



How to Register Collaborate Now Deal

Americas

July 09, 2014

The screenshot shows the Cisco Commerce Workspace interface. At the top is a navigation bar with links: Products & Services, Support, How to Buy, Training & Events, Partners, and a search bar. Below this is the 'Cisco Commerce Workspace' header with 'Help' and 'Training' links. The main content area starts with a 'Welcome' message and a 'Workspace Preferences' link. There are two main sections: 'Quick Start' and 'Quick Links'. The 'Quick Start' section contains two buttons: 'Create Deal' and 'Create Quick Quote'. A green arrow points to the 'Create Deal' button. The 'Quick Links' section contains links for 'My Partner Profile', 'My Reports', 'My Enrollments', and 'View All Promotions', along with a 'Preferred Language' dropdown set to 'English' and a disclaimer. Below these is the 'Deals and Quotes' section, which includes a filter dropdown set to 'Deals Created By Me', a 'Filter by Deal Status' dropdown set to 'All', and a 'Search' button. Below the filters is a table with columns: Deal ID, Deal Status, Deal Name, Promotion Name, End Customer Name, CAM E-Mail id, AM E-Mail id, Next Approver, and Next Partner Action. The table contains four rows of data.

Deal ID	Deal Status	Deal Name	Promotion Name	End Customer Name	CAM E-Mail id	AM E-Mail id	Next Approver	Next Partner Action
13409807	Approval In P...	Test PP-COEVI07892-150...	COEW - Colla...	TOTAL RAFFINAGE MARKETING	mibraun	kheron	jumpig	
13408407	Approved	Test Seedt/First Time...	Seedt/First...	TOTAL RAFFINAGE MARKETING	mibraun	kheron		Place Order
13225080	Not Submitted	aaaa						Submit
12732202	Closed	WFLNFR-BT	NFR for Auth	BT FRANCE	elametri	etrancol		

1. Once logged into CCW you will need to select “ Create Deal.”

Cisco Commerce Workspace

[Open a Case](#) | [Training](#) | [Support & FAQs](#)

Create a Deal

Deal Name *

*Required Field

[Contacts](#) | [Feedback](#) | [Help](#) | [Site Map](#) | [Terms & Conditions](#) | [Privacy Statement](#) | [Cookie Policy](#) | [Trademarks](#)

1. Enter the deal name. This can be anything that helps you to identify the deal.
2. Select “Create Deal.”

Click on the box to auto fill your contact information

Who's Involved | About the Deal | Promotions | Quote | Review and Submit | Order

* Required Field

Save Save and Continue >

Partner [View Partner Profile](#)

ALEXANDER OPEN SYSTEMS, INC

Partner Name and Address 12980 FOSTER ST STE 300
OVERLAND PARK, KS 66213
UNITED STATES

☐ Use the Contact Details in my User Profile

Partner Contact *

First Name *

Last Name *

Title *

Phone Number *

Email Address *

End Customer

Add Address

English Chinese Japanese Korean

NEW Faster Search (English Only)

Customer Contact *

First Name *

Last Name *

Title *

Phone Number *

Email Address *

Company Website *

Cisco

Cisco Channel Account Manager (CAM) *

Select CAM

[Find your CAM with the CAM Locator.](#)

Cisco Account Manager (AM)
(To be assigned by Cisco.)

Save Save and Continue >

You will be brought to the first tab “Who’s Involved.” This tab is critical for when you will be placing the order since all partner and customer information is pulled from this page.

- Select the End Customer company from the “Add Address” box
- Fill in all the fields that have a red asterisk (*)
- After completing all fields, select “Save to Continue”

*Also note you can return to any tab and edit the information.

Export
Print
Email
Share
Delete
Save as Estimate
Debug

Who's Involved
About the Deal
Promotions
Quote
Review and Submit
Order

Deal Quote *

Deal Description:

Intended Use: [Definitions](#)

Resale

Deal Category: [What's this?](#)

Other - Resale/Infrastructure

Deal Source:

Get Refreshed

Deal Type:

Purchase

Expected Closing Date: *

28 Jul 2014

Probability of Closing:

25% - Low

Do you want to receive an Easy Lease quote for this deal?

No

Expected Cisco Hardware and Software List Amount: *

\$ 50.00

Expected Cisco Service List Amount:

\$.00

Total Expected Amount:

\$ 50.00

User currency dictated by promotion rules and country policy

[Currency Converter](#)

Expected Technology Mix *

Technology Name % of Technology Mix

COLLABORATION-Co... 100

Competitors

Competitor Name Technology Name

Save
Save and Continue >

“About the Deal” Tab

- Here you enter the specifics for the deal
- Then select the “Save and Continue”

Who's Involved | About the Deal | **Promotions** | Quote | Review and Submit | Order

Select a Promotion > Enter Qualifying Information

Select a Promotion that will best support your Deal.

Select or View a Promotion
Currently Selected Intended Use: Resale

Promotion Code and Information	Price List	Start Date	End Date	Deadline to Register Deal	Intended Use
<input type="radio"/> Opportunity Incentive Program (OIP)					
<input type="radio"/> NFR					
<input checked="" type="radio"/> OTHER					
<input type="radio"/> Solutions Incentive Programs (SIP)					
<input type="radio"/> Network Academy					
<input type="radio"/> CMSP					
<input type="radio"/> PSPP					
<input type="radio"/> TIP					
<input type="radio"/> TECHNOLOGY					

[Show/Hide XMLs](#)

“Promotions” Tab

- Click on the plus sign next to “Other”

Select or View a Promotion
Currently Selected Intended Use: Resale

Promotion Code and Information	Price List	Start Date	End Date	Deadline to Register Deal	Intended Use
<input checked="" type="radio"/> Opportunity Incentive Program (OIP)					
<input type="radio"/> NFR					
<input type="radio"/> PUBLICSECTOR					
<input type="radio"/> SERVICE					
<input checked="" type="radio"/> OTHER					
<input type="button" value="Select"/> Collaborate Now PP-COEV107595-150725 View Promotional Details	Global Price List US Availability	02-Jul-2014	25-Jul-2015	25-Jul-2015	Managed Service, Resale
<input type="button" value="Select"/> Video Collaboration - US PP-TPV180047-140125 View Promotional Details	Global Price List US Availability	09-Sep-2013	25-Oct-2014	26-Jul-2014	Resale
<input type="button" value="Select"/> Collaboration Breakaway Plus US - Upgrade PP-Coll84788-140726 View Promotional Details	Global Price List US Availability	06-May-2013	25-Oct-2014	26-Jul-2014	Resale, Managed Service

Select a “Collaborate Now” Promotion From the List

Who's Involved | About the Deal | **Promotions** | Quote | Review and Submit | Order

[Select a Different Promotion](#) > Enter Qualifying Information Save Save and Continue >

Collaborate Now US
PP-COEW107595-150725

You have selected the Cisco Collaborate Now promotion. The opportunity must meet at least one of the following eligibility criteria: 1. Upgrade of an existing Cisco call control customer 2. Displacement of competitive call control, video or conferencing 3. BE6K Solution for Small or Midsize Business 4. Video Solution*

2. Displacement of competitive ca...

Which competitor are you displacing?*

Polycom

Please provide the name and/or email address of the Cisco Sales Account Manager with whom you are working.*

Darrell Jones

Identify the end customer sites included in this opportunity; name all cities and states/territories. For maximum protection also provide other customer install locations in addition to the primary address.*

Dallas, TX 76345
Washington, DC 53472
Denver, CO 53478
2456 Jones Valley Drive
New York, NY 32890

Attachments

Warning - You can only upload attachments that are 10MB or less

	Name	Size	Uploaded By	Date Uploaded	File Type
	Upload a file...				

Save Save and Continue >

It is important to include **all** customer sites included in the opportunity.

You Will Be Brought to the Promotions Tab

- Answer **all** partner qualification questions
- Click “Save and Continue”

Who's Involved About the Deal Promotions **Quote** Review and Submit Order

Billing information is Optional

Billing Information

Price List
Global Price List US Availability

Billing Information: ⓘ

ALEXANDER OPEN SYSTEMS ⓘ

Address: 116 INVERNESS DRIVE EAST SUITE 375
C/O CASTLE PINES CAPITAL
ENGLEWOOD, CO
US

Operating Unit: CISCO US OPERATING UNIT

Buy Method

Buy Method:
-- Please Select --

Partners located in the European Economic Area and Switzerland click [here](#)

Install Information

Install Site: *

Either enter a partial Install Site address:

Country: *
UNITED STATES

OR

[Add a Full Install Site...](#)

Please specify an **Install Site**. A full install site is optional at this stage, however the minimum of a country is required. You can change the default install site for new items at any time.

Service To Information

Service To: * ⓘ

Either enter a partial Service To address:

Country: *
UNITED STATES

OR

[Add a Full Service To...](#)

Please specify an **Service To**.

Save and Continue

Quote Tab

- Select a “Buy Method” and an “Install Site”
- Then select the “Save and Continue” button

The screenshot shows the Cisco CCW Quote interface. At the top, there are tabs for 'Who's Involved', 'About the Deal', 'Promotions', 'Quote' (selected), 'Review and Submit', and 'Order'. Below these are sub-tabs: 'Items', 'Discounts & Credits', 'Install Site', and 'Billing'. A red arrow points to the 'Import a Saved Configuration...' link in the 'Imported Quotes' section. Below this link is a form to 'Add a SKU to Your Quote' with a text input field, a 'Qty' dropdown, and an 'Add' button. A yellow banner below the form states: 'Please check [availability](#) for remanufactured products on your Quote.' Below the banner are links for 'Expand All' and 'Collapse All', a 'Filter By' dropdown set to 'All Items', and a 'Buy Method' dropdown set to 'Select one' with 'Validate', 'Remove Selected', and 'Detach services' buttons. At the bottom, there is a table header with columns: 'Hardware, Software and Services', 'Estimated Lead Time*', 'Unit List Price', 'Qty', and 'Extended List Price'. The table body shows 'No records found'. At the very bottom, there is a pagination bar with '20' items per page, 'Page 1 of 1', and 'First' and 'Last' buttons.

Next You Will Need to Upload the Bill of Materials (BOM) Into CCW

- Select the “Import a Saved Configuration”

DEAL ID
13410893

QUOTE NUMBER
4708395676

QUOTE STATUS
Not Submitted

EXPIRY DATE
N/A [View History](#)

[View Quote History](#) | [View Contact Details](#)

Import Saved Configuration

Available Config Tools

	Name	Description
Select	Next Generation Configuration Tool (Preferred)	A web based application that enables configuration of Cisco Hardware, Software and Services. Includes real time configuration validation, user selectable modes for attaching services and configuration sharing capabilities.
Select	Estimate	Estimates, can be imported to quote. Estimate import will bring Bill of Material (Item, Qty, duration) from the estimate for quoting. Discounts will be applied on lines during the quote pricing and validation process.
Select	Dynamic Configuration Tool (DCT)	Dynamic Configuration Tool enables online configuration of Cisco products and offers detailed compatibility information and intelligent feedback to streamline the ordering process. <div> Dynamic Configuration Tool is scheduled to retire in May 2014. Please use Cisco Commerce Workspace (CCW) and Build and Price now for all configurations. For Training materials, visit Partner Central or Distribution Central. Questions? Please contact your Account Manager or Cisco Customer Service. </div>
Select	ConfigSet from MLC / ICT / Netform-DX	ConfigSets are created using the Integrated Configuration Tool (ICT), Multi Line Configurator (MLC) or DesignXpert® by Netform. ICT & MLC are web based tools that allows partners to create and manage their Cisco hardware and service configurations. DesignXpert® is an integrated desktop tool for discovery, design, & configuration of integrated communications network solutions. <div> Integrated Configuration Tool will be retired on March 31, 2014. Please use Cisco Commerce Workspace (CCW) and Build and Price now for all configurations. For Training materials, visit Partner Central or Distribution Central. Questions? Please contact your Account Manager or Cisco Customer Service. </div>
Select	Copy Existing Quote BOM	Import the Bill of Materials from a quote previously created in CCW to help you quickly build a validated solution.
Select	BOM Upload	You can upload a BOM file that is in XLS/XLSX , CSV , TSV format click on file types to download the template..

Cancel

The Estimated Lead time for a product may increase once it is fully configured.

Total List Price
.00

You will need to select the configuration tool that you have created your BOM in. We have chosen Excel upload in this example.

[View Quote History](#) | [View Contact Details](#)

Export Print Email Share Delete Save as Estimate Debug

Who's Involved About the Deal Promotions Quote Review and Submit Order

⚠ Lines will be priced individually and added as separate lines if they cannot be added as configurations. This may take slightly longer because of the number of lines present in the file. [View estimated average wait times.](#)

Search

Only part number, quantity and duration are uploaded from Excel BOM files.

Select File:

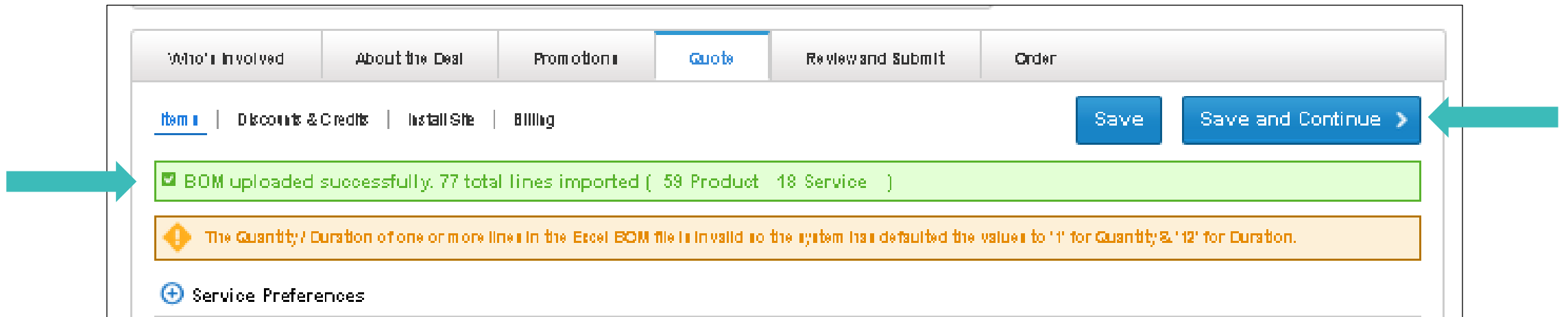
Copy of Collaborate NOW test BOM **Choose File**

☒ Import Lines as assembled configuration (Unchecking this will import all your items as major lines). Click [here](#) for more information.

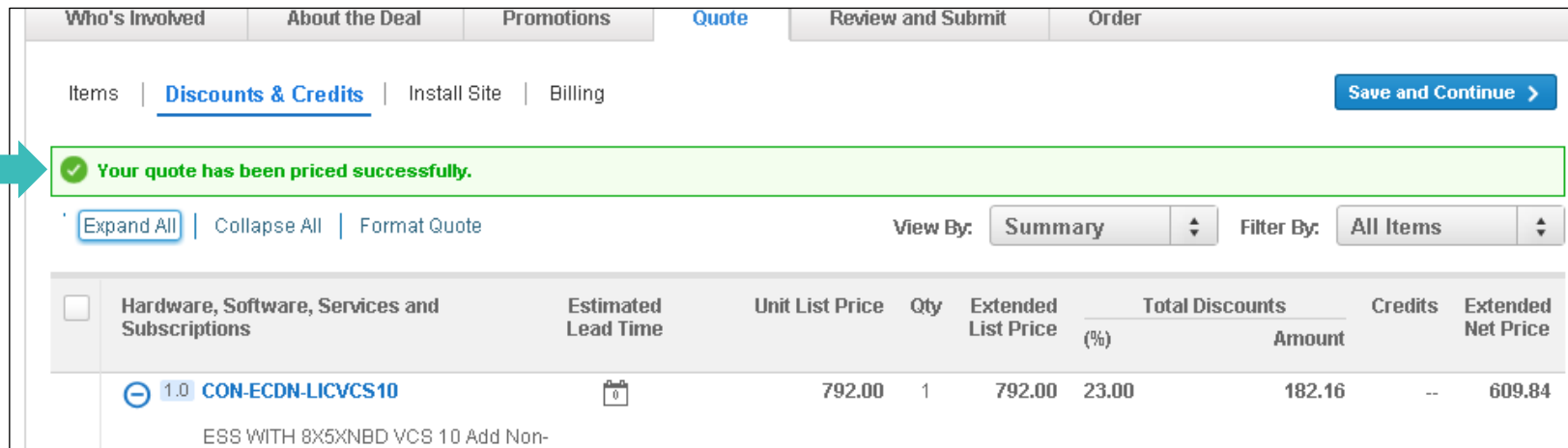
Upload File **Clear** **Cancel**

Select your saved file by clicking "Choose File"

Upload your BOM by clicking "Upload File"



- You see that the “BOM has been uploaded successfully”
- Validate the BOM and then click the “Save and Continue” button



The screenshot displays a web interface for managing a quote. At the top, there are tabs: 'Who's Involved', 'About the Deal', 'Promotions', 'Quote' (highlighted in blue), 'Review and Submit', and 'Order'. Below these tabs, there are sub-tabs: 'Items', 'Discounts & Credits' (highlighted in blue), 'Install Site', and 'Billing'. A blue button labeled 'Save and Continue >' is located in the top right corner. A green banner with a checkmark icon and the text 'Your quote has been priced successfully.' is prominently displayed. Below the banner, there are links for 'Expand All', 'Collapse All', and 'Format Quote'. To the right of these links are dropdown menus for 'View By: Summary' and 'Filter By: All Items'. The main content area is a table with the following columns: 'Hardware, Software, Services and Subscriptions', 'Estimated Lead Time', 'Unit List Price', 'Qty', 'Extended List Price', 'Total Discounts (%)', 'Credits', and 'Extended Net Price'. The table contains one row with the following data: 'CON-ECDN-LICVCS10' (with a minus icon and '1.0' next to it), an estimated lead time of 0 days, a unit list price of 792.00, a quantity of 1, an extended list price of 792.00, a total discount of 23.00%, credits of 182.16, and an extended net price of 609.84. Below the table, there is a note: 'ESS WITH 8X5XNBD VCS 10 Add Non-'. A red arrow points to the green success banner.

Who's Involved | About the Deal | Promotions | **Quote** | Review and Submit | Order

Items | **Discounts & Credits** | Install Site | Billing Save and Continue >

✓ **Your quote has been priced successfully.**

[Expand All](#) | [Collapse All](#) | [Format Quote](#) View By: **Summary** Filter By: **All Items**

Hardware, Software, Services and Subscriptions	Estimated Lead Time	Unit List Price	Qty	Extended List Price	Total Discounts (%)	Credits	Extended Net Price
1.0 CON-ECDN-LICVCS10 ESS WITH 8X5XNBD VCS 10 Add Non-	0	792.00	1	792.00	23.00	182.16	609.84

- Next, you should see that the quote has been priced successfully
- Click “Save and Continue”

View Quote History | View Contact Details

Export Print Email Share Delete Save as Estimate Debug

Who's Involved About the Deal Promotions Quote **Review and Submit** Order

[Submit Quote for Approval](#)

Deal Information:

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

Quote Summary

Configured Hardware, Software and Subscription list total:	475,440.73
Configured Service List Total :	
Special Items List Total:	.00
Discounts:	(--)
Product Total Discount :	(--)
Service Total Discount :	(--)
Credits :	--
Adjustments:	--
Quote Total :	--

All prices shown in USD

[View Deal Consumption Total](#)

You will be taken to the Review and Submit tab. This page is a summary of the deal.

- When you are ready for the deal to be reviewed, click “Submit Quote for Approval”
- The deal will enter the approval process

Thank you for submitting your Quote.

You will be notified via email once Cisco has approved this quote.

Deal ID # 13410004	Created by	on
------------------------------	------------	----

Selected Promotion:
COEW - Collabrate Everywhere
PP-COEW107892-150725

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[View Submitted Quote](#)

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- Expected approval process time is 2 to 3 days
- Approved deals will automatically show the promotion discounts
 - Use the Deal ID to submit your order in CCW
 - If ordering through a distributor, contact your distributor for details

Thank you.

