



Partner Lead Traceability - CCW

Overview

Cisco improved the traceability of partner lead conversion to bookings by making updates to CCW's integration with the Leads and Prospects system. These updates include providing P360 partner users access to leads information from CCW, automatically updating statuses when leads are converted to deals in CCW, and sharing Deal ID and other deal details in the Leads and Prospects system when generated in CCW.

[Glossary of Terms](#)

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[Create Deal within Deals & Quotes by Connecting to a Lead](#)

[Create Quote within Deals & Quotes by Connecting to a Lead](#)

Glossary of Terms

- *Partner Admin*: PA role in Leads & Prospects, gatekeeper of leads passed to the organization
- *Partner Sales Rep*: PSR role in Leads & Prospects, responsible for updating lead status and following up with customer
- *Partner Deals Desk User*: individual from the partner organization who utilizes CCW for deal registration and quote creation but does NOT have access to Leads & Prospects

Create Deal by Searching Open Leads

Partner Admins, Partner Sales Reps, and Partner Deals Desk Users can view leads information and initiate deals in CCW. Partner Admins and Partner Sales Reps have the additional capability to navigate to the Leads and Prospects system from CCW.

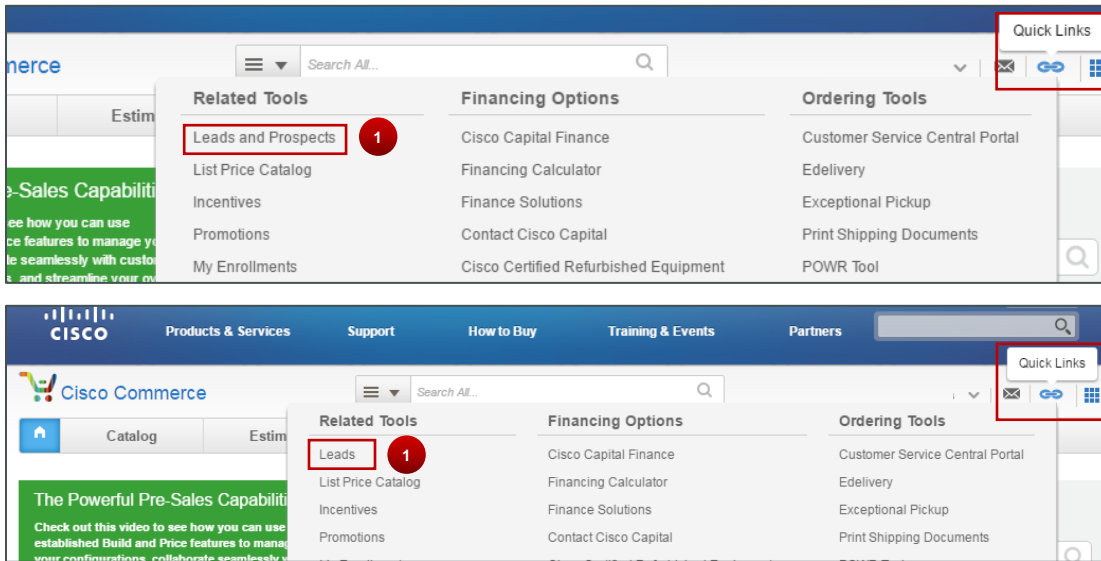
Note: Your organization must be a P360 Partner before the individual users can have access to leads information. Partner Deals Desk Users will not be able to navigate to Leads and Prospects from CCW.

To create a deal using the Leads menus in CCW:

1. Click [Leads](#) from the Deals & Quotes menu, OR click [Leads and Prospects](#) or [Leads](#) from the Quick Links menu

The screenshot shows the Cisco Commerce user interface. The top navigation bar includes 'Catalog', 'Estimates', 'Deals & Quotes', 'Orders', 'Services & Subscriptions', and 'Software'. The 'Deals & Quotes' menu is open, displaying options: 'Create Deal', 'Create Quote', 'Access Shared Deal', 'View All', 'Recent', 'Shared', 'Saved Searches', 'Tags', 'Deviations', and 'Reports'. The 'Leads' option is highlighted with a red box and a red circle containing the number '1'. Below the menu, there is a search bar for 'Find Products and Solutions' and a table titled 'Deals & Quotes: Deals To Modify Subscriptions'.

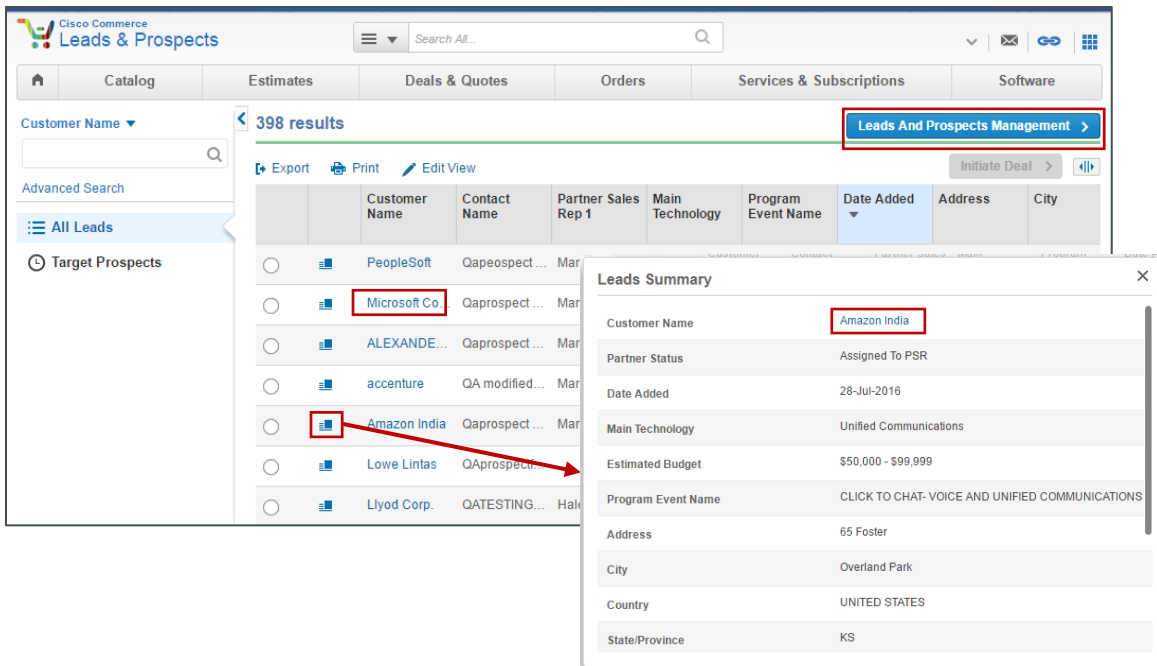
D	Deal Name	Referral Deal Status
1590	Test Deal MIR Reopened...	
1593	test ES incr	
1967	check RNSD OTB	
1557	DNT_UDD_0019	
1967	check RNSD OTB	



The Leads and Prospects view displays the Lead records in descending order of Date Added and you can change the view using the Edit View link.

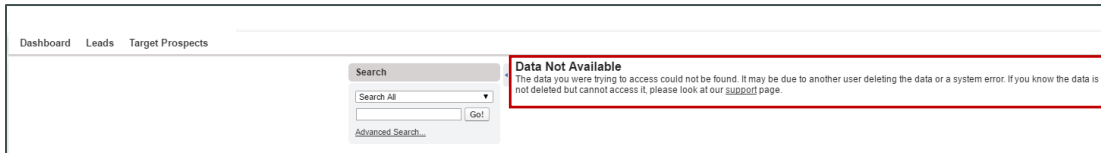
To view lead information on Leads assigned to your company:

- Click Customer Name link;
- Click the Leads Summary icon to view Leads information, then click the Customer Name link; or
- Click **Leads and Prospects Management**



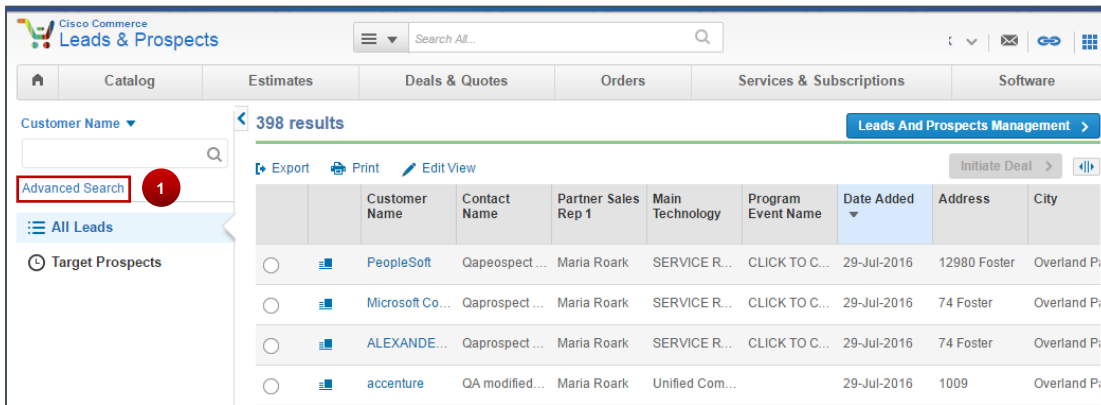


As a PSR, you can view the summary view for all leads assigned to your company. However, you can click and navigate into Leads & Prospects to see the full lead record for the leads directly assigned to you only. If you attempt to view the leads information of a lead that is not assigned to you, the following error message in Leads & Prospects will display.



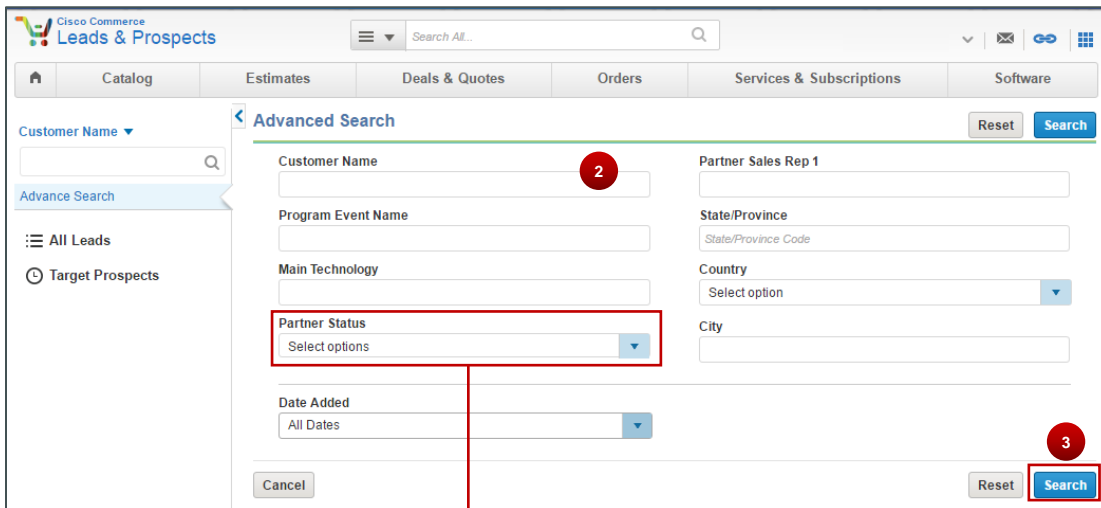
You can use Advanced Search to filter the Leads based on different criteria.

1. Click **Advanced Search**

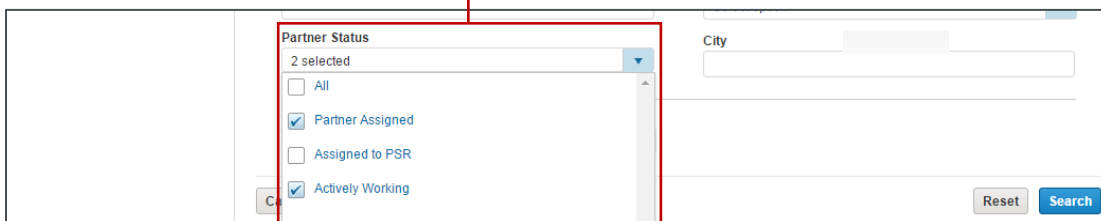


2. Enter search criteria

3. Click **Search**

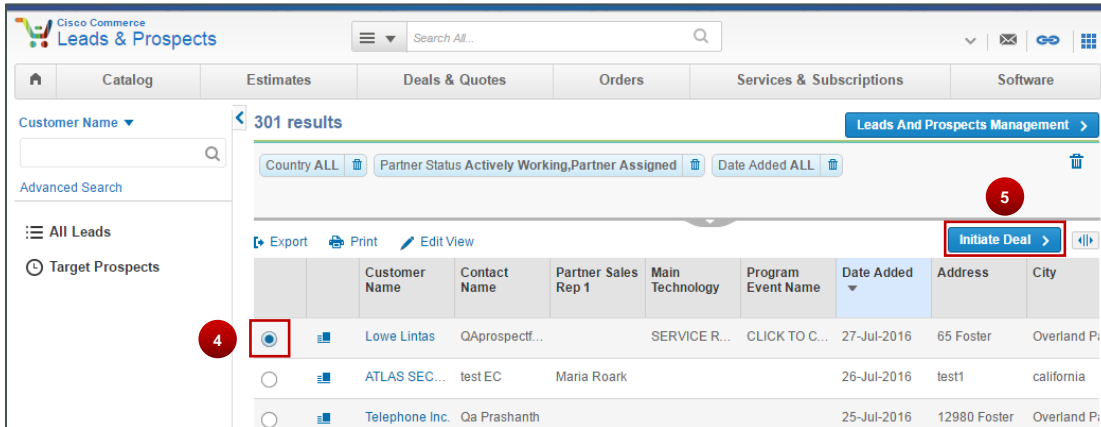


Note: You can search by Partner Status – Partner Assigned, Assigned to PSR, Actively Working

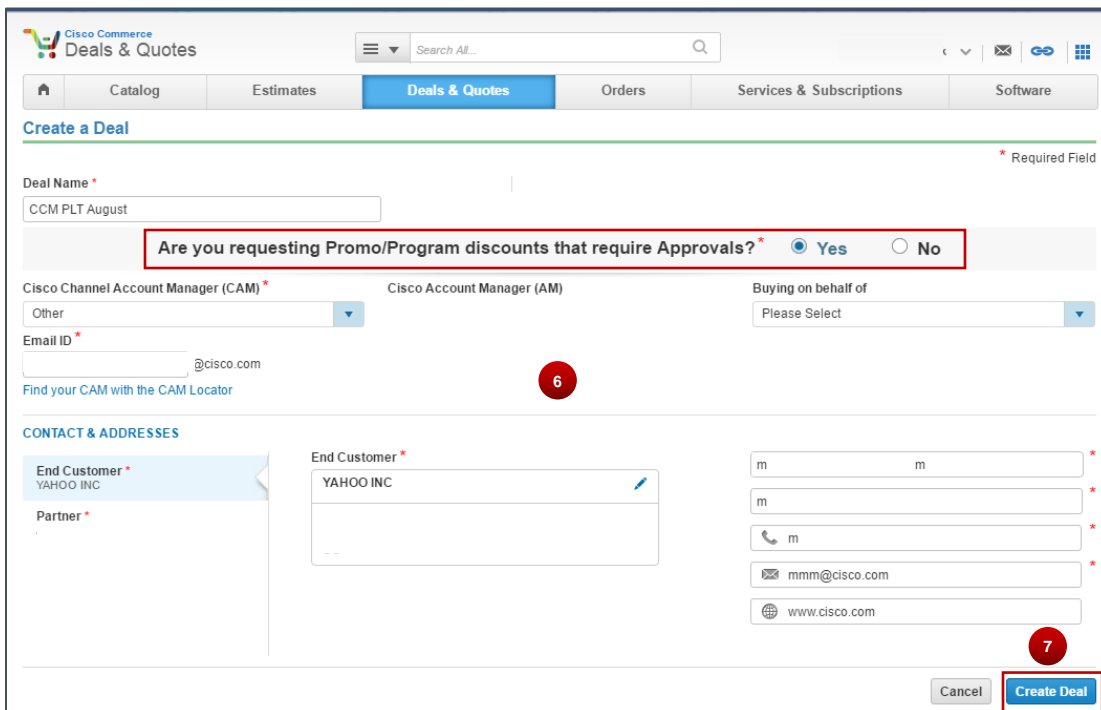




- Click the radio button of the lead record you want to select
- Click **Initiate Deal**



- Complete the required deal information (information from the lead will pre-populate when available)
- Click **Create Deal**



Note: To create a quote, select the 'No' radio button and proceed with the quote.



Note: A Deal ID is assigned to the deal and the Expected List Amount and Lead Information is copied to the deal once the deal is created. You can edit all information, except Lead Information.

8. Click Lead Information to view information about the Lead

Enter any remaining required information and continue with deal registration as-is.

Note: Once the Lead is converted to a deal, the Lead ID will no longer be retrieved in the Leads page. The Lead information in Leads and Prospects is updated with the Deal ID and a status of “Deal Created.”

You can view Lead Information by clicking the Lead Info link on the Review and Submit tab

Quote Summary		All prices shown in USD	
Configured Hardware and Software List Total		307.00	
Configured Service List Total		307.00	
Special Items List Total:		0.00	
Discounts	(18.00%)	55.26	
Product Total Discount	(0.00%)	0.00	

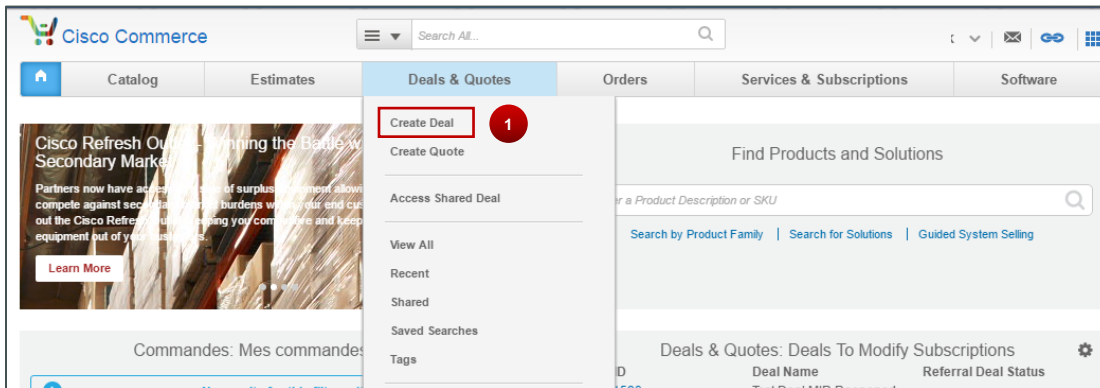
Deal Summary	
Expected Cisco Hardware and Software List Amount	18,000.00
Expected Cisco Service List Amount	.00
Deal Total	18,000.00



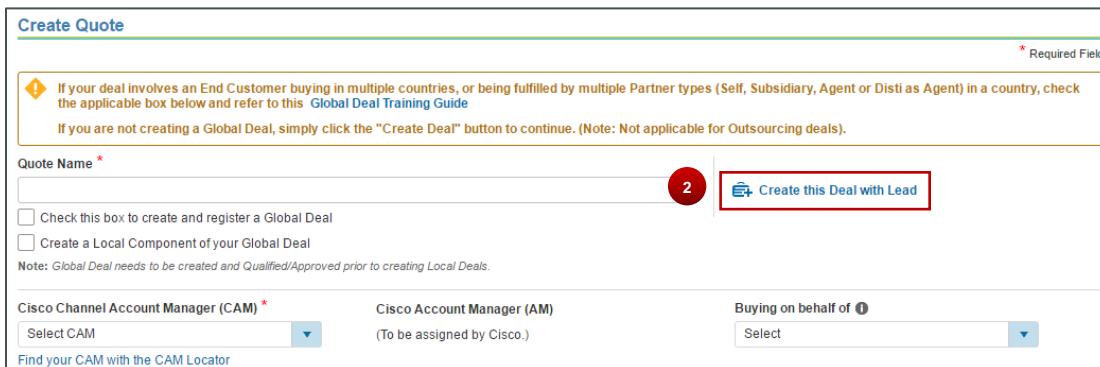
Create a Deal in Deals & Quotes by Connecting to a Lead

To create a deal by connecting to a lead:

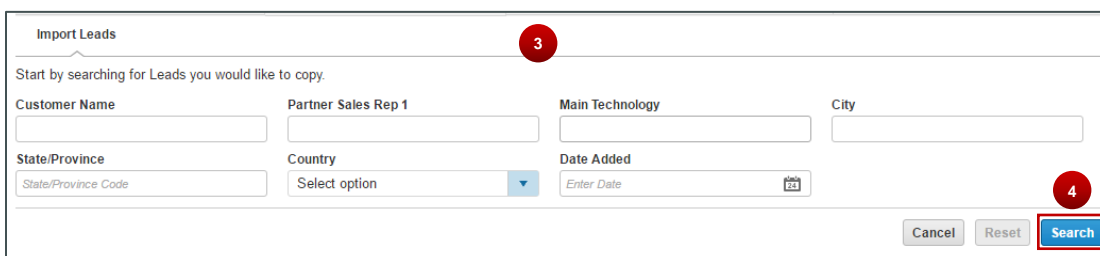
1. Click **Create Deal**



2. Click **Create this Deal with Lead**



3. Enter search criteria, if applicable
4. Click **Search**





- Select a lead by checking its radio button
- Click **Continue with Selected Lead**

395 results

	Customer Name	Contact Name	Partner Sales Rep 1	Main Technology	Program Event Name	Date Added	Address	City	St
<input type="radio"/>	PeopleSoft	Qapeospect Qatest	Maria Roark	SERVICE RENEWAL	CLICK TO CHAT-VOICE AND UNIFIED COMMUNICATIONS	29-Jul-2016	12980 Foster	Overland Park	KS
<input type="radio"/>	Microsoft Corp.	Qapropect Saladanha	Maria Roark	SERVICE RENEWAL	CLICK TO CHAT-VOICE AND UNIFIED COMMUNICATIONS	29-Jul-2016	74 Foster	Overland Park	KS
<input checked="" type="radio"/>	accenture	QA modified date check	Maria Roark	Unified Communication		29-Jul-2016	1009	Overland Park	KS
<input checked="" type="radio"/>	Amazon India	Qaprospect Nitish	Maria Roark	Unified Communications	CLICK TO CHAT-VOICE AND UNIFIED COMMUNICATIONS	28-Jul-2016	65 Foster	Overland Park	KS
<input type="radio"/>	Llyod Corp.	QATESTING Partha	Haley Thompson	INTELLIGENT NETWORK	CLICK TO CHAT SECURITY	26-Jul-2016	77 Foster	Overland Park	KS
<input type="radio"/>	Samsung Mobiles	QABAT Julia	Maria Roark	UNIFIED COMMUNICATIONS	CLICK TO CHAT-VOICE AND UNIFIED COMMUNICATIONS	26-Jul-2016	44 Foster	Overland Park	KS
<input type="radio"/>	Telephone Inc.	Qa Prashanth				25-Jul-2016	12980 Foster	Overland Park	KS
<input type="radio"/>	Testing Cisco	Manjeet Chillar	Haley Thompson			25-Jul-2016	12980 Foster	Overland City	KS
<input type="radio"/>	ALEXANDER OPEN SYSTEMS	QA PRash Vishnu	Maria Roark			22-Jul-2016	1008	ray street	
<input type="radio"/>	Cherokee Communications	Bryan Ponder	Jonathan Lembke	SWITCHING	1-800-553-NETS OPT2	11-Apr-2016	403 N Service Rd.	Calera	OK

View 10 Items Per Page Page 1 Of 40 << Previous 1 Next >>

6 [Continue with Selected Lead](#)

- Click the pencil icon to select a different Lead or click the trash can icon to delete Lead Information. If you delete the Lead, you will be returned to the initial Create a Deal page.
- Complete the required deal information (information from the lead will pre-populate when available)
- Click **Create Deal**

Create a Deal

Deal Name * **7** Deal with Lead [Lead Information](#) [Pencil](#) [Trash](#)

Cisco Channel Account Manager (CAM) * Cisco Account Manager (AM) Buying on behalf of

CONTACT & ADDRESSES

End Customer * **8** [+ Select an End Customer](#) English

First Name Last Name

Title

Phone Number

Email Address

Company Website

9



Note: A Deal ID is assigned to the deal and the Expected List Amount and Lead Information is copied to the deal once the deal is created. All information, except Lead Information, is editable.

10. Click [Lead Information](#) link to view information about the Lead

QUOTE NAME CCM PLT September Global Price List US Availability (USD)

DEAL ID 22963045	QUOTE NUMBER 4713130041	QUOTE STATUS MORE INFORMATION REQUIRED Incentive(s) Status	EXPIRY DATE 30-Jan-2017	SMART ACCOUNT ASSIGNMENT Assign Smart Account
---------------------	----------------------------	--	----------------------------	--

Deal | Quote | **Review and Submit** | Order

Who's Involved | About the Deal | Incentives | Questionnaire Save Save and Continue >

Incentives are linked to this field * Required Field

Deal Description

Price List *

Expected Closing Date *

Expected Cisco Hardware and Software List Amount *

Expected Cisco Service List Amount

Total Expected Amount *

Note: User currency dictated by promotion rules and country policy
Currency Converter

Intended Use * Deal Category *

Deal Source Deal Type

Probability of Closing

[Lead Information](#)

Enter any remaining required information and continue with deal registration as-is.

Note: Once the Lead is converted to a deal, the Lead ID will no longer be retrieved in the Leads page. The Lead information in Leads and Prospects is updated with the Deal ID and a status of "Deal Created."

You can view Lead Information by clicking the Lead Info link on the Review and Submit tab

QUOTE NAME CCM PLT September Global Price List US Availability (USD)

DEAL ID 22963045	QUOTE NUMBER 4713130041	QUOTE STATUS MORE INFORMATION REQUIRED Incentive(s) Status	EXPIRY DATE 30-Jan-2017	SMART ACCOUNT ASSIGNMENT Assign Smart Account
---------------------	----------------------------	--	----------------------------	--

Deal | Quote | **Review and Submit** | Order

[Submit Quote for Approval](#)
Mark Deal as Lost...

Who's Involved | About the Deal | Incentives | Quote | Trade In Items | Install Site | Billing

Quote Summary		Deal Summary	
All prices shown in USD			
Configured Hardware and Software List Total	29,400.00	Expected Cisco Hardware and Software List Amount	18,000.00
Configured Service List Total	0.00	Expected Cisco Service List Amount	.00
Special Items List Total:	0.00	Deal Total	18,000.00
Discounts (42.00%)	12,348.00		

[Lead Info](#)

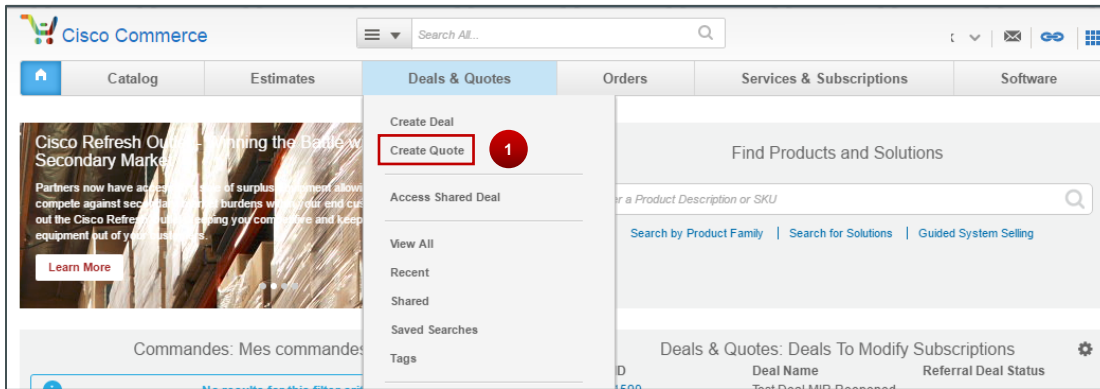


Create a Quote in Deals & Quotes by Connecting to a Lead

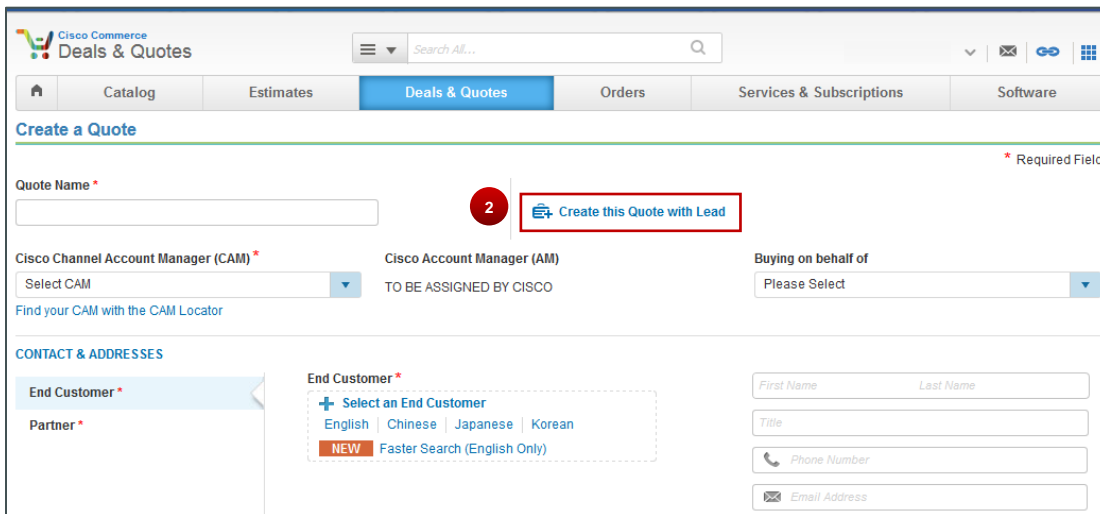
Note: B2B Partners cannot connect a lead to a quote using this option. B2B Partners must either select a lead from the 'Leads' summary or **Create a Deal in Deals & Quotes Connecting to a Lead**

To create a quote by connecting to a lead:

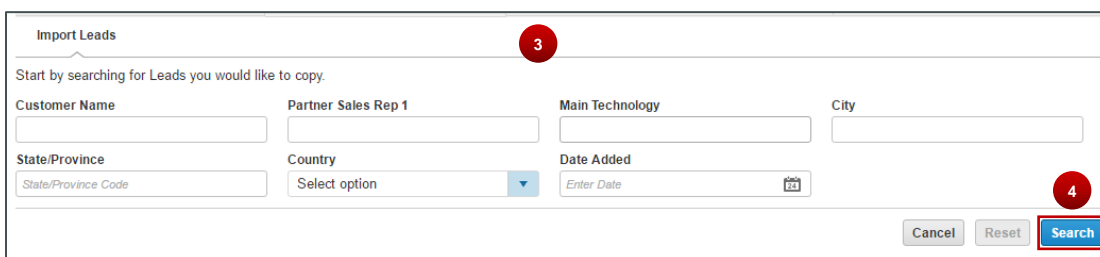
1. Click **Create Quote**



2. Click **Create this Quote with Lead**



3. Enter search criteria, if applicable
4. Click **Search**





- Select a lead by checking its radio button
- Click **Continue with Selected Lead**

387 results

	Customer Name	Contact Name	Partner Sales Rep 1	Main Technology	Program Event Name	Date Added	Address
<input type="radio"/>	Google	Qamanoal Bindu	Maria Roark	UNIFIED COMMUNICATIONS	CLICK TO CHAT- VOICE AND UNIFIED COMMUNICATIONS	03-Aug-2016	89 Foster
<input type="radio"/>	accenture	QA modified date check	Maria Roark	Unified Communication		29-Jul-2016	1009
<input type="radio"/>	Telephone Inc.	Qa Prashanth				25-Jul-2016	12980 Foster
<input type="radio"/>	ALEXANDER OPEN SYSTEMS	QA PRash Vishnu	Maria Roark			22-Jul-2016	1008
<input checked="" type="radio"/>	RKNEAL	Robert Bevis	robert hankins	SECURITY	RCL_IMP_PilotAMERCollateral_OwnedChat_SCC_LUH	08-Apr-2016	1640 McCracken Blvd # 200
<input checked="" type="radio"/>	Mutual of Omaha Companies	Dave Cole	Dan Urzendowski	WAN	USA_PMC_FSA_Deal Data Pilot_OwnedAQL_Customer Intelligence/Analytics	22-Mar-2016	Mutual Of Omaha Plaza South 3
<input type="radio"/>	Mutual of Omaha Companies	Eric Veller	Dan Urzendowski	WAN	USA_PMC_FSA_Deal Data Pilot_OwnedAQL_Customer Intelligence/Analytics	22-Mar-2016	Mutual Of Omaha Plaza South 3
<input type="radio"/>	Wheelchair Professionals LLC	Ron Stahlschmidt	Rob Meyerkord	WAN	USA_PMC_FSA_Deal Data Pilot_OwnedAQL_Customer Intelligence/Analytics	22-Mar-2016	514 Earth City Expressway Suite 100
<input type="radio"/>	American Fidelity Assurance Company	Brian Brawe	Nicholas Trisel	LAN Switching	USA_PMC_FSA_Deal Data Pilot_OwnedAQL_Customer Intelligence/Analytics	22-Mar-2016	2000 North Classen Boulevard
<input type="radio"/>	American Fidelity Assurance Company	Terry Lagaly	Nicholas Trisel	LAN Switching	USA_PMC_FSA_Deal Data Pilot_OwnedAQL_Customer Intelligence/Analytics	22-Mar-2016	2000 North Classen Boulevard

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6 [Continue with Selected Lead](#)

- Click the pencil icon to select a different Lead. Click the trash can icon to delete Lead Information. The Lead will be deleted and you will be returned to the initial Create a Quote page
- Complete the required quote information (information from the lead will pre-populate when available)
- Click **Create Quote**

Cisco Commerce Deals & Quotes

Home Catalog Estimates **Deals & Quotes** Orders Services & Subscriptions Software

Create a Quote

Quote Name * **7** [Quote with Lead](#) [Lead Information](#)

Cisco Channel Account Manager (CAM) * Cisco Account Manager (AM) TO BE ASSIGNED BY CISCO Buying on behalf of

CONTACT & ADDRESSES **8**

End Customer * **9**

Partner *

First Name Last Name
Title
Phone Number
Email Address
Company Website

Cancel [Create Quote](#)



Note: A Deal ID is assigned to the quote and the Expected List Amount and Lead Information is copied to the quote once the quote is created. All information, except Lead Information, is editable.

10. Click [Lead Information](#) link to view information about the Lead

QUOTE NAME CCM PLT Quote Global Price List in US Dollars (USD)

DEAL ID 22963609	QUOTE NUMBER 4713130865	QUOTE STATUS NOT SUBMITTED	EXPIRY DATE N/A	SMART ACCOUNT ASSIGNMENT Assign Smart Account
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Deal | Quote | Review and Submit | Order

Who's Involved | About the Deal Save Save and Continue >

Deal Description

Intended Use [!] Deal Category [!]

Resale Other-Resale/Infrastr...

Deal Source Deal Type

LEAD Purchase

[Lead Information](#)

Probability of Closing

25% - Low

Price List ^{*} * Required Field

Global Price List US Availability

Expected Closing Date

Expected Cisco Hardware and Software List Amount

\$ 35000.00

Expected Cisco Service List Amount

\$ 0.00

Total Expected Amount

\$ 35000.00

Note: User currency dictated by promotion rules and country policy
[Currency Converter](#)

10

Lead Information X

Program Event Name: USA_PMC_FSA_Deal Data Pilot_OwnedAQL_Customer Intelligence/Analytics

Campaign Description: IMP - MULTIPLE PROGRAMS

Lead Source: Partner Demand Center

Main Technology: WAN

Total Value: 35000

Time Frame: Now - 4 Months

Total Expected Amount

You can view Lead Information by clicking the Lead Info link on the Review and Submit tab

QUOTE NAME CCM PLT Quote Global Price List US Availability (USD)

DEAL ID 22963609	QUOTE NUMBER 4713130865	QUOTE STATUS NOT SUBMITTED	EXPIRY DATE N/A	SMART ACCOUNT ASSIGNMENT Assign Smart Account
---------------------	----------------------------	-------------------------------	--------------------	--

Deal | Quote | **Review and Submit** | Order Submit Quote for Approval

Who's Involved | About the Deal | Quote | Trade In Items | Install Site | Billing

Quote Summary		Deal Summary	
All prices shown in USD			
Configured Hardware and Software List Total	29,400.00	Expected Cisco Hardware and Software List Amount	35,000.00
Configured Service List Total	0.00	Expected Cisco Service List Amount	.00
Special Items List Total:	0.00	Deal Total	35,000.00
Discounts	--	User currency dictated by promotion rules and country policy	
Product Total Discount	(--)		

[Lead Info](#)