

6.3.2.3 Try and Buy section

The Try and Buy (TAB) Program is a global Service that allows Cisco Customers to try Cisco products for a short period of time before buying them. It is a product sale with deferred invoicing up to a certain number of days, which is referred to as the “Trial Period“.

If the Customer decides not to complete the purchase for any reason, the product may be returned, at no charge, prior to invoicing on the first day of possession after the trial period ends.

Deal or Quote eligibility for TAB is located on the Review and Submit tab. Not all Deals are TAB eligible. Restrictions for TAB Deals:

- May only be combined with OIP, SIP, or MSCP promotions
- Must have a single source of fulfillment (Buy Method) on the Quote
- Are ineligible if include a trade-in item
- Are excluded if they are IronPort or Service-only Deals/Quotes

To request Try and Buy on eligible Deals, click **Request TAB**.

6.3.2.4 Manage Deviations section

Deviations are any part of a Quote that is not standard. Deviations trigger the creation of a DART.

Click **Manage** to view progress of the approval process rather than waiting for approval notification.

6.3.2.5 Deal Summary section

Review the Deal Summary information.

6.3.2.6 Cisco Capital Finance section

To view an end-customer budgetary finance quote for this deal, click the corresponding link.

To indicate a Cisco Capital representative should contact the user regarding end-customer financing, click the checkbox.

Additionally, there is a link to Cisco Capital information.

6.3.2.7 Comments section

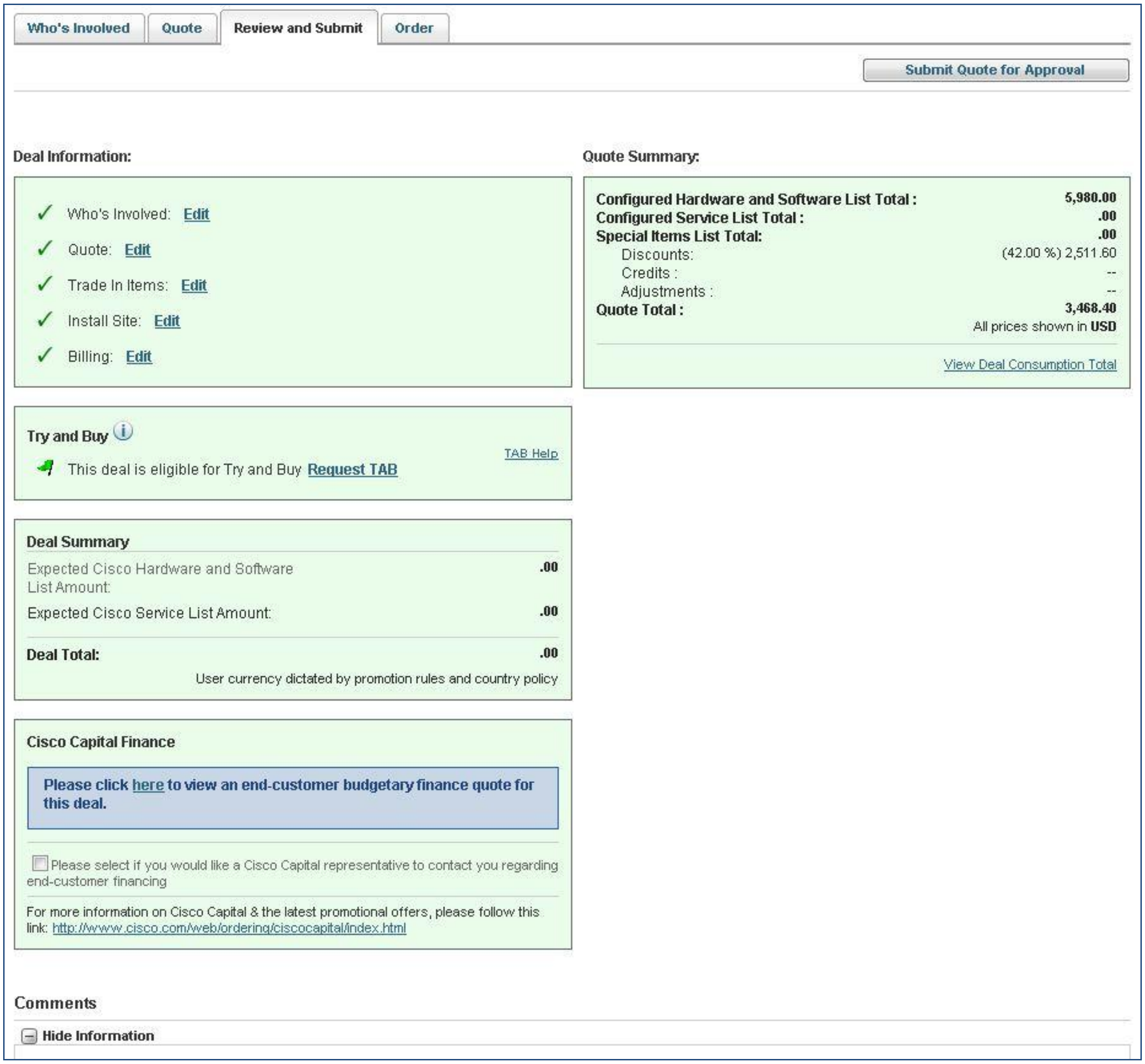
Click **+** corresponding to Show Information for any heading under the Comments section. The relevant Deal information displays.

Click **Submit Quote for Approval**.

6.4 Reviewing and Submitting the Quote (Creating a Quick Quote)

The Review and Submit tab displays many sections that change depending on whether this is a Deal or a Quick Quote and whether the promotion selected (in a Deal) requires qualification. The options detailed below are with respect to a Quick Quote.

Figure 22: Review and Submit Tab (Creating a Quick Quote)



6.4.1 Reviewing the Quote

6.4.1.1 Deal Information section

To make any changes to Quote Information prior to submitting for approval, click **Edit** corresponding to any of the options that display as applicable.

6.4.1.2 Quote Summary section

The Quote Summary also displays on this screen. Once the Quote is approved, click **View Deal Consumption Total** to view what products have been ordered/consumed. The Deal Consumption pop-up window displays. Click Close to close the pop-up window and return to the previous screen.

6.4.1.3 CBN Section 

CCW Quoting will allow the Distributor to confirm a service line (that is the minor line) of a Configuration or bundle as 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 DVAD account and in its entirety on Cisco as a Single Purchase Order.
- Meet a minimum value threshold of $100,000 net product (threshold is adjusted to local currency guidelines).
- Be submitted as net-price (pricing and discounting to be 'up-front').
- Have end user information disclosed and an approved Deal ID attached.

Quotes/Orders can be product only or product and service, but not service only.

Once a Quote is approved, a Distributor can re-open the Quote and view or confirm CBN lines (see Section 8.5.1, Confirming Product at CBN, on page 51), remove CBN confirmation (see Section 8.5.2, Removing CBN Confirmation, on page 52), or split lines between CBN and stock (see Section 8.5.3, Splitting Lines between CBN and Stock, on page 53).

6.4.1.4 Try and Buy section

The Try and Buy (TAB) Program is a global Service that allows Cisco Customers to try Cisco Products for a short period of time before buying them. It is a Product sale with deferred invoicing up to a certain number of days, which is referred to as the "Trial Period".

If the Customer decides not to complete the purchase for any reason, the Product may be returned, at no charge, prior to invoicing on the first day of possession after the trial period ends.

Deal or Quote eligibility for TAB is located on the Review and Submit tab. Not all Deals are TAB eligible. Restrictions for TAB Deals:

- May only be combined with OIP, SIP, or MSCP promotions
- Must have a single source of fulfillment (Buy Method) on the Quote
- Deals including a Trade-in are ineligible
- IronPort and Service-only Deals/Quotes are excluded

To request Try and Buy on eligible Quotes, click **Request TAB**.

6.4.1.5 Manage Deviations section

Deviations are any part of a Quote that is not standard. Deviations trigger the creation of a DART.

Click **Manage** to view progress of the approval process rather than waiting for approval notification.

6.4.1.6 Deal Summary section

The Deal Summary section displays the Expected Cisco Hardware and Software List Amount and the Expected Cisco Service List Amount, which combine to the Deal Total.

6.4.1.7 *Cisco Capital Finance section*

To view end customer budgetary finance Quote for the Deal, click **here** under Cisco Capital Finance. The Calculate Payment Options pop-up window displays. Complete the information and click **Calculate** to determine Financial Options. Alternatively, click **Close** to close the pop-up window and return to the previous screen.

6.4.1.8 *Comments section*

Click **+** corresponding to Show Information for any heading under the Comments section. The relevant Deal information displays.

6.4.2 Adding the AM and CAM and Submitting Quote for Approval

On the Review and Submit tab, add the CAM and submit the Quote for approval.

Figure 23: Account Manager Section

To add the Cisco CAM Approver to the Quote, complete the following steps:

1. Scroll down to the Account Manager section.
2. Click the drop-down arrow corresponding to Cisco Account Manager (AM) and select the appropriate option.
3. Provide the Cisco Channel Account Manager (CAM) information.

   If the CAM is known and displays in the drop-down menu, click the drop-down arrow corresponding to Cisco Channel Account Manager (CAM) and select the appropriate option.

   If the CAM is known, but not listed in the drop-down menu, select Other. Click **Find your CAM with the CAM Locator**. Click the field corresponding to Cisco Channel Account Manager (CAM) Email ID and enter the Cisco user name for the CAM.

   If the CAM is not know, click **click here** on the screen to identify the appropriate CAM.

   The CAM is also referred to as the Partner Account Manager (PAM) for Partners or a Distributor Partner Account Manager (DPAM) for Distributors. When the Quote is submitted for approval, an e-mail is sent to the CAM. The CAM approves the Quote.
4. Click **Submit Quote for Approval**. The Quote screen displays. A message that the Quote has been approved displays at the top of the page.
5. Click **View Submitted Quote**. The Quote header information displays. The Quote status is now Approved.

6.4.3 Request Special Pricing (Americas theater only)

There is a checkbox located at the bottom of the Review and Submit tab. Click the checkbox and provide justification for the special pricing using the Attachments section.

EMEAR and APJC share with AM to request special pricing in a Quick Quote.

7 Sharing Quotes

7.1 

Partner Sharing with Distributor

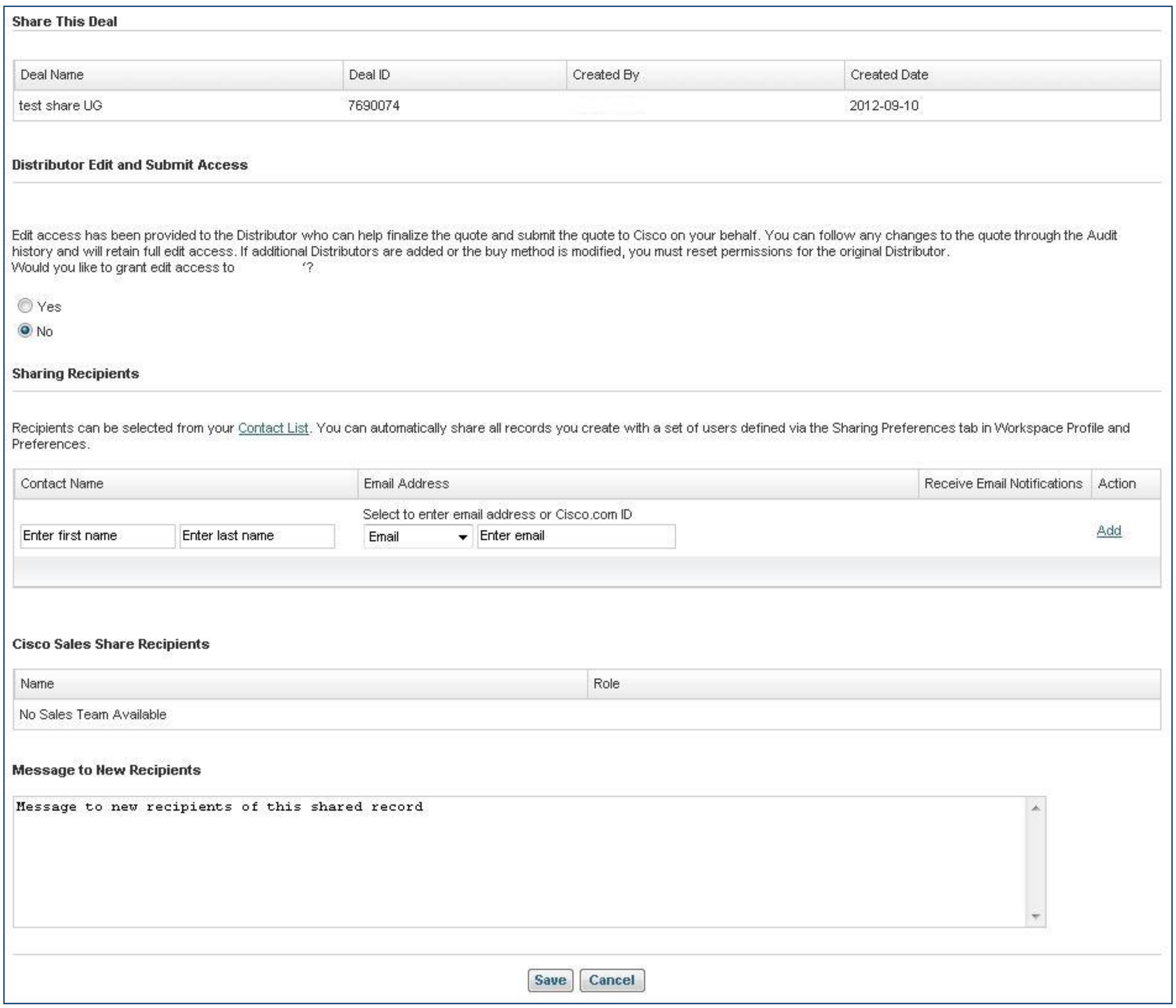
To share a Quote with a Distributor, complete the following steps:

1. From the CCW home page, click the Deal ID to open the Quote.

   Alternatively, begin with a Quote that is already in process.

2. Click **Share**. The Share Deal pop-up window displays.

Figure 24: Share Deal Pop-up Window



3. Select the radio button corresponding to Yes to share the Quote with the Distributor.

Alternatively, select the radio button corresponding to No to prevent the Quote from being shared with the Distributor.

If the same Distributor is listed as the fulfillment source, or Buy Method, for all Quote line items, the Deal is eligible to be shared with the Distributor. By granting the Distributor access to the Quote, the AM or Reseller has explicitly provided the Distributor with the edit and submit responsibilities. If the Buy Method is changed to another Distributor for even one item, the system revokes the access to the previous Distributor and resets the share option to No. If the AM or Reseller needs to grant access to the new Distributor, access the Share link and select Yes again.

4. Click the drop-down arrow corresponding to Receive Email Notifications for each Contact Name.
5. Select **Yes** to allow the contact access to this Quote.

   Select **No** to prevent sharing access to this Quote.

   - To add a contact, click in the Enter first name field and type the new contact's first name. Click in the Enter last name field and enter the new contact's last name. Click the drop-down arrow corresponding to Email Address and select either Email or Cisco.com ID. Click in the Enter email field and enter the appropriate corresponding information. Click **Add**. The contact is added to the list below.
   - Alternatively, click **Contact List** to select contacts from your pre-identified list of contacts.
   - To remove a contact, click **Remove** corresponding to the appropriate Contact Name. The contact is removed from the list.
6. Click in the Message to New Recipients field and type a message to the recipient.
7. Click **Save**.
8. Click **Close**.

7.1.1 Find a Shared Quote

To find a shared Quote, complete the following steps:

1. Go to the Deals and Quotes portlet on the CCW home page.
2. Click the drop-down arrow corresponding to Display.
3. Select **Deals Shared with Me** from the drop-down menu to locate a Deal that was shared. The list of Deals/Quotes updates accordingly.
4. Click the Deal ID corresponding to the appropriate Deal. The Review and Submit tab of the Quote page displays, indicating the Quote ID and Status.
5. Select the Quote tab. The Quote BOM displays. The Quote shared by the Partner is editable by the Distributor.

The Quote can be shared at any time with the originator's contacts. If the Quote is shared with a Distributor by a Partner, then the Distributor can only share with the Partner's contact lists.

7.1.2 Share Quote with Contact List

To share the Quote with other business partners from your Contacts list, complete the following steps:

1. Click **Share**. The Share Deal pop-up window displays. The Sharing Recipients list displays. These recipients automatically receive access to the Quote. The Partner who shared the Quote retains edit access and is notified whenever the Quote is updated and saved.

2. Click the drop-down arrow corresponding to Receive Email Notifications for each Contact Name.

3. Select **Yes** to allow the contact access to this Quote.

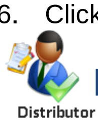
   Select **No** to prevent sharing access to this Quote.

   - To add a contact, click in the Enter first name field and type the new contact's first name. Click in the Enter last name field and enter the new contact's last name. Click the drop-down arrow corresponding to Email Address and select either Email or Cisco.com ID. Click in the Enter email field and enter the appropriate corresponding information. Click **Add**. The contact is added to the list below.
   - Alternatively, click **Contact List** to select contacts from your pre-identified list of contacts.
   - To remove a contact, click **Remove** corresponding to the appropriate Contact Name. The contact is removed from the list.

4. Click in the Message to New Recipients field and type a message to the recipient.

5. Click **Save**.

6. Click **Close**.

7.2 

Distributor Sharing a Quote

To share a Quote, complete the following steps:

1. Scroll to the Deals and Quotes portlet on the CCW home page.

2. Click the drop-down arrow corresponding to Display.

3. Select **Deals Created by Me** from the drop-down menu. The list of Deals/Quotes updates accordingly.

4. Click the Deal ID corresponding to the appropriate Deal. The Review and Submit tab of the Quote page displays, indicating the Quote ID and Status.

5. Click **Share**. The Share Deal pop-up window displays. The Sharing Recipients section displays the Distributor contacts.

6. Click the drop-down arrow corresponding to Receive Email Notifications for each Contact Name.

7. Select **Yes** to allow the contact access to this Quote.

   Alternatively, select **No** to prevent sharing access to this Quote.

   - To add a contact, click in the Enter first name field and type the new contact's first name. Click in the Enter last name field and enter the new contact's last name. Click the drop-down arrow corresponding to Email Address and select either Email or Cisco.com ID. Click in the Enter email field and enter the appropriate corresponding information. Click **Add**. The contact is added to the list below.

- Alternatively, click **Contact List** to select contacts from your pre-identified list of contacts.
- To remove a contact, click **Remove** corresponding to the appropriate Contact Name. The contact is removed from the list.

8. Click in the Message to New Recipients field and type a message to the recipient.
9. Click **Save**.
10. Click **Close**. The Review and Submit tab for the Quote displays. The contacts with an email address that is not a Cisco address receive an email with an access key to the Quote along with the email message just typed. Those using a Cisco email address do not require an access key.

7.2.1 Open a Shared Quote for Editing

To open a Quote for editing if in receipt of an access key, complete the following steps:

1. Click **Access Shared Deal** from the Deals and Quotes portlet on the CCW home page. The Access Shared Deal pop-up window displays.
2. Click in the field corresponding to Access Key and enter the access key provided in the email.
3. Click in the field corresponding to Deal ID and enter the Deal ID number.
4. Click **Continue**. The Deal and Quote screen displays and the Deal opens for editing.

8 Re-opening an Approved Quote

8.1 Editing a Quote

To edit an unsubmitted Quote, click the Deal ID. Make any changes as necessary.

To edit an approved Quote, the Quote must be "re-opened". If a Quote is re-opened and edited, it may require additional approvals. See Section 8.3, Discount Rationalization, on page 48 for more information on the circumstances under which a Quote would need to be reapproved and which changes trigger reapproval.

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

- **Add Parts to or Remove Parts from the Quote**: See Section 5.1, Adding Products, on page 21
- **Add or Remove Options for Products**: See Section 5.3, Selecting Options / Resolving Issues, on page 25
- **Import Saved Configurations**: See Section 5.1.3, Importing a Saved Configuration, on page 24
- **Add or Remove Services**: See Section 5.5, Adding Services, on page 26

Additional functionality includes:

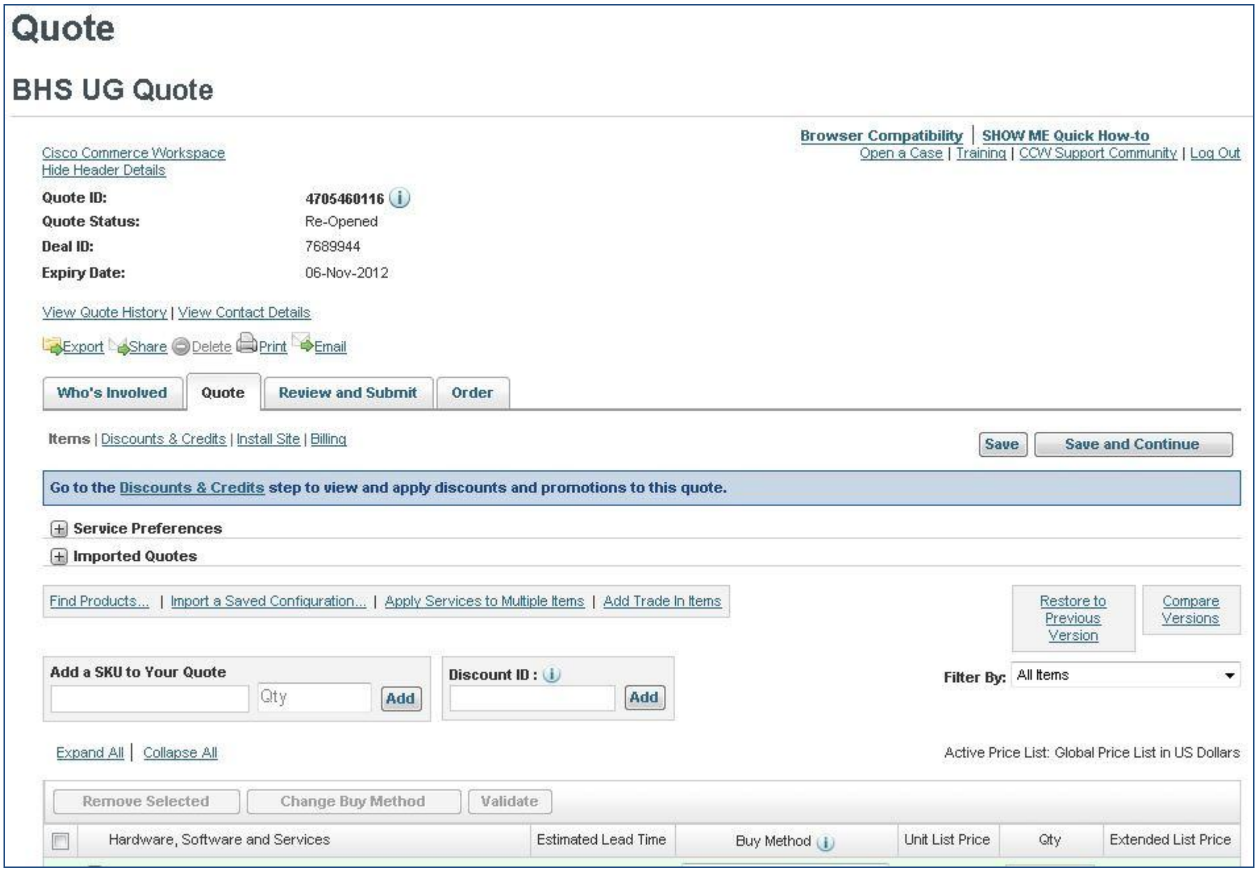
- **Split Lines between CBN and stock (Distributor)**: See Section 8.5.3, Splitting Lines between CBN and Stock, on page 53
- **Remove Try and Buy**: See Section 6.4.1.4, Try and Buy section, on page 40
- **Change Discounts**: see Section 8.4, Modifying Discounts in Re-opened Quotes, on page 49
- **Confirm, unconfirm, or split CBN lines (Distributor)**: see Section 8.5, Channel Booking Neutrality, on page 51, Section 8.5.2, Removing CBN Confirmation, on page 52, and Section 8.5.3, Splitting Lines between CBN and Stock, on page 53
- **Compare Versions or Restore to Previous Version**: see Section 8.6, Compare Versions or Restore to Previous Version, on page 53

8.2 Re-opening an approved Quote

To re-open an approved Quote, complete the following steps:

1. Search for a Quote (See the *CCW Homepage and Portlets General Information User Guide* for instructions on Searching Using Workspace Search. See Section 2, Searching for a Deal/Quote via Deals and Quotes Portlet, on page 2).
2. Click the Deal ID corresponding to the appropriate Quote. The Quote opens to the Review and Submit tab.
3. Click **Re-open**. The Reopen Quote pop-up window displays.
4. Click **Reopen Quote**. The Quote tab: Items page displays.

Figure 25: Re-opened Quote



8.3 Discount Rationalization

Once a Quote has been re-opened and changed, it may need to be re-approved.

A Quote would be resubmitted for approval in the following cases:

- If the user replaces a Configuration with another Configuration outside of the original product family
- If the user adds or removes services from another family other than what was originally approved
- If the user adds or removes parts of the config other than in the original product family
- If the user removes a needed part and defines it as a spare
- If the user switches physical and electronic delivery SKUs outside the ERP family

8.4 Modifying Discounts in Re-opened Quotes

Users can modify the discounts for the lines that are eligible for the discount. Minor line discounts are populated when the discount is entered at the primary level. Click the + to expand the line item and edit at the minor line level. Quotes are automatically approved if the discounts entered are less than the approved threshold and has no other non-standard components.

In CCW, Partners and Distributors can modify an approved non-standard Quote (see Section 8.4.1, Requesting and Modifying a Non-Standard Discount), as well as an approved Reusable Non-Standard Deal (RNSD) Quote (see Section 8.4.2, Working with a Shared/Collaborated RNSD Quote, on page 50).

8.4.1 Requesting and Modifying a Non-Standard Discount

8.4.1.1 Request Non-Standard Discount

To request a non-standard discount, complete the following steps:

1. Build the Quote as usual.
2. Once ready to share with the AM, click **Share** in the Common Utilities bar.
3. Enter the AM's credentials and type a request for a Non-Standard Discount into the Message to New Recipients field.
4. Click **Save**.
5. Click **Close**.

8.4.1.2 Submit Quote for Approval

If the AM agrees to the non-standard discount, open the Quote, ensure all details on the Quote are complete, and submit the non-standard Quote for approval. Monitor the status of the Quote on the Deals and Quotes portlet.

8.4.1.3 Re-open Quote

Once a non-standard Quote is approved, the user can modify it. Click the **Deal ID** on the Deals and Quotes portlet, and re-open the Quote by clicking **Re-Open** and **Reopen Quote**.

8.4.1.4 Modify Discount

To modify the non-standard discount, click **Discounts & Credits**. Modify the discount either at the line level or at the header level.

*Line level: On the appropriate lines, type the discount in the Effective Disc % field. Modifications can be entered on major and minor lines.

*Header level: Click **Update Quote Discounts**. Modify the overall Quote discount for all products and services affected by the Discount in the Effective Discount % field. Click **Save**.

Discounts, lead time, and final pricing information is available only for items fulfilled by Cisco.

Discount modifications do not apply to trade-in credits.

8.4.1.5 Submit for Approval

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

8.4.2 Working with a Shared/Collaborated RNSD Quote

8.4.2.1 Shared RNSD Quote

The AM creates an RNSD Quote on the user's behalf and collaborates it with the user. The user submits the Quote for approval. Once approved, convert the Quote into an Order.

8.4.2.2 Modifying an Approved RNSD Quote or a Shared RNSD Quote

In CCW, the user can modify an approved RNSD Quote or a shared RNSD Quote. The difference for RNSD Quotes is that AMs have the ability to set up the RNSD as user-modifiable, which means that Partners and Distributors can modify the discount on the Quote themselves. As long as the modified discount matches the discount communicated by the AM, the modification is automatically approved on submission. This saves time in the approval process.

To modify an RNSD discount, complete the following steps:

1. Open the shared RNSD Quote, or reopen the approved RNSD Quote. Click **Discount and Credits**.
2. Modify the discount either at the line level or at the header level.

   Line level: On the appropriate lines, type the discount in the Effective Disc % field. Modifications can be done on the major and minor lines.

   Header level: Click **Update Quote Discounts**. Modify the overall Quote discount for all products and services included in the Discount in the Effective Discount % field. Click **Save**.

   If a discount greater than the discount provided by the AM is entered, CCW will produce an error message. Contact the AM to confirm the agreed discount and try again.
3. Click **Submit Quote for Approval** on the Review and Submit tab.

   For approved RNSD Quotes, the Quote is automatically approved.

   For Shared RNSD Quotes from the AM, monitor the Quote's approval on the Deals and Quotes portlet.

8.5 Channel Booking Neutrality

If reopened, the system checks if the Quote meets Channels Booking Neutrality (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/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 as indicated in Section 8.2, Re-opening an approved Quote, on page 47 or complete the following steps:

1. From the CCW home page, scroll down to the Deals and Quotes portlet.
2. Click the drop-down arrow corresponding to Display and select **CBN Eligible Deals**. CBN Eligible Deals display on the screen.

CCW Quoting will allow the Distributor to confirm a service line (that is the minor line) of a Configuration or bundle as 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 DVAD account and in its entirety on Cisco as a Single Purchase Order.
- Meet a minimum value threshold of $100,000 net product (threshold is adjusted to local currency guidelines).
- Be submitted as net-price (pricing and discounting to be 'up-front').
- Have end user information disclosed and an approved Deal ID attached.

Quotes/Orders can be product only or product and service, but not service only.

3. Click the Deal ID corresponding to the appropriate Deal. The Review and Submit tab for the Deal/Quote displays.
4. Ensure the Quote Status is Approved. Only Approved Quotes can be confirmed for CBN.

   If the Quote is not approved, click **Submit Quote for Approval** on the Review and Submit tab. The Quote screen displays with a message that the Quote has been approved. Click **View Submitted Quote**. The Review and Submit tab displays.

8.5.1 Confirming Product at CBN

To confirm the CBN, complete the following steps:

1. Scroll down to the Channels Booking Neutrality section of the Review and Submit tab.
2. Click View/Confirm CBN Lines.

3. Select the appropriate radio button corresponding to service attachment. Mandatory service lines cannot be detached; they are automatically included.
4. Click the checkbox corresponding to the items that need to be confirmed. There is a totals box that travels down the right side of the screen, giving a running total so that the Distributor can track the total and ensure they are within threshold. Selected items must total $100,000. Select one item or many items. Alternatively, lines can be split between CBN and stock (see Section 8.5.3, Splitting Lines between CBN and Stock, on page 53).
5. Click **Confirm CBN**. The Confirm CBN pop-up window displays.

   If the selected 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 selected 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 pop-up window closes. A success message displays in green; the selected lines have been confirmed. The confirmed items are separate from the other items on the Quote.
7. Select the checkbox corresponding to line item that is confirmed. 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, CCW will not make these lines available for selection as CBN.

8.5.2 Removing CBN Confirmation

To undo CBN confirmation, complete the following steps:

1. Click the checkbox corresponding to the appropriate item.
2. Click **Undo CBN Confirmation**. The system checks for the following criteria:
   - Quote Status is Approved or Ordered
   - Selected line is already CBN Confirmed
   - Selected line is not present on a Quote converted Order (Submitted or Un-Submitted)
3. If the eligibility criteria are met, the Undo CBN Confirmation pop-up window displays. The following message displays: 'The selected lines will no longer be CBN confirmed. Are you sure you want to continue?'

   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?'
4. 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.
5. Click **Return**. The CBN page closes, and the Review and Submit tab displays. The system creates a DART for deselected 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.

8.5.3 Splitting Lines between CBN and Stock

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

1. From the CCW home page, scroll down to the Deals and Quotes portlet.
2. Click the appropriate Deal ID. The Deals and Quotes screen displays.
3. Click **View/Confirm CBN Lines**. The Deal displays.
4. 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 point of sale (PoS) Criteria.
5. Click **Split** corresponding to the appropriate line item. The Split Quantity pop-up window displays. The current, unsplit quantity displays under Qty.
6. Click in the Qty field and enter the divided quantity.
7. 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.

8.6 Compare Versions or Restore to Previous Version

On the Quote tab: Items page, users have the option of comparing different versions of the same Quote. To compare versions, complete the following steps:

1. Click Compare Versions.
2. Click the first drop-down arrow and select a version.
3. Click the second drop-down arrow and select a different version.
4. Click **Compare**.

Once an approved Quote is re-opened, a new option displays on the Quote tab: Items screen. Click **Restore to Previous Version** to discard changes and restore the re-opened Quote to the approved version. The Confirm Quote Restore screen displays.

To discard changes and restore to the last approved Quote, click **Restore Last Approved Quote**. The Quote status is Re-opened. Resubmit for approval.

To continue with the edited version of the Quote, cick **Cancel**.

9 Collaborate using Export, Share, Delete, Print, or Email

To export, share, delete, print, or email a specific Quote, complete the steps in the following sections as applicable:

Open the appropriate Quote.

The Export, Share, Delete, Print, and Email links are above the tabs on the Quote information screen.

9.1 Exporting a Quote

To export a Quote, complete the following steps:

1. Click **Export**. The Export Quote pop-up window displays.

Figure 26: Export Quote Pop-up Window: PDF

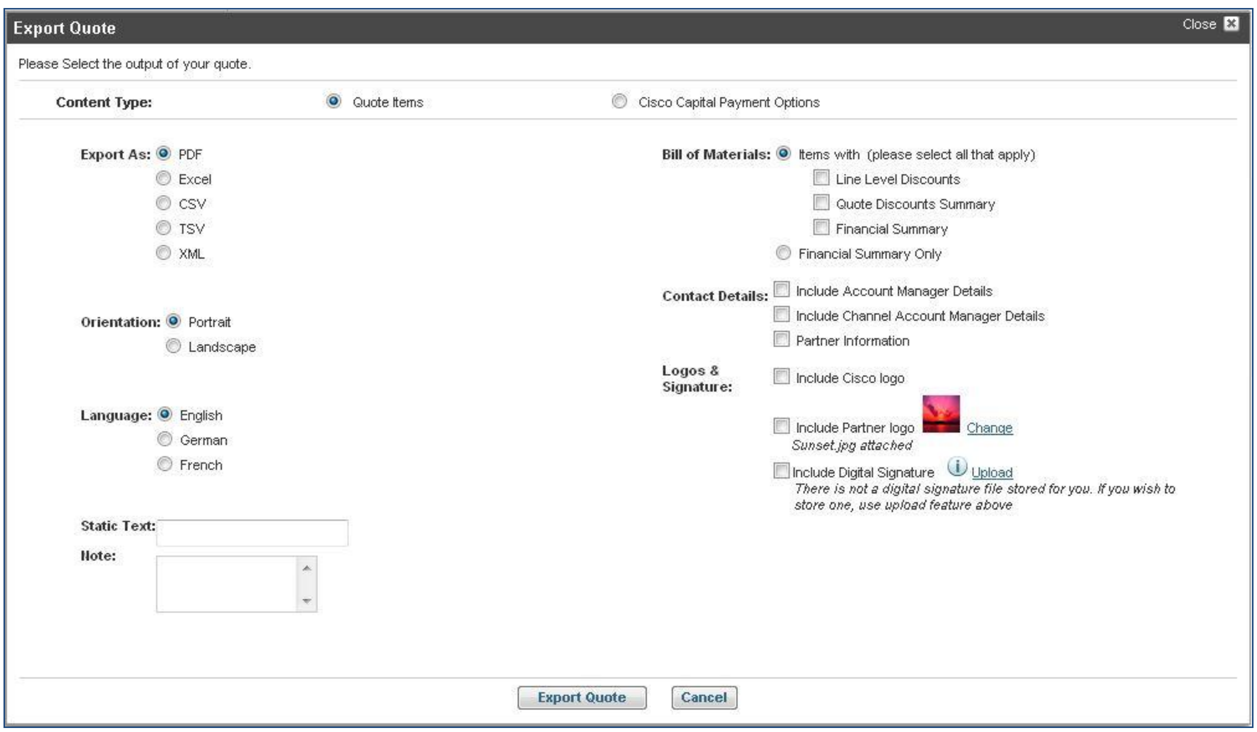


Figure 27: Export Quote Pop-up Window: Excel

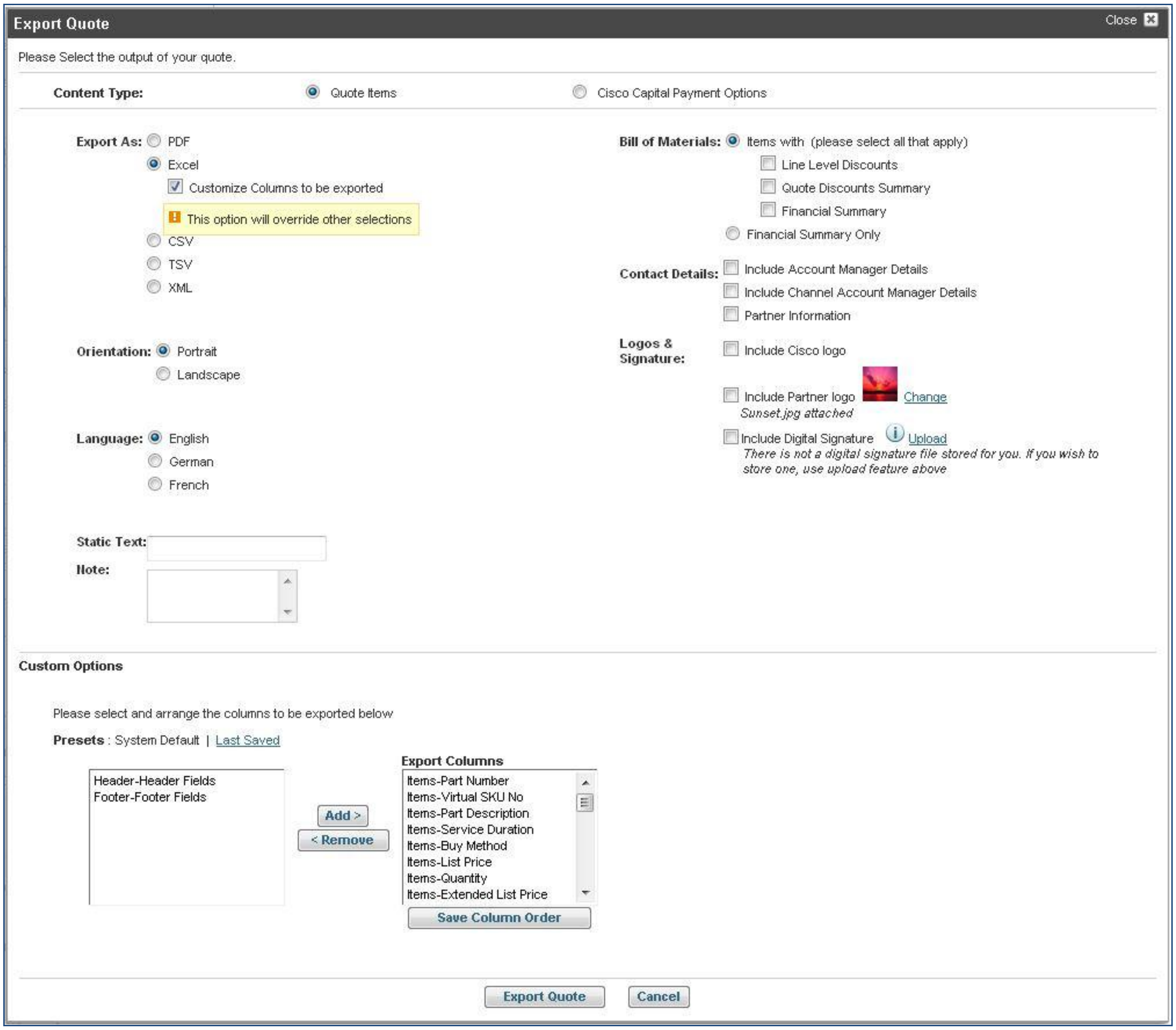
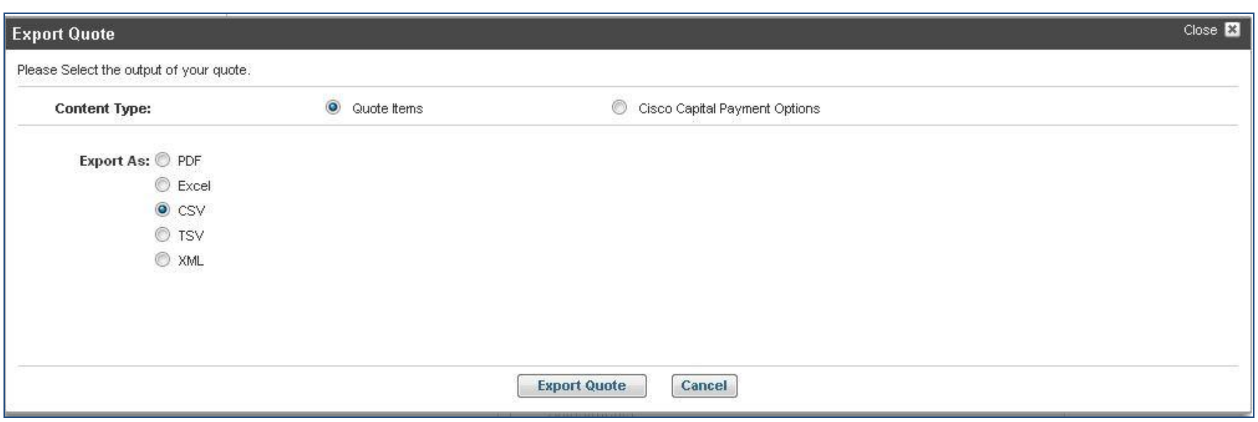


Figure 28: Export Quote Pop-up Window: CSV, TSV, XML



2. Select the radio button corresponding to the appropriate option: Quote Items or Cisco Capital Payment Options. The Export Quote pop-up window expands.

3. Complete the sections of the Export form using the table below.

Table 6: Export Quote options

Section	Options	Action
Export As	PDF	Select the radio button corresponding to the appropriate option.
	Excel	If the user selects Excel and Customize Columns to be exported, the pop-up window expands.
		The system can return the content on this pop-up window to either the system defaults or to the new settings saved the last time this function was used. Click either **System Default** or **Last Saved**.
		Select a column header under the left side list and click **Add>** to include that data in what will be exported. The item displays under the Export Columns list. Select a column header under the Export Columns list and click **<Remove** to ensure that data is not exported. The item displays under the list on the left.
	CSV TSV XML	If the user selects CSV, TSV, or XML, no other options display on the pop-up window. Continue to step 4.
Orientation	Portrait Landscape	Select the radio button corresponding to the appropriate option.
Language	English German French	Select the radio button corresponding to the appropriate option.
Static Text	N/A	Enter information as applicable.
Note	N/A	Enter information as applicable.
Bill of Materials	Items with • Line Level Discounts • Quote Discounts Summary • Financial Summary	Make the applicable selections.
	Financial Summary Only	
Contact Details	• Include Account Manager Details • Include Channel Account Manager Details • Partner Information	Make the applicable selections.

Section	Options	Action
Logos & Signature	Include Cisco logo Include Partner logo • Change or Upload Logo Include Digital Signature • Change or Upload Digital Signature	Make the applicable selections. Click **Change** or **Upload** to change or add the Partner logo or Digital Signature.

4. Once all applicable fields have been completed, click **Export Quote**. The Window's File Download window opens.

5. Click **Open**, **Save**, or **Cancel** as appropriate.

9.2 Sharing a Quote

The Share function allows the owner of a Quote to give edit and access privileges of the same Quote to recipients in the owner’s company or with Cisco. Share functionality gives the recipient of the Quote the same access and edit privileges as those of the Quote creator (any changes made by the originator or the recipient will be seen by all); however, the recipient does not become the owner and can only share the Quote with persons on the original owner’s list.

There are two ways to share a Quote. A Quote can be shared individually using the Share Utility (see Section 9.2.1, Sharing a Single Quote). Or the user can set up a Default Share Team for all Quotes created (see Section 9.2.2, Sharing a Quote via Default Share Team, on page 59).

9.2.1 Sharing a Single Quote

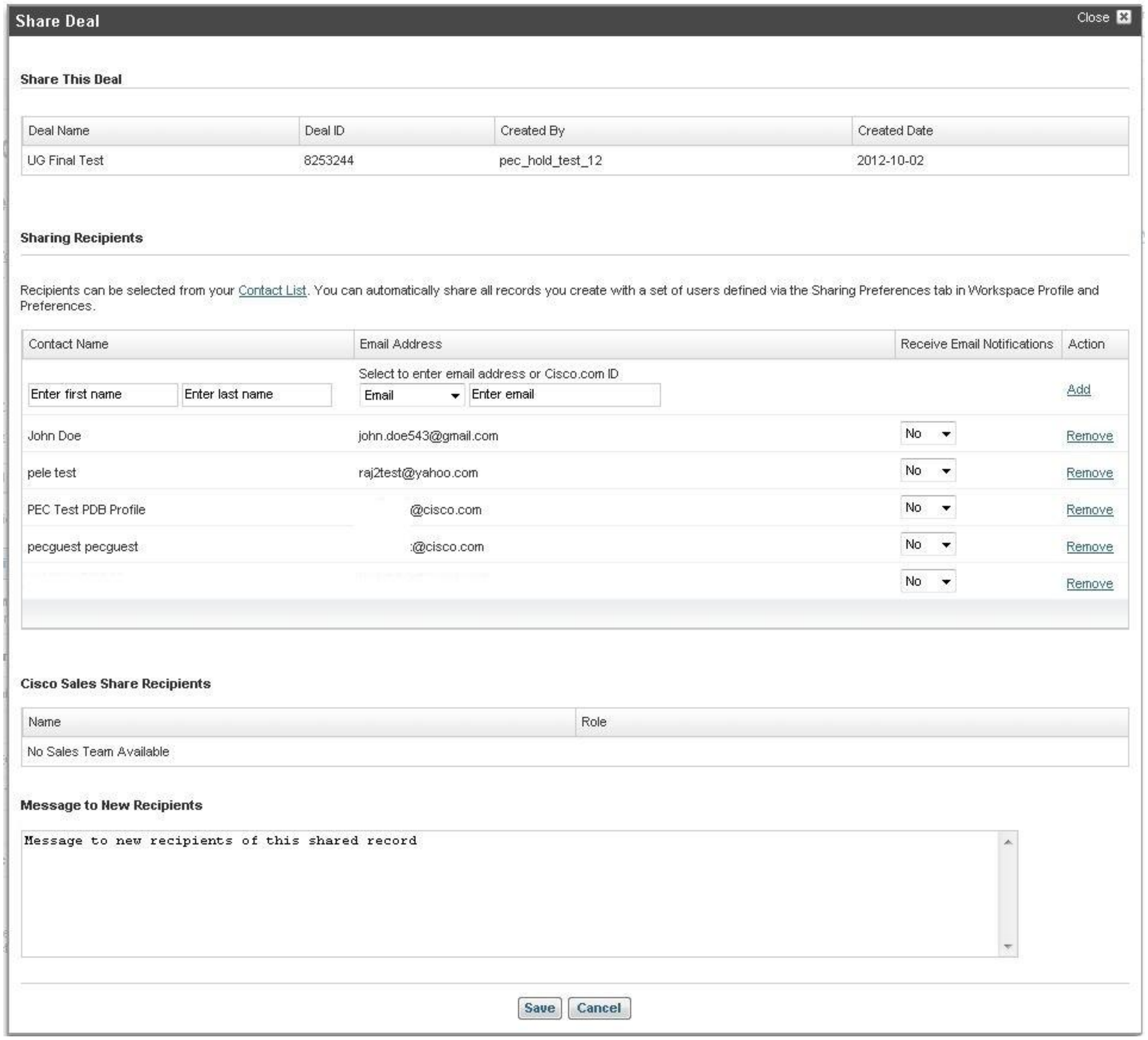
An external user can share Quotes with a Cisco internal user and vice versa.

For a Partner sharing with a Distributor, see Section 7.1, Partner Sharing with Distributor, on page 43.

To share a Quote, complete the following steps:

1. Click **Share**. The Share Deal pop-up window displays. The Sharing Recipients section displays the contacts.

Figure 29: Share Deal Pop-up Window



2. Click the drop-down arrow corresponding to Receive Email Notifications for each Contact Name.
3. Select **Yes** to allow the contact access to this Quote.

   Select **No** to prevent sharing access to this Quote.

To add a contact, click in the Enter first name field and type the new contact’s first name. Click in the Enter last name field and enter the new contact’s last name. Click the drop-down arrow corresponding to Email Address and select either Email or Cisco.com ID. Click in the Enter email field and enter the appropriate corresponding information. Click **Add**. The contact is added to the list below.

Alternatively, click **Contact List** to select contacts from your pre-identified list of contacts.

To remove a contact, click **Remove** corresponding to the appropriate Contact Name. The contact is removed from the list.

4. Click in the Message to New Recipients field and type a message to the recipient.
5. Click **Save**.
6. Click **Close**.

9.2.1.1 Accessing a Quote via an Access Key

To access the Quote with an access key, complete the following steps:

1. Click **Access Shared Deal** from the Deals and Quotes portlet on the CCW home page. The Access Shared Deal pop-up window displays.
2. Click in the field corresponding to Access Key and enter the access key provided in the email.
3. Click in the field corresponding to Deal ID and enter the Deal ID number.
4. Click **Continue**. The Deal and Quote screen displays and the Deal opens.

9.2.1.2 Revoking Access

To revoke access to a Quote, complete the following steps:

1. From the Quote screen, click **Share**. The Share pop-up window displays.
2. To remove a recipient, click **Remove** corresponding to the appropriate contact.
3. Click **Save**.
4. Click **Ok**.

9.2.2 Sharing a Quote via Default Share Team

The Default Share Team is a list of team members who will automatically receive sharing access to Quotes.

To set up the Default Share Team for Quotes, complete the following steps:

1. Click **Workspace Profile and Preferences** under Quick Links on the CCW home page. The Workspace Profile and Preferences screen displays.
2. Click the Sharing Preferences tab.
3. Under the Default Share Team section, click **Add New Member**. The Contact Search pop-up window displays.
4. Click the drop-down arrow to indicate the search criteria.
5. Select First Name, Last Name, Email, or Cisco.com ID.
6. Enter the appropriate information and click **Search**. The search results display below.
7. Scroll through the search results.
8. Click the checkbox corresponding to the appropriate contact and click **Add Selected**. The contact displays under Contacts below.
9. When all contacts have been added, click **Update**. The Contact Search pop-up window closes and the Workspace Profile and Preference screen displays.

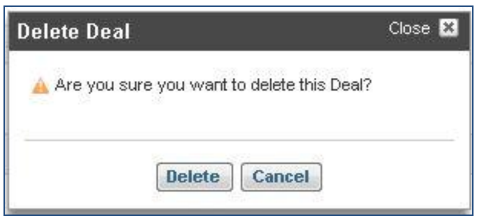
10. Once members are added to the Default Share Team, click the checkbox corresponding to Deals and Quotes next to each appropriate team member.
11. To stop sharing, deselect the checkbox(es) in each appropriate contact line.
12. To remove members from the Default Partner Share Team, click the checkbox corresponding to the appropriate contact name and click **Remove Selected**. The contact is removed from the Default Partner Share Team.
13. Once the Team settings are complete, click **Save**.

9.3 Deleting a Quote

To delete a Quote, complete the following steps:

1. Click **Delete**. The Delete Deal pop-up window displays.

Figure 30: Delete Deal Pop-up Window



2. To delete, click **Delete**. The CCW home page displays

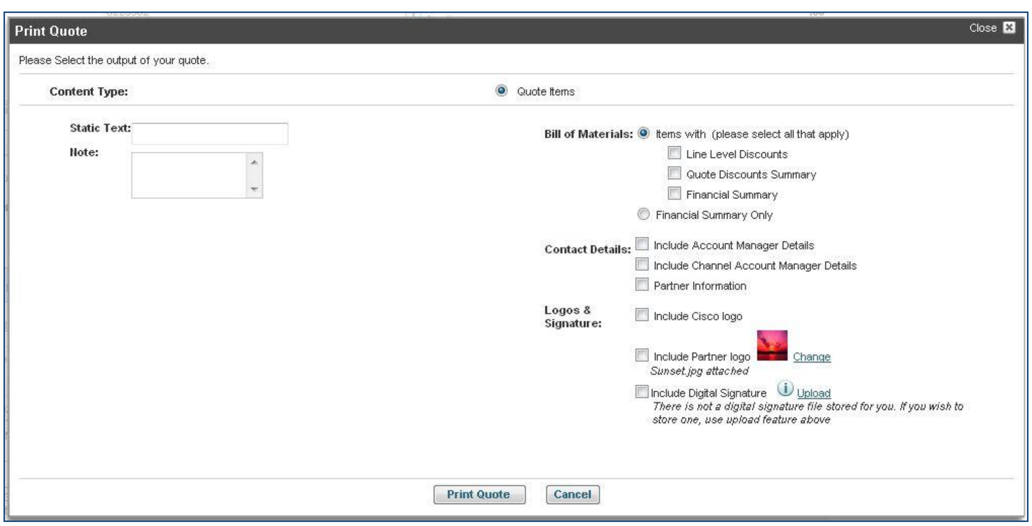
   To cancel and return to the Quote information screen, click **Cancel**.

9.4 Printing a Quote

To print a Quote, complete the following steps:

1. Click **Print**. The Print Quote pop-up window displays.

Figure 31: Print Quote Pop-up Window



2. Select the radio button corresponding to Quote Items. The Print Quote pop-up window expands.
3. Complete the sections of the Print form using the table below.

Table 7: Print Quote options

Section	Options	Action
Static Text	N/A	Enter information as applicable.
Note	N/A	Enter information as applicable.
Bill of Materials	Items with • Line Level Discounts • Quote Discounts Summary • Financial Summary Financial Summary Only	Make the applicable selections.
Contact Details	• Include Account Manager Details • Include Channel Account Manager Details • Partner Information	Make the applicable selections.
Logos & Signatures	Include Cisco logo Include Partner logo • Change or Upload Logo Include Digital Signature • Change or Upload Digital Signature	Make the applicable selections. Click **Change** or **Upload** to change or add the Partner logo or Digital Signature.

4. Once all applicable fields have been completed, click **Print Quote**.

Click **Print**. The printer dialogue box displays. Make appropriate selections and click **Print**.

9.5 Emailing a Quote

To send a Quote via email, complete the following steps:

1. Click **Email**. The Email Quote pop-up window displays. Unlike the Share a Quote functionality, the recipient of the email will not have edit access.
2. Complete the sections of the Email form using the following figures and table.

Figure 32: Email Quote Pop-up Window: PDF

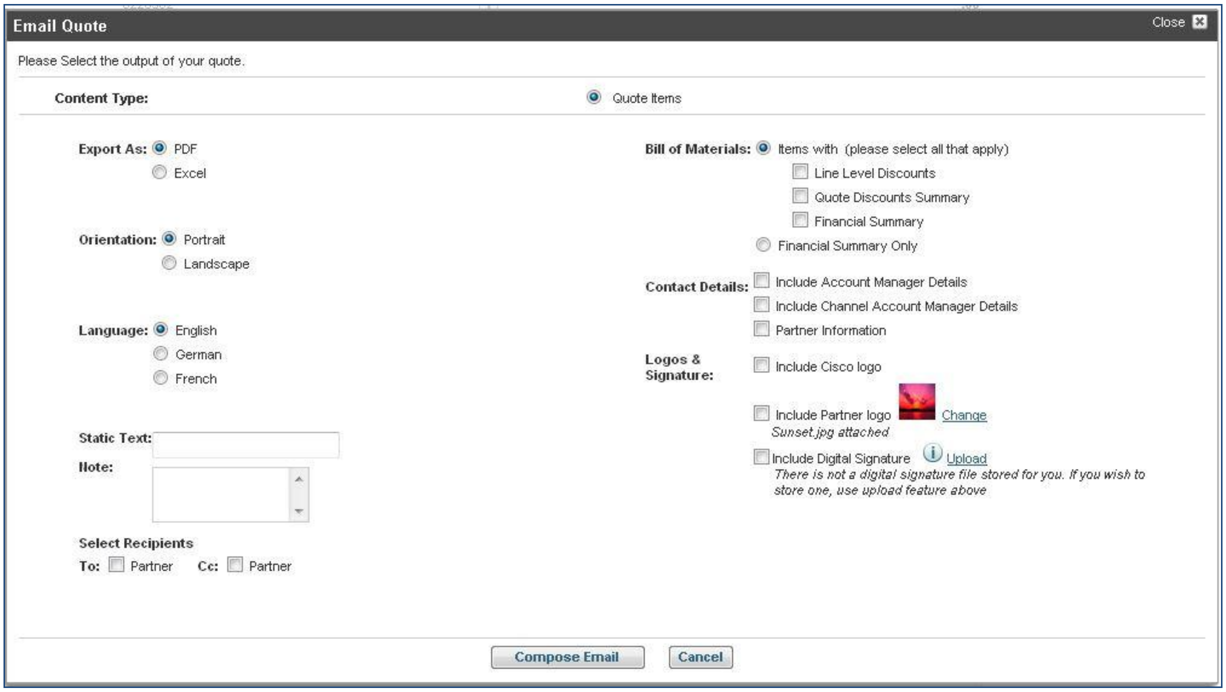


Figure 33: Email Quote Pop-up Window: Excel

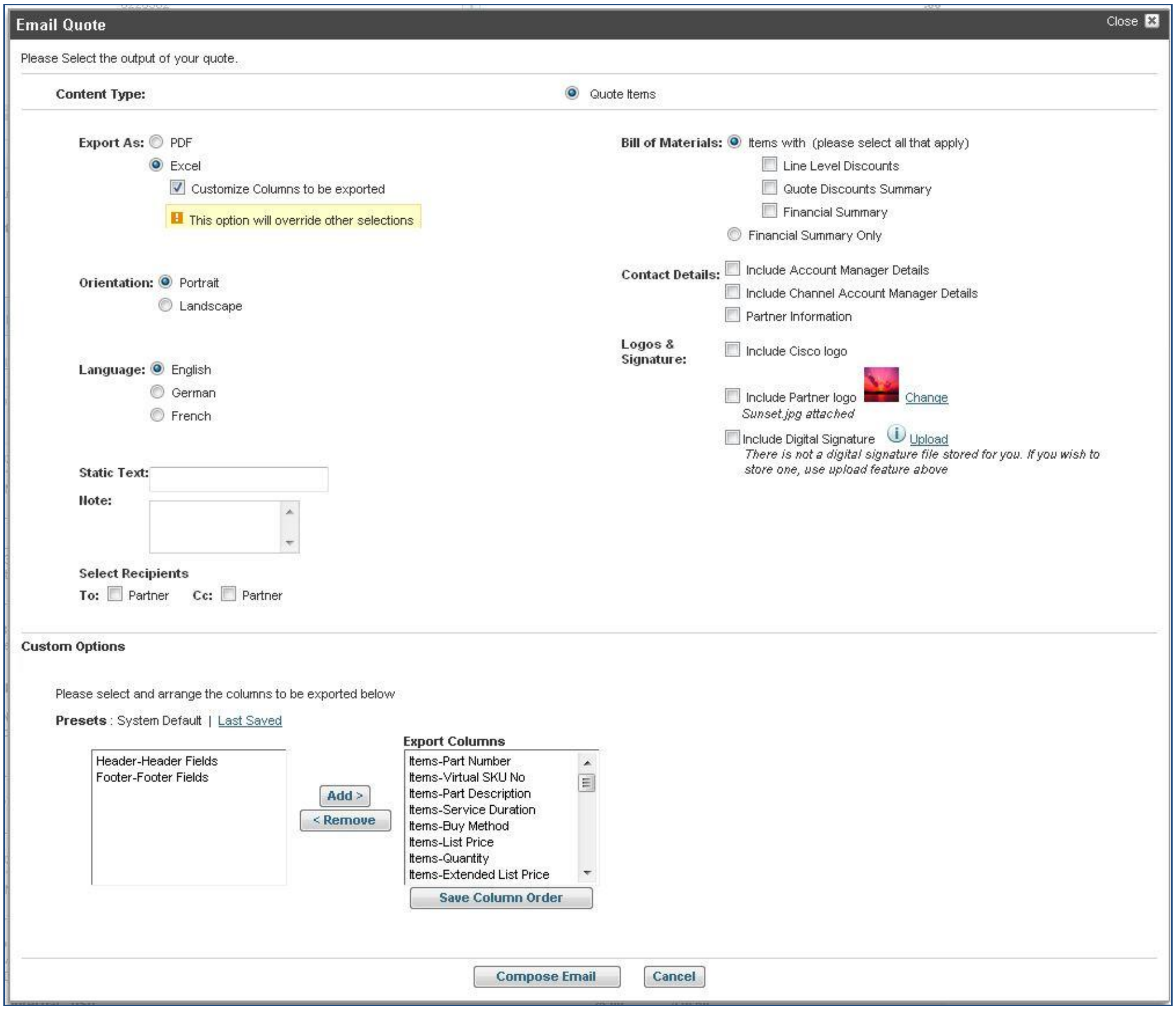


Table 8: Email Quote options

Section	Options	Action
Content Type	Quote items	Select the radio button corresponding to Quote Items.
Export As	PDF	Select the radio button corresponding to the appropriate option.
	Excel	If the user selects Excel and Customize Columns to be exported, the pop-up window expands.
		The system can return the content on this pop-up window to either the system defaults or to the new settings saved the last time this function was used. Click either **System Default** or **Last Saved**.

Section	Options	Action
		Select a column header under the left side list and click **Add>** to include that data in what will be exported. The item displays under the Export Columns list. Select a column header under the Export Columns list and click **<Remove** to ensure that data is not exported. The item displays under the list on the left.
Orientation	Portrait Landscape	Select the radio button corresponding to the appropriate option.
Language	English German French	Select the radio button corresponding to the appropriate option.
Static Text	N/A	Enter information as applicable.
Note	N/A	Enter information as applicable.
Select Recipients	To: • Partner Cc: • Partner	Make the applicable selections.
Bill of Materials	Items with • Line Level Discounts • Quote Discounts Summary • Financial Summary	Make the applicable selections.
	Financial Summary Only	
Contact Details	• Include Account Manager Details • Include Channel Account Manager Details • Partner Information	Make the applicable selections.
Logos & Signature	Include Cisco logo Include Partner logo • Change or Upload Logo Include Digital Signature • Change or Upload Digital Signature	Make the applicable selections. Click **Change** or **Upload** to change or add the Partner logo or Digital Signature.

3. Once all applicable fields have been completed, click **Compose Email**. The Email Quote pop-up window changes.
4. Click in the field corresponding to To and enter the appropriate email address(es).
5. Click in the field corresponding to Cc and enter the appropriate email address(es).

6. Click in the field corresponding to Subject and enter the appropriate information.
7. Click in the field corresponding to Body and enter the appropriate information.
8. Click **Send Email**.

10 How to Create and Run Reports

From the CCW home page, scroll down to the Deals and Quotes portlet and click **Manage Items**. The Deals and Quotes screen displays.

Under the Deals and Quotes portlet, the user can:

- Create a report
- Download a report

10.1 Creating a Report

Reports can be created in two ways:

- Via **Export**
- Via **Generate Report**

10.1.1 Export

To export a report, click **Export**. The File Download dialogue box displays. Select the appropriate option: Open, Save, or Cancel. The report file is in Microsoft Excel format.

10.1.2 Generate

To generate a report, complete the following steps:

1. Click **Generate Report**. The Reports pop-up window displays.
2. Filter your report generation information using the drop-down arrows corresponding to Display and Deal Status.
3. Click the drop-down arrow next to Display and select the appropriate Deal types to include in the report.
4. Click the drop-down arrow next to Deal Status and select which Deals to include based on their status.
5. To generate the report, click **Continue**. The Reports pop-up window indicates that the report request has been submitted and that an email will be sent when the report is ready to download. A 50-column report will be generated and saved for you to download later.
6. Click **OK**. The Reports window closes and the Deals and Quotes screen displays.

10.2 Viewing and Downloading a Report

To download generated reports, click **Download Report**. The Reports screen displays with a list of reports that have been generated. Reports remain in this list for 30 days. After 30 days, the system automatically deletes reports.

An alternate access to this screen is to click **Deal & Quote Reports** next to Download under the Quick Start portlet on the CCW Homepage.

To view a report, click the appropriate report name. The file opens.

To remove a report, click the checkbox corresponding to the appropriate report(s) and click **Remove**.

To refresh a report, click the checkbox corresponding to the appropriate report(s) and click **Refresh**.

Click **Commerce Workspace Home** to return to the CCW home page. The CCW home page displays.