cisco Commerce



Partner & Distributor
Release Training Document
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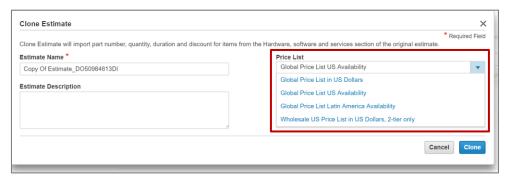


1 Estimates

1.1 Enhancements to Estimates from Customer Feedback

Based on your feedback, a number of enhancements have been made in Estimates, including:

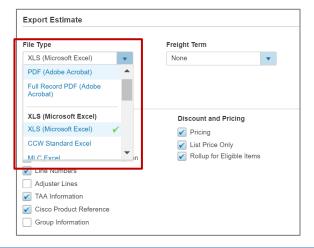
1. You will now be able to choose a different price list when you clone your estimate:



2. You will now be able to copy multiple lines at a time using the "Copy Lines" option in the **More** dropdown on the Cart page:

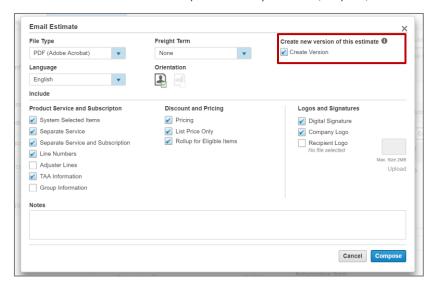


3. You will now be able to export your estimate in many new formats (currently, you can only choose .xls or PDF):

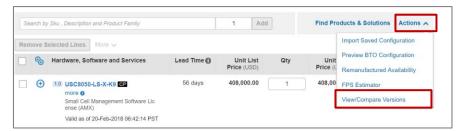




4. You now have the ability to maintain version history of an estimate. To save a version, select the "Create New Version of this Estimate" option when you share, export, or email it:



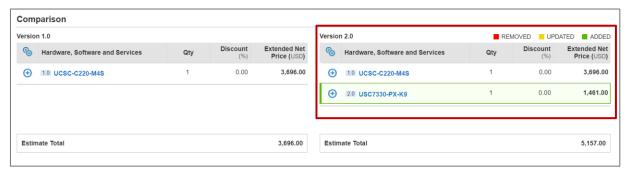
5. You will then be able to compare versions using the "View/Compare Versions" option in the **Actions** dropdown of the Cart page:



6. Select the versions of the estimate you wish to compare and click **Compare.**

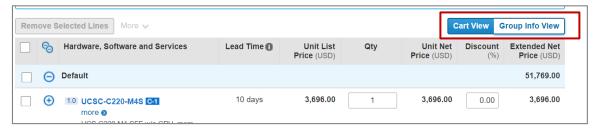


7. You can compare two version at once, and CCW will highlight the differences in the BOM details.





8. You will now have the ability to view all SKUs in the same group on the Cart page and perform actions at the group level. On the Cart page, you can toggle between the default Cart view and a new "Group Info View" where the SKUs will be sorted by Group.



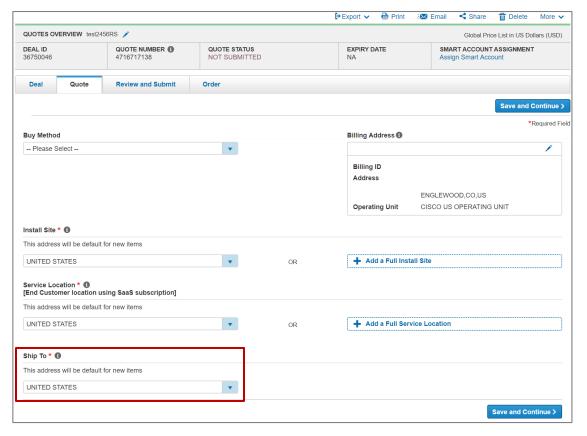
2 Deals & Quotes

2.1 Commercial Invoice Indicative Value Now Available On Approved Quotes

To view Commercial Invoice values on your Quote, follow steps below

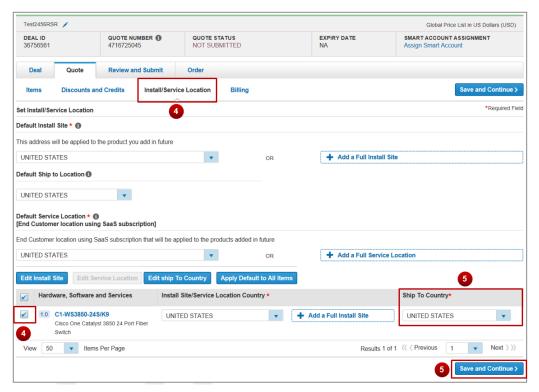
- 1. Start with creating the Quote following the As-Is process
- 2. A new **Ship To** option is made available while creating a Quote and will be systematically defaulted to the End Customer Country

Note: The Billing and Ship to details are required to determine the indicative CI Value on the Quote



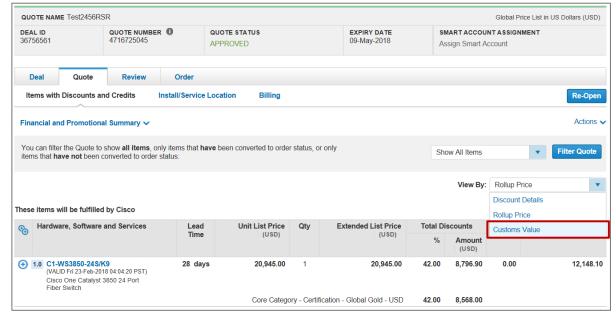


- 3. Ship To Country can be changed for individual SKUs on your Quote.
- To change Ship To Country for a SKU, Go to Install/Service Location tab and Select the SKU
- 5. Select the Ship To Country from the drop-down menu and Click Save and Continue



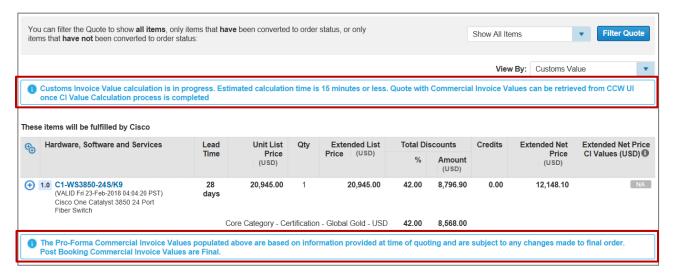
- 6. Proceed further in the quote creation process and Submit the Quote for Approval
- 7. Once the Quote is Approved, return to the Quote and Select Customs Value from the View By drop down

Note: The Customs Value option will only appear if the Quote is in Approved status





8. The Customs Invoice Value will take approximately 15 minutes to show up after the Quote is approved and the same would be indicated via an informational message shown on the page. You will also see another informational message that the CI values populated in quote are indicative only and the Post Booking Commercial Values should be considered as final



 A new column Extended Net Price CI Value will appear. <u>Click</u> on View to expand and see the associated values

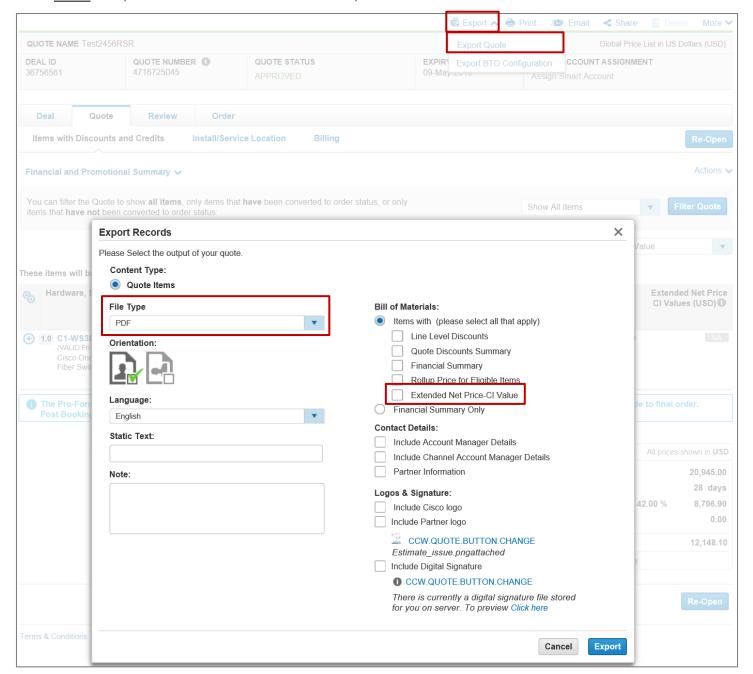


⊕ н	Hardware, Software and Services	Lead	Unit List Price (USD)		Extended List	Total Discounts		Credits	Extended Net	Extended Net
•		Time			Price (USD)	%	Amount (USD)		Price (USD)	Price CI Values (USD) 🛈
☐ 1.0	C1-WS3850-24S/K9 (VALID Wed 14-Feb-2018 15:47:00 PST) Cisco One Catalyst 3850 24 Port Fiber Switch	28 days	20,400.00	1	20,400.00	42.00	8,568.00	0.00	11,832.00	16,675.00
		С	ore Category - Ce	ertification	- Global Gold - USD	42.00	8,568.00			
1.0	.1 CON-SSSNT-38024SK9 SOLN SUPP 8X5XNBD Cisco One Catalyst 3850 24 Port Fiber Swit Duration: 12.00 Months	Not Applicable	2,612.50	1	2,612.50	32.00	836.00	0.00	1,776.50	NA .
			Service Multi National Quoting - USD		32.00	836.00				
1.1	C1-EGW-50-K9 Cisco ONE Energy Mgmt Perpetual Lic - 50 DO End Points	14 days	0.00	1	0.00	0.00	0.00	0.00	0.00	0.00
			Market Category	- Multinat	ional Certified Partner - USD		0.00			
1.2	STACK-T1-50CM 50CM Type 1 Stacking Cable	Not Applicable	100.00	1	100.00	42.00	42.00	0.00	58.00	58.00
			Core Category -	Certificati	on - Global Gold - USD	42.00	42.00			

Note: NA indicates the SKU is not eligible for CI calculation

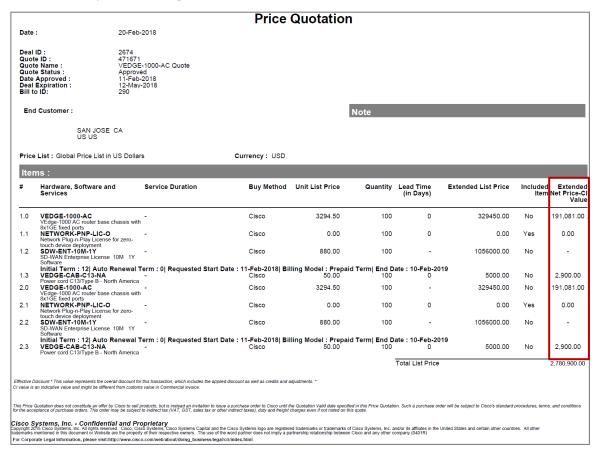


10. To download the Commercial Invoice related details into excel or pdf file type, <u>Click</u> on Export Quote and Select newly added **Extended Net Price-Cl Value** option

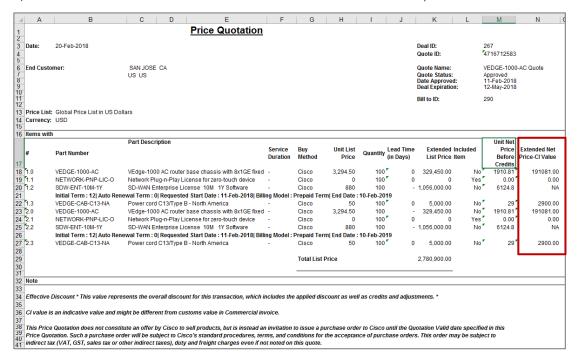




a) PDF file export indicating the Commercial Invoice Value



b) Commercial Invoice Value are also made available in the excel export

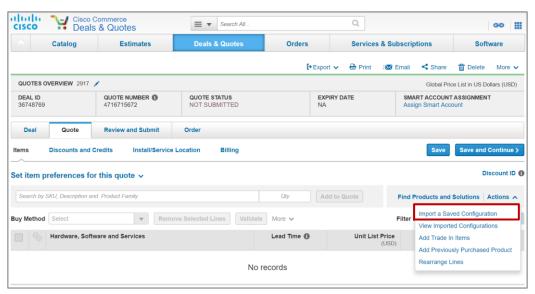




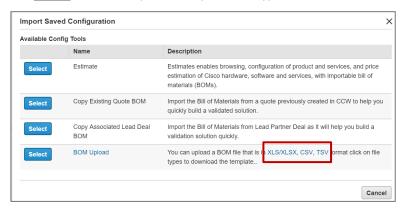
2.2 Support Excel Upload for Cisco ONE EA BOM Creation in CCW Quote

To make use of this feature, follow steps below

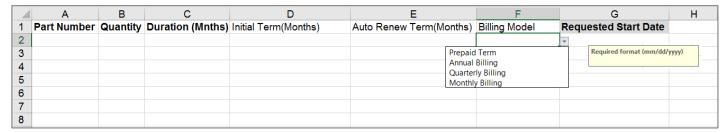
1. In the **Items** tab of Quote, <u>Click</u> on **Actions** and <u>Choose</u> **Import a Saved Configuration** to download the new BOM template, which you will use later to upload the configuration



2. Select the BOM Upload template file type (XLS/XLSX, CSV, TSV) to enter the configuration details



- 3. In the new excel template, additional attributes are added to support the XaaS Configurations
 - a. Initial Term(Months) Enter the term of subscription in months, as applicable
 - b. Auto Renew Term(Months) Enter the auto renewal term of the subscription in months, as applicable
 - c. Billing Model Select the option available in the drop-down
 - d. Requested Start Date Enter the subscription requested start date in mm/dd/yyyy format





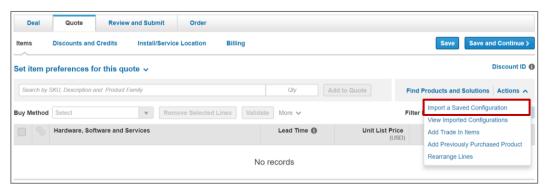
4. Enter the configuration details in the template and save the file

Please note the below when entering data into the excel file

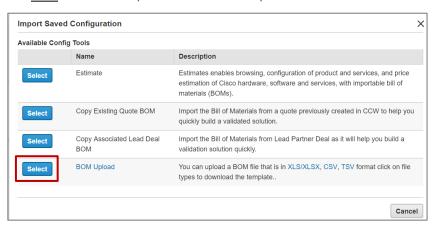
- A) All the minor line for each product should align after the Major line (including EA Bundle), if the minor line is not aligned one after other within ATO or MLB, we will not honor it
- B) If any of the values for XaaS SKUs are not provided in the excel file, we will default the values as per Cisco's Offer Setup logic except for Service to country
- C) If a XaaS configuration, including XaaS MLBs (Multi Line Bundles) requires question/answer construct, those will not be supported by the excel upload capability

	Α	В	С	D	E	F	G
1	Part Number	Quantity	Duration (Mnths)	Initial Term(Months)	Auto Renew Term(Months)	Billing Model	Requested Start Date
2	ELA2-M	1		36	0	Annual Billing	2/18/2018
3	E2-C1-P	1					
4	E2C1-AIR-F	1000					
5	E2C1-AIR-F-S	1000					
6							

 Return to the CCW Quote Items tab, and <u>Click</u> Import a Saved Configuration to upload the filled BOM template

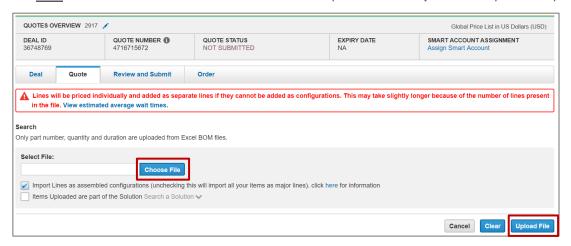


6. Click on **Select** to proceed with BOM upload

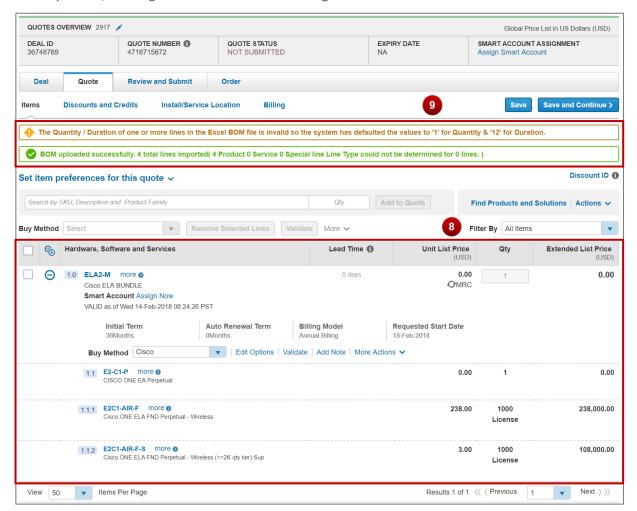




7. Click on Choose File to select the saved BOM template and use Upload File option to upload the BOM



- 8. The items in the excel file will be systematically imported to the Quote and show under the items tab
- 9. Any errors/warning will also be shown indicating the users to take suitable action





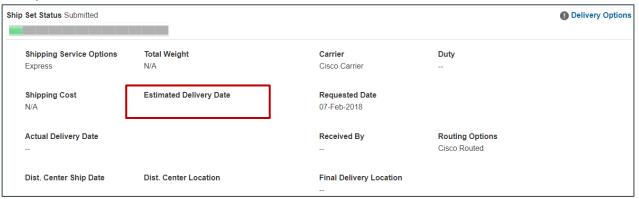
3 Quote and Order

3.1 Track and Trace Shipments

We are improving the way Cisco Partners and customers choosing Cisco Routed freight can track product shipments in CCW. Shipment details will display information for the final leg (2.2) of delivery. Tracking details and date changes will display in the Shipping & Install tab. For verification of your Cisco Routed APAC – US shipments, you can follow the hyperlinked tracking number to visit the commercial carrier's tracking information.



• The customer estimated delivery date will update in CCW with incoming notifications based on ETA from carriers post shipment.



 CCW will have the capability to provide access to the Proof of Customer delivery or Proof of Carrier handover documents.



• Customers choosing Self Routed freight will see Leg 2.2 Tracking/reference numbers in CCW to track their shipments in their carriers' website.

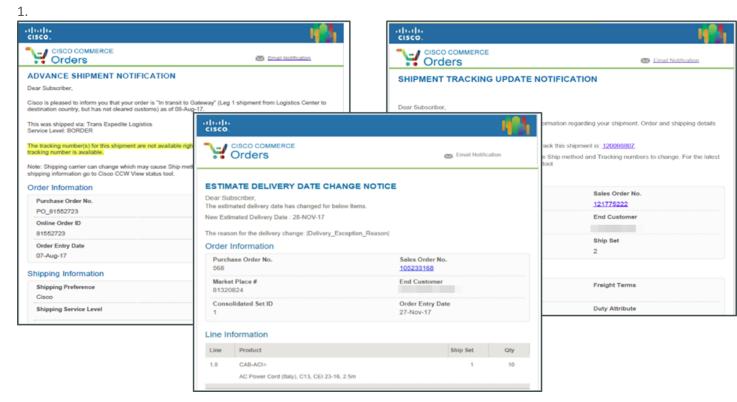




• Delivery exceptions and alert notifications will display within CCW.



Notifications will keep you updated on shipment status. Here is a sample of ASN, tracking update, and estimate
delivery messages. Note: If you are a B2B customer and have any trouble seeing messages, you can reach out to
your Cisco B2B contact for setup assistance.





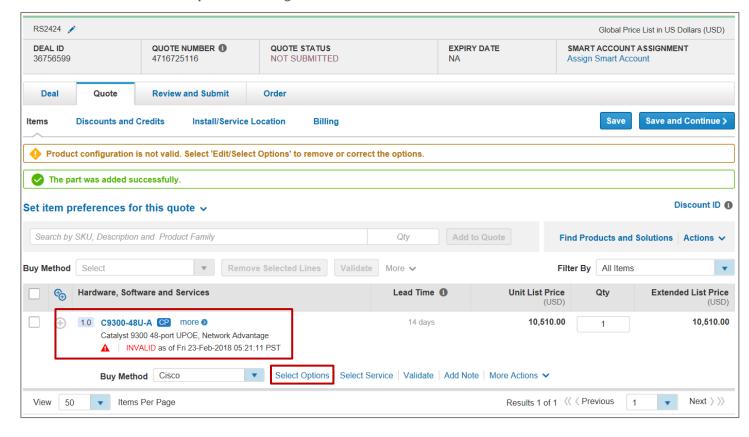
3.2 Enhancements to Smart Account Based Discount Capability for Cisco ONE EA Purchases

A. Co-Terming: The term based licenses or subscriptions purchased as part of the Cisco ONE EA deal (Net \$0 SW licenses) will be co-termed to your EA contract end date

Note: If a Subscription SKU minimum duration is more than the EA end date i.e. SKU duration is 36 months but the EA end date is in 30 months, then we will not consider the EA end date and will honor the SKU minimum duration of 36 months to co-term

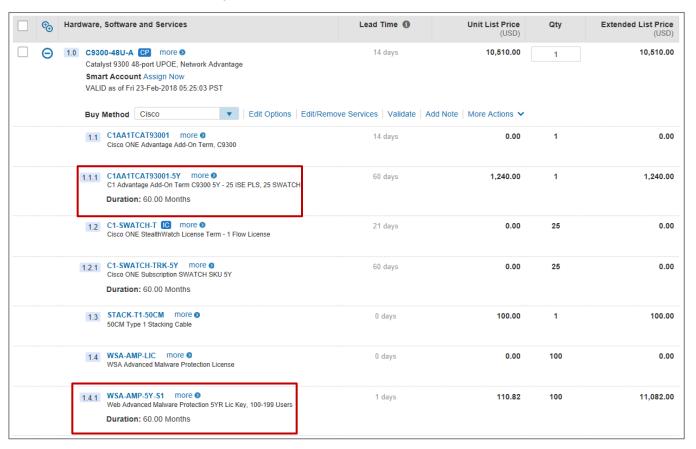
See instructions below to use this feature on Quotes:

- 1. Follow the existing process of creating a quote
- 2. Add the SKU and Select Options to configure

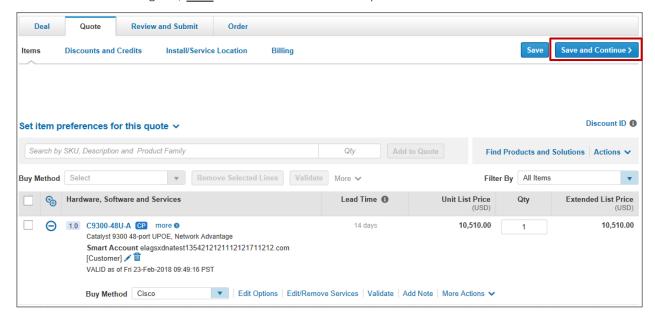




3. The configuration will turn valid after the mandatory minor items are selected. In this configuration, we have **5 Year duration license/subscription** that are added as minor items

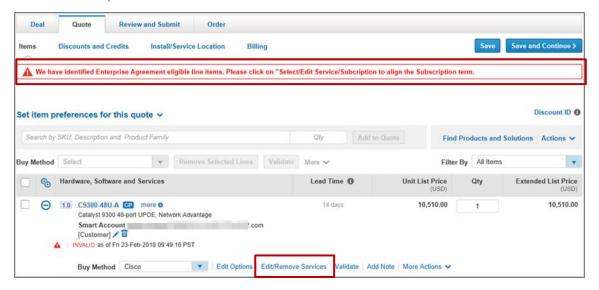


- 4. Following the As-Is process, assign the Smart Account to the SKU
- 5. After the SA is assigned, Click on **Save and Continue** to proceed further

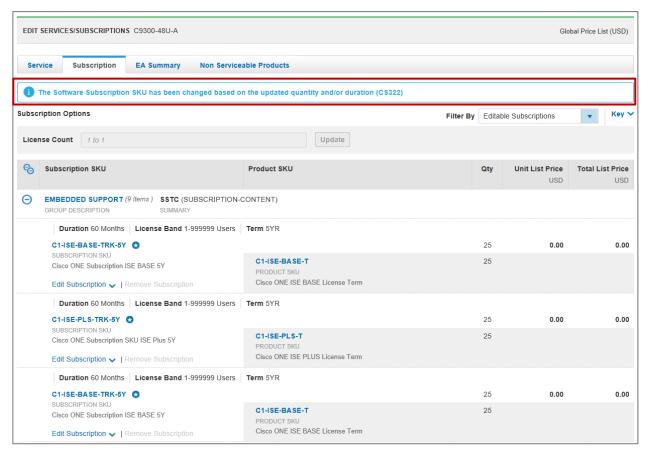




6. An error message will show up, indicating EA eligible subscription term to be adjusted. <u>Click</u> on **Edit/Remove**Services to proceed further

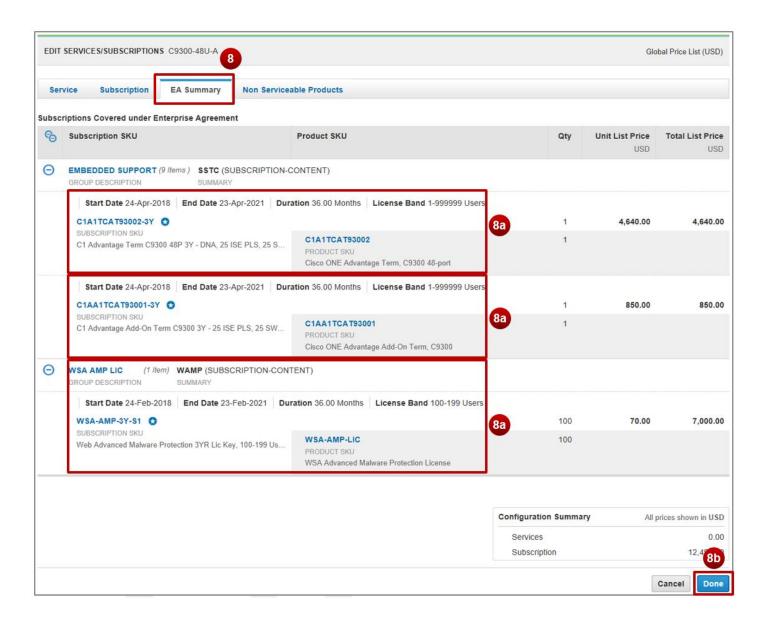


7. On the **Edit Services & Subscriptions** page, you will see an informational message indicating the Subscriptions SKU/s changes



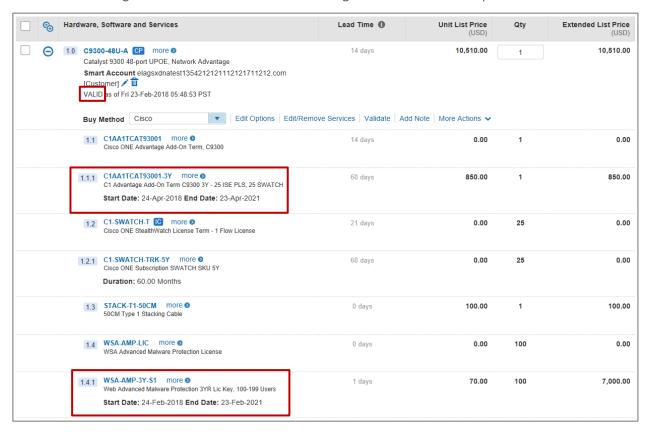


- 8. <u>Click</u> on the newly added **EA Summary** tab to see the subscription changes that were systematically made based on your EA
 - a. The subscriptions SKUs present on your configuration are now changed from **5Year** term to **3Year** term and stamped with the **Start and End Date**
 - b. Click on **Done** to return, after reviewing the changes





9. The Item Configuration will turn Valid and the changes made to the subscription can be seen at line level

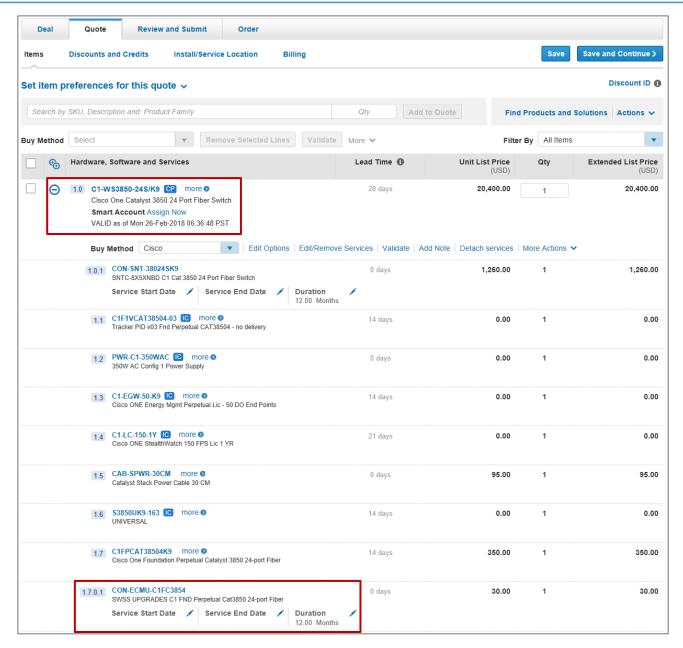


- 10. After reviewing the duration changes made to the items, proceed further with the As-Is flow to submit your quote.
- **B.** Eliminate Duplicate SWSS Entitlement: Systematic validation in CCW will now automatically drop the SWSS services from your configuration, if you already have a SWSS contract as part of your EA to avoid duplicate entitlement

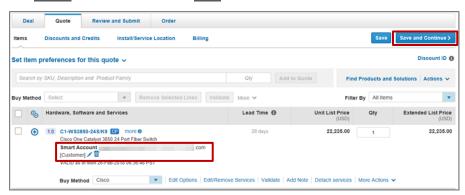
See instructions below to use this feature on **Quotes**:

1. Following the As-Is process, Add and Configure an item with a Software Support Service (SWSS) to your Quote



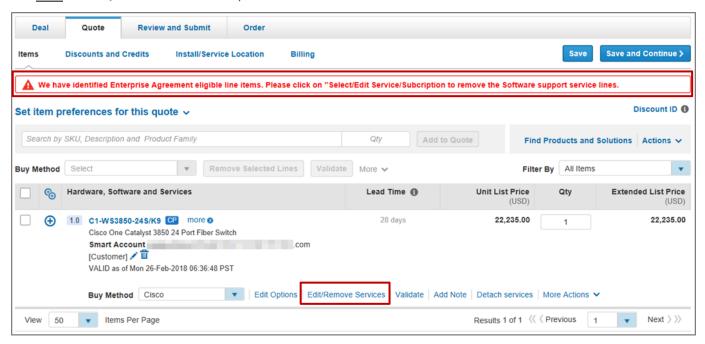


2. Assign Smart Account and Click Save and Continue

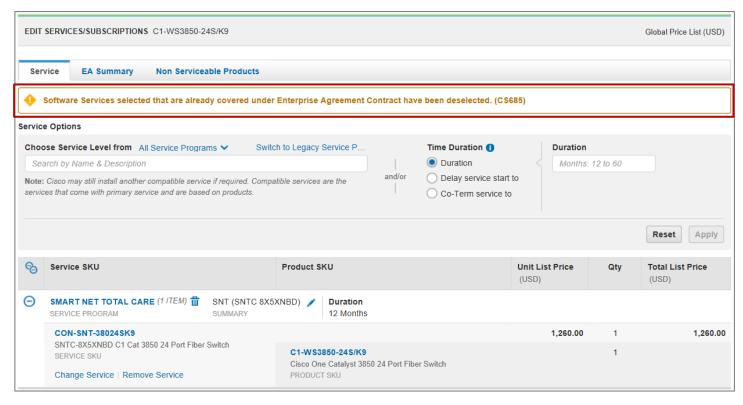




3. An error message will show up and indicate EA eligible items requiring removal of Software Support Service. Click on **Edit/Remove Services** to proceed further

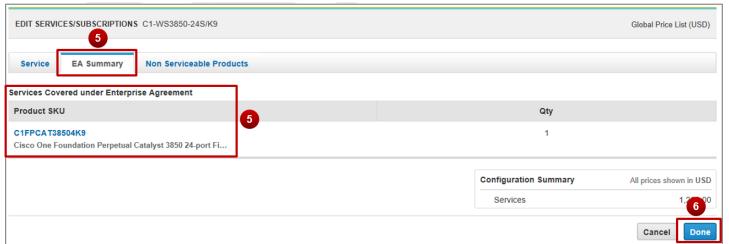


 On the Edit Services & Subscriptions page, you will see a warning message indicating the de-selection of the Software Support Service

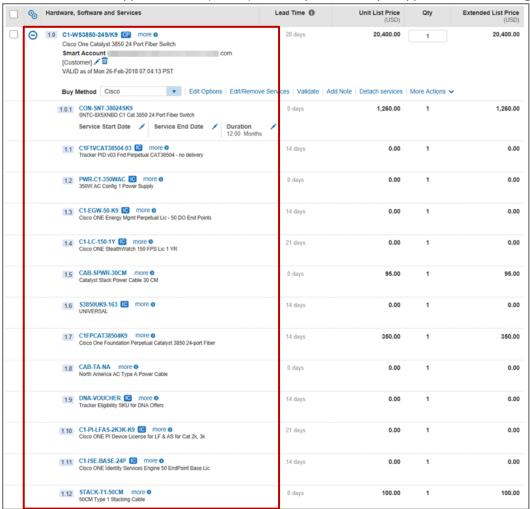




- 5. <u>Click</u> on the newly added **EA Summary** tab to view the details of the product that has services covered as part of your EA
- 6. <u>Click</u> on **Done** to return, after reviewing the changes



7. The Software Support Service (ECMU) will be systematically dropped from the configuration



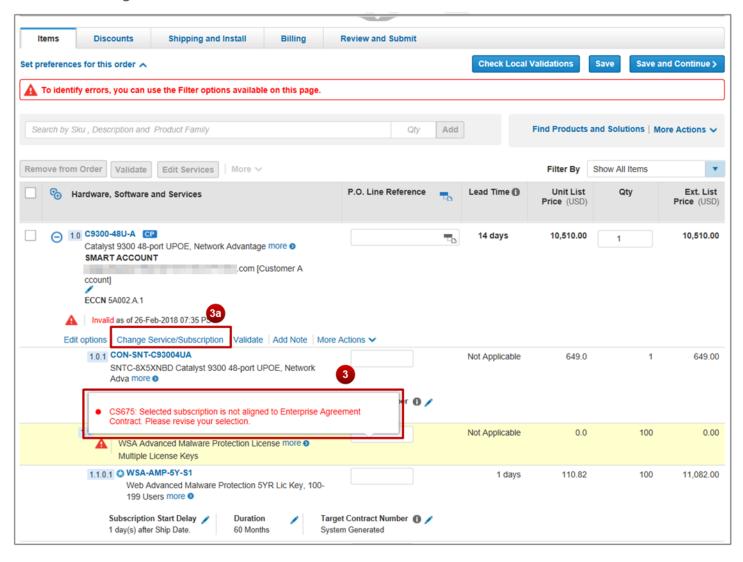


Order

To make use of the **Co-Terming** and **Eliminate Duplicate SWSS Entitlement** feature on Orders, see instructions below:

Co-Terming - Orders

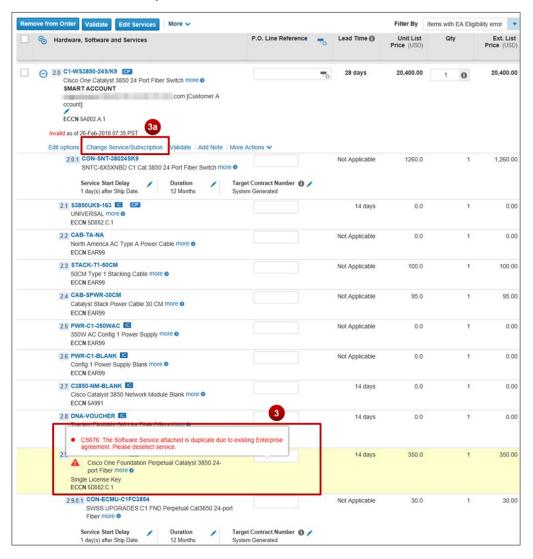
- 1. Follow the existing steps as available under Quotes section to Configure a SKU and Assign Smart Account
- 2. After the Smart Account is added, Click on Save and Continue
- 3. Configuration will turn Invalid and the errors for each SKUs will be shown at line level
 - To fix the error, <u>Click</u> on <u>Change Service/Subscription</u> and follow <u>Steps 7 to 9</u> as indicated under <u>Co-</u>
 <u>Terming section of Quote</u>





Eliminate Duplicate SWSS Entitlement - Orders

- 1. Follow the existing steps as available under Quotes section to Configure a SKU and Assign a Smart Account
- 2. After the Smart Account is assigned, Click on Save and Continue
- 3. Configuration will turn Invalid and the errors for each SKUs will show at line level
 - a. To fix the error, <u>Click</u> on **Change Service/Subscription** and follow **Steps 4 to 7** as indicated under **Eliminate Duplicate SWSS Entitlement** section of Quote



3.3 Flexible Service Start Delay (FSSD) for Subscription and Services

You can now select Flexible Service Start Delay (FSSD) for services at the time of product purchase in CCW. FSSD enables the service activation date to be delayed by a maximum of 60 days from the product ship date, aligning the service delivery with service need. When using FSSD in CCW to delay service activation, the invoice for the service will not be generated until the service activation date. You will be able to specify and select the Flexible Service Start Delay (FSSD) for T&C subscriptions when ordering along with a HW ATO. Different FSSDs can be selected between eligible subscriptions and Services with in the same order. For more information on how to select and apply FSSDs in the order, please refer to our FSSD Job Aid



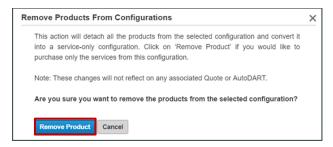
3.4 Enhancements for Remove Product and Serial Number Entry for Follow on Service Order

Distributors can use a Remove Product capability on an imported configuration that contains both hardware and attached services.

1. On the imported product line item under the More Actions pull down menu, the **Remove Product** option can be used when they already have hardware on hand and just want to purchase the services. This action removes the hardware parts from the configuration and converts it into a service-only configuration.



2. A pop-up will appear informing you that this action will detach all products from the selected configuration; converting it into a service-only configuration. Select **Remove Product** to confirm.



3. Using the View/Edit Product Order details link available on this configuration, you have the option to specify the exact serial numbers that you want covered by this new service. You also have the option to fetch Serial Numbers submitted in the POS (Point Of Sale).





- 4. You'll now be able to enter you're the serial numbers you want covered by this new service. Please note, that to enter multiple serial numbers, you'll want to ensure you separate them by either a comma, or allow dedicate a separate line to each serial number.
- 5. You'll also see previously entered serial numbers

