



# SCC New Quoting for Indirect Resellers

User Guide for Resellers

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## Overview

Welcome to the Cisco Service Contract Center (SCC) New Quoting for Indirect Resellers user guide.

This training guide is intended to show Cisco resellers how to effectively create, modify, share, manage, and send order requests using the SCC New Quoting tool.

## Objectives

At the end of this user guide, you will be able to:

- Log on to SCC New Quoting
- Create, and modify quotes
- Submit order requests to distributors
- Generate a renewal quote
- Manage quotes
- Register quotes
- Contact support

# Lesson 1: Introduction to SCC New Quoting

## What is SCC New Quoting?

SCC New Quoting for Indirect Resellers, formally known as SMS3, consolidates multiple applications into a single quoting tool to deliver a consistent global, scaleable and streamlined method to configure, order, manage and register new and renewal services based on the Enterprise Price List. A single user interface provides access to key service contract information, enabling you to respond quickly and easily to expiring contracts with accurate information.

## Objectives

At the end of this lesson, you will be able to:

- Describe the purpose and benefits of SCC New Quoting
- Obtain a Cisco.com User ID
- Log on to SCC New Quoting
- Navigate the SCC New Quoting pages
- Access your reseller preferences

## What are the Benefits of SCC New Quoting?

- The consolidation of SCC registration and SCC renewal simplifies the quoting process and reduces administrative work, freeing up your sales teams to focus on selling
- If you are able to provide sufficient information up front, new tool capability may eliminate back end registration and allow same day contract entitlement
- The move away from packaged services will mean an end to token and shell administration; the reduction in price deviations will speed up your work flow
- New pick list functionality makes it easier to find information

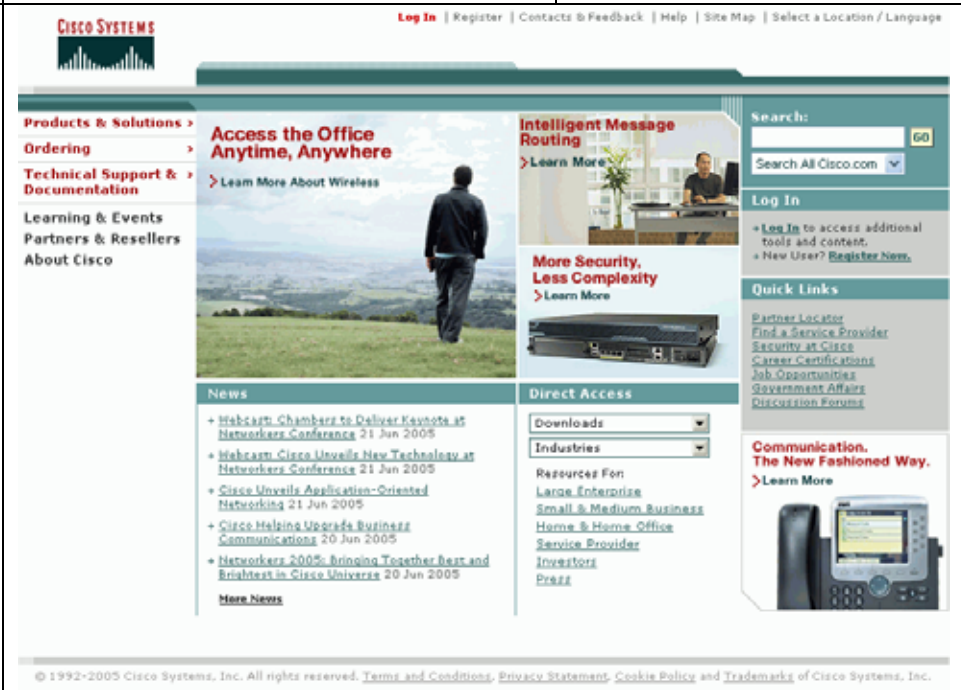
## Obtaining a Cisco.com User ID

In order to access SCC New Quoting, you must first obtain a Cisco.com User ID (CCO User ID). The procedure below describes how to obtain a CCO User ID.

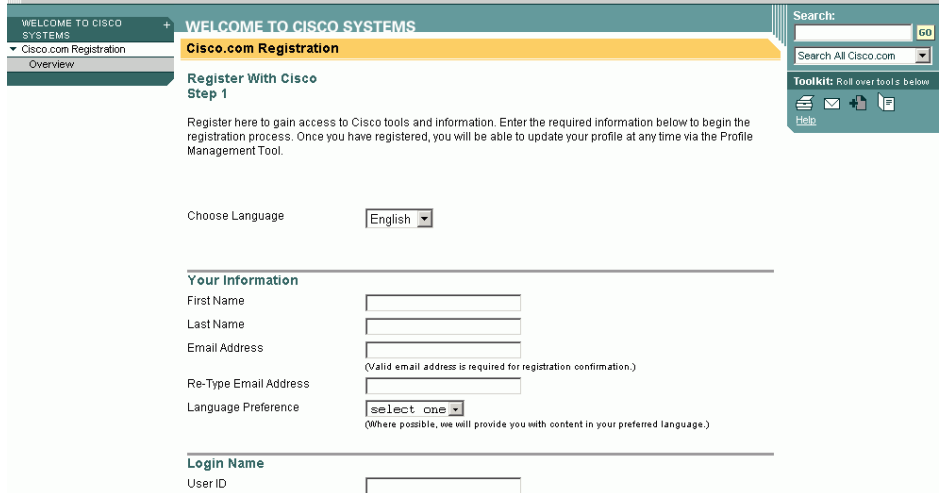
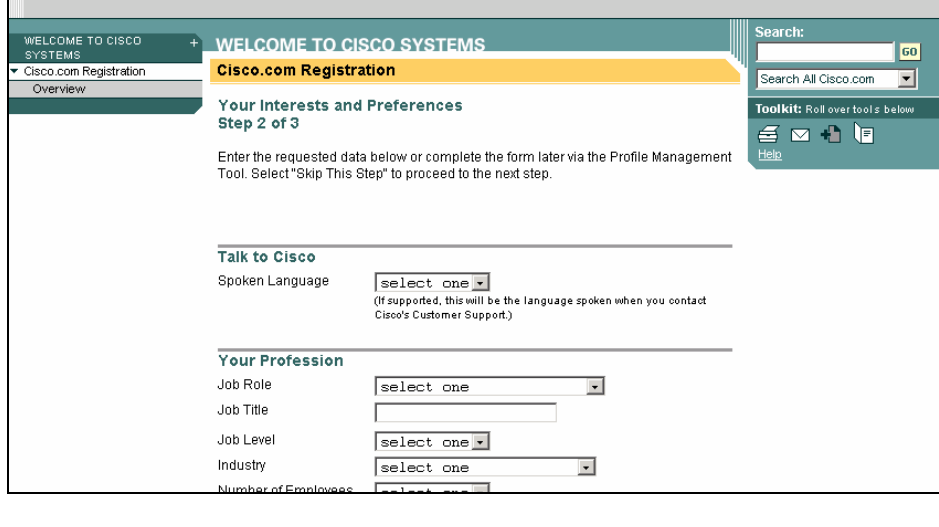


## Procedure: Obtaining a CCO User ID

Step	Action	Result or Note
1.	Open your Web browser and navigate to <b>www.cisco.com</b> .	The <b>Cisco.com Home</b> page displays.
2.	From the <b>Cisco.com</b> home page, click the <b>Register Now</b> link under the Log In section located in the upper right corner of the page.	The <b>Register with Cisco-Step 1</b> page displays.



SCC New Quoting for Indirect Resellers

Step	Action	Result or Note
		
3.	<p>Complete the page and make sure you click the check box next to <b>Cisco Channel Partner or Authorized Reseller</b>. Click the <b>Submit</b> button.</p>	<p>The <b>Your Interests and Preferences-Step 2 of 3</b> page displays.</p>
		
4.	<p>Enter the requested information on the page. When you are finished, click the <b>Submit</b> button.</p>	<p>The <b>Complete Registration-Step 3 of 3</b> page displays. Follow the instructions shown on the page. Once you receive your email confirming your information, you will have a CCO User ID.</p>

Step	Action	Result or Note

**Note** You must click the activation link in the email confirmation mail and complete the **Partner Self-Service** procedure before your CCO User ID will be enabled.

## Log on to SCC New Quoting

Now that you have your CCO User ID, you can log on to SCC. You will be denied access if:

- Your password is not the one affiliated with your user name.
- Your password has expired.
- The system administrator has disabled your user account.

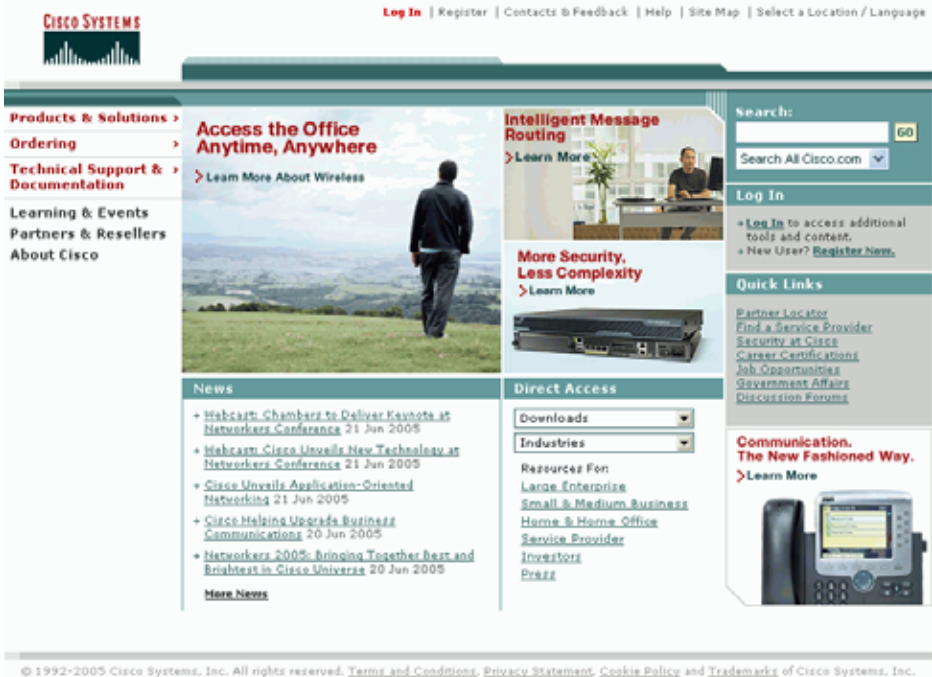
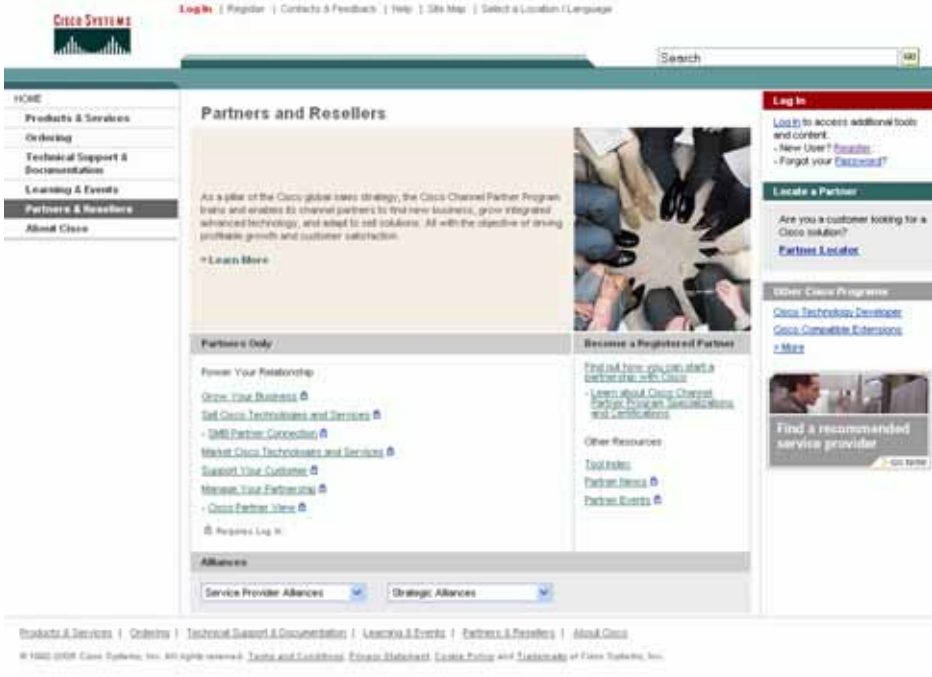
If you did not choose either the Cisco Channel Partner or Authorized Reseller option, you will only receive Guest Level access and will not be able to access many of the tools described in this user guide.



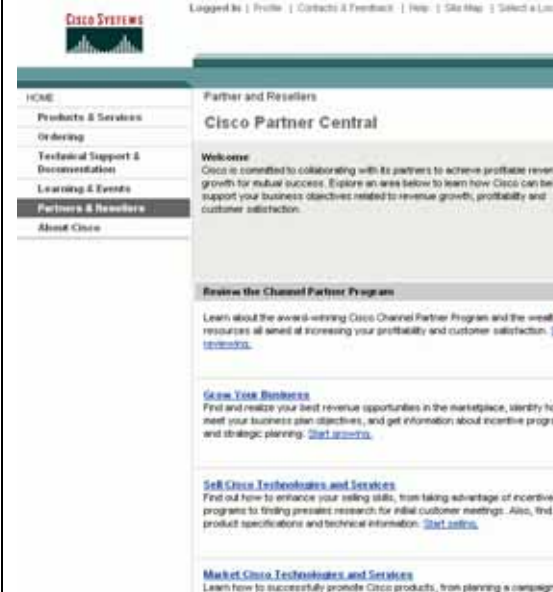
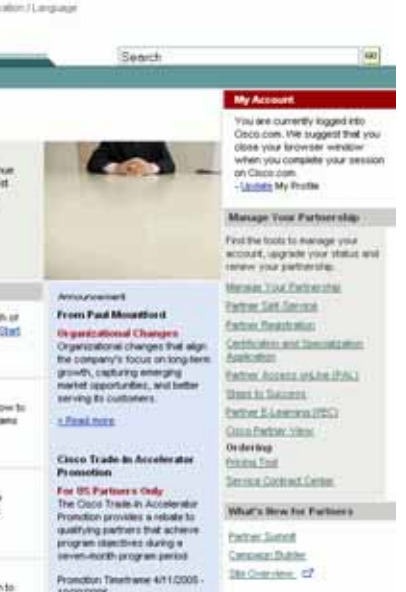


### Procedure: Log on to SCC New Quoting


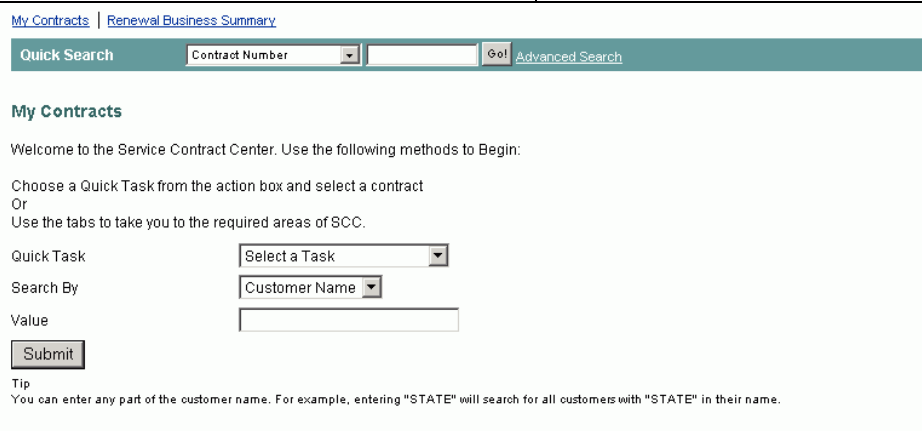
Step	Action	Result or Note
1.	Open your Web browser and navigate to <b>www.cisco.com</b> .	The <b>Cisco.com</b> home page displays.

SCC New Quoting for Indirect Resellers

Step	Action	Result or Note
		<p><b>Result or Note</b></p>
2.	<p>From the Cisco.com home page, choose the <b>Partners &amp; Resellers</b> link.</p>	<p>The <b>Partners &amp; Resellers</b> Start page displays.</p>
		<p><b>Result or Note</b></p>
3.	<p>Click the <b>Log In</b> link, and log in using your CCO User ID and password.</p>	<p>The Partners &amp; Resellers page displays the <b>Service Contract Center</b> link located under the Ordering section on the far right of the page.</p>

SCC New Quoting for Indirect Resellers

Step	Action	Result or Note
		
4.	Click the <b>Service Contract Center (SCC)</b> link.	The <b>Service Contract Center (SCC)</b> landing page displays.
		
5.	From the Service Contract Center page, click the <b>Login to SCC</b> link.	The <b>Enter Network Password</b> window displays. Your login ID will be your Cisco.com (user ID and password.)

Step	Action	Result or Note
		
6.	<p>Enter your Cisco.com user name and password, and then click the <b>OK</b> button.</p>	<p>The <b>My Contracts</b> page displays in your Web browser window. This is your Service Contract Center home page.</p> <p>Minimum Browser Requirements:</p> <ul style="list-style-type: none"> <li>• Internet Explorer 4.01 Service Pack 1 or later</li> </ul> <p>HTML Browser Recommendations for Optimal Performance:</p> <ul style="list-style-type: none"> <li>• Internet Explorer 6.0</li> </ul>
		

## SCC Navigation Overview

This overview shows the location and flow of the main functions in SCC New Quoting. Detailed functionality and benefits will be explained in later in the guide.



## Contracts Tab

The Contracts tab automatically displays after you log into SCC. From the Contracts tab you may view existing contracts by customer name or contract number, and check your Renewal Business Summary reports. Also, you may request serial number information by using the Serial Number Information Finder (SNIF) tool and view the status of your SNIF request.

The screenshot shows the 'Service Contract Center' interface. At the top, there are navigation tabs: 'CONTRACTS', 'QUOTING & ORDERING', 'PRICING & AVAILABILITY', 'PACKAGED SERVICES', and 'ADMINISTRATION'. Below these are links for 'My Contracts', 'Renewal Business Summary', 'SNIF', and 'View Request Status'. A 'Quick Search' section includes a dropdown for 'Contract Number', a search input field, and an 'Advanced Search' link. The 'My Contracts' section contains a welcome message and instructions: 'Welcome to the Service Contract Center. Use the following methods to Begin: Choose a Quick Task from the action box and select a contract Or Use the tabs to take you to the required areas of SCC.' Below this are form fields for 'Quick Task' (with a 'Select a Task' dropdown), 'Search By' (with a 'Customer Name' dropdown), and a 'Value' input field. A 'Submit' button is located below the 'Value' field. A 'Tip' section at the bottom states: 'You can enter any part of the customer name. For example, entering "STATE" will search for all customers with "STATE" in their name.'

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**Note** If you have access to less than 10 contracts, the **Contract Summary** page will display with a contract overview.

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## Quoting and Ordering Tab

From the Quoting and Ordering tab, you can create a quote for a new service contract, add to an existing contract, and generate a renewal quote to extend an expiring contract. You may also use the Quote Manager to make changes to your existing quotes.

## SCC New Quoting for Indirect Resellers

The screenshot shows the 'Service Contract Center' interface with the 'PRICING & AVAILABILITY' tab selected. The main heading is 'Generate a Quote', with links for 'Quote Manager', 'Quote Wizard', 'Import Quote File', and 'Update Rejected Site Address'. Below this is a 'Quick Search' bar with a 'Contract Number' dropdown and a 'Go!' button. The 'Generate a Quote' section explains that users can create service quotes online and submit an electronic purchase order. A 'Please note' section states that users must sign a 'Service Contract Center Enrollment Agreement'. Two sections of radio buttons are provided: 'For products not covered by a Cisco service contract' (with options 'Create a new service contract' and 'Add to an existing service contract') and 'For products currently covered by a Cisco service contract' (with option 'Renewal Quote (extend an expiring service contract)'). A 'Submit' button is at the bottom.



## Pricing and Availability Tab

From the Pricing and Availability tab, you can create service contract pricing estimates on Cisco products. You may also use the Service Availability Matrix (SAM) tool to verify that a particular service level is available for a specific product in a specific location globally.

The screenshot shows the 'Service Contract Center' interface with the 'PRICING & AVAILABILITY' tab selected. The main heading is 'Service Pricing', with a link for 'Service Availability Matrix'. Below this is a 'Quick Search' bar with a 'Contract Number' dropdown and a 'Go!' button. The 'Service Pricing' section explains that it provides pricing and checks service availability for Cisco's products. The 'Create New Quote' section has a sub-heading 'Step 1: Select Service Level and Location'. A note indicates that required fields are marked with an asterisk. The 'Service Level' dropdown is set to 'Online SMARTnet'. The 'Product Location Country' dropdown is set to 'UNITED STATES'. A note states: 'To Verify Service Availability please include the Product Location City, State/Region, Zip/Postal Code'. Below this are fields for 'Product Location City', 'Product Location State/Province' (dropdown set to 'Select state'), and 'Product Location Zip/Postal Code' (with a note '(Official Postal Sites: US Canada)'). There is also a 'Quote Notes (Comments)' text area. At the bottom, 'Set Reseller Price By' is set to 'Discount Off List' and 'Discount/Markup Percentage' is set to '0 %'.

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**Note** Service Pricing and Availability is checked automatically when you begin the Create New Quote process.

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## Packaged Services Tab

From the Packaged Services tab, you can register Cisco products under a service contract using a Packaged Services registration number. Delete this!

**Service Contract Center**

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[CONTRACTS](#)    [QUOTING & ORDERING](#)    [PRICING & AVAILABILITY](#)    [PACKAGED SERVICES](#)    [ADMINISTRATION](#)

[SCC Registration](#)    [Packaged Services Registration](#)    [Packaged Service Categories](#)

Quick Search:  Contract Number   [Advanced Search](#)

Logged in as: cedisti

**Cisco SCC Registration**  
 Welcome to the Cisco SCC Registration tool (formerly known as Cisco SMS). This application enables you to register your Cisco hardware and software products and place them under a Cisco service contract.

**NEW LOOK AND FEEL:** You will notice a new user interface that has been redesigned to better align and meet the needs of Cisco reseller and distributor business processes. We recommend you visit the [Cisco SCC home page](#) for more information and to access training materials.

To proceed, please select the task that you wish to perform:  
[SCC Registration Search](#): View registration shell details and execute registrations.  
[CCO Maintenance](#): Set up and assign reseller CCO ID accounts - enabling them access to their registration shells.  
[Virtual Token Inventory](#): View all virtual token numbers and corresponding purchase order numbers currently in your inventory.

**Note** Packaged Services is available to (insert partner level information here). Packaged Services will no longer be available after Spring of 2006.



## Administration Tab

From the Administration tab, you can setup establish your reseller preferences. You can also register for additional contracts associated with your company.

**Reseller Preferences**    [Register Contracts](#)    [Customer Initiated Quoting](#)

Quick Search:  Contract Number   [Advanced Search](#)

**Establish Preferences**

**Confirm reseller information**

**Contact Address**

PRAVEEN US  
 280 NORTH MATHILDA AVENUE  
 SUNNYVALE, CA 94086    [Edit](#)  
 UNITED STATES

**Select your primary distributor**

Primary	Distributor	Account Number(s)
<input type="radio"/>	Comstor US	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>
<input checked="" type="radio"/>	Ingram Micro US	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>
<input type="radio"/>	Tech Data US	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>

**Enter your order confirmation email address(es)**

## Confirm Reseller Information and Set Your Default Distributor

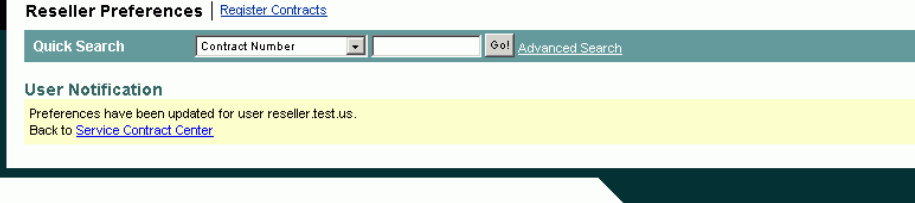
You can confirm your reseller information and set your default distributor by accessing the **Reseller Preferences** located in the SCC New Quoting **Administration** tab.



### Procedure: Confirm Reseller Information and Set Your Default Distributor

Step	Action	Result or Note
1.	From the <b>SCC New Quoting Home</b> page, click the <b>Administration</b> tab located in the top right of the page.	The <b>Establish Preferences</b> page displays. <b>NOTE:</b> If the Establish Reseller Preferences page is not displayed, click the <b>Reseller Preferences</b> link.
	<p>The screenshot shows the 'Reseller Preferences' page with the following elements:</p> <ul style="list-style-type: none"> <li>Navigation tabs: Reseller Preferences (selected), Register Contracts, Customer Initiated Quoting</li> <li>Search bar: Quick Search (Contract Number dropdown), Go, Advanced Search</li> <li>Section: Establish Preferences</li> <li>Section: Confirm reseller information</li> <li>Section: Contact Address (PRAVEEN US, 260 NORTH MATHILDA AVENUE, SUNNYVALE, CA 94086, UNITED STATES, Edit link)</li> <li>Section: Select your primary distributor (table with columns: Primary, Distributor, Account Number(s))</li> <li>Section: Enter your order confirmation email address(es) (sms-renewals@cisco.com, Update button)</li> </ul>	
2.	Confirm that the Reseller contact address is correct	
	If...	Then...
	The contact information is correct,	Go to Step 3.

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Step	Action	Result or Note
	<p>The preferred bill to is not yet selected, or the contact information is not correct,</p> <p>Click the <b>Edit</b> link and choose a default reseller contact address from the options available, then click the <b>Update Contact Address</b> button.</p>	<p>The reseller contact information is updated.</p>
3.	<p>Return to <b>Reseller Preferences</b> page and choose your default distributor by clicking the radio button next to the primary distributor name</p>	<p>The default distributor is selected. You can also add the distributor account number in the <b>Account Number(s)</b> field.</p>
4.	<p>Enter the e-mail address where you would like your confirmations sent.</p>	<p>Your order confirmation will be sent to this e-mail address.</p>
5.	<p>Click <b>Update</b>.</p>	<p>The User Notification page confirms that the preferences have been updated.</p>
	 <p>The screenshot shows the 'Reseller Preferences' page with a search bar containing 'Contract Number' and an 'Advanced Search' button. Below the search bar is a yellow notification box with the text: 'User Notification: Preferences have been updated for user reseller.test.us. Back to Service Contract Center'.</p>	
	<p>Click the <b>Back to Service Contract Center</b> link to return to SCC.</p>	<p>The <b>My Contracts</b> page displays.</p>



## On your own Exercise 1: Log on, and set your Reseller Preferences

### Instructions

Try logging on to SCC New Quoting. After you do this, verify your reseller information. Make any changes that are necessary. After completing the exercise, try answering the questions below.

### Questions

1. What must you do before you can log on to SCC?
2. What SCC tab must you click to create a new quote?
3. How do you access your reseller preferences?

---

**Note** The answers to these questions are located in the back of the User Guide.

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## Lesson 2: Quoting and Ordering

How do you create a new service contract using SCC New Quoting? This lesson examines how to create, edit, add to, and submit order requests on service quotes.

### Objectives

At the end of this lesson, you will be able to:

- Describe the benefits of creating a partial quote
- Describe the benefits of creating a complete quote
- Create a new service quote
- Add products to a quote
- Submit an order request to your distributor

### Creating a New Service Quote

SCC New Quoting allows you to create both **complete** and **partial** quotes. Entering all the required install site and serial number information will generate a complete quote. Creating a complete quote allows SCC New Quoting to complete the registration process automatically.

The **partial** quoting feature allows you to create a service quote without requiring install site or serial number information. The partial quoting feature maintains “as is” business process requirements for packaged services.

**Note:** Partial quoting is only available in the United States.

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**Note** The missing partial quote information must eventually be entered using the Registration Wizard in order to complete the contract entitlement process. Please go to lesson 4 for more information on the Registration process.

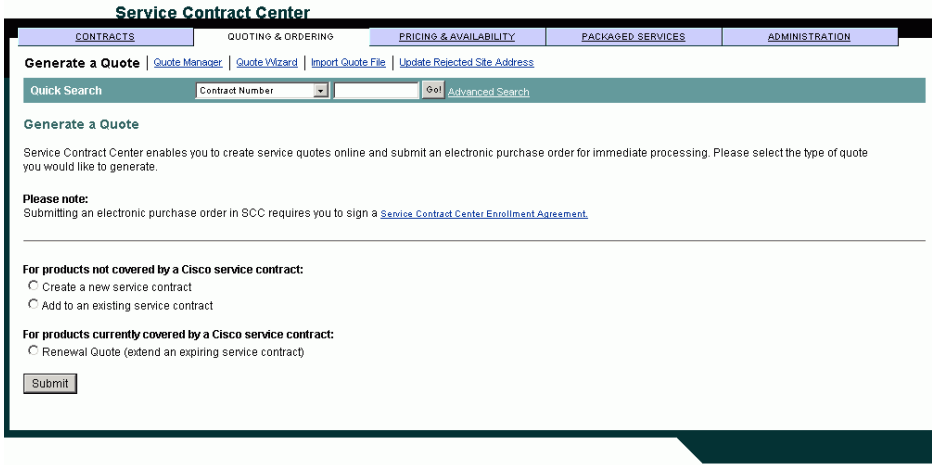
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### Procedure: Creating a New Service Quote

Step	Action	Result or Note
1.	From the <b>SCC New Quoting</b> home page, click the <b>Quoting and Ordering</b> tab.	The <b>Generate a Quote</b> page displays.

# SCC New Quoting for Indirect Resellers

Step	Action	Result or Note
		
2.	Click the <b>Create a New Service Contract</b> option.	The Create a New Service Contract option is selected.
3.	Click the <b>Submit</b> button.	The <b>Service Pricing</b> page displays. The Service Pricing page provides service contract pricing and checks service availability for Cisco products. <b>Note:</b> Service level and country are required fields for verifying service pricing. All other fields are optional.

SCC New Quoting for Indirect Resellers

Step	Action	Result or Note
4.	Choose the Service Level that you want the equipment covered under from the <b>Service Level</b> drop-down menu. If you do not see your desired service level, click the Feedback link to open a support case. In most cases, the reason why you cannot view a specific service level is because your <b>Cisco.com User ID</b> is not associated with the service level.	The target service level is displayed. Note: an * indicates a required field.
5.	Choose the <b>Product Location Country</b> from the drop-down list.	The Product Location Country is displayed.
6.	Choose a Distributor from the Distributor drop-down list.	The Distributor is displayed.
7.	Enter the <b>Production Location City</b>	<b>Note:</b> Entering the Production location city, state/province, and zip/postal code are optional for generating the quote, but required if you need to verify service availability

SCC New Quoting for Indirect Resellers

Step	Action	Result or Note	
8.	Choose the <b>Production Location State/Province</b> from the drop-down list.	The Product Location Country is displayed.	
9.	Enter the <b>Product Location Zip/Postal Code</b> .	The Product Location Country is displayed.	
10.	Enter any comments in the <b>Quote Notes</b> field.		
11.	Set the <b>End Customer Adjustment (from list)</b> by choosing either the Markup from Cost (+) or the Discount Off List (-) option from the drop-down list.	The default choice is Markup from Cost.	
12.	Enter a value in the <b>Discount/Markup Percentage</b> field. For this example we entered a 10% discount.	<b>NOTE:</b> Entering this value helps you calculate your customer's price based on the discount/markup you entered.	
13.	Scroll down to the <b>Step 2: Add Products or Serial Number by Group</b> section. You can specify the products that you want covered by entering one or more Product IDs or Serial Numbers. Click the appropriate radio button next to either Product IDs or Serial Numbers.	<b>Important:</b> Each Product ID or serial number entered in the field needs to be separated by a comma or a hard return space. A maximum of 4000 characters is allowed.	
	If...	Then...	
	You are entering Product Numbers,	Enter the Product IDs in the Add Products/Serial Number field.	If you do not know the exact product number, click the <b>Product Lookup</b> link.
	You are entering Serial Numbers,	Enter the serial number in the Products/Serial Number field.	

---

**Note** To save time, you can cut and paste multiple product or serial numbers from a text file or spreadsheet.

---

14.	Specify the product service coverage period by clicking the appropriate radio button next to either the <b>Years</b> drop-down list or the <b>Begin and End Date</b> fields.		
	If...	Then...	
	You choose Years,	Choose either 1, 2 or 3 years from the drop-down list	Selecting 2 or 3 years will result in a multi-year discount. The multi-year discount is automatically calculated and applied to the quote.

	You choose Begin and End Date	Enter the begin and end date in the Begin and End Date fields.	Choose this option if you need to identify specific start and end dates. For example, use this option if you need to generate a quote, but won't actually install the equipment until a future date. <b>Note:</b> A minimum coverage of one year is required.
15.	Click <b>Submit</b> .		The <b>Service Pricing Verify</b> page displays.
16.	Verify that the information is correct. If necessary, you can edit the Begin and End Date fields as well as the Quantity field.		If you edit the dates or the quantity, select the quote, and then choose Update Selected Dates/Quantity from the drop-down list.
17.	Choose <b>Save Quote</b> from the drop-down list.		Save Quote is selected. Note: You can also choose the following actions: <ul style="list-style-type: none"> <li>• Add Products</li> <li>• Delete Selected Products</li> <li>• Add Another Site to Quote</li> <li>• Update Selected Dates/Quantity</li> </ul>
18.	Click <b>Submit</b> .		The <b>Quote Wizard</b> page displays the quote information. This page confirms that a new quote has been created. <b>NOTE:</b> If you added a product without a serial number, the Site Status will be set to incomplete.

---

**Note** Quotes are valid for 60 days and will display in SCC New Quoting for only 60 days. After 60 days have passed, it becomes an expired quote and you will not have the ability to query or edit the quote.

---

## Service Pricing Error Page

If you entered an incorrect product or serial number you would receive a **Service Pricing Error Notification**. The Service Pricing Error Notification page displays because pricing could not be obtained due to one or more of the fields containing invalid values. From the Service Pricing Error Notification page, you can:

- Edit the **Value** and **Quantity** fields
- Access the Product Lookup Tool
- Delete invalid fields

After resolving the errors, click **Submit** to revalidate the quote. An example of a Service Pricing Error Notification page is shown below.

Service Pricing | [Service Availability Matrix](#)

Quick Search  Contract Number   [Advanced Search](#)

### Service Pricing Error Notification

Pricing could not be obtained because one or more fields contain invalid values.  
Please correct or select the invalid fields for deletion and press Submit to revalidate.

Value	Quantity	Error	Delete
			<input type="checkbox"/> Select All
CISCO2851	8S	Invalid quantity entered. Valid quantities are between 1 and 9999.	<input type="checkbox"/>
WVS	1	Invalid Product ID. <a href="#">Product Lookup Tool</a>	<input type="checkbox"/>

---

**Note** If you cut and paste a valid minor line item into the Add Products field that is not mapped to a service level, you may receive an **Invalid Product ID** error message. If you receive this error, verify that the part number is correct. If it is correct, ignore the message and submit the quote.

---

## Modify the Quote and Order Service Using the Quote Wizard

The Quote Wizard allows you make several modifications to your quote, including:

- Add additional access to the quote
- Edit Reseller information

- Create install site
- Grant Quote Access to Distributor
- Delete Site
- Edit End Customer Price
- Edit Quote Dates
- Edit Distributor Account Number
- Email a quote
- Route a quote
- Download a quote

## Grant Additional Contract Access

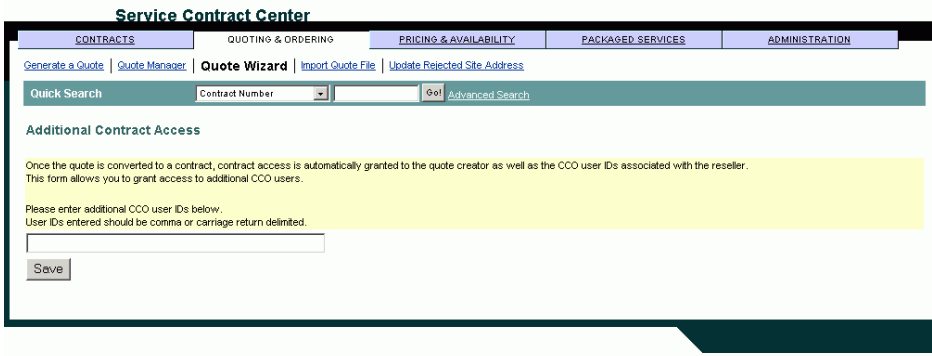
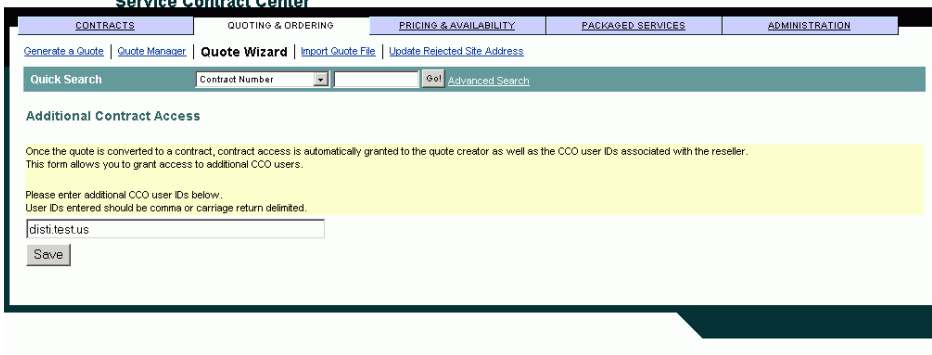

Once the quote is converted to a contract, contract access is automatically granted to the quote creator. You can also grant access to other users that have CCO IDs associated with the Reseller. Granting additional access to the quote improves contract management by reducing the need to route the quote to multiple users. The Additional Contract Access feature also saves you time by eliminating the need to contact Cisco to have additional users added to the quote.



### Procedure: Grant Additional Contract Access

Step	Action	Result or Note
1.	From the Quote Wizard page, click the <b>Additional Contract Access: Edit</b> link.	The <b>Additional Contract Access</b> page displays.

## SCC New Quoting for Indirect Resellers

Step	Action	Result or Note
		
2.	Enter the additional CCO User IDs in the CCO User ID field.	<p>The User IDs must be separated by a comma or a hard (carriage) return.</p> <p>Note: Be careful when granting additional contract access. User IDs cannot be deleted once they are added and saved to the quote.</p>
		
3.	Click <b>Save</b> .	The <b>User Notification</b> page confirms that the CCO User IDs have been saved.
4.	Click the <b>Return to Quote Wizard</b> link.	The Quote Wizard page displays the additional contract access User IDs.
		

## Edit Reseller Information

You can edit your reseller information quickly and easily using the **Edit Reseller Name, Address and Contact Information** features. The Edit Reseller Name and Address feature allows you to select a new reseller address from a list of addresses available in the database. Use the **Edit**

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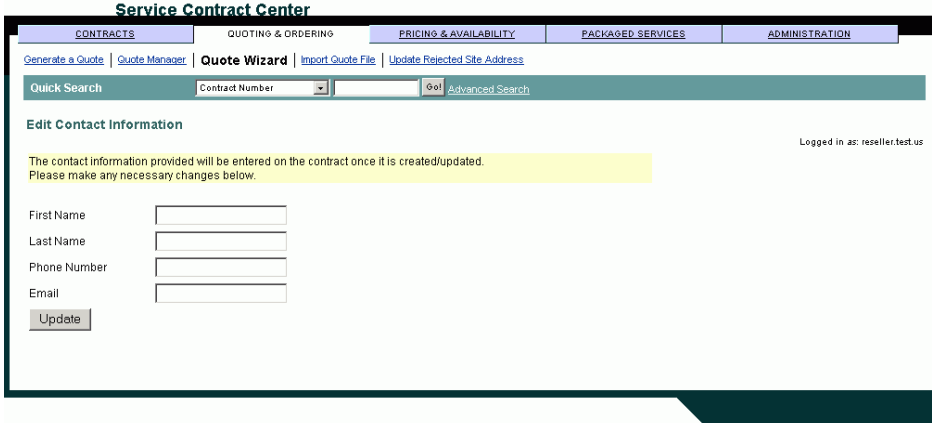

**Contact Information** feature to create or update your reseller contact information. Note: The Reseller information must be set on the Quote Wizard page before you can order service on the quote.



## Procedure: Edit Reseller Name, Address and Contact Information

Step	Action	Result or Note
1.	From the Quote Wizard page, click the <b>Reseller Information Name and Address Edit</b> link.	The <b>Reseller Address</b> page displays.
2.	Select the new address from the <b>Reseller Address</b> list.	
3.	Click <b>Submit</b> .	The Quote Wizard page displays the new reseller name and address.
4.	Click the <b>Contact Information Edit</b> link.	The <b>Edit Contact Information</b> page displays.

## SCC New Quoting for Indirect Resellers

Step	Action	Result or Note
		
5.	Enter the contact's first name, last name, phone number and email in the corresponding fields. Once you are finished, click <b>Update</b> .	The User Notification page confirms that the new contact information has been saved. Click the <b>Return to Quote Wizard</b> link to view the changes.
		

## Create Install Site

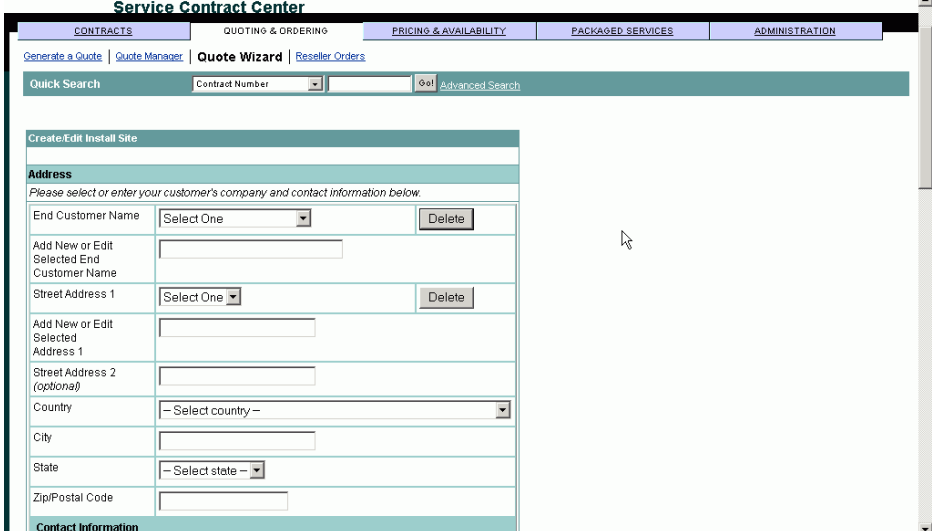
After reviewing the quote information, you notice that a site, which should be covered, was not included. SCC New Quoting allows you to create a new site and add it to the quote.



### Procedure: Create Install Site

Step	Action	Result or Note
1.	From the <b>Quote Wizard</b> page, choose <b>Create Install Site</b> from the Action drop-down list.	Create Install Site displays in the Action drop-down list.
2.	Click <b>Submit</b> .	The <b>Create/Edit Install Site</b> page displays.

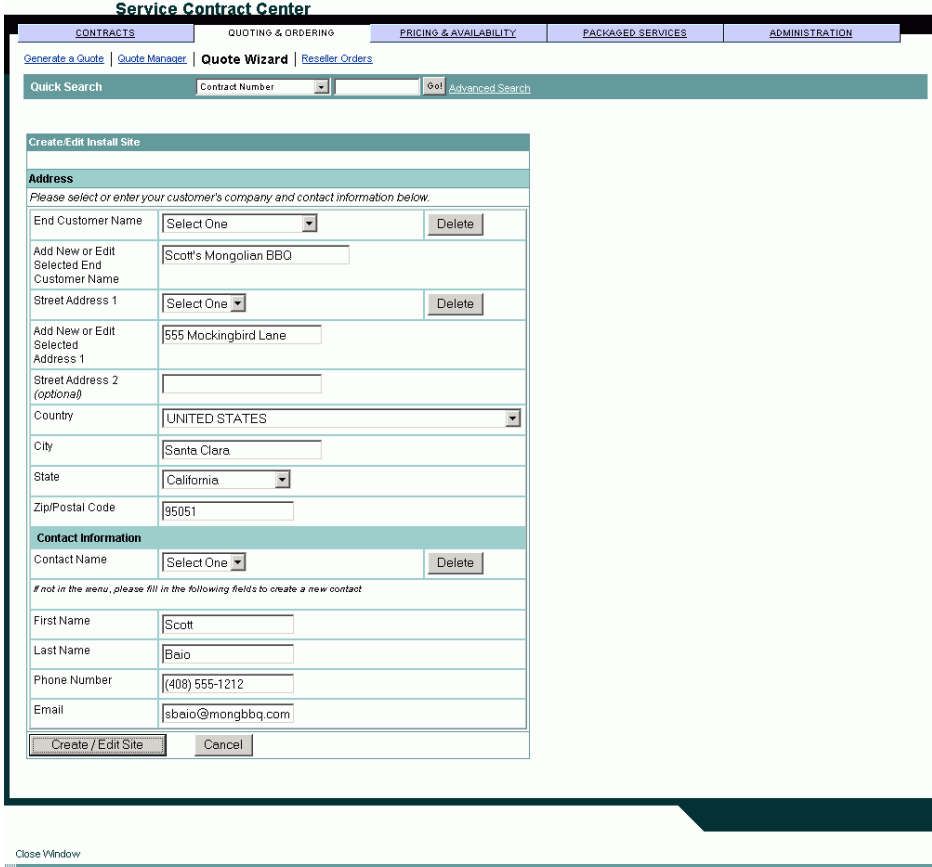
SCC New Quoting for Indirect Resellers

Step	Action	Result or Note
		
3.	Choose the Customer Name from the <b>End Customer Name</b> drop-down list.	If the customer name exists, the customer address fields will populate automatically. If the customer name does not appear in the list, enter the name in the <b>Add New or Edit Selected End User Name</b> field.
4.	Choose the street address from the <b>Street Address 1</b> drop-down list.	If the street address does not appear in the list, enter the address in the <b>Add New or Edit Selected Address 1</b> field.

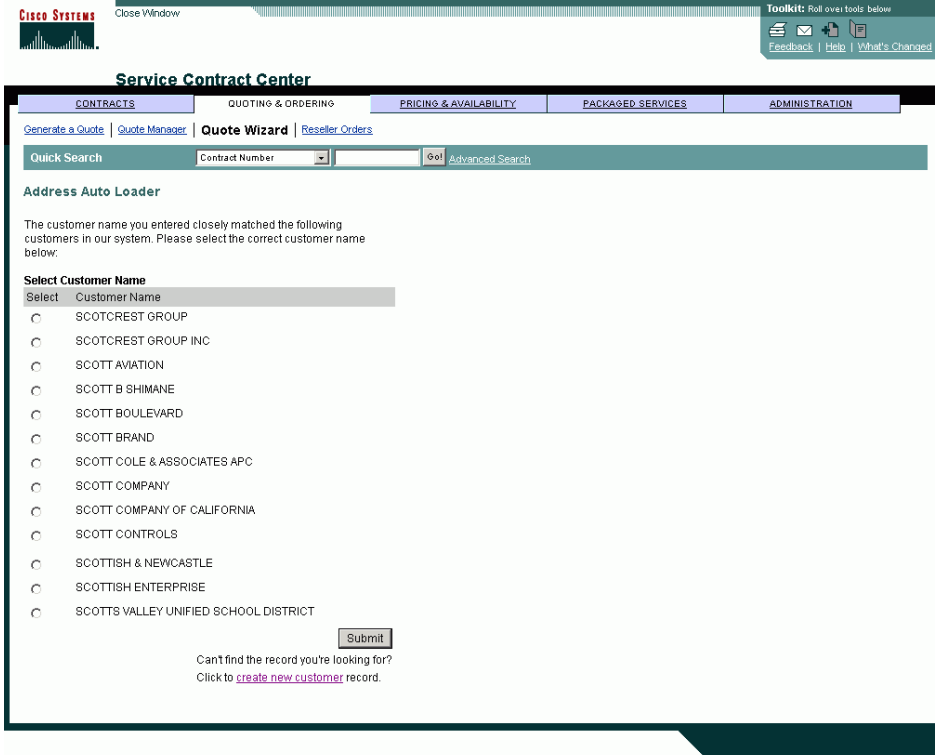
## SCC New Quoting for Indirect Resellers

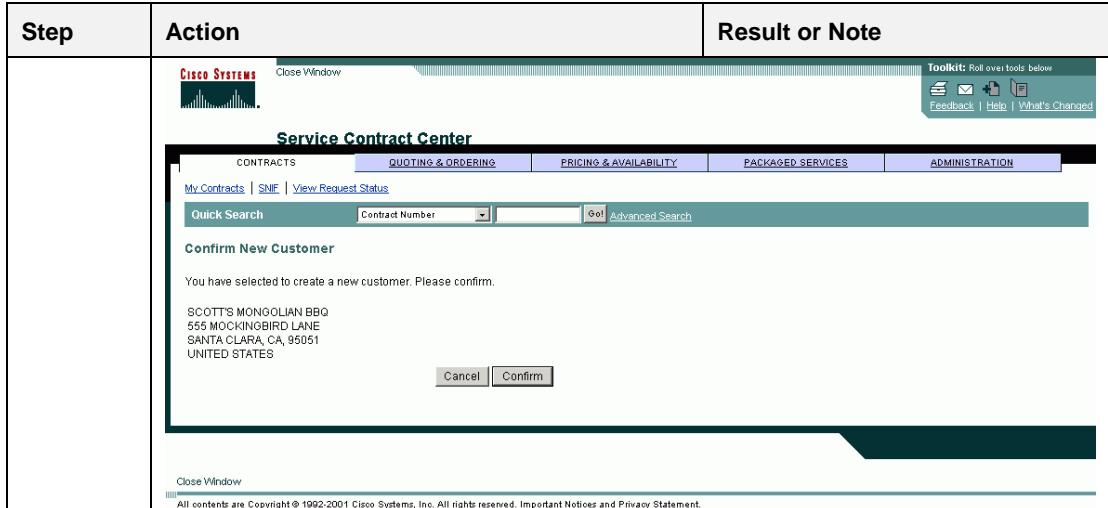
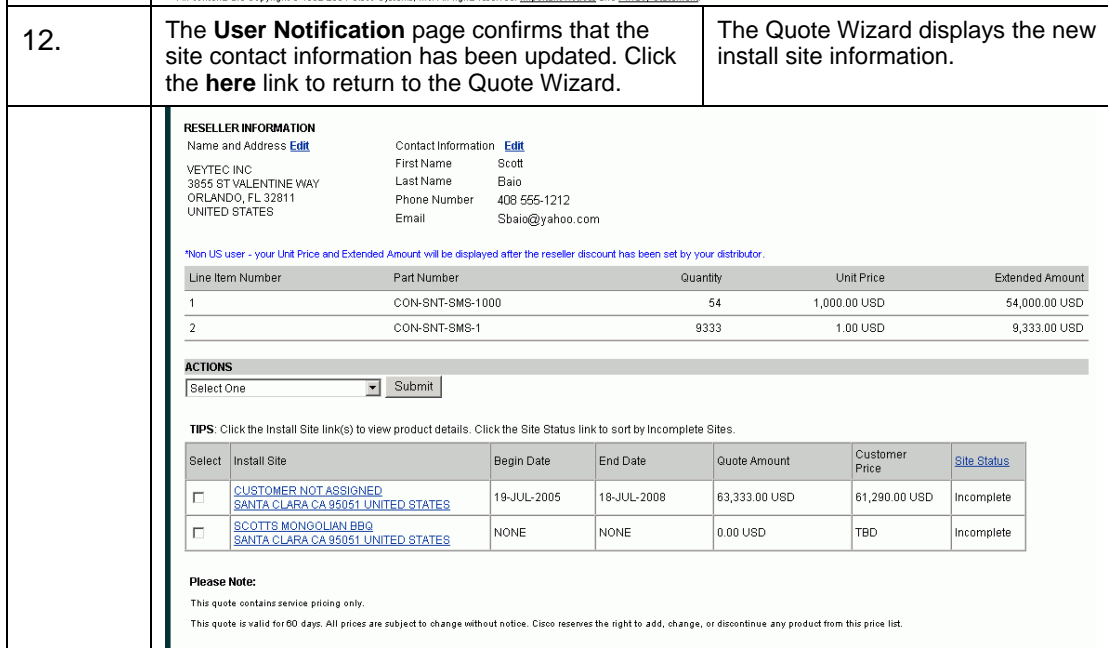
Step	Action	Result or Note
5.	If necessary, enter an address in the Street Address 2 field.	Street Address 2 is an optional field.
6.	Choose a country from the <b>Country</b> drop-down list.	For this example, we choose <b>United States</b> .
7.	Enter a city in the <b>City</b> field.	For this example, we entered Santa Clara.
8.	Choose a state from the <b>State</b> drop-down list.	For this example, we choose California.
9.	Enter the zip or postal code in the Zip/Postal Code field.	For this example, we entered 95051.
10.	Scroll down to the <b>Contact Information</b> section and choose a name from the <b>Contact Name</b> drop-down list.	If the contact name appears on the list, the contact information fields will populate automatically. If the contact name does not appear in the list, enter the appropriate information in the <b>First Name, Last Name, Phone Number and Email</b> fields.

SCC New Quoting for Indirect Resellers

Step	Action	Result or Note
		
11.	Verify that the install information you entered is correct. Once you are finished, click <b>Create/Edit Install Site</b> .	The <b>Address Auto Loader</b> page displays a list of customer names that closely match the name and information that you just entered.

SCC New Quoting for Indirect Resellers

Step	Action	Result or Note	
			
	If...	Then...	
	The customer name appears on the Address Auto Loader list,	Select the customer name, and then click <b>Submit</b> .	The Address Auto Loader page displays an install site that closely matches what you entered. Select the Install Site, and then click Submit. Go on to Step 12.
	The customer name does not appear on the Address Auto Loader list,	Click the <b>Create New Customer</b> link located at the bottom of the Address Auto Loader page.	The <b>Confirm New Customer</b> page displays. Verify that the address you entered is correct. Once you are finished, click <b>Confirm</b> .

Step	Action	Result or Note
		
12.	<p>The <b>User Notification</b> page confirms that the site contact information has been updated. Click the <b>here</b> link to return to the Quote Wizard.</p>	<p>The Quote Wizard displays the new install site information.</p>
		

## Grant Quote Access to Distributor

Use the Grant Quote Access to Distributor feature to give your distributor read/write access to the quote.



### Procedure: Grant Quote Access to Distributor

Step	Action	Result or Note
1.	<p>From the <b>Quote Wizard</b> page, choose <b>Grant Quote Access to Distributor</b> from the Action drop-down list.</p>	<p>Grant Access to Distributor displays in the Action drop-down list.</p>

## SCC New Quoting for Indirect Resellers

Step	Action	Result or Note																																														
	<p><b>Quote Wizard</b></p> <p style="text-align: right;">Logged in as: reseller.test.us</p> <p><b>Quote Status:</b> Open  <b>Quote:</b> Q4422911  <b>Quote Date:</b> 19-JUL-2005  <b>Contract:</b>  <b>Service Level:</b> SMARTnet 8x5xNBD (SNT)  <b>Quote Type:</b> New Service  <b>Quote Notes:</b></p> <p><b>Created by:</b> reseller.test.us  <b>Distributor:</b> Ingram Micro US  <b>Distributor Account Number:</b> 456789  <b>Distributor Invoice Number:</b>  <b>Reseller PO Number:</b>  <b>Quote Amount:</b> 63,333.00 USD (Includes Multi-Year Adjustment)  <b>Reseller Price:</b> CONTACT DISTRIBUTOR  <b>Customer Price:</b> 61,290.00 USD</p> <p><b>Additional Contract Access:</b> distl.test.us <a href="#">Edit</a></p> <p><b>RESELLER INFORMATION</b></p> <table border="0"> <tr> <td>Name and Address <a href="#">Edit</a></td> <td>Contact Information <a href="#">Edit</a></td> </tr> <tr> <td>VEYTEC INC</td> <td>First Name Scott</td> </tr> <tr> <td>3855 ST VALENTINE WAY</td> <td>Last Name Baio</td> </tr> <tr> <td>ORLANDO, FL 32811</td> <td>Phone Number 408 555-1212</td> </tr> <tr> <td>UNITED STATES</td> <td>Email Sbaio@yahoo.com</td> </tr> </table> <p><small>*Non US user - your Unit Price and Extended Amount will be displayed after the reseller discount has been set by your distributor.</small></p> <table border="1"> <thead> <tr> <th>Line Item Number</th> <th>Part Number</th> <th>Quantity</th> <th>Unit Price</th> <th>Extended Amount</th> </tr> </thead> <tbody> <tr> <td>1</td> <td>CON-SNT-SMS-1000</td> <td>54</td> <td>1,000.00 USD</td> <td>54,000.00 USD</td> </tr> <tr> <td>2</td> <td>CON-SNT-SMS-1</td> <td>9333</td> <td>1.00 USD</td> <td>9,333.00 USD</td> </tr> </tbody> </table> <p><b>ACTIONS</b></p> <p>Grant Quote Access To Distributor <input type="button" value="Submit"/></p> <p><b>TIPS:</b> Click the Install Site link(s) to view product details. Click the Site Status link to sort by Incomplete Sites.</p> <table border="1"> <thead> <tr> <th>Select</th> <th>Install Site</th> <th>Begin Date</th> <th>End Date</th> <th>Quote Amount</th> <th>Customer Price</th> <th>Site Status</th> </tr> </thead> <tbody> <tr> <td><input type="checkbox"/></td> <td><a href="#">CUSTOMER NOT ASSIGNED SANTA CLARA CA 95051 UNITED STATES</a></td> <td>19-JUL-2005</td> <td>18-JUL-2008</td> <td>63,333.00 USD</td> <td>61,290.00 USD</td> <td>Incomplete</td> </tr> <tr> <td><input type="checkbox"/></td> <td><a href="#">SCOTT'S MONGOLIAN BBQ SANTA CLARA CA 95051 UNITED STATES</a></td> <td>NONE</td> <td>NONE</td> <td>0.00 USD</td> <td>TBD</td> <td>Incomplete</td> </tr> </tbody> </table>	Name and Address <a href="#">Edit</a>	Contact Information <a href="#">Edit</a>	VEYTEC INC	First Name Scott	3855 ST VALENTINE WAY	Last Name Baio	ORLANDO, FL 32811	Phone Number 408 555-1212	UNITED STATES	Email Sbaio@yahoo.com	Line Item Number	Part Number	Quantity	Unit Price	Extended Amount	1	CON-SNT-SMS-1000	54	1,000.00 USD	54,000.00 USD	2	CON-SNT-SMS-1	9333	1.00 USD	9,333.00 USD	Select	Install Site	Begin Date	End Date	Quote Amount	Customer Price	Site Status	<input type="checkbox"/>	<a href="#">CUSTOMER NOT ASSIGNED SANTA CLARA CA 95051 UNITED STATES</a>	19-JUL-2005	18-JUL-2008	63,333.00 USD	61,290.00 USD	Incomplete	<input type="checkbox"/>	<a href="#">SCOTT'S MONGOLIAN BBQ SANTA CLARA CA 95051 UNITED STATES</a>	NONE	NONE	0.00 USD	TBD	Incomplete	
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## Delete Site(s)

While reviewing the quote, you notice that an incorrect site was added. SCC New Quoting allows you to delete the site(s) from the quote.



### Procedure: Delete Site(s)

## SCC New Quoting for Indirect Resellers

Step	Action	Result or Note																																				
1.	Check the site(s) that you want to delete from the Install Site list.	The site that you want to delete is selected. <b>NOTE:</b> If you do not check a site, you will receive an error message after clicking the Submit button.																																				
2.	From the <b>Quote Wizard</b> page, choose <b>Delete Site(s)</b> from the Action drop-down list.	Delete Site(s) displays in the Action drop-down list.																																				
	<p>Quote Date: 19-JUL-2005            Contract: SMARTnet 8x5xNBD (SNT)            Service Level: SMARTnet 8x5xNBD (SNT)            Quote Type: New Service            Quote Notes:</p> <p>Distributor Account Number: 456789            Distributor Invoice Number:            Reseller PO Number:            Quote Amount: 63,333.00 USD (Includes Multi-Year Adjustment)            Reseller Price: CONTACT DISTRIBUTOR            Customer Price : 61,290.00 USD</p> <p>Additional Contract Access: dist: test us <a href="#">Edit</a></p> <p><b>RESELLER INFORMATION</b></p> <p>Name and Address <a href="#">Edit</a>      Contact Information <a href="#">Edit</a></p> <p>VEYTEC INC      First Name      Scott            3855 ST VALENTINE WAY      Last Name      Baio            ORLANDO, FL 32811      Phone Number      408 555-1212            UNITED STATES      Email      Sbaio@yahoo.com</p> <p><small>*Non US user - your Unit Price and Extended Amount will be displayed after the reseller discount has been set by your distributor.</small></p> <table border="1"> <thead> <tr> <th>Line Item Number</th> <th>Part Number</th> <th>Quantity</th> <th>Unit Price</th> <th>Extended Amount</th> </tr> </thead> <tbody> <tr> <td>1</td> <td>CON-SNT-SMS-1000</td> <td>54</td> <td>1,000.00 USD</td> <td>54,000.00 USD</td> </tr> <tr> <td>2</td> <td>CON-SNT-SMS-1</td> <td>9333</td> <td>1.00 USD</td> <td>9,333.00 USD</td> </tr> </tbody> </table> <p><b>ACTIONS</b></p> <p>Delete Site <input type="button" value="Submit"/></p> <p><b>TIPS:</b> Click the Install Site link(s) to view product details. Click the Site Status link to sort by Incomplete Sites.</p> <table border="1"> <thead> <tr> <th>Select</th> <th>Install Site</th> <th>Begin Date</th> <th>End Date</th> <th>Quote Amount</th> <th>Customer Price</th> <th>Site Status</th> </tr> </thead> <tbody> <tr> <td><input type="checkbox"/></td> <td><a href="#">CUSTOMER NOT ASSIGNED SANTA CLARA CA 95051 UNITED STATES</a></td> <td>19-JUL-2005</td> <td>18-JUL-2008</td> <td>63,333.00 USD</td> <td>61,290.00 USD</td> <td>Incomplete</td> </tr> <tr> <td><input checked="" type="checkbox"/></td> <td><a href="#">SCOTT'S MONGOLIAN BBQ SANTA CLARA CA 95051 UNITED STATES</a></td> <td>NONE</td> <td>NONE</td> <td>0.00 USD</td> <td>TBD</td> <td>Incomplete</td> </tr> </tbody> </table> <p><b>Please Note:</b>            This quote contains service pricing only.            This quote is valid for 60 days. All prices are subject to change without notice. Cisco reserves the right to add, change, or discontinue any product from this price list.</p>		Line Item Number	Part Number	Quantity	Unit Price	Extended Amount	1	CON-SNT-SMS-1000	54	1,000.00 USD	54,000.00 USD	2	CON-SNT-SMS-1	9333	1.00 USD	9,333.00 USD	Select	Install Site	Begin Date	End Date	Quote Amount	Customer Price	Site Status	<input type="checkbox"/>	<a href="#">CUSTOMER NOT ASSIGNED SANTA CLARA CA 95051 UNITED STATES</a>	19-JUL-2005	18-JUL-2008	63,333.00 USD	61,290.00 USD	Incomplete	<input checked="" type="checkbox"/>	<a href="#">SCOTT'S MONGOLIAN BBQ SANTA CLARA CA 95051 UNITED STATES</a>	NONE	NONE	0.00 USD	TBD	Incomplete
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4.	Click the <b>Back to Quote</b> link to return to the Quote Wizard page.	The <b>Quote Wizard</b> page displays.																																				

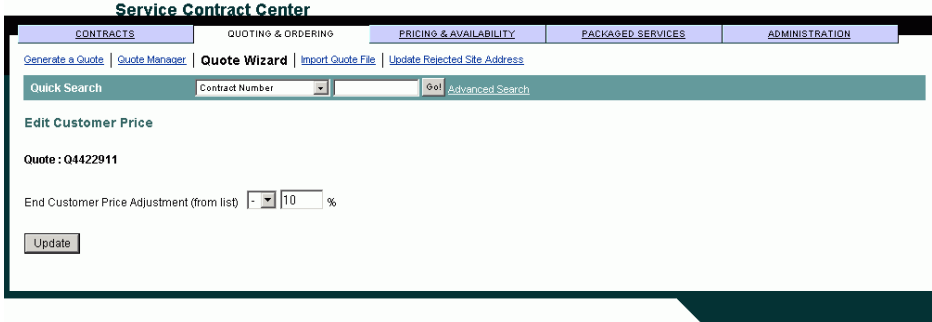
## Edit End Customer Price

While reviewing the quote, you notice that the Customer price information is incorrect. SCC New Quoting allows you to edit the discount or markup price before you submit the quote.



## Procedure: Edit End Customer Price

Step	Action	Result or Note
1.	From the <b>Quote Wizard</b> page, choose <b>Edit End Customer Price</b> from the Action drop-down list.	Edit End Customer Price displays in the Action drop-down list.
	<p>The screenshot shows the Quote Wizard interface. At the top, it displays quote details such as Quote Status (Open), Quote ID (Q4422911), and Quote Date (19-JUL-2005). Below this, there is a section for RESELLER INFORMATION with fields for Name and Address, Contact Information, and a table of installed sites. In the ACTIONS section, a dropdown menu is open, showing 'Edit End Customer Price' as the selected option. A 'Submit' button is visible next to the dropdown.</p>	
2.	Click <b>Submit</b> .	The <b>Edit Customer Price</b> page displays.
	<p>The screenshot shows the 'Edit Customer Price' page within the Service Contract Center. The page has a navigation bar with tabs for CONTRACTS, QUOTING &amp; ORDERING, PRICING &amp; AVAILABILITY, PACKAGED SERVICES, and ADMINISTRATION. Below the navigation bar, there are links for 'Generate a Quote', 'Quote Manager', 'Quote Wizard', 'Import Quote File', and 'Update Rejected Site Address'. A 'Quick Search' section includes a 'Contract Number' dropdown and a 'Go!' button. The main content area shows the 'Quote : Q4422911' and an 'End Customer Price Adjustment (from list)' dropdown menu set to a percentage value. An 'Update' button is located at the bottom of the form.</p>	
3.	Choose either <b>Markup from Cost (+)</b> or <b>Discount Off List (-)</b> from the <b>End Customer Price Adjustment</b> drop-down list. In this example we chose <b>Discount Off List (-)</b> .	

Step	Action	Result or Note
4.	Enter a value in the Discount/Markup percentage field. In this example, we adjusted the price by 10%.	10% is displayed in the percentage field.
		
5.	Click the <b>Update</b> button.	The <b>Quote Wizard</b> page displays the updated customer pricing information.

## Edit Quote Dates

Suppose you want to edit the end the quote coverage dates in order to increase the multi-year discount. SCC New Quoting allows you to edit the dates before you submit the quote



### Procedure: Edit Quote Dates

Step	Action	Result or Note
1.	From the <b>Quote Wizard</b> page, choose <b>Edit Quote Dates</b> from the Action drop-down list.	Edit Quote Dates displays in the Action drop-down list.

SCC New Quoting for Indirect Resellers

Step	Action	Result or Note																													
	<p><b>Quote Wizard</b></p> <p style="text-align: right;">Logged in as: reseller.test.us</p> <p>Quote Status: Open            Quote: G4422911            Quote Date: 19-JUL-2005            Contract:            Service Level: SMARTnet 8x5xNBD (SNT)            Quote Type: New Service            Quote Notes:</p> <p>Created by: reseller.test.us            Distributor: Ingram Micro US            Distributor Account Number: 456789            Distributor Invoice Number:            Reseller PO Number:            Quote Amount: 63,333.00 USD (Includes Multi-Year Adjustment)            Reseller Price: CONTACT DISTRIBUTOR            Customer Price : 61,290.00 USD</p> <p>Additional Contract Access: distl.test.us <a href="#">Edit</a></p> <p><b>RESELLER INFORMATION</b></p> <p>Name and Address <a href="#">Edit</a></p> <p>VEYTEC INC            3855 ST VALENTINE WAY            ORLANDO, FL 32811            UNITED STATES</p> <p>Contact information <a href="#">Edit</a></p> <p>First Name: Scott            Last Name: Baio            Phone Number: 408 555-1212            Email: Sbaio@yahoo.com</p> <p>*Non US user - your Unit Price and Extended Amount will be displayed after the reseller discount has been set by your distributor.</p> <table border="1"> <thead> <tr> <th>Line Item Number</th> <th>Part Number</th> <th>Quantity</th> <th>Unit Price</th> <th>Extended Amount</th> </tr> </thead> <tbody> <tr> <td>1</td> <td>CON-SNT-SMS-1000</td> <td>54</td> <td>1,000.00 USD</td> <td>54,000.00 USD</td> </tr> <tr> <td>2</td> <td>CON-SNT-SMS-1</td> <td>9333</td> <td>1.00 USD</td> <td>9,333.00 USD</td> </tr> </tbody> </table> <p><b>ACTIONS</b></p> <p><a href="#">Edit Quote Dates</a> <input type="button" value="Submit"/></p> <p><b>TIPS:</b> Click the Install Site link(s) to view product details. Click the Site Status link to sort by Incomplete Sites.</p> <table border="1"> <thead> <tr> <th>Select</th> <th>Install Site</th> <th>Begin Date</th> <th>End Date</th> <th>Quote Amount</th> <th>Customer Price</th> <th>Site Status</th> </tr> </thead> <tbody> <tr> <td><input type="checkbox"/></td> <td><a href="#">CUSTOMER NOT ASSIGNED SANTA CLARA CA 95051 UNITED STATES</a></td> <td>19-JUL-2005</td> <td>18-JUL-2008</td> <td>63,333.00 USD</td> <td>61,290.00 USD</td> <td>Incomplete</td> </tr> </tbody> </table> <p><b>Please Note:</b>            This quote contains service pricing only.            This quote is valid for 60 days. All prices are subject to change without notice. Cisco reserves the right to add, change, or discontinue any product from this price list.</p>	Line Item Number	Part Number	Quantity	Unit Price	Extended Amount	1	CON-SNT-SMS-1000	54	1,000.00 USD	54,000.00 USD	2	CON-SNT-SMS-1	9333	1.00 USD	9,333.00 USD	Select	Install Site	Begin Date	End Date	Quote Amount	Customer Price	Site Status	<input type="checkbox"/>	<a href="#">CUSTOMER NOT ASSIGNED SANTA CLARA CA 95051 UNITED STATES</a>	19-JUL-2005	18-JUL-2008	63,333.00 USD	61,290.00 USD	Incomplete	
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2.	Click <b>Submit</b> .	The <b>Edit Quote Begin and End Date</b> page displays.																													
	<p><a href="#">Generate a Quote</a>   <a href="#">Quote Manager</a>   <b>Quote Wizard</b>   <a href="#">Import Quote File</a>   <a href="#">Update Rejected Site Address</a></p> <p>Quick Search: <input type="text"/> Contract Number <input type="button" value="Go"/> <a href="#">Advanced Search</a></p> <p><b>Edit Quote Begin and End Dates</b></p> <p>Select a new coverage term or use the calendar icons below to edit the quote Begin and End date.            All products on the quote will be changed.</p> <p><i>PLEASE NOTE: This will override any previous date changes you have made.</i></p> <p>Quote: <a href="#">G4422911</a>            Reseller Name: VEYTEC INC            Earliest Quote Begin Date: 19-JUL-2005            Latest Quote End Date: 18-JUL-2007</p> <p><input checked="" type="radio"/> <b>Select New Coverage Term</b> <input type="button" value="Select One"/></p> <p><input type="radio"/> <b>Select New Quote Begin Date</b> <input type="button" value="Calendar"/> <input type="text"/> Example: 1-JAN-2005</p> <p><b>Select New Quote End Date</b> <input type="button" value="Calendar"/> <input type="text"/> Example: 1-JAN-2005</p> <p><input type="button" value="Submit"/></p>																														
3.	Choose either the <b>Select New Coverage Term</b> or the <b>Select New Quote Begin Date/Select New Quote End Date</b> option.	For this example, we will choose the <b>Select New Coverage Term</b> option.																													
4.	Choose a year option from the drop-down list. For this example, we will choose the <b>3 Years</b> option.	Note: making this selection will override any previous date changes you have made.																													
5.	Click <b>Submit</b> .	The <b>Quote Wizard</b> page displays the updated coverage information.																													

## SCC New Quoting for Indirect Resellers

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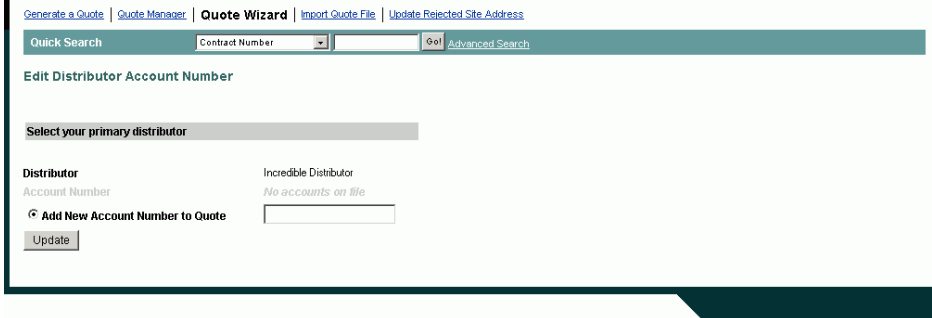
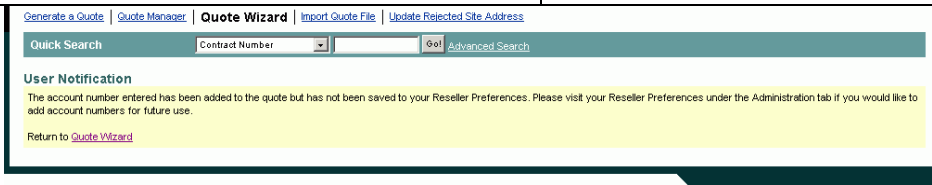
## Edit Distributor Account Number

You can edit your distributor account number directly from the Quote Wizard page.



### Procedure: Edit Distributor Account Number

Step	Action	Result or Note																													
1.	From the <b>Quote Wizard</b> page, choose <b>Edit Distributor Account Number</b> from the Action drop-down list.	Edit Distributor Account Number displays in the Action drop-down list.																													
	<p><b>RESELLER INFORMATION</b></p> <p>Name and Address <a href="#">Edit</a>      Contact Information <a href="#">Edit</a></p> <p>VEYTEC INC      First Name      Scott            3855 ST VALENTINE WAY      Last Name      Baio            ORLANDO, FL 32811      Phone Number      408 555-1212            UNITED STATES      Email      Sbaio@yahoo.com</p> <p><small>*Non US user - your Unit Price and Extended Amount will be displayed after the reseller discount has been set by your distributor.</small></p> <table border="1"> <thead> <tr> <th>Line Item Number</th> <th>Part Number</th> <th>Quantity</th> <th>Unit Price</th> <th>Extended Amount</th> </tr> </thead> <tbody> <tr> <td>1</td> <td>CON-SNT-SMS-1000</td> <td>54</td> <td>1,000.00 USD</td> <td>54,000.00 USD</td> </tr> <tr> <td>2</td> <td>CON-SNT-SMS-1</td> <td>9333</td> <td>1.00 USD</td> <td>9,333.00 USD</td> </tr> </tbody> </table> <p><b>ACTIONS</b></p> <p><a href="#">Edit Distributor Account Number</a> <input type="button" value="Submit"/></p> <p><b>TIPS:</b> Click the Install Site link(s) to view product details. Click the Site Status link to sort by Incomplete Sites.</p> <table border="1"> <thead> <tr> <th>Select</th> <th>Install Site</th> <th>Begin Date</th> <th>End Date</th> <th>Quote Amount</th> <th>Customer Price</th> <th>Site Status</th> </tr> </thead> <tbody> <tr> <td><input type="checkbox"/></td> <td><a href="#">CUSTOMER NOT ASSIGNED</a> <a href="#">SANTA CLARA CA 95051 UNITED STATES</a></td> <td>19-JUL-2005</td> <td>18-JUL-2008</td> <td>63,333.00 USD</td> <td>61,290.00 USD</td> <td>Incomplete</td> </tr> </tbody> </table> <p><b>Please Note:</b>  <small>This quote contains service pricing only.            This quote is valid for 60 days. All prices are subject to change without notice. Cisco reserves the right to add, change, or discontinue any product from this price list.</small></p>	Line Item Number	Part Number	Quantity	Unit Price	Extended Amount	1	CON-SNT-SMS-1000	54	1,000.00 USD	54,000.00 USD	2	CON-SNT-SMS-1	9333	1.00 USD	9,333.00 USD	Select	Install Site	Begin Date	End Date	Quote Amount	Customer Price	Site Status	<input type="checkbox"/>	<a href="#">CUSTOMER NOT ASSIGNED</a> <a href="#">SANTA CLARA CA 95051 UNITED STATES</a>	19-JUL-2005	18-JUL-2008	63,333.00 USD	61,290.00 USD	Incomplete	
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2.	Click <b>Submit</b> .	The <b>Edit Distributor Account Number</b> page displays.																													

Step	Action	Result or Note
		
3.	Enter the distributor account number. Once you are finished, click <b>Update</b> .	The <b>User Notification</b> page confirms that the account number has been added to the quote. Note: you can also add the distributor account number in the Reseller Preferences.
		

## Route a Quote

You can use the Route Quote feature to grant another user access to your quote. You have the option to grant the other user Full access to edit the quote or View-Only access. .


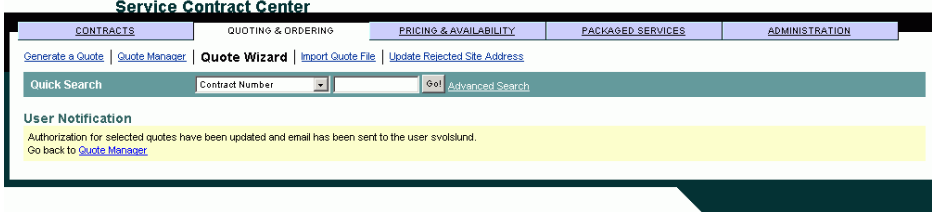


### Procedure: Route Quote

Step	Action	Result or Note
1.	From the <b>Quote Wizard</b> page, choose <b>Route Quote</b> from the Action drop-down list.	Route Quote displays in the Action drop-down list.

SCC New Quoting for Indirect Resellers

Step	Action	Result or Note																													
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2.	Click the <b>Submit</b> button.	The <b>Route Selected Quotes to Another User</b> page displays.																													
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3.	Enter the CCO User ID of the user you want to route the quote to in the <b>Enter CCO User ID</b> field.	The user's CCO user ID displays in the Enter CCO User ID field.																													
4.	Enter a comment in the <b>Requisition Subject</b> line.																														
5.	Choose an <b>Access Type</b> .	The options are <b>Full</b> and <b>View Only</b> .																													

Step	Action	Result or Note
		
6.	Click <b>Update</b> .	The <b>User Notification</b> page confirms that authorization for the selected quote(s) has been updated and an email has been sent to the user.
7.		
8.	Click the <b>Go Back to Quote Wizard</b> link to return to the Quote Wizard page.	The <b>Quote Wizard</b> page displays.

## Download a Quote

You can download the quote and view it in a Spreadsheet program such as Microsoft Excel. This feature is useful if you want to download the quote to an Excel spreadsheet and review it with your customer.



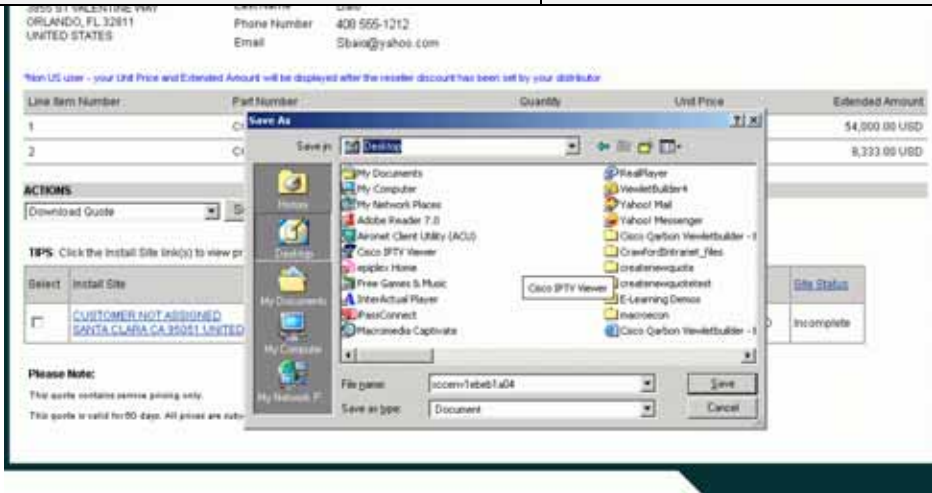
### Procedure: Download a Quote

Step	Action	Result or Note
1.	From the <b>Quote Wizard</b> page, choose <b>Download Quote</b> from the Action drop-down list.	<b>Download Quote</b> displays in the Action drop-down list.

# SCC New Quoting for Indirect Resellers

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3.	Click <b>Save</b> to save the file to your computer.	The <b>Save As</b> dialog box appears.																													

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4.	Specify where you want to save the file, then click the <b>Save</b> button.	The file is saved to the location that you specified.																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																
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<td>2</td> <td>CON-SNT-</td> <td>9333</td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> </tr> <tr> <td>28</td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> </tr> <tr> <td>29</td> <td>Site ID#</td> <td>Company I</td> <td>Address 1</td> <td>Address 2</td> <td>Country</td> <td>Product N</td> <td>Service Pn</td> <td>Description</td> <td>Serial Num</td> <td>Begin Date</td> <td>End Date</td> <td>Quote Am</td> <td>Customer Price</td> <td></td> <td></td> </tr> <tr> <td>30</td> <td>525454</td> <td>CUSTOME</td> <td></td> <td></td> <td></td> <td>CISCO265</td> <td>CON-SNT-</td> <td>2651 w/ Ac</td> <td></td> <td>19-Jul-05</td> <td>18-Jul-06</td> <td>#####</td> <td>\$1,890.00 USD</td> <td></td> <td></td> </tr> <tr> <td>31</td> <td>525454</td> <td>CUSTOME</td> <td></td> <td></td> <td></td> <td>WS-C6513</td> 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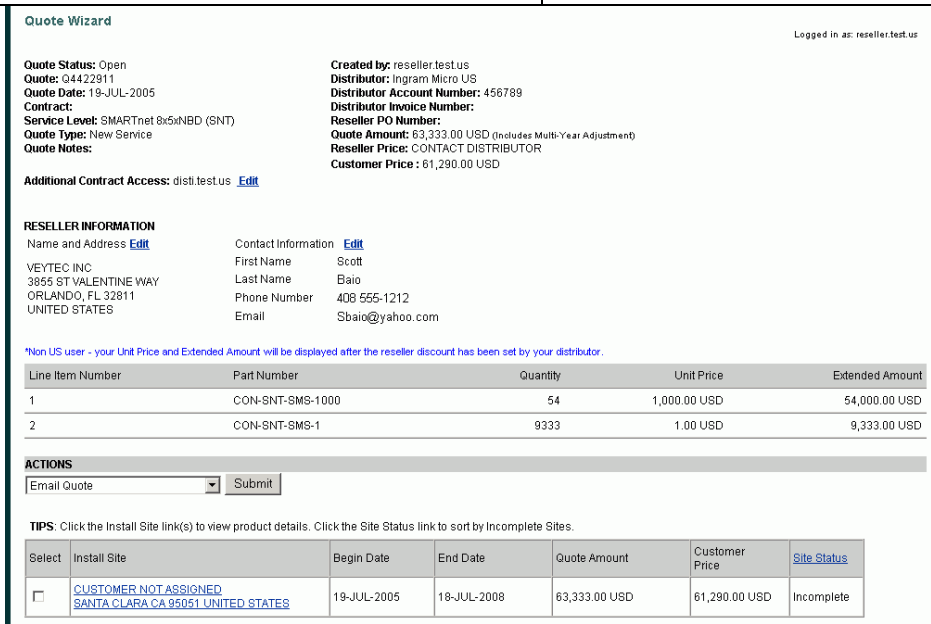
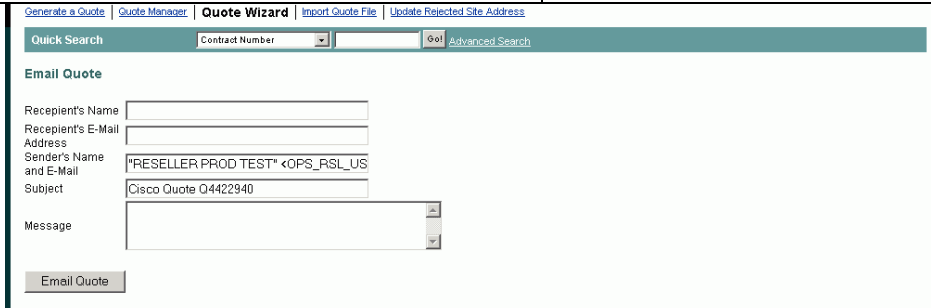
## Email a Quote

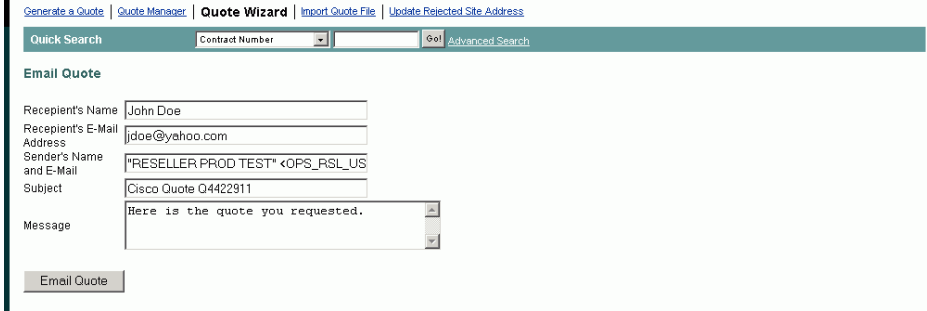
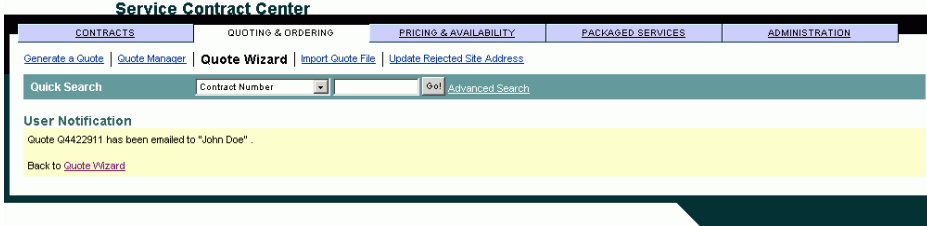
You can email a quote to any recipient. For example, you can email an Excel version of the quote to your customer for review.



### Procedure: Email a Quote

SCC New Quoting for Indirect Resellers

Step	Action	Result or Note
1.	From the Quote Wizard page, choose <b>E-mail Quote</b> from the Action drop-down list.	E-mail Quote displays in the Action drop-down list.
	 <p>The screenshot shows the 'Quote Wizard' interface. At the top right, it says 'Logged in as: reseller.test.us'. The quote status is 'Open' with quote number 'Q4422911' and date '19-JUL-2005'. It lists contract details, service level 'SMARTnet 8x5xNBD (SNT)', and quote type 'New Service'. Reseller information for 'VEYTEC INC' is provided, including address and contact details for Scott Biao. A table of line items shows two items: 'CON-SNT-SMS-1000' with quantity 54 and 'CON-SNT-SMS-1' with quantity 9333. An 'ACTIONS' section has a dropdown menu with 'Email Quote' selected and a 'Submit' button. A 'TIPS' section and a table of site installation details are also visible.</p>	
2.	Click the <b>Submit</b> button.	The <b>Email Quote</b> page displays.
	 <p>The screenshot shows the 'Email Quote' page. It features a search bar at the top and a form for email details. The 'Recipient's Name' field is empty. The 'Recipient's E-Mail Address' field is empty. The 'Sender's Name and E-Mail' field is pre-filled with '"RESELLER PROD TEST" &lt;OPS_RSL_US@...&gt;'. The 'Subject' field is pre-filled with 'Cisco Quote Q4422940'. There is a 'Message' field at the bottom which is currently empty. An 'Email Quote' button is located at the bottom left.</p>	
3.	Enter the recipient's name in the <b>Recipient's Name</b> field.	The recipient's name displays in the Recipient's Name field.
4.	Enter the recipient's email address in the <b>Recipient's E-mail Address</b> field.	The recipient's email address displays in the Recipient's Email Address field. <b>NOTE:</b> The sender's name, and email address, as well as the subject line, are all automatically filled in.
5.	Enter a message in the <b>Message</b> field.	The message will display in the body of the email.

Step	Action	Result or Note
		
6.	Click the <b>Email Quote</b> button.	The <b>User Notification</b> page confirms that the quote has been emailed to the recipient. The quote is sent to the recipient in Microsoft Excel (.xls) format.
		
7.	Click the <b>Back to Quote Wizard</b> link.	The <b>Quote Wizard</b> page displays.

## Send Order Request to Distributor

Using the Send Order Request to Distributor feature to send the order request and lock the quote. You have the option of sending the order request from either the Quote Wizard page, or from the Quote Manager page. This section describes how to send the order request from the Quote Wizard page. Please refer to **Lesson 3: Manage Quotes**, for detailed instructions on submitting a quote from the Quote Manager.

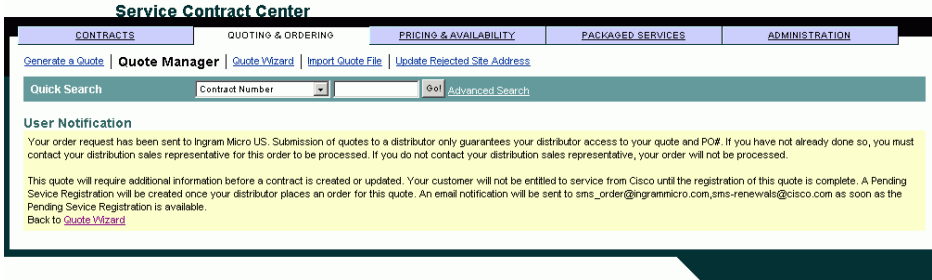


### Procedure: Send Order Request to Distributor

Step	Action	Result or Note
1.	From the <b>Quote Wizard</b> page, choose <b>Send Order Request to Distributor</b> from the Action drop-down list.	Send Order Request to Distributor displays in the Action drop-down list.

SCC New Quoting for Indirect Resellers

Step	Action	Result or Note																																							
	<p><b>Quote Wizard</b></p> <p style="text-align: right;">Logged in as: reseller.test.us</p> <p><b>Quote Status:</b> Open  <b>Quote:</b> Q4422911  <b>Quote Date:</b> 19-JUL-2005  <b>Contract:</b>  <b>Service Level:</b> SMARTnet 8x5xNBD (SNT)  <b>Quote Type:</b> New Service  <b>Quote Notes:</b></p> <p><b>Created by:</b> reseller.test.us  <b>Distributor:</b> Ingram Micro US  <b>Distributor Account Number:</b> 456789  <b>Distributor Invoice Number:</b>  <b>Reseller PO Number:</b>  <b>Quote Amount:</b> 63,333.00 USD (Includes Multi-Year Adjustment)  <b>Reseller Price:</b> CONTACT DISTRIBUTOR  <b>Customer Price:</b> 61,290.00 USD</p> <p><b>Additional Contract Access:</b> distl.test.us <a href="#">Edit</a></p> <p><b>RESELLER INFORMATION</b></p> <table border="0"> <tr> <td>Name and Address <a href="#">Edit</a></td> <td>Contact Information <a href="#">Edit</a></td> </tr> <tr> <td>VEYTEC INC</td> <td>First Name Scott</td> </tr> <tr> <td>3855 ST VALENTINE WAY</td> <td>Last Name Baio</td> </tr> <tr> <td>ORLANDO, FL 32811</td> <td>Phone Number 408 555-1212</td> </tr> <tr> <td>UNITED STATES</td> <td>Email Sbaio@yahoo.com</td> </tr> </table> <p><small>*Non US user - your Unit Price and Extended Amount will be displayed after the reseller discount has been set by your distributor.</small></p> <table border="1"> <thead> <tr> <th>Line Item Number</th> <th>Part Number</th> <th>Quantity</th> <th>Unit Price</th> <th>Extended Amount</th> </tr> </thead> <tbody> <tr> <td>1</td> <td>CON-SNT-SMS-1000</td> <td>54</td> <td>1,000.00 USD</td> <td>54,000.00 USD</td> </tr> <tr> <td>2</td> <td>CON-SNT-SMS-1</td> <td>9333</td> <td>1.00 USD</td> <td>9,333.00 USD</td> </tr> </tbody> </table> <p><b>ACTIONS</b></p> <p>Send Order Request to Distributor <input type="button" value="Submit"/></p> <p><b>TIPS:</b> Click the Install Site link(s) to view product details. Click the Site Status link to sort by Incomplete Sites.</p> <table border="1"> <thead> <tr> <th>Select</th> <th>Install Site</th> <th>Begin Date</th> <th>End Date</th> <th>Quote Amount</th> <th>Customer Price</th> <th>Site Status</th> </tr> </thead> <tbody> <tr> <td><input type="checkbox"/></td> <td><a href="#">CUSTOMER NOT ASSIGNED SANTA CLARA CA 95051 UNITED STATES</a></td> <td>19-JUL-2005</td> <td>18-JUL-2008</td> <td>63,333.00 USD</td> <td>61,290.00 USD</td> <td>Incomplete</td> </tr> </tbody> </table> <p><b>Please Note:</b>  This quote contains service pricing only.  This quote is valid for 60 days. All prices are subject to change without notice. Cisco reserves the right to add, change, or discontinue any product from this price list.</p>	Name and Address <a href="#">Edit</a>	Contact Information <a href="#">Edit</a>	VEYTEC INC	First Name Scott	3855 ST VALENTINE WAY	Last Name Baio	ORLANDO, FL 32811	Phone Number 408 555-1212	UNITED STATES	Email Sbaio@yahoo.com	Line Item Number	Part Number	Quantity	Unit Price	Extended Amount	1	CON-SNT-SMS-1000	54	1,000.00 USD	54,000.00 USD	2	CON-SNT-SMS-1	9333	1.00 USD	9,333.00 USD	Select	Install Site	Begin Date	End Date	Quote Amount	Customer Price	Site Status	<input type="checkbox"/>	<a href="#">CUSTOMER NOT ASSIGNED SANTA CLARA CA 95051 UNITED STATES</a>	19-JUL-2005	18-JUL-2008	63,333.00 USD	61,290.00 USD	Incomplete	
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2.	Click <b>Submit</b> .	<b>The Online Ordering – Order Detail</b> page displays.																																							
	<p><a href="#">Generate a Quote</a>   <a href="#">Quote Manager</a>   <b>Quote Wizard</b>   <a href="#">Import Quote File</a>   <a href="#">Update Rejected Site Address</a></p> <p>Quick Search <input type="text"/> Contract Number <input type="text"/> <input type="button" value="Go"/> <a href="#">Advanced Search</a></p> <div style="border: 1px solid gray; padding: 5px;"> <p>An order request is about to be sent to <b>Incredible Dist</b> for quote Q4422911.</p> <p>Please use the email and comments field to notify your distributor representative of this order submission. <b>If you do not contact your distributor representative your order will not be placed.</b></p> <p>You will receive an order confirmation as soon as the order has been placed by your distributor.</p> <table border="1"> <tr> <td>Enter Your PO Number</td> <td><input type="text"/></td> </tr> <tr> <td>Enter your Account Number with the distributor*</td> <td>456789</td> </tr> <tr> <td>Distributor Representative Email Address*</td> <td><input type="text"/></td> </tr> <tr> <td>Comments*</td> <td><input type="text"/></td> </tr> </table> <p>*Highly Recommended</p> <p>Do you wish to continue? <input type="button" value="Yes"/> <input type="button" value="No"/></p> </div>	Enter Your PO Number	<input type="text"/>	Enter your Account Number with the distributor*	456789	Distributor Representative Email Address*	<input type="text"/>	Comments*	<input type="text"/>																																
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3.	Enter your purchase order number in the <b>Enter Your PO Number</b> field.	Note: Follow your company process to approve the order and obtain the purchase order number. Only one purchase order number may be entered per order.																																							
4.	Enter the distributor account number in the <b>Enter Your Account Number with the distributor</b> field.	This field is recommended but not required.																																							
5.	Enter the distributor's email in the <b>Distributor Representative Email address</b> field.																																								

Step	Action	Result or Note
6.	Enter any comments that you may have in the <b>Comments</b> field.	This field is recommended but not required.
7.	Click <b>Yes</b> to proceed.	The User Notification page confirms that that the quote has been sent to the distributor.
		

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**Note** Submission of quotes to a distributor only guarantees your distributor access to your quote and PO#. If you have not already done so, you **must** contact your distribution sales representative for this order to be processed. If you do not contact your distribution sales representative, your order will not be processed.. If you submitted a partial quote, your customer will not be entitled to service from Cisco until the registration of the quote is complete. Please go to Lesson 4: **Register Quotes** to see detailed instructions on how to register a quote.

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## Add to an Existing Contract

After converting the quote to a contract, you may find that there are situations where you need to add additional products to the contract. The Add to an Existing Service Contract feature allows you to add products quickly and easily.



### Procedure: Add to an Existing Contract

Step	Action	Result or Note
1.	Click the <b>Quoting and Ordering</b> tab.	The <b>Generate a Quote</b> page displays.

## SCC New Quoting for Indirect Resellers

Step	Action	Result or Note
	<p><b>Generate a Quote</b></p> <p>Service Contract Center enables you to create service quotes online and submit an electronic purchase order for immediate processing. Please select the type of quote you would like to generate.</p> <p><b>Please note:</b> Submitting an electronic purchase order in SCC requires you to sign a <a href="#">Service Contract Center Enrollment Agreement</a>.</p> <hr/> <p><b>For products not covered by a Cisco service contract:</b></p> <p><input type="radio"/> Create a new service contract  <input checked="" type="radio"/> Add to an existing service contract</p> <p><b>For products currently covered by a Cisco service contract:</b></p> <p><input type="radio"/> Renewal Quote (extend an expiring service contract)</p> <p><input type="button" value="Submit"/></p>	
2.	Click the <b>Adding to an Existing Service Contract</b> option.	The Adding to an Existing Service Contract option is selected.
3.	Click the <b>Submit</b> button.	The <b>Add to Existing Contract – Search Options</b> page displays.
	<p><b>Generate a Quote</b>   <a href="#">Quote Manager</a>   <a href="#">Quote Wizard</a>   <a href="#">Import Quote File</a>   <a href="#">Update Rejected Site Address</a></p> <p>Quick Search <input type="text" value="Contract Number"/> <input type="button" value="Go"/> <a href="#">Advanced Search</a></p> <p><b>Add to Existing Service Contract - Search Options</b></p> <p>Enter the contract number to which you wish to Add the Products or if you do not know the contract number, enter the customer (end user) name. *Required Field</p> <p>Search By* <input type="text" value="Select One"/></p> <p>Value* <input type="text"/></p> <p><input type="button" value="Submit"/></p> <p><small>Tip You can query any part of the customer name. For example, entering "STATE" will search for all customers with "STATE" in their name.</small></p>	
4.	Choose either Contract Number or Customer Name from the Search By drop-down list. For this example we will use the Contract Number search option.	
5.	Enter the contract number in the <b>Value</b> field. Once you are finished, click <b>Submit</b> .	The <b>Service Pricing</b> page displays.

SCC New Quoting for Indirect Resellers

Step	Action	Result or Note
	<p><b>Service Pricing</b></p> <p>Provides Service Contract Pricing and checks Service Availability for Cisco's products.</p> <p><b>Create New Quote</b></p> <p>Contract 2224479</p> <p><b>Step 1: Select Service Level and Location</b></p> <p>* Required Field</p> <p><b>Service Level *</b> SMARTnet 8x5xNBD (SNT)</p> <p><b>Product Location Country *</b> UNITED STATES</p> <p><b>Distributor *</b> Ingram Micro US</p> <p><i>To Verify Service Availability please include the Product Location City, State/Region, Zip/Postal Code</i></p> <p>Product Location City</p> <p>Product Location State/Province - Select state -</p> <p>Product Location Zip/Postal Code (Official Postal Sites: <a href="#">US</a> <a href="#">Canada</a>)</p> <p>Quote Notes (Comments)</p> <p>End Customer Price Adjustment (from list) 0 %</p> <p><b>Step 2: Add Products or Serial Number by Group</b></p> <p><input checked="" type="radio"/> <b>Product IDs</b> example "CISCO1721" or "3 CISCO1721" <a href="#">Product Lookup</a>  <i>Tip: You may add the Product IDs or the quantity and the Product IDs.</i></p> <p><input type="radio"/> <b>Serial Numbers</b> example ABC1234DEF  <i>Product IDs or Serial Numbers entered below should be comma or carriage return delimited</i></p> <p>(4000 Character Limit)</p> <p>4000 characters left</p> <p><input checked="" type="radio"/> 1 Year</p> <p><input type="radio"/> <b>Begin Date</b> 07/20/2005 <b>End Date</b> 07/19/2006</p> <p>Date Format MM/DD/YYYY</p> <p><input type="button" value="Submit"/></p> <p><a href="#">Save Preferences</a> for Service Pricing</p>	
6.	Select the location and add the products by serial number or group using steps 4-12 from the Create New Quote Procedure.	Note: The service level is automatically selected.
7.	Specify the product service coverage period by clicking the appropriate radio button next to either the <b>Years</b> drop-down list or the <b>Begin</b> and <b>End Date</b> fields.	
8.	Click <b>Submit</b> .	The <b>Service Pricing Verify</b> page displays.

SCC New Quoting for Indirect Resellers

Step	Action	Result or Note																																	
	<p><b>Service Pricing Verify</b></p> <p>Contract: 2224479</p> <p><b>Pricing</b>            Price List: Global Price List            Service Level: SMARTnet 8x5xNBD (SNT)            Currency: USD</p> <p><b>Products</b>            *Includes Multi-Year Adjustment</p> <table border="1"> <thead> <tr> <th>Select</th> <th>Serial Number</th> <th>Product Number</th> <th>Product Location</th> <th>Begin Date</th> <th>End Date</th> <th>Annual List Price</th> <th>*Prorated Price</th> <th>Quantity</th> <th>*Amount</th> <th>End Customer Price</th> </tr> </thead> <tbody> <tr> <td><input type="checkbox"/></td> <td></td> <td>WS-C6513</td> <td>95051,CA,UNITED STATES</td> <td>07/20/2005</td> <td>07/19/2007</td> <td>11,000.00</td> <td>21,120.00</td> <td>3</td> <td>63,360.00</td> <td>59,400.00</td> </tr> <tr> <td colspan="9" style="text-align: right;">Total</td> <td>63,360.00</td> <td>59,400.00</td> </tr> </tbody> </table> <p><b>Please Note:</b>            This quote contains service pricing only.            This quote is valid for 60 days. All prices are subject to change without notice. Cisco reserves the right to add, change, or discontinue any product from this price list.            Service Pricing and Availability does not perform checks against last date of support for the products being quoted. Actual coverage term may vary.</p> <p>Select One <input type="button" value="Submit"/></p>	Select	Serial Number	Product Number	Product Location	Begin Date	End Date	Annual List Price	*Prorated Price	Quantity	*Amount	End Customer Price	<input type="checkbox"/>		WS-C6513	95051,CA,UNITED STATES	07/20/2005	07/19/2007	11,000.00	21,120.00	3	63,360.00	59,400.00	Total									63,360.00	59,400.00	
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Total									63,360.00	59,400.00																									
9.	Verify that the information is correct. If necessary, you can edit the Begin and End Date fields as well as the Quantity field.	If you edit the dates or the quantity, select the quote, and then choose Update Selected Dates/Quantity from the drop-down list.																																	
10.	Choose <b>Save Quote</b> from the drop-down list.	Save Quote is selected.																																	
11.	Click <b>Submit</b> .	The <b>Quote Wizard</b> confirms that a new quote with the new product(s) has been created.																																	
	<p><b>Quote Wizard</b> <span style="float: right;">Logged in as: reseller.test.us</span></p> <p><b>Quote Status:</b> Open  <b>Quote:</b> Q4422941  <b>Quote Date:</b> 20-JUL-2005  <b>Contract:</b> 2224479  <b>Service Level:</b> SMARTnet 8x5xNBD (SNT)  <b>Quote Type:</b> Add To Existing Contract  <b>Quote Notes:</b></p> <p><b>Created by:</b> reseller.test.us  <b>Distributor:</b> Ingram Micro US  <b>Distributor Account Number:</b>  <b>Distributor Invoice Number:</b>  <b>Reseller PO Number:</b>  <b>Quote Amount:</b> 63,360.00 USD (Includes Multi-Year Adjustment)  <b>Reseller Price:</b> CONTACT DISTRIBUTOR  <b>Customer Price:</b> 59,400.00 USD</p> <p><b>Additional Contract Access:</b> <a href="#">Edit</a></p> <p><b>RESELLER INFORMATION</b></p> <p>Name and Address <a href="#">Edit</a>      Contact Information <a href="#">Edit</a></p> <p>COMVAD            15573 SOUTH 2ND STREET            SCURRY, TX 75158            UNITED STATES</p> <p>First Name            Last Name            Phone Number            Email</p> <p><small>*Non US user - your Unit Price and Extended Amount will be displayed after the reseller discount has been set by your distributor.</small></p> <table border="1"> <thead> <tr> <th>Line Item Number</th> <th>Part Number</th> <th>Quantity</th> <th>Unit Price</th> <th>Extended Amount</th> </tr> </thead> <tbody> <tr> <td>1</td> <td>CON-SNT-SMS-1000</td> <td>54</td> <td>1,000.00 USD</td> <td>54,000.00 USD</td> </tr> <tr> <td>2</td> <td>CON-SNT-SMS-1</td> <td>9360</td> <td>1.00 USD</td> <td>9,360.00 USD</td> </tr> </tbody> </table> <p><b>ACTIONS</b></p> <p>Select One <input type="button" value="Submit"/></p> <p><b>TIPS:</b> Click the Install Site link(s) to view product details. Click the Site Status link to sort by Incomplete Sites.</p> <table border="1"> <thead> <tr> <th>Select</th> <th>Install Site</th> <th>Begin Date</th> <th>End Date</th> <th>Quote Amount</th> <th>Customer Price</th> <th>Site Status</th> </tr> </thead> <tbody> <tr> <td><input type="checkbox"/></td> <td><a href="#">CUSTOMER NOT ASSIGNED</a> <a href="#">SANTA CLARA CA 95051 UNITED STATES</a></td> <td>20-JUL-2005</td> <td>19-JUL-2007</td> <td>63,360.00 USD</td> <td>59,400.00 USD</td> <td>Incomplete</td> </tr> </tbody> </table> <p><b>Please Note:</b>            This quote contains service pricing only.            This quote is valid for 60 days. All prices are subject to change without notice. Cisco reserves the right to add, change, or discontinue any product from this price list.</p>	Line Item Number	Part Number	Quantity	Unit Price	Extended Amount	1	CON-SNT-SMS-1000	54	1,000.00 USD	54,000.00 USD	2	CON-SNT-SMS-1	9360	1.00 USD	9,360.00 USD	Select	Install Site	Begin Date	End Date	Quote Amount	Customer Price	Site Status	<input type="checkbox"/>	<a href="#">CUSTOMER NOT ASSIGNED</a> <a href="#">SANTA CLARA CA 95051 UNITED STATES</a>	20-JUL-2005	19-JUL-2007	63,360.00 USD	59,400.00 USD	Incomplete					
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## On Your Own Exercise 3: Create a New Quote

### Instructions

Try creating a quote for one of your key resellers. Go back to review the key steps, if necessary. When you are finished, try answering the questions below.

### Questions

1. What partial quote information must be completed before service can be ordered?
2. What is the minimum amount of service coverage years a customer must have to receive a multi-year discount?

---

**Note** The answers to these questions are located in the back of the User Guide.

---

## Lesson 3: Manage Your Quotes

Frequently, you will generate several quotes over a period of time before actually submitting them to your distributor. In this situation, you can effectively manage the quotes you created by using the **Quote Manager**. The Quote Manager page displays all of your outstanding quotes, based on your user profile. You can access Quote Manager by clicking the **Quote Manager** link under the **Quoting and Ordering** tab.

### Objectives

At the end of this lesson, you will be able to:

- Use quote filters to search for and display quotes
- Manage your quotes using the Quote Manager

### Quote Manager Page

You can search for your quotes using the quote filters located at the top of the page. The Quote Manager, by default, sorts quotes by the date quoted. The newest quotes are automatically displayed first. Current quotes are displayed in **green**. Quotes that are more than 30 days old are displayed in **orange**. Quotes that are more than 45 days old are displayed in **red**.

You can sort the quotes by clicking on the column headers. You can also route, submit, or delete any selected quote in the Quote Manager. The Quote Manager page is shown in the figure below.

The screenshot shows the Quote Manager interface. At the top, there is a 'Quick Search' bar with a 'Contract Number' dropdown and a 'Go!' button. Below this is the 'Quote Manager' title and a 'Quote Filtering Guidelines' section. The guidelines state: 'Use any or all of the three filter options below to display your quotes or narrow a list of previously displayed quotes. Note: Quotes older than 60 days may be archived and unavailable for display.' There are three filter options: 'From Date' (21-APR-2005), 'To Date' (20-JUL-2005), and 'Example' (01-JAN-2004). Below these are 'Filter Criteria' with 'Status' set to 'Open' and 'Customer' set to 'End User Name'. There is a 'Set Defaults' link and an 'OR' separator. Below the 'OR' is a 'Search for' dropdown set to 'Quote Number' and a 'Search' button. Below the search section is a 'Currently Displaying' section with 'Color Codes for Date Quoted' showing 'More than 45 days old' (red), 'More than 30 days old' (orange), and 'Current' (green). There is a 'Customize View' link. At the bottom is a table header with columns: 'Quote Number', 'Distributor Name', 'Quote Notes', 'Distributor Invoice', 'Distributor Account#', 'Reseller PO Number', 'Quote Amount', 'Created By', 'Reseller Price', 'End Customer Name', 'Quote Date (Days Old)', 'Status', 'Service Level', 'Contract', 'Quote Type', and 'Quote Complete'. Below the table header is a 'Select One' dropdown and a 'Submit' button.

## Search Using Quote Filters

Use the quote filter options to display quotes or narrow a list of previously displayed quotes. The filter options are:

- Open
- Submitted
- Distributor Ordered
- Pending Registration
- Conversion Failure
- RMA
- Auto-Registered
- Registered

You can also search by the Quote Number, Distributor Invoice Number, or Reseller PO Number.

---

**Note** Quotes older than 60 days may be achieved and unavailable for display.

---



### Procedure: Search Using the Quote Filters

Step	Action	Result or Note
1.	From the <b>Quoting and Ordering</b> tab, click the <b>Quote Manager</b> link.	The <b>Quote Manager</b> page displays.

## SCC New Quoting for Indirect Resellers

Step	Action	Result or Note
2.	For this example, we will search for open quotes that were created between June 1 <sup>st</sup> and July 20 <sup>th</sup> , 2005. Click the <b>From Date</b> Calendar Icon.	The <b>Calendar</b> tool displays. Notice that the calendar display defaults to June (the current month)
3.	Click the single Back arrow icon to navigate to May.	The month of May displays in the calendar. <b>NOTE:</b> Clicking the double back arrow icon will take you 12 months back to the previous year.
4.	Click the May 2 <sup>nd</sup> link.	02-MAY-2005 appears in the From Date field.
5.	Choose <b>Open</b> (default setting) from the Status drop-down list.	
	Click <b>Go</b> .	The Quote Manager page displays the search results.

# SCC New Quoting for Indirect Resellers

Step	Action	Result or Note																																																																																																																																																																																																																													
	<p><b>Quote Manager</b></p> <p>Quotes for RESELLER PROD TEST from TEST CUSTOMER TWO TIER</p> <p><b>Quote Filtering Guidelines:</b> Use any or all of the three filter options below to display your quotes or narrow a list of previously displayed quotes.</p> <p>Note: Quotes older than 60 days may be archived and unavailable for display.</p> <p>From Date: 01-JUL-2005 To Date: 20-JUL-2005 Example: 01-JAN-2004</p> <p>Filter Criteria: Status: Open Customer: End User Name Go</p> <p><a href="#">Set Defaults</a> for Filter and Search Criteria</p> <p>OR</p> <p>Search for Quote Number Search</p> <p>Currently Displaying - <b>Open Quotes</b></p> <p>Color Codes for Date Quoted : <a href="#">More than 45 days old</a> <a href="#">More than 30 days old</a> <a href="#">Current</a></p> <p><a href="#">Customize View</a> for Quote Header Display</p> <p>Currently showing page 1 of 2. Go to page: 1 next&gt;&gt;</p> <table border="1"> <thead> <tr> <th>Select</th> <th>Quote Number</th> <th>Distributor Name</th> <th>Quote Notes</th> <th>Distributor Invoice</th> <th>Distributor Account#</th> <th>Reseller PO Number</th> <th>Quote Amount</th> <th>Created By</th> <th>Reseller Price</th> <th>End Customer Name</th> <th>Quote Date (Days Old)</th> <th>Status</th> <th>Service Level</th> <th>Contract</th> <th>Quote Type</th> <th>Quote Com</th> </tr> </thead> <tbody> <tr> <td><input type="checkbox"/></td> <td><a href="#">04422940</a></td> <td>Ingram Micro US</td> <td></td> <td></td> <td></td> <td></td> <td>553.00 USD</td> <td>reseller.testus</td> <td>CONTACT DISTRIBUTOR</td> <td>TBD</td> <td>20-JUL-2005 (0)</td> <td>Open</td> <td>SMARTnet 8x5xNBD (SNT)</td> <td></td> <td>New Service</td> <td>No</td> </tr> <tr> <td><input type="checkbox"/></td> <td><a href="#">04422922</a></td> <td>Ingram Micro US</td> <td></td> <td></td> <td></td> <td></td> <td>2,800.00 USD</td> 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	<p>In this example, the filters we applied returned a very long list of search results. We can narrow the list by applying a customer name filter to the search criteria. Choose <b>End User Name</b> from the Customer drop-down list.</p>	<p>End User Name is displayed.</p>																																																																																																																																																																																																																													
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## Customize the Quote Header Display

You can sort the quotes by clicking the Quote Header links. You can also customize the display of the quote header display by using the Customize View feature.



### Procedure: Customize the Quote Header Display

Step	Action	Result or Note
1.	From the <b>Quoting and Ordering</b> tab, click the <b>Quote Manager</b> link.	The Quote Manager page displays.

# SCC New Quoting for Indirect Resellers

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	<p><a href="#">Generate a Quote</a>   <a href="#">Quote Manager</a>   <a href="#">Quote Wizard</a>   <a href="#">Import Quote File</a>   <a href="#">Update Rejected Site Address</a></p> <p>Customize View for Quote Header Display</p> <div style="display: flex; justify-content: space-between;"> <div data-bbox="506 800 649 1003"> <p><b>Available Quote Fields</b></p> <div style="border: 1px solid gray; height: 100px; width: 100%;"></div> <p><input type="button" value="Add &gt;"/></p> <p><input type="button" value="Add All &gt;&gt;"/></p> <p><input type="button" value="&lt; Remove"/></p> <p><input type="button" value="&lt;&lt; Remove All"/></p> </div> <div data-bbox="695 856 812 1003"> <p><input type="button" value="Add &gt;"/></p> <p><input type="button" value="Add All &gt;&gt;"/></p> <p><input type="button" value="&lt; Remove"/></p> <p><input type="button" value="&lt;&lt; Remove All"/></p> </div> <div data-bbox="824 800 998 1003"> <p><b>Displayed Quote Fields</b></p> <div style="border: 1px solid gray; padding: 2px;">             Distributor Name              Distributor Invoice Number              Distributor Account Number              Quote Amount              Created By              End Customer Name              Date Quote              Status              Service Level              Contract Number              Quote Type              Quote Complete           </div> <p><input type="button" value="Move Up"/></p> <p><input type="button" value="Move Down"/></p> </div> </div> <p style="text-align: center;"><input type="button" value="Submit"/> <input type="button" value="Cancel"/></p> <p><small>* Removing all quote fields will revert back to the Quote Manager defaults or to your previous saved defaults.</small></p>																													
3.	Choose the quote fields that you want to display or hide. In this example, we will hide the <b>Quote Notes</b> , <b>Reseller PO Number</b> , and <b>Reseller Price</b> quote headers and move the <b>Status</b> column to display first. In the <b>Displayed Quote Fields</b> list, select these three headers by holding the Ctrl key on your keyboard down.	The three quote headers are selected.																												
4.	Click <b>Remove All</b> .	The three quote headers are moved to the <b>Available Quote Fields</b> list.																												
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5.	Select <b>Status</b> from the Displayed Quote Fields list.	The Status header is selected.																												

Step	Action	Result or Note
6.	Click <b>Move Up</b> until the Status header is at the top of the Displayed Quote Fields list.	
7.	Click <b>Submit</b> .	The Quote Manager displays the quote headers with the customized changes.

## Route Quotes

You can route quotes from the Quote Manager for review and approval purposes or to verify if the quote is still valid.



### Procedure: Route a Quote from the Quote Manager

Step	Action	Result or Note
1.	From the <b>Quoting and Ordering</b> tab, click the <b>Quote Manager</b> link.	The Quote Manager page displays.

# SCC New Quoting for Indirect Resellers

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	<p><b>Quote Manager</b></p> <p>Quotes for RESELLER PROD TEST from TEST CUSTOMER TWO TIER</p> <p><b>Quote Filtering Guidelines:</b> Use any or all of the three filter options below to display your quotes or narrow a list of previously displayed quotes.                      Note: Quotes older than 60 days may be archived and unavailable for display.</p> <p>From Date: <input type="text" value="21-APR-2005"/> To Date: <input type="text" value="20-JUL-2005"/> Example: 01-JAN-2004</p> <p>Filter Criteria: Status: <input type="text" value="Open"/> Customer: <input type="text" value="End User Name"/> <input type="text" value="GOOGLE"/> <input type="button" value="Go"/></p> <p><a href="#">Set Defaults</a> for Filter and Search Criteria</p> <p>OR</p> <p>Search for: <input type="text" value="Quote Number"/> <input type="button" value="Search"/></p> <p>Currently Displaying: <b>Open Quotes</b>                      Color Codes for Date Quoted: <span style="color: red;">More than 45 days old</span> <span style="color: orange;">More than 30 days old</span> <span style="color: green;">Current</span>  <a href="#">Customize View</a> for Quote Header Display</p> <table border="1"> <thead> <tr> <th>Select</th> <th>Quote Number</th> <th>Status</th> <th>Distributor Name</th> <th>Distributor Invoice</th> <th>Distributor Account#</th> <th>Quote Amount</th> <th>Created By</th> <th>End Customer Name</th> <th>Quote Date (Days Old)</th> <th>Service Level</th> <th>Contract</th> <th>Quote Type</th> <th>Quote Complete</th> </tr> </thead> <tbody> <tr> <td><input type="checkbox"/></td> <td><a href="#">Q4422890</a></td> <td>Open</td> <td>Ingram Micro US</td> <td></td> <td></td> <td>96.00 USD</td> <td>reseller.testus</td> <td>GOOGLE</td> <td>18-JUL-2005(2)</td> <td>SMARTnet 8x5xNBD (SNT)</td> <td></td> <td>New Service</td> <td>No</td> </tr> <tr> <td><input type="checkbox"/></td> <td><a href="#">Q4422887</a></td> <td>Open</td> <td>Ingram Micro US</td> <td></td> <td></td> <td>553.00 USD</td> <td>reseller.testus</td> <td>GOOGLE</td> <td>18-JUL-2005(2)</td> <td>SMARTnet 8x5xNBD (SNT)</td> <td></td> <td>New Service</td> <td>No</td> </tr> <tr> <td><input type="checkbox"/></td> <td><a href="#">Q4422886</a></td> <td>Open</td> <td>Ingram Micro US</td> <td></td> <td></td> <td>553.00 USD</td> <td>reseller.testus</td> <td>GOOGLE</td> <td>18-JUL-2005(2)</td> <td>SMARTnet 8x5xNBD (SNT)</td> <td></td> <td>New Service</td> <td>No</td> </tr> <tr> <td><input type="checkbox"/></td> <td><a href="#">Q4422479</a></td> <td>Open</td> <td>Ingram Micro US</td> <td></td> <td></td> <td>125.00 USD</td> <td>reseller.testus</td> <td>GOOGLE</td> <td>05-JUL-2005(15)</td> <td>SMARTnet 8x5xNBD (SNT)</td> <td></td> <td>New Service</td> <td>No</td> </tr> </tbody> </table> <p><input type="text" value="Select One"/> <input type="button" value="Submit"/></p>	Select	Quote Number	Status	Distributor Name	Distributor Invoice	Distributor Account#	Quote Amount	Created By	End Customer Name	Quote Date (Days Old)	Service Level	Contract	Quote Type	Quote Complete	<input type="checkbox"/>	<a href="#">Q4422890</a>	Open	Ingram Micro US			96.00 USD	reseller.testus	GOOGLE	18-JUL-2005(2)	SMARTnet 8x5xNBD (SNT)		New Service	No	<input type="checkbox"/>	<a href="#">Q4422887</a>	Open	Ingram Micro US			553.00 USD	reseller.testus	GOOGLE	18-JUL-2005(2)	SMARTnet 8x5xNBD (SNT)		New Service	No	<input type="checkbox"/>	<a href="#">Q4422886</a>	Open	Ingram Micro US			553.00 USD	reseller.testus	GOOGLE	18-JUL-2005(2)	SMARTnet 8x5xNBD (SNT)		New Service	No	<input type="checkbox"/>	<a href="#">Q4422479</a>	Open	Ingram Micro US			125.00 USD	reseller.testus	GOOGLE	05-JUL-2005(15)	SMARTnet 8x5xNBD (SNT)		New Service	No	
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## SCC New Quoting for Indirect Resellers

Step	Action	Result or Note
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5.	Route the Quote using the procedures described in Lesson 5. Click the <b>Submit</b> button when finished.	The quote is routed to the designated user.

## Delete Quotes

If necessary, you can delete your quotes in the Quote Manager.



### Procedure: Delete Quotes

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## SCC New Quoting for Indirect Resellers

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4.	Click <b>Submit</b> .	The Quote Manager cancels the selected quote. The User Notification page informs you that the quote has been canceled.																																																																						
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5.	Click the <b>Back to Quote Manager</b> link.	The Quote Manager page displays.																																																																						

## Submit Order Request

For your convenience, you can submit an order request to your distributor directly from the Quote Manager. If you are not authorized to plan an order on your company's behalf, go through your normal internal procurement process.



### Procedure: Submit Order Request

Step	Action	Result or Note
1.	From the Quoting and Ordering Tab, click the <b>Quote Manager</b> link.	The <b>Quote Manager</b> page displays.

# SCC New Quoting for Indirect Resellers

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2.	<p>Choose the quote that you want to submit for order by clicking the check box icon next to the quote number link</p>	<p><b>The Online Ordering – Order Detail</b> page displays. Submit the order request using the submit order request procedure described in Lesson 2: Quoting and Ordering.</p>																																																								
	<p><a href="#">Generate a Quote</a>   <b>Quote Manager</b>   <a href="#">Quote Wizard</a>   <a href="#">Import Quote File</a>   <a href="#">Update Rejected Site Address</a></p> <p>An order request is about to be sent to for quote Q4422890.</p> <p>Please use the email and comments field to notify your distributor representative of this order submission. <b>If you do not contact your distributor representative your order will not be placed.</b></p> <p>You will receive an order confirmation as soon as the order has been placed by your distributor.</p> <p>Enter Your PO Number: <input type="text"/></p> <p>Enter your Account Number with the distributor*: <input type="text"/></p> <p>Distributor Representative Email Address*: <input type="text"/></p> <p>Comments*: <input type="text"/></p> <p>*Highly Recommended</p> <p>Do you wish to continue? <input type="button" value="Yes"/> <input type="button" value="No"/></p>																																																									



## On Your Own Exercise 3: Manage Quotes

### Instructions

Open the Quote Manager and select one quote to revise for an order. To confirm any steps, refer back to the lesson for details.

### Questions

1. What quote filters can you use to search by in the Quote Manager?
2. What tasks can you perform from the Quote Manager page?
3. How do you change the display of the quote column headers?
4. Quotes that are color coded in green are what type of quotes?

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**Note** The answers to these questions are located in the back of the User Guide.

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## Lesson 4: Register Service

Partial quotes need to be registered in order to complete the contract entitlement process. This lesson examines how to register the partial quote using the SCC New Quoting Registration Wizard.

**Note:** The Registration Wizard is only available in the United States. New quotes that contained complete information are registered automatically.

### Objectives

At the end of this lesson, you will be able to:

- Identify the sections of the Registration Wizard
- Identify actions you can take using the Registration Wizard
- Edit Install Sites
- Register Service

### Registration Wizard

All partial quote registration entry and validation takes place on the **Registration Wizard** page. The Registration Wizard displays the following:

- Registration Information
- Reseller
- Install Site Actions
- Registered Products

The Registration Wizard page is shown in the figure below.

## SCC New Quoting for Indirect Resellers

[Generate a Quote](#) | [Quote Manager](#) | [Quote Wizard](#) | [Import Quote File](#) | [Update Rejected Site Address](#)

Quick Search  Contract Number   [Advanced Search](#)

**Registration Wizard** Logged in as: reseller.test.us

Welcome to Registration Wizard.

**REGISTRATION INFORMATION**  
 Status: Pending Registration Quote Amount: \$25,584.00 USD  
 Quote: Q4423022 Reseller Price: CONTACT DISTRIBUTOR  
 Service Level: SMARTnet 8x5xNBD (SNT) Customer Price: \$29,315.00 USD  
 Order Date: 25-JUL-2005 Reseller PO Number:  
 Created by: reseller.test.us Distributor Invoice Number:  
 Distributor: Ingram Micro US Quote Notes:  
 Distributor Account Number: INGRAM

**Reseller**

**Name and Address** [Contact Information Edit](#)  
 PRAVEEN US  
 260 NORTH MATHILDA AVENUE  
 SUNNYVALE, CA 94086  
 UNITED STATES  
 First Name  
 Last Name  
 Phone Number  
 Email  
 CCO User ID

**Actions**  
 Select One

Select	Install Site	Adding To Existing Contract <a href="#">Advanced Contract Search</a>	Begin Date	End Date	Remaining Products To Be Registered	Site Status
<input type="checkbox"/>	<a href="#">SCOTT'S MONGOLIAN BBQ</a> <a href="#">555 MOCKINGBIRD LANE</a> <a href="#">SANTA CLARA, CA 95051</a> <a href="#">UNITED STATES</a>	<input type="text"/>	25-JUL-2005	24-JUL-2007	2	Incomplete
<input type="checkbox"/>	<a href="#">LANCES GREAT BIKES</a> <a href="#">ONE VICTORY SQUARE</a> <a href="#">SANTA CLARA, CA 95051</a> <a href="#">UNITED STATES</a>	<input type="text"/>	25-JUL-2005	24-JUL-2007	1	Incomplete

**Registered Products**

INSTALL SITE	REG TYPE	PRODUCT NUMBER	SERIAL NUMBER	REFERENCE SERVICE PART	BEGIN DATE	END DATE	REG DATE	REG BY	CONTRACT	ADDITIONAL CONTRACT ACCESS
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## Edit Reseller Information

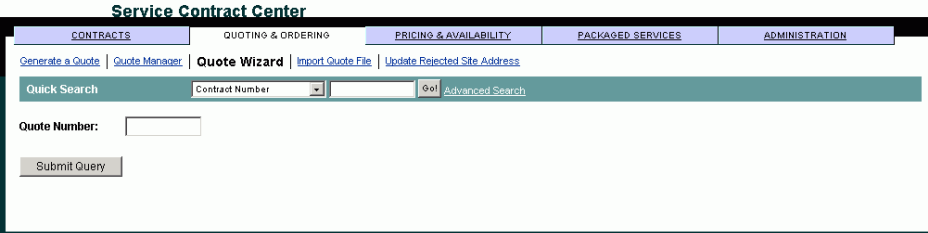
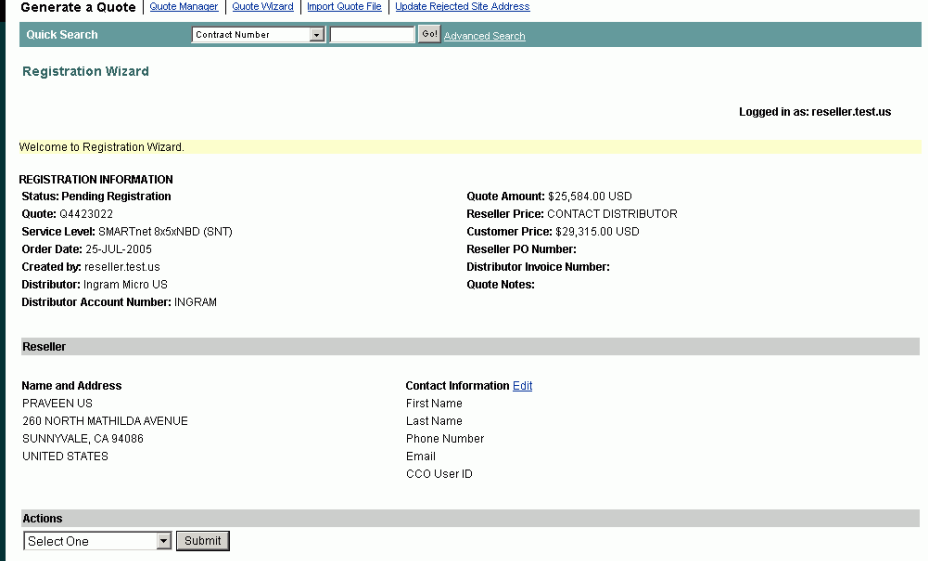
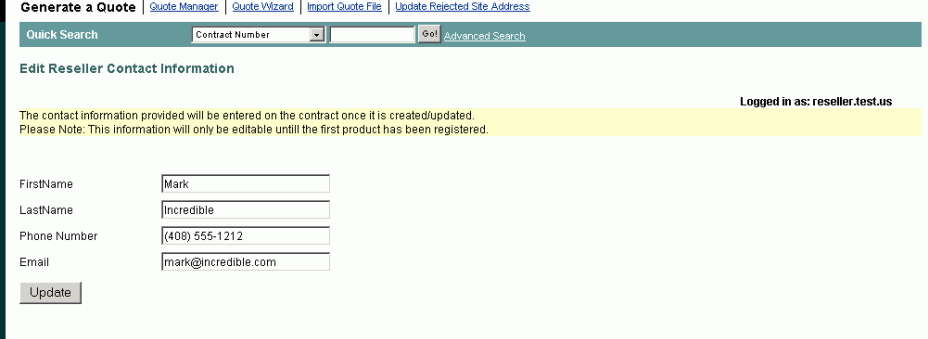
The Reseller Information section identifies the Reseller name, address and contact information. Here you can also edit the Reseller contact information, if needed.



### Procedure: Edit Reseller Information

Step	Action	Result or Note
1.	From the Quoting and Ordering Tab, click the <b>Quote Wizard</b> link.	The <b>Quote Wizard</b> search page displays.

SCC New Quoting for Indirect Resellers

Step	Action	Result or Note
	 <p>The screenshot shows the 'Service Contract Center' interface with tabs for CONTRACTS, QUOTING &amp; ORDERING, PRICING &amp; AVAILABILITY, PACKAGED SERVICES, and ADMINISTRATION. The 'QUOTING &amp; ORDERING' tab is active, showing options like 'Generate a Quote', 'Quote Manager', 'Quote Wizard', 'Import Quote File', and 'Update Rejected Site Address'. There is a search bar with 'Contract Number' and a 'Submit Query' button.</p>	
2.	Enter the quote number that you want to register service for.	You must have ordered service on the quote for the Registration Wizard to display.
3.	Click <b>Submit Query</b> .	The <b>Registration Wizard</b> page displays.
	 <p>The screenshot shows the 'Registration Wizard' page. It includes a search bar, a 'Logged in as: reseller.test.us' indicator, and a yellow welcome message. The 'REGISTRATION INFORMATION' section lists: Status: Pending Registration, Quote: Q4423022, Service Level: SMARTnet 8x5xNBD (SNT), Order Date: 25-JUL-2005, Created by: reseller.test.us, and Distributor: Ingram Micro US. The 'Reseller' section shows 'Name and Address' (PRAVEEN US, 260 NORTH MATHILDA AVENUE, SUNNYVALE, CA 94086, UNITED STATES) and 'Contact Information' (First Name, Last Name, Phone Number, Email, CCO User ID). There are 'Actions' at the bottom with a 'Submit' button.</p>	
4.	In the Reseller section, click the Contact Information <b>Edit</b> link.	The <b>Edit Reseller Contact Information</b> page displays.
	 <p>The screenshot shows the 'Edit Reseller Contact Information' page. It includes a search bar, a 'Logged in as: reseller.test.us' indicator, and a yellow note: 'The contact information provided will be entered on the contract once it is created/updated. Please Note: This information will only be editable until the first product has been registered.' The form fields are: First Name (Mark), Last Name (Incredible), Phone Number ((408) 555-1212), and Email (mark@incredible.com). There is an 'Update' button at the bottom.</p>	
5.	Make the appropriate changes. When you are finished, click <b>Update</b> .	The Registration Wizard displays the updated Reseller contact information.

## Registration Wizard Actions

The Registration Wizard provides several actions that you can perform on the install sites. These actions are:

- Register Site(s)
- Create Install Site
- Delete Site
- Route Registration
- Download Registration

---

**Note** The status of each install site on the quote must be **Complete** before they can be registered from the Registration Wizard page.

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### Procedure: Register Site(s)

Step	Action	Result or Note
1.	From the Registration Wizard page, click the checkboxes next to the install sites that you want to register.	The install site status must be <b>Complete</b> before registration can be validated. See the Edit Install Site section for detailed instructions on setting the install site status to Complete.

SCC New Quoting for Indirect Resellers

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	<p><b>Generate a Quote</b>   <a href="#">Quote Manager</a>   <a href="#">Quote Wizard</a>   <a href="#">Import Quote File</a>   <a href="#">Update Rejected Site Address</a></p> <p>Quick Search <input type="text"/> Contract Number <input type="text"/> <input type="button" value="Go"/> <a href="#">Advanced Search</a></p> <p><b>Registration Wizard</b></p> <p style="text-align: right;">Logged in as: reseller.test.us</p> <p>Welcome to Registration Wizard.</p> <p><b>REGISTRATION INFORMATION</b></p> <p>Status: Pending Registration  Quote: Q4423022  Service Level: SMARTnet 8x5xNBD (SNT)  Order Date: 25-JUL-2005  Created by: reseller.test.us  Distributor: Ingram Micro US  Distributor Account Number: INGRAM</p> <p>Quote Amount: \$25,584.00 USD  Reseller Price: CONTACT DISTRIBUTOR  Customer Price: \$29,315.00 USD  Reseller PO Number:  Distributor Invoice Number:  Quote Notes:</p> <p><b>Reseller</b></p> <p><b>Name and Address</b>  PRAVEEN US  260 NORTH MATHILDA AVENUE  SUNNYVALE, CA 94086  UNITED STATES</p> <p><b>Contact Information</b> <a href="#">Edit</a>  First Name  Last Name  Phone Number  Email  CCO User ID</p> <p><b>Actions</b></p> <p>Register Site <input type="button" value="Submit"/></p> <table border="1"> <thead> <tr> <th>Select</th> <th>Install Site</th> <th>Adding To Existing Contract <a href="#">Advanced Contract Search</a></th> <th>Begin Date</th> <th>End Date</th> <th>Remaining Products To Be Registered</th> <th>Site Status</th> </tr> </thead> <tbody> <tr> <td><input type="checkbox"/></td> <td><a href="#">SCOTT'S MONGOLIAN BBQ</a> <a href="#">555 MOCKINGBIRD LANE</a> <a href="#">SANTA CLARA, CA 95051</a> <a href="#">UNITED STATES</a></td> <td><input type="text"/></td> <td>25-JUL-2005</td> <td>24-JUL-2007</td> <td>2</td> <td>Incomplete</td> </tr> <tr> <td><input checked="" type="checkbox"/></td> <td><a href="#">LANCES GREAT BIKES</a> <a href="#">ONE VICTORY SQUARE</a> <a href="#">SANTA CLARA, CA 95051</a> <a href="#">UNITED STATES</a></td> <td><input type="text"/></td> <td>25-JUL-2005</td> <td>24-JUL-2007</td> <td>1</td> <td>Complete</td> </tr> </tbody> </table> <p><b>Registered Products</b></p> <table border="1"> <thead> <tr> <th>INSTALL SITE</th> <th>REG TYPE</th> <th>PRODUCT NUMBER</th> <th>SERIAL NUMBER</th> <th>REFERENCE SERVICE PART</th> <th>BEGIN DATE</th> <th>END DATE</th> <th>REG DATE</th> <th>REG BY</th> <th>CONTRACT</th> <th>ADDITIONAL CONTRACT ACCESS</th> </tr> </thead> <tbody> <tr> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> </tr> </tbody> </table>	Select	Install Site	Adding To Existing Contract <a href="#">Advanced Contract Search</a>	Begin Date	End Date	Remaining Products To Be Registered	Site Status	<input type="checkbox"/>	<a href="#">SCOTT'S MONGOLIAN BBQ</a> <a href="#">555 MOCKINGBIRD LANE</a> <a href="#">SANTA CLARA, CA 95051</a> <a href="#">UNITED STATES</a>	<input type="text"/>	25-JUL-2005	24-JUL-2007	2	Incomplete	<input checked="" type="checkbox"/>	<a href="#">LANCES GREAT BIKES</a> <a href="#">ONE VICTORY SQUARE</a> <a href="#">SANTA CLARA, CA 95051</a> <a href="#">UNITED STATES</a>	<input type="text"/>	25-JUL-2005	24-JUL-2007	1	Complete	INSTALL SITE	REG TYPE	PRODUCT NUMBER	SERIAL NUMBER	REFERENCE SERVICE PART	BEGIN DATE	END DATE	REG DATE	REG BY	CONTRACT	ADDITIONAL CONTRACT ACCESS												
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2.	Determine if you want to add the install site(s) to an existing contract or a new contract.	You must have granted your distributor access to the quote, and the distributor must have ordered service on the quote for the Registration Wizard to display.																																											
	If...	Then...																																											
	You want to add the install sites to an existing contract,	Enter the contract number in the Add to an Existing Contract field.	Note: If you do not know the contract number, click the Advanced Contract Search link. Refer to Lesson 2: Searching to assist you in locating an existing contract number.																																										
	If you want to create a new contract to add the install sites to,	Leave the Add to Existing Contract field blank.	A new contract is created upon registration completion.																																										
3.	Review and verify that the Reseller and Registration information is correct.																																												
4.	Choose <b>Register Site</b> from the <b>Action</b> drop-down menu.		Register Site displays in the Action drop-down list.																																										
5.	Click <b>Submit</b> .		The <b>Registration Submission</b> page displays.																																										

Step	Action	Result or Note																						
	<p><b>Generate a Quote</b>   <a href="#">Quote Manager</a>   <a href="#">Quote Wizard</a>   <a href="#">Import Quote File</a>   <a href="#">Update Rejected Site Address</a></p> <p>Quick Search <input type="text"/> Contract Number <input type="text"/> <input type="button" value="Go"/> <a href="#">Advanced Search</a></p> <p><b>REGISTRATION SUBMISSION</b></p> <p>Please review the alert messages below before completing the registration.</p> <p>Quote: Q4423022                      Service Level: SMARTnet 8x5xNBD (SNT)                      Order Date: 25-JUL-2005                      Created By: reseller.test.us                      Reseller PO Number:                      Distributor Invoice Number:</p> <p>Tip: To grant additional contract access, please enter the CCO User IDs below. User IDs entered below should be comma or carriage returned delimited.                      Please note, contract access is automatically granted to the quote creator as well as all User IDs associated with the Reseller.</p> <p><b>PRODUCTS TO BE REGISTERED</b></p> <table border="1"> <thead> <tr> <th>Install Site</th> <th>Grant Additional Contract Access</th> <th>Add to Existing Contract Number</th> <th>Product Number</th> <th>Serial Number</th> <th>Reference Service Part</th> <th>Begin Date</th> <th>End Date</th> <th>Product Ship Date</th> <th>Alerts</th> </tr> </thead> <tbody> <tr> <td>LANCES GREAT BIKES ONE VICTORY SQUARE,CA 95051 UNITED STATES</td> <td><input type="text"/></td> <td></td> <td>PIX-525-UR-BUN</td> <td>88807212791</td> <td>CON-SNT-PIX525</td> <td>25-JUL-2005</td> <td>24-JUL-2007</td> <td>15-MAY-2003</td> <td></td> </tr> </tbody> </table> <p><input type="button" value="Submit Registration"/> <input type="button" value="Cancel"/></p>	Install Site	Grant Additional Contract Access	Add to Existing Contract Number	Product Number	Serial Number	Reference Service Part	Begin Date	End Date	Product Ship Date	Alerts	LANCES GREAT BIKES ONE VICTORY SQUARE,CA 95051 UNITED STATES	<input type="text"/>		PIX-525-UR-BUN	88807212791	CON-SNT-PIX525	25-JUL-2005	24-JUL-2007	15-MAY-2003				
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6.	Review any alert messages before completing the submission.	To grant additional contract access, please enter the CCO user IDs in the <b>Grant Additional Contract Access</b> field.																						
7.	Click Submit Registration.	The Registration Confirmation page verifies that the products on the sites have been registered. Click <b>Return to Registration</b> button to go back to the Registration Wizard.																						
	<p><b>Generate a Quote</b>   <a href="#">Quote Manager</a>   <a href="#">Quote Wizard</a>   <a href="#">Import Quote File</a>   <a href="#">Update Rejected Site Address</a></p> <p>Quick Search <input type="text"/> Contract Number <input type="text"/> <input type="button" value="Go"/> <a href="#">Advanced Search</a></p> <p><b>Registration Confirmation</b></p> <p>The products below have been registered. You will receive an email notification as soon as the contract information is available. <span style="float: right;">Logged in as: reseller.test.us</span></p> <p>Quote: Q4423022                      Service Level: SMARTnet 8x5xNBD (SNT)                      Order Date: 25-JUL-2005                      Created By: reseller.test.us                      Reseller PO Number:                      Distributor Invoice Number:</p> <p><b>REGISTERED PRODUCTS</b></p> <table border="1"> <thead> <tr> <th>Install Site</th> <th>Reg Type</th> <th>Product Number</th> <th>Serial Number</th> <th>Reference Service Part</th> <th>Begin Date</th> <th>End Date</th> <th>Reg Date</th> <th>Reg By</th> <th>Contract</th> <th>Additional Contract Access</th> </tr> </thead> <tbody> <tr> <td>LANCES GREAT BIKES ONE VICTORY SQUARE,CA 95051 UNITED STATES</td> <td>NEW</td> <td>PIX-525-UR-BUN</td> <td>88807212791</td> <td>CON-SNT-PIX525</td> <td>25-JUL-2005</td> <td>24-JUL-2007</td> <td>25-JUL-2005</td> <td>reseller.test.us</td> <td>TBD</td> <td></td> </tr> </tbody> </table> <p><input type="button" value="Return to Registration"/> <input type="button" value="Go to Quote Manager"/></p>	Install Site	Reg Type	Product Number	Serial Number	Reference Service Part	Begin Date	End Date	Reg Date	Reg By	Contract	Additional Contract Access	LANCES GREAT BIKES ONE VICTORY SQUARE,CA 95051 UNITED STATES	NEW	PIX-525-UR-BUN	88807212791	CON-SNT-PIX525	25-JUL-2005	24-JUL-2007	25-JUL-2005	reseller.test.us	TBD		
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## Create a New Site

You can create a new site directly from the Registration Wizard and add it to the quote.



### Procedure: Create a New Site

SCC New Quoting for Indirect Resellers

Step	Action	Result or Note
1.	From the <b>Registration Wizard</b> page, choose <b>Create Install Site</b> from the Action drop-down list.	Create Install Site displays in the Action drop-down list.
2.	Click <b>Submit</b> .	The <b>Create/Edit Install Site</b> page displays.
3.	Create the new site using steps 9 – 16 from <b>Lesson 4: Quoting and Ordering, Create New Site</b> procedure.	

Step	Action	Result or Note																																													
4.	Verify that the install information you entered is correct. Once you are finished, click <b>Create/Edit Install Site</b> .	The <b>Address Auto Loader</b> page displays a list of customer names that closely match the name and information that you just entered.																																													
	If...	Then...																																													
	The customer name appears on the Address Auto Loader list,	Select the customer name, and then click <b>Submit</b> .																																													
	The customer name does not appear on the Address Auto Loader list,	Click the <b>Create New Customer</b> link located at the bottom of the Address Auto Loader page.																																													
5.	The <b>User Notification</b> page confirms that the site contact information has been updated. Click the <b>here</b> link to return to the Registration Wizard.	The Registration Wizard displays the new site.																																													
<div style="border: 1px solid black; padding: 5px;"> <p><b>Reseller</b></p> <table border="0" style="width: 100%;"> <tr> <td style="width: 60%;"> <p><b>Name and Address</b>                      PRAVEEN US                      260 NORTH MATHILDA AVENUE                      SUNNYVALE, CA 94086                      UNITED STATES</p> </td> <td style="width: 40%;"> <p><b>Contact Information</b>                      First Name                      Last Name                      Phone Number                      Email                      CCO User ID</p> </td> </tr> </table> <p><b>Actions</b></p> <p>Select One <input type="button" value="Submit"/></p> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th>Select</th> <th>Install Site</th> <th>Adding To Existing Contract <a href="#">Advanced Contract Search</a></th> <th>Begin Date</th> <th>End Date</th> <th>Remaining Products To Be Registered</th> <th>Site Status</th> </tr> </thead> <tbody> <tr> <td style="text-align: center;"><input type="checkbox"/></td> <td><a href="#">ROE BOATS</a> 458 ANYSTREET SAN JOSE, CA 95127 UNITED STATES</td> <td><input type="text"/></td> <td>TBD</td> <td>TBD</td> <td style="text-align: center;">0</td> <td>Incomplete</td> </tr> <tr> <td style="text-align: center;"><input type="checkbox"/></td> <td><a href="#">SCOTT'S MONGOLIAN BBQ</a> 555 MOCKINGBIRD LANE SANTA CLARA, CA 95051 UNITED STATES</td> <td><input type="text"/></td> <td>25-JUL-2005</td> <td>24-JUL-2007</td> <td style="text-align: center;">2</td> <td>Incomplete</td> </tr> </tbody> </table> <p><b>Registered Products</b></p> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th>INSTALL SITE</th> <th>REG TYPE</th> <th>PRODUCT NUMBER</th> <th>SERIAL NUMBER</th> <th>REFERENCE SERVICE PART</th> <th>BEGIN DATE</th> <th>END DATE</th> <th>REG DATE</th> <th>REG BY</th> <th>CONTRACT</th> <th>ADDITIONAL CONTRACT ACCESS</th> </tr> </thead> <tbody> <tr> <td>LANCES GREAT BIKES ONE VICTORY SQUARE SANTA CLARA, CA 95051 UNITED STATES</td> <td>NEW</td> <td>PIX-525-UR-BUN</td> <td>88807212791</td> <td>CON-SNT-PIX525</td> <td>25-JUL-2005</td> <td>24-JUL-2007</td> <td>25-JUL-2005</td> <td>reseller.test.us</td> <td>2776638</td> <td></td> </tr> </tbody> </table> </div>			<p><b>Name and Address</b>                      PRAVEEN US                      260 NORTH MATHILDA AVENUE                      SUNNYVALE, CA 94086                      UNITED STATES</p>	<p><b>Contact Information</b>                      First Name                      Last Name                      Phone Number                      Email                      CCO User ID</p>	Select	Install Site	Adding To Existing Contract <a href="#">Advanced Contract Search</a>	Begin Date	End Date	Remaining Products To Be Registered	Site Status	<input type="checkbox"/>	<a href="#">ROE BOATS</a> 458 ANYSTREET SAN JOSE, CA 95127 UNITED STATES	<input type="text"/>	TBD	TBD	0	Incomplete	<input type="checkbox"/>	<a href="#">SCOTT'S MONGOLIAN BBQ</a> 555 MOCKINGBIRD LANE SANTA CLARA, CA 95051 UNITED STATES	<input type="text"/>	25-JUL-2005	24-JUL-2007	2	Incomplete	INSTALL SITE	REG TYPE	PRODUCT NUMBER	SERIAL NUMBER	REFERENCE SERVICE PART	BEGIN DATE	END DATE	REG DATE	REG BY	CONTRACT	ADDITIONAL CONTRACT ACCESS	LANCES GREAT BIKES ONE VICTORY SQUARE SANTA CLARA, CA 95051 UNITED STATES	NEW	PIX-525-UR-BUN	88807212791	CON-SNT-PIX525	25-JUL-2005	24-JUL-2007	25-JUL-2005	reseller.test.us	2776638	
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## Delete Site

You can create a new site directly from the Registration Wizard and add it to the quote.



### Procedure: Delete Site

SCC New Quoting for Indirect Resellers

Step	Action	Result or Note																																											
1.	From the <b>Registration Wizard</b> page, choose <b>Delete Site</b> from the Action drop-down list.	Delete Install Site displays in the Action drop-down list.																																											
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2.	Click the checkbox next to the install site that you want to delete.																																												
3.	Click <b>Submit</b> .	The User Notification page confirms that the site has been deleted..																																											
	<p><b>Service Contract Center</b></p> <p>CONTRACTS   QUOTING &amp; ORDERING   PRICING &amp; AVAILABILITY   PACKAGED SERVICES   ADMINISTRATION</p> <p>Generate a Quote   <a href="#">Quote Manager</a>   <a href="#">Quote Wizard</a>   <a href="#">Import Quote File</a>   <a href="#">Update Rejected Site Address</a></p> <p>Quick Search: Contract Number [v] [x] Advanced Search</p> <p><b>User Notification</b>          The selected sites have been deleted from the registration.  <a href="#">Return to Registration Wizard</a></p>																																												

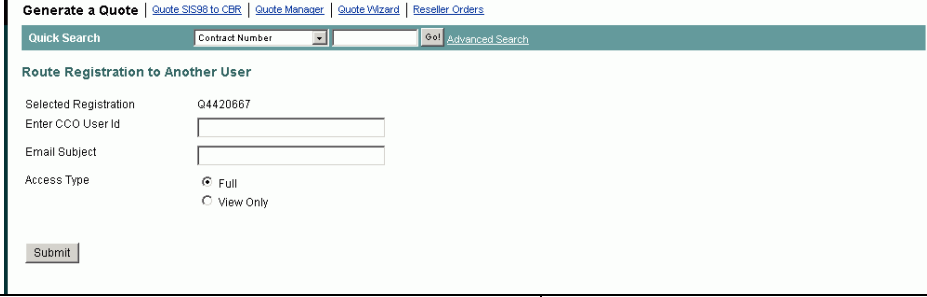
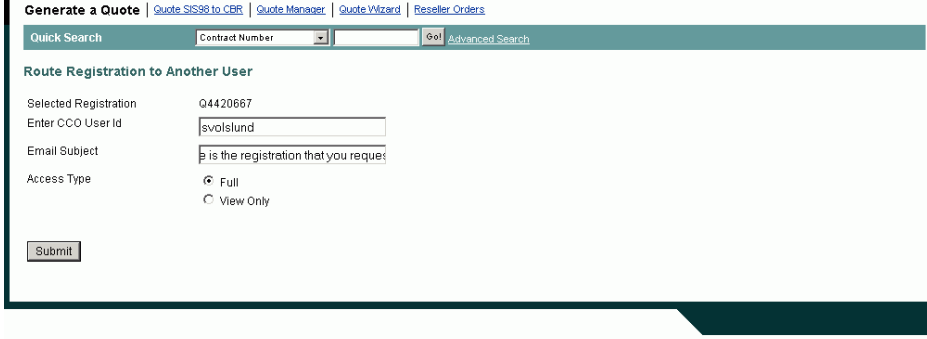
## Route Registration

You can route the registration to grant another user access to the registration. You have the option to grant the other user Full access to edit the quote or View-Only access. .



### Procedure: Route Registration

Step	Action	Result or Note
1.	From the <b>Registration Wizard</b> page, choose <b>Route Quote</b> from the Action drop-down list.	Route Quote displays in the Action drop-down list.
	<p>The screenshot shows the 'Registration Wizard' page. At the top, there are navigation links: 'Generate a Quote', 'Quote Manager', 'Quote Wizard', 'Import Quote File', and 'Update Rejected Site Address'. Below this is a search bar with 'Quick Search' and 'Advanced Search' options. The main content area is titled 'Registration Wizard' and includes a login status 'Logged in as: reseller.test.us'. A yellow banner says 'Welcome to Registration Wizard.' Below that, 'REGISTRATION INFORMATION' is displayed, including 'Status: Pending Registration', 'Quote: Q4423022', 'Service Level: SMARTnet 8x5xNBD (SNT)', 'Order Date: 25-JUL-2005', 'Created by: reseller.test.us', 'Distributor: Ingram Micro US', and 'Distributor Account Number: INGRAM'. To the right, 'Quote Amount: \$25,584.00 USD', 'Reseller Price: CONTACT DISTRIBUTOR', 'Customer Price: \$29,315.00 USD', 'Reseller PO Number:', and 'Distributor Invoice Number:' are shown. A 'Reseller' section follows, with 'Name and Address' (PRAVEEN US, 260 NORTH MATHILDA AVENUE, SUNNYVALE, CA 94086, UNITED STATES) and 'Contact Information' (First Name, Last Name, Phone Number, Email, CCO User ID). An 'Actions' section has a dropdown menu set to 'Route Registration' and a 'Submit' button. Below this is a table with columns: 'Select', 'Install Site', 'Adding To Existing Contract', 'Begin Date', 'End Date', 'Remaining Products To Be Registered', and 'Site Status'. The table contains one row for 'SCOTT'S MONGOLIANN BBO' with a '2' in the 'Remaining Products' column and 'Incomplete' in the 'Site Status' column. At the bottom, a 'Registered Products' table is shown with columns: 'INSTALL SITE', 'REG TYPE', 'PRODUCT NUMBER', 'SERIAL NUMBER', 'REFERENCE SERVICE PART', 'BEGIN DATE', 'END DATE', 'REG DATE', 'REG BY', 'CONTRACT', and 'ADDITIONAL CONTRACT ACCESS'. It lists 'LANCES GREAT BIKES ONE VICTORY SQUARE' with product number 'PIX-525-UR-BUN', serial number '88807212791', and reference 'CON-SNT-PIX525'.</p>	
2.	Click the <b>Submit</b> button.	The <b>Route Registration to Another User</b> page displays.

Step	Action	Result or Note
		
3.	Enter the CCO User ID of the user you want to route the registration to in the <b>Enter CCO User ID</b> field.	The user's CCO user ID displays in the Enter CCO User ID field.
4.	Enter a comment in the <b>Email Subject</b> line.	
5.	Choose an <b>Access Type</b> .	The options are <b>Full</b> and <b>View Only</b> .
		
6.	Click <b>Update</b> .	The <b>User Notification</b> page confirms that authorization for the registration (s) has been updated and an email has been sent to the user.

## Download Registration

You can download the registration information and view it in a Spreadsheet program such as Microsoft Excel. This feature is useful if you want to download the registration to an Excel spreadsheet and review it with your customer.



### Procedure: Download Registration

SCC New Quoting for Indirect Resellers

Step	Action	Result or Note																																				
1.	From the <b>Registration Wizard</b> page, choose <b>Download Registration</b> from the Action drop-down list.	<b>Download Registration</b> displays in the Action drop-down list.																																				
	<p><a href="#">Generate a Quote</a>   <a href="#">Quote Manager</a>   <a href="#">Quote Wizard</a>   <a href="#">Import Quote File</a>   <a href="#">Update Rejected Site Address</a></p> <p>Quick Search: <input type="text"/> Contract Number <input type="text"/> <input type="button" value="Go"/> <a href="#">Advanced Search</a></p> <p><b>Registration Wizard</b></p> <p style="text-align: right;">Logged in as: reseller.test.us</p> <p>Welcome to Registration Wizard.</p> <p><b>REGISTRATION INFORMATION</b>  <b>Status:</b> Pending Registration  <b>Quote:</b> Q4423022  <b>Service Level:</b> SMARTnet 8x5xNBD (SNT)  <b>Order Date:</b> 25-JUL-2005  <b>Created by:</b> reseller.test.us  <b>Distributor:</b> Ingram Micro US  <b>Distributor Account Number:</b> INGRAM</p> <p style="text-align: right;"><b>Quote Amount:</b> \$25,584.00 USD  <b>Reseller Price:</b> CONTACT DISTRIBUTOR  <b>Customer Price:</b> \$29,315.00 USD  <b>Reseller PO Number:</b>  <b>Distributor Invoice Number:</b>  <b>Quote Notes:</b></p> <p><b>Reseller</b></p> <p><b>Name and Address</b>  PRAVEEN US  260 NORTH MATHILDA AVENUE  SUNNYVALE, CA 94086  UNITED STATES</p> <p><b>Contact Information</b>  First Name  Last Name  Phone Number  Email  CCO User ID</p> <p><b>Actions</b>  <input type="button" value="Download Registration"/> <input type="button" value="Submit"/></p> <table border="1"> <thead> <tr> <th>Select</th> <th>Install Site</th> <th>Adding To Existing Contract</th> <th>Begin Date</th> <th>End Date</th> <th>Remaining Products To Be Registered</th> <th>Site Status</th> </tr> </thead> <tbody> <tr> <td><input type="checkbox"/></td> <td><a href="#">SCOTT'S MONGOLIAN BBQ</a> <a href="#">555 MOCKINGBIRD LANE</a> <a href="#">SANTA CLARA, CA 95051</a> <a href="#">UNITED STATES</a></td> <td><input type="text"/></td> <td>25-JUL-2005</td> <td>24-JUL-2007</td> <td>2</td> <td>Incomplete</td> </tr> </tbody> </table> <p><b>Registered Products</b></p> <table border="1"> <thead> <tr> <th>INSTALL SITE</th> <th>REG TYPE</th> <th>PRODUCT NUMBER</th> <th>SERIAL NUMBER</th> <th>REFERENCE SERVICE PART</th> <th>BEGIN DATE</th> <th>END DATE</th> <th>REG DATE</th> <th>REG BY</th> <th>CONTRACT</th> <th>ADDITIONAL CONTRACT ACCESS</th> </tr> </thead> <tbody> <tr> <td>LANCES GREAT BIKES ONE VICTORY SQUARE SANTA CLARA, CA 95051 UNITED STATES</td> <td>NEW</td> <td>PIX-525-UR-BUN</td> <td>88807212791</td> <td>CON-SNT-PIX525</td> <td>25-JUL-2005</td> <td>24-JUL-2007</td> <td>25-JUL-2005</td> <td>reseller.test.us</td> <td>2776638</td> <td></td> </tr> </tbody> </table>	Select	Install Site	Adding To Existing Contract	Begin Date	End Date	Remaining Products To Be Registered	Site Status	<input type="checkbox"/>	<a href="#">SCOTT'S MONGOLIAN BBQ</a> <a href="#">555 MOCKINGBIRD LANE</a> <a href="#">SANTA CLARA, CA 95051</a> <a href="#">UNITED STATES</a>	<input type="text"/>	25-JUL-2005	24-JUL-2007	2	Incomplete	INSTALL SITE	REG TYPE	PRODUCT NUMBER	SERIAL NUMBER	REFERENCE SERVICE PART	BEGIN DATE	END DATE	REG DATE	REG BY	CONTRACT	ADDITIONAL CONTRACT ACCESS	LANCES GREAT BIKES ONE VICTORY SQUARE SANTA CLARA, CA 95051 UNITED STATES	NEW	PIX-525-UR-BUN	88807212791	CON-SNT-PIX525	25-JUL-2005	24-JUL-2007	25-JUL-2005	reseller.test.us	2776638		
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2.	Click the <b>Submit</b> button.	The <b>File Download</b> dialog box displays. You have the option to open the file directly, or save it to your computer.																																				

## SCC New Quoting for Indirect Resellers

Step	Action	Result or Note										
	<p> <b>Service Level:</b> SMARTnet 8x5xNBD (SNT)  <b>Order Date:</b> 25-JUL-2005  <b>Created by:</b> reseller.testus  <b>Distributor:</b> Ingram Micro US  <b>Distributor Account Number:</b> INGRAM                 </p> <p> <b>Customer Price:</b> \$29,315.00 USD  <b>Reseller PO Number:</b>  <b>Distributor Invoice Number:</b>  <b>Quote Notes:</b> </p> <p> <b>Reseller</b>  <b>Name and Address</b>                      PRAVEEN US                      260 NORTH MATHILDA AVENUE                      SUNNYVALE, CA 94086                      UNITED STATES                 </p> <p> <b>Actions</b>                      Download Registration Submit                 </p> <p> <b>File Download</b>                      Some files can harm your computer. If the file information below looks suspicious, or you do not fully trust the source, do not open or save this file.                      File name: sccenv1b78cb803                      File type:                      From: cco-stage.cisco.com                      Would you like to open the file or save it to your computer?                      Open Save Cancel More Info  <input checked="" type="checkbox"/> Always ask before opening this type of file                 </p> <table border="1"> <thead> <tr> <th>Select</th> <th>Install Site</th> <th>Adding T</th> <th>Products To Be Registered</th> <th>Site Status</th> </tr> </thead> <tbody> <tr> <td><input type="checkbox"/></td> <td>SCOTT'S MONGOLIAN BBQ 555 MOCKINGBIRD LANE SANTA CLARA, CA 95051 UNITED STATES</td> <td></td> <td>25-JUL-2005 24-JUL-2007 2</td> <td>Incomplete</td> </tr> </tbody> </table>	Select	Install Site	Adding T	Products To Be Registered	Site Status	<input type="checkbox"/>	SCOTT'S MONGOLIAN BBQ 555 MOCKINGBIRD LANE SANTA CLARA, CA 95051 UNITED STATES		25-JUL-2005 24-JUL-2007 2	Incomplete	
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<input type="checkbox"/>	SCOTT'S MONGOLIAN BBQ 555 MOCKINGBIRD LANE SANTA CLARA, CA 95051 UNITED STATES		25-JUL-2005 24-JUL-2007 2	Incomplete								
3.	Click <b>Save</b> to save the file to your computer.	The <b>Save As</b> dialog box appears.										
	<p> <b>REGISTRATION INFORMATION</b>  <b>Status:</b> Pending Registration  <b>Quote:</b> Q4423022  <b>Service Level:</b> SMARTnet 8x5xNBD (SNT)  <b>Order Date:</b> 25-JUL-2005  <b>Created by:</b> reseller.testus  <b>Distributor:</b> Ingram Micro US  <b>Distributor Account Number:</b> INGRAM                 </p> <p> <b>Quote Amount:</b> \$25,584.00 USD  <b>Reseller Price:</b> CONTACT DISTRIBUTOR  <b>Customer Price:</b> \$29,315.00 USD  <b>Reseller PO Number:</b>  <b>Distributor Invoice Number:</b>  <b>Quote Notes:</b> </p> <p> <b>Reseller</b>  <b>Name and Address</b>                      PRAVEEN US                      260 NORTH MATHILDA AVENUE                      SUNNYVALE, CA 94086                      UNITED STATES                 </p> <p> <b>Actions</b>                      Download Registration Submit                 </p> <p> <b>Save As</b>                      Save in: quotes                      sccenv153b12d38                      File name: sccenv1b78cb803                      Save as type: Document                      Save Cancel                 </p> <table border="1"> <thead> <tr> <th>Select</th> <th>Install Site</th> <th>Adding T</th> <th>Products To Be Registered</th> <th>Site Status</th> </tr> </thead> <tbody> <tr> <td><input type="checkbox"/></td> <td>SCOTT'S MONGOLIAN BBQ 555 MOCKINGBIRD LANE SANTA CLARA, CA 95051 UNITED STATES</td> <td></td> <td>25-JUL-2005 24-JUL-2007 2</td> <td>Incomplete</td> </tr> </tbody> </table>	Select	Install Site	Adding T	Products To Be Registered	Site Status	<input type="checkbox"/>	SCOTT'S MONGOLIAN BBQ 555 MOCKINGBIRD LANE SANTA CLARA, CA 95051 UNITED STATES		25-JUL-2005 24-JUL-2007 2	Incomplete	
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4.	Specify where you want to save the file, then click the <b>Save</b> button.	The file is saved to the location that you specified.										
5.	Open the file in a spreadsheet program such as Microsoft Excel.	The registration displays in the spreadsheet program.										

## Edit Install Site

You can edit and complete the install site status from the **Registration Wizard Site** page. To complete the install site status, you must:

- Enter a **valid** serial number for each product number on the site
- Verify that the install site address and contact are correct, and edit if necessary.

The Registration Wizard Site page is shown in the figure below.

## SCC New Quoting for Indirect Resellers

[Generate a Quote](#) | [Quote Manager](#) | [Quote Wizard](#) | [Import Quote File](#) | [Update Rejected Site Address](#)

Quick Search  Contract Number   [Advanced Search](#)

### Registration Wizard Site

**Quote:** [04423011](#)  
**Service Level:** SMARTnet 9x5xNBD (SNT)  
**Order Date:** 25-JUL-2005  
**Install Site:** [Edit](#)  
SCOTT'S MONGOLIAN BBQ  
555 MOCKINGBIRD LANE  
SANTA CLARA, CA 95051  
UNITED STATES

SCOTT BAO  
SBAIO@MONGOLBBQ.COM  
(408) 555-1212

**Actions**

Select One

**Tips:**  
The Register Site action registers all eligible products on the site.  
To add a site to an existing contract, enter the contract number in the Add to Existing Contract field, then select the Register Site action.

ADD SITE TO EXISTING CONTRACT  [Advanced Contract Search](#)

Move Products to Site

Select	Product Number	Serial Number	Reference Service Part	Begin Date	End Date	Product Ship Date	Alerts
<input type="checkbox"/>	PIX-501-UL-BUN-K9	<input type="text"/>	CON-SNT-PIX501UL	25-JUL-2005	24-JUL-2007		
<input type="checkbox"/>	PIX-525-UR-BUN	<input type="text"/>	CON-SNT-PIX525	25-JUL-2005	24-JUL-2007		

The Registration Wizard Site page allows you to take several actions on the site, including:

- Edit Install Site information
- Register Site
- Edit Dates for Sites and Products
- Revert to Original Quote Begin Dates
- Show Product Details
- Contact Support for Products
- Add Site to Existing Contract
- Move Products to Site

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**Note** Please go to Lesson 5 for detailed information on Contact Support for Products.

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### Procedure: Register Site

SCC New Quoting for Indirect Resellers

Step	Action	Result or Note																								
1.	From the <b>Registration Wizard</b> page, click the install site link.	The Register Wizard Site page displays.																								
	<p><b>Registration Wizard Site</b></p> <p>Quote: 04423011  Service Level: SMARTnet 8x5xNBD (SNT)  Order Date: 25-JUL-2005  Install Site: <a href="#">Edit</a>  SCOTTS MONGOLIAN BBQ  555 MOCKINGBIRD LANE  SANTA CLARA, CA 95051  UNITED STATES</p> <p>SCOTT BAIO  SBAIO@MONGOBBQ.COM  (408) 555-1212</p> <p><b>Actions</b>  Select One <input type="button" value="Submit"/></p> <p><b>Tips:</b>  The Register Site action registers all eligible products on the site.  To add a site to an existing contract, enter the contract number in the Add to Existing Contract field, then select the Register Site action.</p> <p>ADD SITE TO EXISTING CONTRACT <input type="text"/> <a href="#">Advanced Contract Search</a></p> <p>Move Products to Site <input type="button" value="Select One"/> <input type="button" value="Move"/></p> <table border="1"> <thead> <tr> <th>Select</th> <th>Product Number</th> <th>Serial Number</th> <th>Reference Service Part</th> <th>Begin Date</th> <th>End Date</th> <th>Product Ship Date</th> <th>Alerts</th> </tr> </thead> <tbody> <tr> <td><input type="checkbox"/></td> <td>PIX-501-UL-BUN-K9</td> <td><input type="text"/></td> <td>CON-SNT-PIX501UL</td> <td>25-JUL-2005</td> <td>24-JUL-2007</td> <td><input type="text"/></td> <td><input type="text"/></td> </tr> <tr> <td><input type="checkbox"/></td> <td>PIX-525-UR-BUN</td> <td><input type="text"/></td> <td>CON-SNT-PIX525</td> <td>25-JUL-2005</td> <td>24-JUL-2007</td> <td><input type="text"/></td> <td><input type="text"/></td> </tr> </tbody> </table> <p><input type="button" value="Save Changes"/></p>	Select	Product Number	Serial Number	Reference Service Part	Begin Date	End Date	Product Ship Date	Alerts	<input type="checkbox"/>	PIX-501-UL-BUN-K9	<input type="text"/>	CON-SNT-PIX501UL	25-JUL-2005	24-JUL-2007	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>	PIX-525-UR-BUN	<input type="text"/>	CON-SNT-PIX525	25-JUL-2005	24-JUL-2007	<input type="text"/>	<input type="text"/>	
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<input type="checkbox"/>	PIX-525-UR-BUN	<input type="text"/>	CON-SNT-PIX525	25-JUL-2005	24-JUL-2007	<input type="text"/>	<input type="text"/>																			
2.	Determine if you want to add the install site to an existing contract or a new contract.	You must have ordered service on the quote for the Registration Wizard to display.																								
	If...	Then...																								
	You want to add the install sites to an existing contract,	Enter the contract number in the Add to an Existing Contract field.	Note: If you do not know the contract number, click the Advanced Contract Search link. Refer to Lesson 2: Searching to assist you in locating an existing contract number.																							
	If you want to create a new contact to add the install sites to,	Leave the Add to Existing Contract field blank.	A new contract is created upon registration completion.																							
3.	Enter a valid serial number for each product.																									
4.	Review and verify that the Install Site information is correct.	If necessary, click the <b>Install Site Edit</b> link and make the appropriate changes.																								

# SCC New Quoting for Indirect Resellers

Step	Action	Result or Note																								
	<p><b>Generate a Quote</b>   <a href="#">Quote Manager</a>   <a href="#">Quote Wizard</a>   <a href="#">Import Quote File</a>   <a href="#">Update Rejected Site Address</a></p> <p>Quick Search <input type="text"/> Contract Number <input type="text"/> <input type="button" value="Go"/> <a href="#">Advanced Search</a></p> <p><b>Registration Wizard Site</b></p> <p><b>Quote:</b> <a href="#">Q4423011</a>  <b>Service Level:</b> SMARTnet 8x5xNBD (SNT)  <b>Order Date:</b> 25-JUL-2005  <b>Install Site:</b> <a href="#">Edit</a>            SCOTTS MONGOLIAN BBQ            555 MOCKINGBIRD LANE            SANTA CLARA, CA 95051            UNITED STATES</p> <p>SCOTT BAIO            SBAIO@MONGOLBBQ.COM            (408) 555-1212</p> <p><b>Actions</b></p> <p>Register Site <input type="button" value="Submit"/></p> <p><b>Tips:</b>            The Register Site action registers all eligible products on the site.            To add a site to an existing contract, enter the contract number in the Add to Existing Contract field, then select the Register Site action.</p> <p>ADD SITE TO EXISTING CONTRACT <input type="text"/> <a href="#">Advanced Contract Search</a></p> <p>Move Products to Site <input type="button" value="Select One"/> <input type="button" value="Move"/></p> <table border="1"> <thead> <tr> <th>Select</th> <th>Product Number</th> <th>Serial Number</th> <th>Reference Service Part</th> <th>Begin Date</th> <th>End Date</th> <th>Product Ship Date</th> <th>Alerts</th> </tr> </thead> <tbody> <tr> <td><input checked="" type="checkbox"/></td> <td>PIX-501-UL-BUN-K9</td> <td><input type="text" value="88807504675"/></td> <td>CON-SNT-PIX501UL</td> <td>25-JUL-2005</td> <td>24-JUL-2007</td> <td></td> <td></td> </tr> <tr> <td><input checked="" type="checkbox"/></td> <td>PIX-525-UR-BUN</td> <td><input type="text" value="88807206809"/></td> <td>CON-SNT-PIX525</td> <td>25-JUL-2005</td> <td>24-JUL-2007</td> <td></td> <td></td> </tr> </tbody> </table> <p><input type="button" value="Save Changes"/></p>	Select	Product Number	Serial Number	Reference Service Part	Begin Date	End Date	Product Ship Date	Alerts	<input checked="" type="checkbox"/>	PIX-501-UL-BUN-K9	<input type="text" value="88807504675"/>	CON-SNT-PIX501UL	25-JUL-2005	24-JUL-2007			<input checked="" type="checkbox"/>	PIX-525-UR-BUN	<input type="text" value="88807206809"/>	CON-SNT-PIX525	25-JUL-2005	24-JUL-2007			
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5.	Select the products to be registered by either clicking the checkbox next to each product number, or clicking the <b>Select</b> checkbox to select all the products on the site.	The products are selected.																								
6.	Choose <b>Register Site</b> from the <b>Action</b> drop-down menu.	Register Site displays in the Action drop-down list. <b>Note:</b> You can also click the Save Changes button to verify the serial numbers before registering the site.																								
7.	Click <b>Submit</b> .	The <b>Registration Submission</b> page displays.																								

## SCC New Quoting for Indirect Resellers

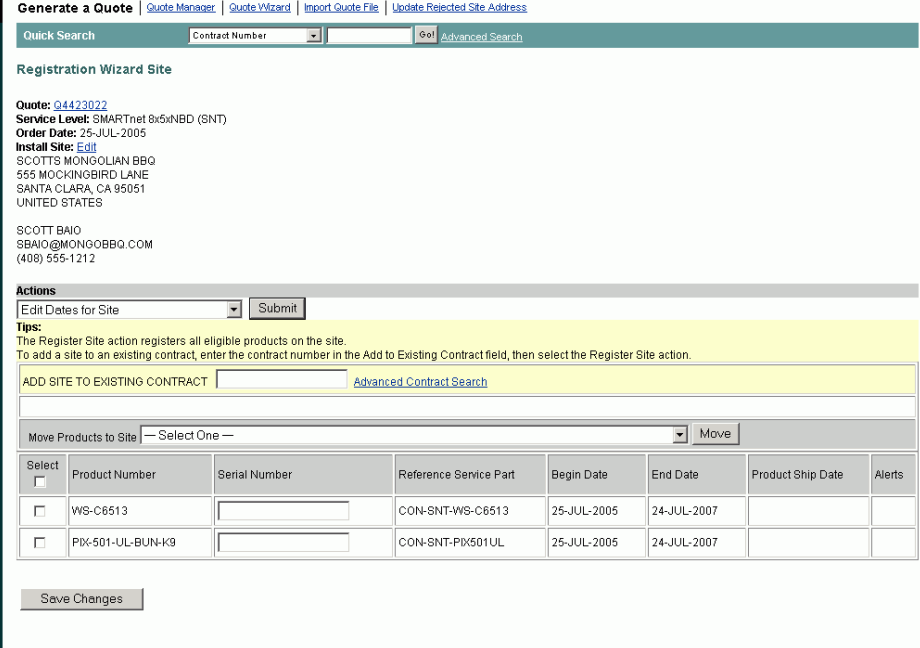
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	<p><b>Generate a Quote</b>   <a href="#">Quote Manager</a>   <a href="#">Quote Wizard</a>   <a href="#">Import Quote File</a>   <a href="#">Update Rejected Site Address</a></p> <p>Quick Search <input type="text"/> Contract Number <input type="text"/> <input type="button" value="Go"/> <a href="#">Advanced Search</a></p> <p><b>REGISTRATION SUBMISSION</b></p> <p>Please review the alert messages below before completing the registration.</p> <p>Quote: <a href="#">Q4423011</a>  <b>Service Level:</b> SMARTnet 8x5xNBD (SNT)  <b>Order Date:</b> 25-JUL-2005  <b>Created By:</b> reseller.test.us  <b>Reseller PO Number:</b>  <b>Distributor Invoice Number:</b></p> <p>Tip: To grant additional contract access, please enter the CCO User IDs below. User IDs entered below should be comma or carriage returned delimited.  Please note, contract access is automatically granted to the quote creator as well as all User IDs associated with the Reseller.</p> <p><b>PRODUCTS TO BE REGISTERED</b></p> <table border="1"> <thead> <tr> <th>Install Site</th> <th>Grant Additional Contract Access</th> <th>Add to Existing Contract Number</th> <th>Product Number</th> <th>Serial Number</th> <th>Reference Service Part</th> <th>Begin Date</th> <th>End Date</th> <th>Product Ship Date</th> <th>Alerts</th> </tr> </thead> <tbody> <tr> <td rowspan="2">SCOTTS MONGOLIAN BBQ 555 MOCKINGBIRD LANE, CA 95051 UNITED STATES</td> <td><input type="checkbox"/></td> <td></td> <td>PIX-501-UL-BUN-K9</td> <td>88807504675</td> <td>CON-SNT-PIX501UL</td> <td>25-JUL-2005</td> <td>24-JUL-2007</td> <td>N/A</td> <td></td> </tr> <tr> <td><input type="checkbox"/></td> <td></td> <td>PIX-525-UR-BUN</td> <td>88807206809</td> <td>CON-SNT-PIX525</td> <td>25-JUL-2005</td> <td>24-JUL-2007</td> <td>N/A</td> <td></td> </tr> </tbody> </table> <p><input type="button" value="Submit Registration"/> <input type="button" value="Cancel"/></p>	Install Site	Grant Additional Contract Access	Add to Existing Contract Number	Product Number	Serial Number	Reference Service Part	Begin Date	End Date	Product Ship Date	Alerts	SCOTTS MONGOLIAN BBQ 555 MOCKINGBIRD LANE, CA 95051 UNITED STATES	<input type="checkbox"/>		PIX-501-UL-BUN-K9	88807504675	CON-SNT-PIX501UL	25-JUL-2005	24-JUL-2007	N/A		<input type="checkbox"/>		PIX-525-UR-BUN	88807206809	CON-SNT-PIX525	25-JUL-2005	24-JUL-2007	N/A					
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9.	Click Submit Registration.	The Registration Confirmation page verifies that the products on the sites have been registered. You will receive an email notification as soon as the contract information is available. Click <b>Return to Registration</b> button to go back to the Registration Wizard.																																
	<p><b>Generate a Quote</b>   <a href="#">Quote Manager</a>   <a href="#">Quote Wizard</a>   <a href="#">Import Quote File</a>   <a href="#">Update Rejected Site Address</a></p> <p>Quick Search <input type="text"/> Contract Number <input type="text"/> <input type="button" value="Go"/> <a href="#">Advanced Search</a></p> <p><b>Registration Confirmation</b> <span style="float: right;">Logged in as: reseller.test.us</span></p> <p>The products below have been registered. You will receive an email notification as soon as the contract information is available.</p> <p>Quote: <a href="#">Q4423011</a>  <b>Service Level:</b> SMARTnet 8x5xNBD (SNT)  <b>Order Date:</b> 25-JUL-2005  <b>Created by:</b> reseller.test.us  <b>Reseller PO Number:</b>  <b>Distributor Invoice Number:</b></p> <p><b>REGISTERED PRODUCTS</b></p> <table border="1"> <thead> <tr> <th>Install Site</th> <th>Reg Type</th> <th>Product Number</th> <th>Serial Number</th> <th>Reference Service Part</th> <th>Begin Date</th> <th>End Date</th> <th>Reg Date</th> <th>Reg By</th> <th>Contract</th> <th>Additional Contract Access</th> </tr> </thead> <tbody> <tr> <td rowspan="2">SCOTTS MONGOLIAN BBQ 555 MOCKINGBIRD LANE, CA 95051 UNITED STATES</td> <td>NEW</td> <td>PIX-501-UL-BUN-K9</td> <td>88807504675</td> <td>CON-SNT-PIX501UL</td> <td>25-JUL-2005</td> <td>24-JUL-2007</td> <td>25-JUL-2005</td> <td>reseller.test.us</td> <td>TBD</td> <td></td> </tr> <tr> <td>NEW</td> <td>PIX-525-UR-BUN</td> <td>88807206809</td> <td>CON-SNT-PIX525</td> <td>25-JUL-2005</td> <td>24-JUL-2007</td> <td>25-JUL-2005</td> <td>reseller.test.us</td> <td>TBD</td> <td></td> </tr> </tbody> </table> <p><input type="button" value="Return to Registration"/> <input type="button" value="Go to Quote Manager"/></p>	Install Site	Reg Type	Product Number	Serial Number	Reference Service Part	Begin Date	End Date	Reg Date	Reg By	Contract	Additional Contract Access	SCOTTS MONGOLIAN BBQ 555 MOCKINGBIRD LANE, CA 95051 UNITED STATES	NEW	PIX-501-UL-BUN-K9	88807504675	CON-SNT-PIX501UL	25-JUL-2005	24-JUL-2007	25-JUL-2005	reseller.test.us	TBD		NEW	PIX-525-UR-BUN	88807206809	CON-SNT-PIX525	25-JUL-2005	24-JUL-2007	25-JUL-2005	reseller.test.us	TBD		
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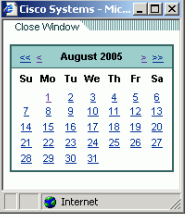
## Edit Begin Date for a Site

You can also edit the begin date coverage for a particular site. This feature allows you to change the coverage dates on certain sites based on the customer's request.



## Procedure: Edit Begin Date for a Site

Step	Action	Result or Note																								
1.	From the <b>Registration Wizard Site</b> page, choose <b>Edit Dates for Site</b> from the Action drop-down list.	Edit End Dates for Site is displayed in the drop-down list.																								
	 <p><b>Generate a Quote</b>   <a href="#">Quote Manager</a>   <a href="#">Quote Wizard</a>   <a href="#">Import Quote File</a>   <a href="#">Update Rejected Site Address</a></p> <p>Quick Search: <input type="text"/> Contract Number <input type="text"/> <input type="button" value="Go"/> <a href="#">Advanced Search</a></p> <p><b>Registration Wizard Site</b></p> <p>Quote: <a href="#">Q4423022</a>  <b>Service Level:</b> SMARTnet 8x5xNBD (SNT)  <b>Order Date:</b> 25-JUL-2005  <b>Install Site:</b> <a href="#">Edit</a>          SCOTTS MONGOLIAN B&amp;B          555 MOCKINGBIRD LANE          SANTA CLARA, CA 95051          UNITED STATES</p> <p>SCOTT BAIQ          SBAIQ@MONGOBBO.COM          (408) 555-1212</p> <p><b>Actions</b></p> <p>Edit Dates for Site <input type="button" value="Submit"/> <input type="button" value="Register Site"/></p> <p><b>Tips:</b>          The Register Site action registers all eligible products on the site.          To add a site to an existing contract, enter the contract number in the Add to Existing Contract field, then select the Register Site action.</p> <p>ADD SITE TO EXISTING CONTRACT <input type="text"/> <a href="#">Advanced Contract Search</a></p> <p>Move Products to Site <input type="text"/> Select One <input type="button" value="Move"/></p> <table border="1"> <thead> <tr> <th>Select</th> <th>Product Number</th> <th>Serial Number</th> <th>Reference Service Part</th> <th>Begin Date</th> <th>End Date</th> <th>Product Ship Date</th> <th>Alerts</th> </tr> </thead> <tbody> <tr> <td><input type="checkbox"/></td> <td>WS-C6513</td> <td><input type="text"/></td> <td>CON-SNT-WS-C6513</td> <td>25-JUL-2005</td> <td>24-JUL-2007</td> <td></td> <td></td> </tr> <tr> <td><input type="checkbox"/></td> <td>PIX-501-UL-BUN-K9</td> <td><input type="text"/></td> <td>CON-SNT-PIX501UL</td> <td>25-JUL-2005</td> <td>24-JUL-2007</td> <td></td> <td></td> </tr> </tbody> </table> <p><input type="button" value="Save Changes"/></p>	Select	Product Number	Serial Number	Reference Service Part	Begin Date	End Date	Product Ship Date	Alerts	<input type="checkbox"/>	WS-C6513	<input type="text"/>	CON-SNT-WS-C6513	25-JUL-2005	24-JUL-2007			<input type="checkbox"/>	PIX-501-UL-BUN-K9	<input type="text"/>	CON-SNT-PIX501UL	25-JUL-2005	24-JUL-2007			
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<input type="checkbox"/>	PIX-501-UL-BUN-K9	<input type="text"/>	CON-SNT-PIX501UL	25-JUL-2005	24-JUL-2007																					
2.	Click <b>Submit</b> .	<p>The <b>Edit Dates for Site</b> page displays. The Edit Dates for Site page displays the following information:</p> <ul style="list-style-type: none"> <li>• Quote</li> <li>• Install Site Name</li> <li>• Quote Creation Date</li> <li>• Quote Order Date</li> <li>• Product Ship Date</li> <li>• Select New Site Begin Date</li> </ul> <p><b>NOTE:</b> The Select new Site Begin Date field is editable.</p>																								

Step	Action	Result or Note
	<p><b>Edit Dates for Site</b></p> <p>Select a new begin date for the site within the date range below.</p> <p><i>PLEASE NOTE: This will override any previous date changes you have made.</i></p> <p><b>Quote</b> <a href="#">04423022</a>  <b>Install Site</b> SCOTTS MONGOLIAN BBQ            555 MOCKINGBIRD LANE            SANTA CLARA, CA 95051            UNITED STATES</p> <p><b>Quote Creation Date</b> N/A  <b>Quote Order Date</b> 25-JUL-2005  <b>Product Ship Date</b> N/A</p> <p><b>The new Begin Date must be between 25-JUL-2005 and 24-AUG-2005.</b></p> <p><b>Select New Site Begin Date</b> <input type="text" value="01-AUG-2005"/> Example: 01-JAN-2004</p> <p><input type="button" value="Submit"/></p>	
3.	<p>Choose a new <b>Month, Day and Year</b> from the <b>Select New Site Begin Date</b> calendar.</p>	<p>The new site begin date is displayed in the <b>Select New Site Begin Date</b> field. Note: the new begin date cannot exceed 30 days from the current begin date. Changing the begin date here will override any previous date changes that you have made.</p>
4.	<p>Click the <b>Submit</b> button.</p>	<p>The <b>User Notification</b> informs you that the begin dates have been changed for all uncovered products shipped on or before the order date.</p>
	<p><b>Service Contract Center</b></p> <p>CONTRACTS   QUOTING &amp; ORDERING   PRICING &amp; AVAILABILITY   PACKAGED SERVICES   ADMINISTRATION</p> <p><b>Generate a Quote</b>   <a href="#">Quote Manager</a>   <a href="#">Quote Wizard</a>   <a href="#">Import Quote File</a>   <a href="#">Update Rejected Site Address</a></p> <p>Quick Search <input type="text" value="Contract Number"/> <input type="button" value="Go!"/> <a href="#">Advanced Search</a></p> <p><b>User Notification</b></p> <p>The begin date has been changed for all uncovered products shipped on or before the quote order date. Products shipped after the quote order date were not changed. To edit the dates for these products please use the <a href="#">Edit Dates for Products</a> action.</p> <p><a href="#">Return to site</a></p>	
5.	<p>Click the <b>Return to Site</b> link.</p>	<p>The Registration Wizard Site page displays the new site Begin and End dates.</p>

## Edit Dates for Products

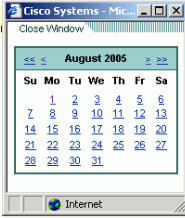
You can also edit the coverage dates for particular products on a site. This feature allows you to change the coverage dates on certain products based on the customer's request.



### Procedure: Edit Dates for Products

SCC New Quoting for Indirect Resellers

Step	Action	Result or Note																								
1.	From the <b>Registration Wizard Site</b> page, select the products that you want to edit, and then choose <b>Edit Dates for Products</b> from the Action drop-down list.	Edit Dates for Products is displayed in the drop-down list.																								
	<p><b>Generate a Quote</b>   <a href="#">Quote Manager</a>   <a href="#">Quote Wizard</a>   <a href="#">Import Quote File</a>   <a href="#">Update Rejected Site Address</a></p> <p>Quick Search <input type="text"/> Contract Number <input type="text"/> <input type="button" value="Go"/> <a href="#">Advanced Search</a></p> <p><b>Registration Wizard Site</b></p> <p>Quote: <a href="#">04423022</a>  <b>Service Level:</b> SMARTnet 8x5xNBD (SNT)  <b>Order Date:</b> 25-JUL-2005  <b>Install Site:</b> <a href="#">Edit</a>            SCOTTS MONGOLIAN BBQ            555 MOCKINGBIRD LANE            SANTA CLARA, CA 95051            UNITED STATES</p> <p>SCOTT BAIQ            SBAIQ@MONGOBBQ.COM            (408) 555-1212</p> <p><b>Actions</b></p> <p><input type="button" value="Edit Dates for Products"/> <input type="button" value="Submit"/></p> <p><b>Tips:</b>            The Register Site action registers all eligible products on the site.            To add a site to an existing contract, enter the contract number in the Add to Existing Contract field, then select the Register Site action.</p> <p>ADD SITE TO EXISTING CONTRACT <input type="text"/> <a href="#">Advanced Contract Search</a></p> <p>Move Products to Site <input type="button" value="Select One"/> <input type="button" value="Move"/></p> <table border="1"> <thead> <tr> <th>Select</th> <th>Product Number</th> <th>Serial Number</th> <th>Reference Service Part</th> <th>Begin Date</th> <th>End Date</th> <th>Product Ship Date</th> <th>Alerts</th> </tr> </thead> <tbody> <tr> <td><input checked="" type="checkbox"/></td> <td>WS-C6513</td> <td><input type="text"/></td> <td>CON-SNT-WS-C6513</td> <td>01-AUG-2005</td> <td>31-JUL-2007</td> <td></td> <td></td> </tr> <tr> <td><input checked="" type="checkbox"/></td> <td>PIX-501-UL-BUN-K9</td> <td><input type="text"/></td> <td>CON-SNT-PIX501UL</td> <td>01-AUG-2005</td> <td>31-JUL-2007</td> <td></td> <td></td> </tr> </tbody> </table> <p><input type="button" value="Save Changes"/></p>	Select	Product Number	Serial Number	Reference Service Part	Begin Date	End Date	Product Ship Date	Alerts	<input checked="" type="checkbox"/>	WS-C6513	<input type="text"/>	CON-SNT-WS-C6513	01-AUG-2005	31-JUL-2007			<input checked="" type="checkbox"/>	PIX-501-UL-BUN-K9	<input type="text"/>	CON-SNT-PIX501UL	01-AUG-2005	31-JUL-2007			
Select	Product Number	Serial Number	Reference Service Part	Begin Date	End Date	Product Ship Date	Alerts																			
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<input checked="" type="checkbox"/>	PIX-501-UL-BUN-K9	<input type="text"/>	CON-SNT-PIX501UL	01-AUG-2005	31-JUL-2007																					
2.	Click <b>Submit</b> .	<p>The <b>Edit Dates for Products</b> page displays. The Edit Dates for Products page displays the following information:</p> <ul style="list-style-type: none"> <li>• Quote</li> <li>• Install Site Name</li> <li>• Quote Creation Date</li> <li>• Quote Order Date</li> <li>• Product Ship Date</li> <li>• Select New Site Begin Date</li> </ul> <p><b>NOTE:</b> The Select new Site Begin Date field is editable.</p>																								

Step	Action	Result or Note																		
	<p><b>Edit Dates for Products</b></p> <p>Select a new begin date for the products within the date range below. This will not change the begin date for</p> <p><i>PLEASE NOTE: This will override any previous date changes you have made.</i></p> <p><b>Quote</b> <a href="#">Q4423022</a> SCOTTS MONGOLIAN BBQ 555 MOCKINGBIRD LANE SANTA CLARA, CA 95051 UNITED STATES</p> <p><b>Install Site</b></p> <p><b>Quote Creation Date</b> N/A <b>Quote Order Date</b> 25-JUL-2005 <b>Product Ship Date</b> N/A</p> <p><b>The new Begin Date must be between 25-JUL-2005 and 24-AUG-2005.</b></p> <p><b>Select New Begin Date</b> <input type="text" value="01-AUG-2005"/> Example: 01-JAN-2004</p> <p><input type="button" value="Submit"/></p> <p><b>Products</b></p> <table border="1"> <thead> <tr> <th>Product Number</th> <th>Serial Number</th> <th>Reference Service Part</th> <th>Begin Date</th> <th>End Date</th> <th>Product Ship Date</th> </tr> </thead> <tbody> <tr> <td>WS-C6513</td> <td></td> <td>CON-SNT-WS-C6513</td> <td>01-AUG-2005</td> <td>31-JUL-2007</td> <td></td> </tr> <tr> <td>PIX-501-UL-BUN-K9</td> <td></td> <td>CON-SNT-PIX501UL</td> <td>01-AUG-2005</td> <td>31-JUL-2007</td> <td></td> </tr> </tbody> </table>	Product Number	Serial Number	Reference Service Part	Begin Date	End Date	Product Ship Date	WS-C6513		CON-SNT-WS-C6513	01-AUG-2005	31-JUL-2007		PIX-501-UL-BUN-K9		CON-SNT-PIX501UL	01-AUG-2005	31-JUL-2007		
Product Number	Serial Number	Reference Service Part	Begin Date	End Date	Product Ship Date															
WS-C6513		CON-SNT-WS-C6513	01-AUG-2005	31-JUL-2007																
PIX-501-UL-BUN-K9		CON-SNT-PIX501UL	01-AUG-2005	31-JUL-2007																
3.	Select a new begin date using the steps from the <b>Edit Dates for Site</b> procedure.	The new end date is displayed in the <b>Select New Site Begin Date</b> field. Note: the new begin date cannot exceed 30 days from the current begin date. Changing the begin date here will override any previous date changes that you have made.																		
4.	Click the <b>Submit</b> button.	The <b>User Notification</b> informs you that the begin date has been changed for the selected uncovered products.																		
	<p><b>Service Contract Center</b></p> <p>CONTRACTS   QUOTING &amp; ORDERING   PRICING &amp; AVAILABILITY   PACKAGED SERVICES   ADMINISTRATION</p> <p><a href="#">Generate a Quote</a>   <a href="#">Quote Manager</a>   <a href="#">Quote Wizard</a>   <a href="#">Import Quote File</a>   <a href="#">Update Rejected Site Address</a></p> <p>Quick Search <input type="text" value="Contract Number"/> <input type="button" value="Go"/> <a href="#">Advanced Search</a></p> <p><b>User Notification</b> The begin date has been changed for the selected uncovered products. <a href="#">Return to site</a></p>																			
5.	Click the <b>Return to Site</b> link.	The Register Wizard Site page displays																		

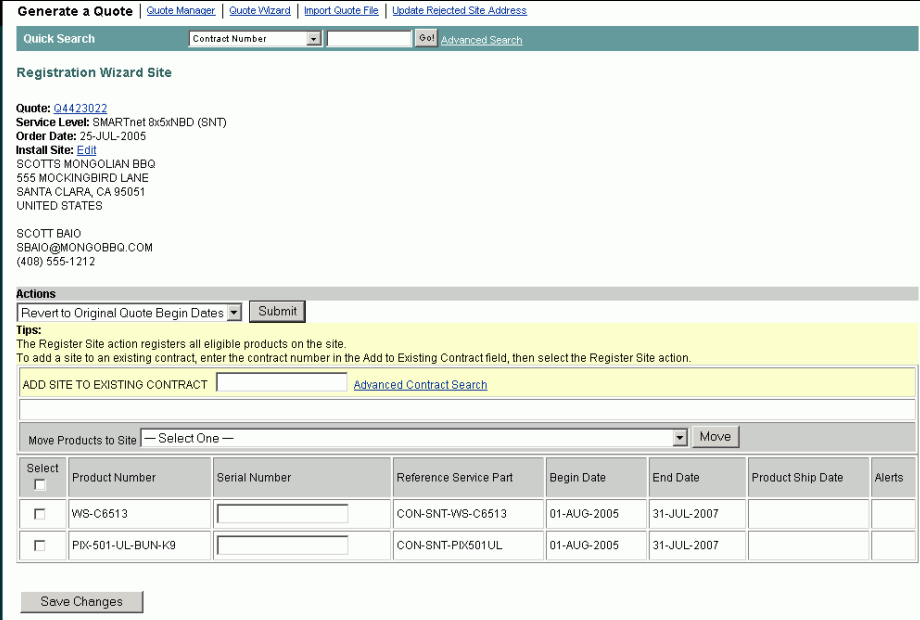
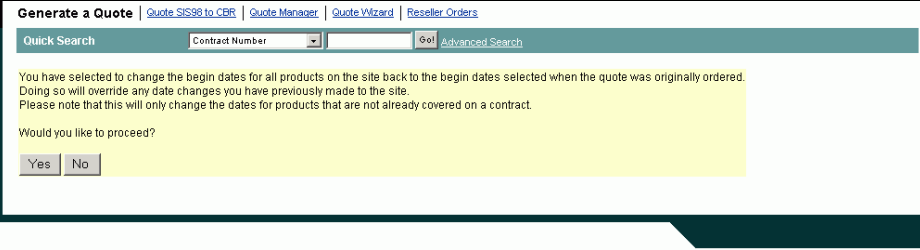
## Revert to Original Quote Begin Dates

Suppose, after editing the site and product coverage dates, that you need to reset the dates back to the original quote dates. You can reset the dates by using the **Revert to Original Quote Begin Dates** feature.



### Procedure: Edit Dates for Products

SCC New Quoting for Indirect Resellers

Step	Action	Result or Note
1.	From the <b>Registration Wizard Site</b> page, choose <b>Revert to Original Quote Begin Dates</b> from the Action drop-down list.	Revert to Original Quote Begin Dates is displayed in the drop-down list.
	 <p>The screenshot shows the 'Registration Wizard Site' interface. At the top, there are navigation links: 'Generate a Quote', 'Quote Manager', 'Quote Wizard', 'Import Quote File', and 'Update Rejected Site Address'. Below this is a search bar with 'Quick Search' and 'Advanced Search' options. The main content area displays quote details for quote number 04423022, including service level (SMARTnet 8x5xNBD (SNT)), order date (25-JUL-2005), and contact information for Scott Baio. Under the 'Actions' section, a dropdown menu is open, showing 'Revert to Original Quote Begin Dates' as the selected option. Below the dropdown is a 'Submit' button. A 'Tips' section explains that the Register Site action registers all eligible products on the site. At the bottom, there is a table with columns for 'Select', 'Product Number', 'Serial Number', 'Reference Service Part', 'Begin Date', 'End Date', 'Product Ship Date', and 'Alerts'. Two products are listed: WS-C6513 and PFX-501-UL-BUN-K9. A 'Save Changes' button is located at the bottom left.</p>	
2.	Click <b>Submit</b> .	SCC New Quoting displays the message shown in the image below.
	 <p>The screenshot shows a confirmation dialog box with a yellow background. The text reads: 'You have selected to change the begin dates for all products on the site back to the begin dates selected when the quote was originally ordered. Doing so will override any date changes you have previously made to the site. Please note that this will only change the dates for products that are not already covered on a contract. Would you like to proceed?'. There are two buttons: 'Yes' and 'No'.</p>	
3.	Click <b>Yes</b> .	The new end date is displayed in the Select New Site Begin Date field. Note: the new begin date cannot exceed 30 days from the current begin date. Changing the begin date here will override any previous date changes that you have made.
4.	Click the <b>Submit</b> button.	All product dates on the site revert back to the original quote dates.



## On Your Own Exercise 4: Register Service

### Instructions

Try registering a quote that is currently in pending registration status. To confirm any steps, refer back to the lesson for details.

### Questions

1. What status must a site be in before it can be registered?
2. What actions can you take from the Registration page?

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**Note** The answers to these questions are located in the back of the User Guide.

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## Lesson 5: Contacting Support

In Lesson 4, you saw how to register a partial quote without errors. What happens when you receive an error during the registration process? This lesson examines how to contact support.

### Objectives

At the end of this lesson, you will be able to:

- Contact support

### Registration Error Page

Errors generated during the registration process are shown on the Registration Error page. The Registration Error page lists the products and the corresponding error alert messages. From the Registration Error page, you can:

- Add to Existing Contract
- Contact Support for Selected Products

You can also **Resubmit** the registration if you are able to resolve the error. For example, if you entered the product serial number incorrectly, you can enter the correct serial number on the Registration Error page and resubmit. An example of a Registration Error page is shown below.

**Registration Errors** Logged in as: reseller.test.us

The products and/or sites below cannot be registered. Please view the alert messages below for more details

Quote: Q4423022  
 Service Level: SMARTnet 8x5xNBD (SNT)  
 Order Date: 25-JUL-2005  
 Created by: reseller.test.us  
 Reseller PO Number:  
 Distributor Invoice Number:

SITES/PRODUCTS WITH ERRORS									
Install Site	Add to Existing Contract	Select	Product Number	Serial Number	Reference Service Part	Begin Date	End Date	Product Ship Date	Alerts
SCOTTS MONGOLIAN BBQ 555 MOCKINGBIRD LANE, CA 95051 UNITED STATES	<input type="checkbox"/>	<input type="checkbox"/>	WS-C6513	TBM06390670	CON-SNT-WS-C6513	25-JUL-2005	24-JUL-2007		Serial number may be invalid. Please re-enter the serial number and try again.
	<input type="checkbox"/>	<input type="checkbox"/>	PIX-501-UL-BUN-K9	88808120129	CON-SNT-PIX501UL	25-JUL-2005	24-JUL-2007		Serial number may be invalid. Please re-enter the serial number and try again.

Resubmit    Contact Support for Selected Products    Cancel

You can also contact support directly from the Registration Wizard Site page.

## Serial Number Error Alert Messages

A list of typical serial number error messages and probable causes is shown in the table below.

Message	Cause
Serial number may be invalid. Please re-enter the serial number and try again.	After "scrubbing" the serial number, no match was found in the Cisco database.
Serial number entered multiple times. Please correct and try again.	User entered the same serial number multiple times.
Serial number tied to more than 1 product number. Please select a product.	Serial number as entered is attributed to more than 1 product number in the Cisco database.
Duplicate serial number exists for the same product. Please select a product.	Some products in CIBER have the same serial number attributed to the same product part number. In Service Pricing, display drop down menu with all the matches.
Serial number does not match product ID entered. Please correct.	SN does not match the product ID entered in IB.
Serial number is valid but is covered under a contract with a different service level.	Service levels on the contract do not match the service levels on the quote.
Serial number already covered on existing contract <contract number>. Serial number must be renewed using the Renewal Tool.	SN is covered (must be in active, overdue, signed, QA Hold or Entered status) on a contract in which either the BT on the quote or the reseller CCO user ID on the quote (if available) has access.
Serial number is already covered. Please correct.	User has entered the serial number more than once on the same quote or registration. They may enter this for different sites.
Serial number already covered. Serial number must be renewed using the Renewal Tool.	Serial number is covered (must be in active, overdue, signed, QA Hold or Entered status).
<product part number> - INVALID PRODUCT PART NUMBER FOR SERVICE LEVEL	Fails SPA validation.

## Contacting Support during Product Registration

You can contact support directly from SCC New Quoting if you encounter an error with a product during registration that you cannot resolve on your own. SCC New Quoting allows you to contact support directly from the Registration Wizard Site page, or from the Registration Error page if errors are generating during the registration process. The procedure below shows how to contract support for products from the Registration Error page.



### Procedure: Contact Support for Products

SCC New Quoting for Indirect Resellers

Step	Action	Result or Note																												
1.	From the Register Wizard page, click the install site link.	The <b>Register Wizard Site</b> page displays.																												
	<p><b>Generate a Quote</b>   <a href="#">Quote Manager</a>   <a href="#">Quote Wizard</a>   <a href="#">Import Quote File</a>   <a href="#">Update Rejected Site Address</a></p> <p>Quick Search <input type="text"/> Contract Number <input type="text"/> <input type="button" value="Go"/> <a href="#">Advanced Search</a></p> <p><b>Registration Wizard Site</b></p> <p>Quote: <a href="#">Q4423011</a>            Service Level: SMARTnet 8x5xNBD (SNT)            Order Date: 25-JUL-2005            Install Site: <a href="#">Edit</a>            SCOTTS MONGOLIAN BBO            555 MOCKINGBIRD LANE            SANTA CLARA, CA 95051            UNITED STATES</p> <p>SCOTT BAIO            SBAIO@MONGOBBQ.COM            (408) 555-1212</p> <p><b>Actions</b></p> <p>Register Site <input type="button" value="Submit"/></p> <p><b>Tips:</b>            The Register Site action registers all eligible products on the site.            To add a site to an existing contract, enter the contract number in the Add to Existing Contract field, then select the Register Site action.</p> <p>ADD SITE TO EXISTING CONTRACT <input type="text"/> <a href="#">Advanced Contract Search</a></p> <p>Move Products to Site <input type="button" value="Select One"/> <input type="button" value="Move"/></p> <table border="1"> <thead> <tr> <th>Select</th> <th>Product Number</th> <th>Serial Number</th> <th>Reference Service Part</th> <th>Begin Date</th> <th>End Date</th> <th>Product Ship Date</th> <th>Alerts</th> </tr> </thead> <tbody> <tr> <td><input checked="" type="checkbox"/></td> <td>PIX-501-UL-BUN-K9</td> <td>88807504675</td> <td>CON-SNT-PIX501UL</td> <td>25-JUL-2005</td> <td>24-JUL-2007</td> <td></td> <td></td> </tr> <tr> <td><input checked="" type="checkbox"/></td> <td>PIX-525-UR-BUN</td> <td>88807206809</td> <td>CON-SNT-PIX525</td> <td>25-JUL-2005</td> <td>24-JUL-2007</td> <td></td> <td></td> </tr> </tbody> </table> <p><input type="button" value="Save Changes"/></p>	Select	Product Number	Serial Number	Reference Service Part	Begin Date	End Date	Product Ship Date	Alerts	<input checked="" type="checkbox"/>	PIX-501-UL-BUN-K9	88807504675	CON-SNT-PIX501UL	25-JUL-2005	24-JUL-2007			<input checked="" type="checkbox"/>	PIX-525-UR-BUN	88807206809	CON-SNT-PIX525	25-JUL-2005	24-JUL-2007							
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<input checked="" type="checkbox"/>	PIX-525-UR-BUN	88807206809	CON-SNT-PIX525	25-JUL-2005	24-JUL-2007																									
2.	Submit the registration using the Registration Site procedure shown in Lesson 5.	In this example, the serial number is incorrect, result in an error. The <b>Registration Errors</b> page displays the site/products with the errors.																												
	<p><b>Registration Errors</b> <span style="float: right;">Logged in as: reseller.test.us</span></p> <p>The products and/or sites below cannot be registered. Please view the alert messages below for more details</p> <p>Quote: <a href="#">Q4423022</a>            Service Level: SMARTnet 8x5xNBD (SNT)            Order Date: 25-JUL-2005            Created by: reseller.test.us            Reseller PO Number:            Distributor Invoice Number:</p> <p><b>SITES/PRODUCTS WITH ERRORS</b></p> <table border="1"> <thead> <tr> <th>Install Site</th> <th>Add to Existing Contract</th> <th>Select</th> <th>Product Number</th> <th>Serial Number</th> <th>Reference Service Part</th> <th>Begin Date</th> <th>End Date</th> <th>Product Ship Date</th> <th>Alerts</th> </tr> </thead> <tbody> <tr> <td rowspan="2">SCOTTS MONGOLIAN BBO 555 MOCKINGBIRD LANE, CA 95051 UNITED STATES</td> <td rowspan="2"><input type="text"/></td> <td><input type="checkbox"/></td> <td>WS-C6513</td> <td>TBM06390670</td> <td>CON-SNT-WS-C6513</td> <td>25-JUL-2005</td> <td>24-JUL-2007</td> <td></td> <td>Serial number may be invalid. Please re-enter the serial number and try again.</td> </tr> <tr> <td><input type="checkbox"/></td> <td>PIX-501-UL-BUN-K9</td> <td>88808120129</td> <td>CON-SNT-PIX501UL</td> <td>25-JUL-2005</td> <td>24-JUL-2007</td> <td></td> <td>Serial number may be invalid. Please re-enter the serial number and try again.</td> </tr> </tbody> </table> <p><input type="button" value="Resubmit"/> <input type="button" value="Contact Support for Selected Products"/> <input type="button" value="Cancel"/></p>	Install Site	Add to Existing Contract	Select	Product Number	Serial Number	Reference Service Part	Begin Date	End Date	Product Ship Date	Alerts	SCOTTS MONGOLIAN BBO 555 MOCKINGBIRD LANE, CA 95051 UNITED STATES	<input type="text"/>	<input type="checkbox"/>	WS-C6513	TBM06390670	CON-SNT-WS-C6513	25-JUL-2005	24-JUL-2007		Serial number may be invalid. Please re-enter the serial number and try again.	<input type="checkbox"/>	PIX-501-UL-BUN-K9	88808120129	CON-SNT-PIX501UL	25-JUL-2005	24-JUL-2007		Serial number may be invalid. Please re-enter the serial number and try again.	
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3.	Click the checkbox next to the product(s) that you want to request support on.	The product(s) is selected.																												
4.	Click <b>Contact Support for Select Products</b> .	The <b>Contact Support</b> page displays.																												

SCC New Quoting for Indirect Resellers

Step	Action	Result or Note																																		
	<p><b>CONTACT SUPPORT</b>                      Complete the information below to create a support case with Cisco. A Cisco Customer Support Agent will then work through the case to resolution. Please verify or modify the support case contact information, enter any additional comments, and click the submit button.</p> <p>Quote: Q4423022                      Service Level: SMARTnet 8x5xNBD (SNT)                      Order Date: 25-JUL-05                      Created by: reseller/testus                      Reseller PO Number:                      Distributor Invoice Number:</p> <p><b>Support Case Contact</b></p> <p>First Name: <input type="text"/> Last Name: <input type="text"/> Incredible                      Email Address: <input type="text"/> Incredible@yahoo.com Phone Number: <input type="text"/> (408) 555-9999</p> <p><b>Comments</b>                      (Please provide details; the validation section below will automatically be included)</p> <div style="border: 1px solid gray; height: 100px; width: 100%;"></div> <p>(4000 Character Limit)</p> <table border="1"> <thead> <tr> <th colspan="8">SITES/PRODUCTS WITH ERRORS</th> </tr> <tr> <th>Install Site</th> <th>Add to Existing Contract</th> <th>Product Number</th> <th>Serial Number</th> <th>Reference Service Part</th> <th>Begin Date</th> <th>End Date</th> <th>Product Ship Date</th> <th>Alerts</th> </tr> </thead> <tbody> <tr> <td rowspan="2">SCOTTS MONGOLIAN BBQ 555 MOCKINGBIRD LANE, CA 95051 UNITED STATES</td> <td></td> <td>WS-C6513</td> <td></td> <td>CON-SNT-WS-C6513</td> <td>25-JUL-05</td> <td>24-JUL-07</td> <td></td> <td>Serial number may be invalid. Please re-enter the serial number and try again.</td> </tr> <tr> <td></td> <td>PIX-501-UL-BUN-k9</td> <td>88808120129</td> <td>CON-SNT-PIX501UL</td> <td>25-JUL-05</td> <td>24-JUL-07</td> <td></td> <td>Serial number may be invalid. Please re-enter the serial number and try again.</td> </tr> </tbody> </table> <p><input type="button" value="Contact Support"/> <input type="button" value="Cancel"/></p>	SITES/PRODUCTS WITH ERRORS								Install Site	Add to Existing Contract	Product Number	Serial Number	Reference Service Part	Begin Date	End Date	Product Ship Date	Alerts	SCOTTS MONGOLIAN BBQ 555 MOCKINGBIRD LANE, CA 95051 UNITED STATES		WS-C6513		CON-SNT-WS-C6513	25-JUL-05	24-JUL-07		Serial number may be invalid. Please re-enter the serial number and try again.		PIX-501-UL-BUN-k9	88808120129	CON-SNT-PIX501UL	25-JUL-05	24-JUL-07		Serial number may be invalid. Please re-enter the serial number and try again.	
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5.	Verify that the Support Case Contact information is correct.	The Support Case Contact fields are editable. You will receive an error message if these fields are not completed.																																		
6.	Enter a detailed explanation of the support request in the <b>Comments</b> field.	There is a 4000 character limit in the Additional Comments field.																																		
7.	Verify that the product number or numbers are the ones that you want to request support on.	Click the <b>Cancel</b> button if you do not want to complete the product support request.																																		
8.	Click <b>Contact Support</b> .	The User Notification page confirms that your support case has been opened. An email will be sent to you with the case number. Click the Continue Registration link to return to Registration Wizard Site page.																																		
	<p><b>Generate a Quote</b>   <a href="#">Quote SIS98 to CBR</a>   <a href="#">Quote Manager</a>   <a href="#">Quote Wizard</a>   <a href="#">Reseller Orders</a></p> <p>Quick Search <input type="text"/> Contract Number <input type="text"/> <input type="button" value="Go!"/> <a href="#">Advanced Search</a></p> <p><b>User Notification</b></p> <p>Thank you for opening a case with Partner Service Center.                      A case # will be generated and emailed to you shortly.</p> <p><a href="#">Continue with registration.</a></p>																																			

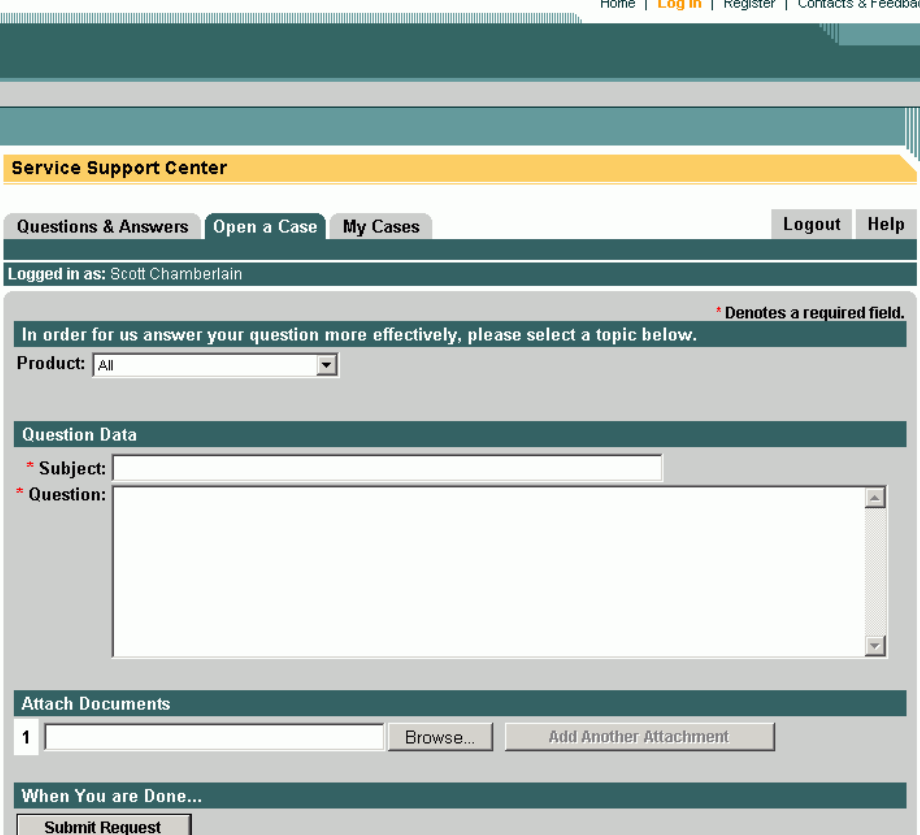
## Online Support Request

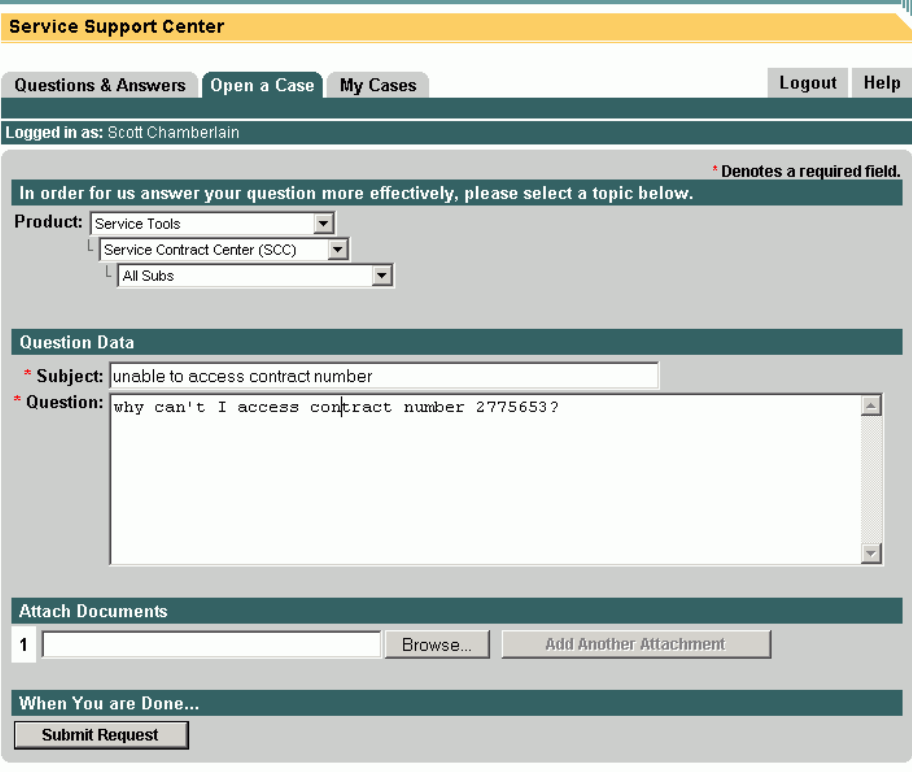
You can also submit an online support request directly from SCC New Quoting.

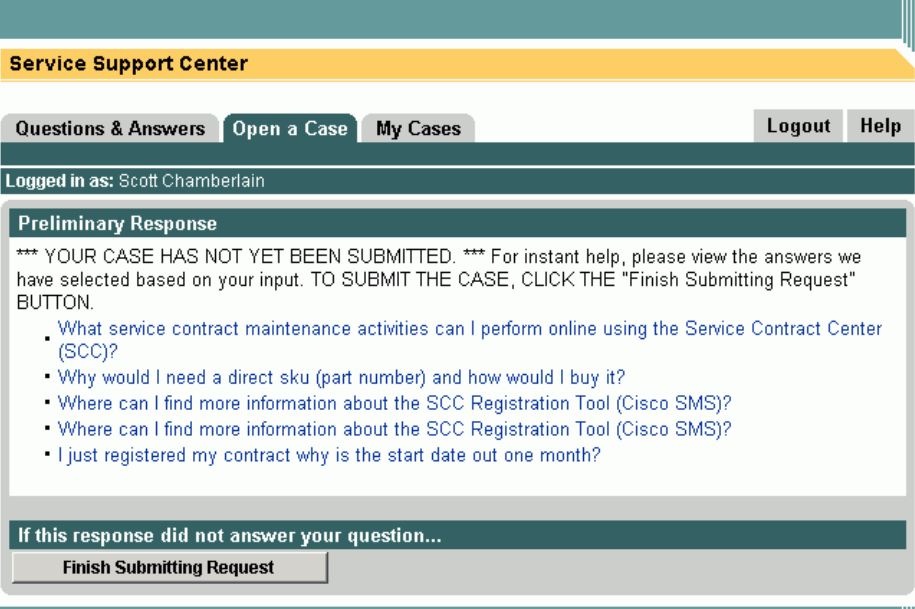
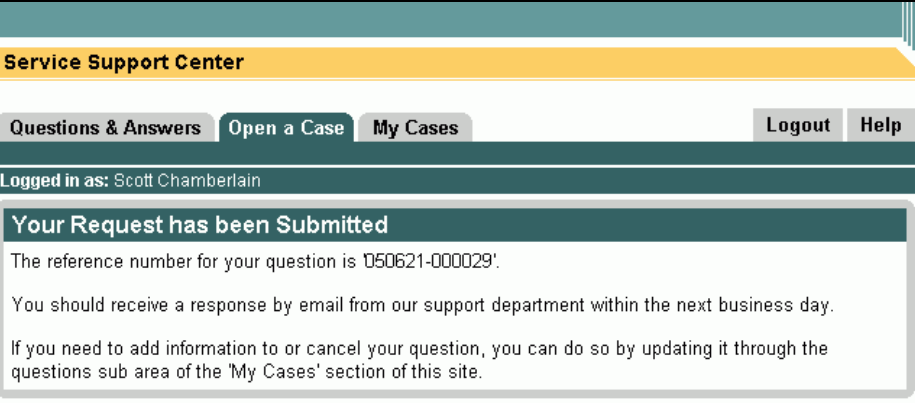


### Procedure: Submit an Online Support Request

Step	Action	Result or Note
9.	Click the <b>Feedback</b> link located in the upper right corner of SCC.	The <b>Service Support Center</b> page displays.
10.	Click the <b>Open a Case</b> link.	The Open a Case page displays. If you don't already have an account with the Service Support Center, you will be asked for information needed to create a new account before your question can be submitted.

Step	Action	Result or Note
		
11.	Click the Product drop-down list and choose <b>Tools</b> .	The <b>Tools</b> sub-menu displays.
12.	Choose <b>Service Contract Center (SCC)</b> from the Tools drop-down list.	
13.	Enter your subject in the <b>Subject</b> field.	
14.	Enter your question or feedback in the <b>Question</b> field.	If you refer to anything specific within the application, be sure to include as much detail as possible to help the support team troubleshoot the issue and resolve your case quickly. For example, include any error messages.

Step	Action	Result or Note
		
15.	Click <b>Submit Request</b> .	The <b>Preliminary Response</b> page displays some commonly asked questions based on your input. Before submitting your request, take a few moments to review the instant help answers. If none of the answers resolve your question, proceed with submitting the request.

Step	Action	Result or Note
		
16.	Click <b>Finish Submitting Request</b> .	The <b>Your Request Has Been Submitted</b> page displays. Note the incident number that has been assigned to your case. You can use the incident number to future reference to the case. You should receive an email response from the support department by the next business day. If you need to add information to or cancel your question, you can do so through the <b>My Cases</b> section of this site.
		



## Discussion Questions: Contacting Support

### Questions

1. From what pages can you access the Registration Wizard Contact Support tool?

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**Note** The answers to these questions are located in the back of the User Guide.

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## Lesson 6: Generating a Renewal Quote

SCC New Quoting allows you to create a renewal quote to extend coverage on an expiring service contract. This lesson explores the steps necessary to generate a renewal quote using SCC New Quoting.

### Objectives

At the end of this lesson, you will be able to:

- Generate a renewal quote

### Renewing a Contract

In order to create a renewal quote, you'll need to find the existing contract. You can use the **Quick Search**, **Advanced Search**, and **My Contracts** features.

You can also find the contract through the **Generate Renewal Quote** page.



### Procedure: Generate a Renewal Quote

Step	Action	Result or Note
1.	Click the <b>Quoting and Ordering</b> tab.	The <b>Generate a Quote</b> page displays.
2.	Click the <b>Renewal Quote</b> option.	The Renewal Quote option is selected.
3.	Click the <b>Submit</b> button.	The <b>Generate Renewal Quote – Search Options</b> page displays.
4.	Choose Contract Number from the <b>Search By</b> drop-down list.	You can also search by customer name.
5.	Enter the contract number in the <b>Value</b> field. For this example, the contract number value is 2178164.	The contract number displays in the Value field.

SCC New Quoting for Indirect Resellers

Step	Action	Result or Note										
	<p><b>Generate a Quote</b>   <a href="#">Quote Manager</a>   <a href="#">Quote Wizard</a>   <a href="#">Import Quote File</a>   <a href="#">Update Rejected Site Address</a></p> <p>Quick Search <input type="text" value="Contract Number"/> <input type="text" value="Advanced Search"/></p> <p><b>Renewal Quote - Search Options</b></p> <p>Enter the contract number you wish to Renew or if you do not know the contract number, enter the customer (end user) name.</p> <p>Search By <input type="text" value="Contract Number"/></p> <p>Value <input type="text" value="2178164"/></p> <p><input type="button" value="Submit"/></p> <p>Tip You can query any part of the customer name. For example, entering "STATE" will search for all customers with "STATE" in their name.</p>											
6.	Click <b>Submit</b> .	The <b>Generate Renewal Quote</b> page displays.										
	<p><b>Generate Renewal Quote</b></p> <p><b>Contract</b> <a href="#">2178164</a>  <b>Service Level</b> SMARTnet Premium 24x7x4(SNTP)  <b>Reseller</b> MOREFIELD COMMUNICATIONS INC  35 NORTH 35TH STREET  CAMP HILL, PA 17011  UNITED STATES  <b>Customer Name</b> UNION NATIONAL COMMUNITY BANK</p> <p><b>Step 1: Select Distributor</b></p> <p>Distributor <input type="text" value="Incredible Dist"/></p> <p><b>Step 2: Enter Comments and End Customer Pricing Information</b></p> <p>Quote Notes (Comments) <input type="text"/></p> <p>End Customer Price Adjustment (from list) <input type="text" value="+"/> <input type="text" value=""/> %</p> <p><b>Step 3: Select Products</b></p> <p><input checked="" type="radio"/> All  <input type="radio"/> Select Products Expiring in <input type="text" value="90"/> days</p> <p><b>Step 4: Select End Date</b></p> <p><input type="radio"/> Select coterminous end date Month <input type="text" value="Select"/> Day <input type="text" value="Select"/> Year <input type="text" value="Select"/>  <input checked="" type="radio"/> Extend end dates by <input type="text" value="1"/> year</p> <p><b>Select Site</b>  Default is set to 'ALL SITES'. For specific <a href="#">sites</a>, use the pull down menu and pick 'Checked Sites'. Next scroll and check specific sites. Then click 'Generate Quote'.</p> <p>All Sites <input type="button" value="Generate Quote"/></p> <table border="1"> <thead> <tr> <th>Select</th> <th>Customer/Site Name</th> <th>Address</th> <th>City/State</th> <th>Equipment Expiring between</th> </tr> </thead> <tbody> <tr> <td><input checked="" type="checkbox"/></td> <td>UNION NATIONAL COMMUNITY BANK</td> <td>101 EAST MAIN STREET</td> <td>MOUNT JOY, PA</td> <td>31-AUG-2005 and 31-AUG-2008</td> </tr> </tbody> </table>	Select	Customer/Site Name	Address	City/State	Equipment Expiring between	<input checked="" type="checkbox"/>	UNION NATIONAL COMMUNITY BANK	101 EAST MAIN STREET	MOUNT JOY, PA	31-AUG-2005 and 31-AUG-2008	
Select	Customer/Site Name	Address	City/State	Equipment Expiring between								
<input checked="" type="checkbox"/>	UNION NATIONAL COMMUNITY BANK	101 EAST MAIN STREET	MOUNT JOY, PA	31-AUG-2005 and 31-AUG-2008								
7.	Verify that the Contract Service Level, Reseller, and Customer Name information are all correct.	<b>NOTE:</b> If the Reseller Address is incorrect, you can utilize the <b>Edit Reseller Information</b> option in Quote Wizard to modify this information once the quote is created.										
8.	Scroll down to the <b>Step 1: Select Distributor</b> section. Choose your distributor from the drop-down list.	The distributor is selected.										
9.	Scroll down to the <b>Step 2: Enter Comments and End Customer Pricing Information</b> section. Enter a comment in the <b>Quote Notes</b> field.	<b>NOTE:</b> <b>Quote Notes</b> is a required field.										

SCC New Quoting for Indirect Resellers

Step	Action	Result or Note
10.	Choose either <b>Discount Off List (-)</b> , or <b>Markup from Cost (+)</b> from the <b>End Customer Price Adjustment (from list)</b> drop-down list. For this example, we will choose Discount Off List (-).	
11.	Enter a value in the <b>Discount/Markup Percentage</b> field. For this example we entered 10%.	<b>NOTE:</b> The End Customer Price Adjustment (from list) options help you calculate your customer's price based on the discount/markup you entered.
12.	Scroll down to the <b>Step 2: Select Products</b> section. Choose either <b>All</b> or <b>Select Products Expiring</b> for renewal. For this example we choose All.	<b>NOTE:</b> You can select all of the products or certain product expiring in X days for renewal.
13.	Scroll down to the <b>Step 3: Select End Date</b> section. Choose either a <b>Coterminous end date</b> or <b>Extend end dates by X years</b> . For this example we extended the end date by 2 years.	<p><b>NOTE:</b> Coterminous end date allow you to set the selected products to end on a specific date.</p> <p>Extend end days by X years automatically extend the current end date by X years.</p> <p>Renewing items for at least 2 years results in a multi-year discount.</p>
14.	Choose the install sites that you want to include in the quote in the <b>Select Site</b> section.	<p><b>Note:</b> The default is set to <b>All Sites</b>. Leave the default set to All Sites if you want to renew all sites on the contract.</p> <p>If you want to renew a specific install site or sites, choose <b>Checked Sites</b> from the Select Sites drop-down list. Scroll down and check the specific site or sites.</p>

SCC New Quoting for Indirect Resellers

Step	Action	Result or Note										
	<p><b>Generate Renewal Quote</b></p> <p><b>Contract</b> <a href="#">2178164</a>  <b>Service Level</b> SMARTnet Premium 24x7x4(SNTP)  <b>Reseller</b> MOREFIELD COMMUNICATIONS INC            35 NORTH 35TH STREET            CAMP HILL, PA 17011            UNITED STATES  <b>Customer Name</b> UNION NATIONAL COMMUNITY BANK</p> <p><b>Step 1: Select Distributor</b></p> <p>Distributor <input type="text" value="Incredible Dist"/></p> <p><b>Step 2: Enter Comments and End Customer Pricing Information</b></p> <p>Quote Notes (Comments) <input type="text" value="Renew for 2 more years"/>            End Customer Price Adjustment (from list) <input type="text" value="10"/> %</p> <p><b>Step 3: Select Products</b></p> <p><input checked="" type="radio"/> All  <input type="radio"/> Select Products Expiring in <input type="text" value="90"/> days</p> <p><b>Step 4: Select End Date</b></p> <p><input type="radio"/> Select coterminous end date Month <input type="text" value="Select"/> Day <input type="text" value="Select"/> Year <input type="text" value="Select"/>  <input checked="" type="radio"/> Extend end dates by <input type="text" value="2 years"/></p> <p><b>Select Site</b>            Default is set to 'ALL SITES'. For specific <a href="#">sites</a>, use the pull down menu and pick 'Checked Sites'. Next scroll and check specific sites. Then click 'Generate Quote'.</p> <p><input type="text" value="All Sites"/> <input type="button" value="Generate Quote"/></p> <table border="1"> <thead> <tr> <th>Select</th> <th>Customer/Site Name</th> <th>Address</th> <th>City/State</th> <th>Equipment Expiring between</th> </tr> </thead> <tbody> <tr> <td><input checked="" type="checkbox"/></td> <td>UNION NATIONAL COMMUNITY BANK</td> <td>101 EAST MAIN STREET</td> <td>MOUNT JOY, PA</td> <td>31-AUG-2005 and 31-AUG-2008</td> </tr> </tbody> </table>	Select	Customer/Site Name	Address	City/State	Equipment Expiring between	<input checked="" type="checkbox"/>	UNION NATIONAL COMMUNITY BANK	101 EAST MAIN STREET	MOUNT JOY, PA	31-AUG-2005 and 31-AUG-2008	
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<input checked="" type="checkbox"/>	UNION NATIONAL COMMUNITY BANK	101 EAST MAIN STREET	MOUNT JOY, PA	31-AUG-2005 and 31-AUG-2008								
15.	Click the <b>Generate Quote</b> button.	The <b>Quote Wizard</b> page displays the renewal quote information. This page confirms that a renewal quote has been created. In this example, we see that the customer is receiving a multi-year adjustment for renewing a contract for at least 2 years.										

SCC New Quoting for Indirect Resellers

Step	Action	Result or Note																								
	<p><b>Quote Wizard</b> <span style="float: right;">Logged in as: reseller.test.us</span></p> <p><b>Quote Status:</b> Open  <b>Quote:</b> Q4422951  <b>Contract:</b>  <b>Service Level:</b> SMARTnet Premium 24x7x4 (SNTP)  <b>Quote Type:</b> Renewal Service  <b>Products for the Quote:</b> ALL PRODUCTS  <b>Coterminate:</b> No  <b>Renewal Period:</b> 2 Year  <b>Quote Notes:</b> Renew for 2 more years</p> <p><b>Quote Date:</b> 20-JUL-2005  <b>Created by:</b> reseller.test.us  <b>Distributor:</b> Ingram Micro US  <b>Distributor Account Number:</b>  <b>Distributor Invoice Number:</b>  <b>Reseller PO Number:</b>  <b>Quote Amount:</b> 6,144.00 USD (Includes Multi-Year Adjustment)  <b>Reseller Price:</b> CONTACT DISTRIBUTOR  <b>Customer Price:</b> 5,760.00 USD</p> <p><b>Additional Contract Access:</b> <a href="#">Edit</a></p> <p><b>RESELLER INFORMATION</b></p> <p>Name and Address <a href="#">Edit</a>      Contact Information <a href="#">Edit</a></p> <p>MOREFIELD COMMUNICATIONS INC      First Name  35 NORTH 35TH STREET      Last Name  CAMP HILL, PA 17011      Phone Number  UNITED STATES      Email</p> <p><small>*Non US user - your Unit Price and Extended Amount will be displayed after the reseller discount has been set by your distributor.</small></p> <table border="1"> <thead> <tr> <th>Line Item Number</th> <th>Part Number</th> <th>Quantity</th> <th>Unit Price</th> <th>Extended Amount</th> </tr> </thead> <tbody> <tr> <td>1</td> <td>CON-SNTP-SMS-1</td> <td>6144</td> <td>1.00 USD</td> <td>6,144.00 USD</td> </tr> </tbody> </table> <p><b>ACTIONS</b></p> <p>Select One <input type="button" value="Submit"/></p> <p><b>TIPS:</b> Click the Install Site link(s) to view product details. Click the Site Status link to sort by Incomplete Sites.</p> <table border="1"> <thead> <tr> <th>Select</th> <th>Install Site</th> <th>Begin Date</th> <th>End Date</th> <th>Quote Amount</th> <th>Customer Price</th> <th>Site Status</th> </tr> </thead> <tbody> <tr> <td><input type="checkbox"/></td> <td><a href="#">UNION NATIONAL COMMUNITY BANK MOUNT JOY, PA 17552, UNITED STATES</a></td> <td>01-SEP-2008</td> <td>31-AUG-2010</td> <td>6,144.00 USD</td> <td>5,760.00 USD</td> <td>complete</td> </tr> </tbody> </table> <p><b>Please Note:</b>  This quote contains service pricing only.  This quote is valid for 60 days. All prices are subject to change without notice. Cisco reserves the right to add, change, or discontinue any product from this price list.</p>	Line Item Number	Part Number	Quantity	Unit Price	Extended Amount	1	CON-SNTP-SMS-1	6144	1.00 USD	6,144.00 USD	Select	Install Site	Begin Date	End Date	Quote Amount	Customer Price	Site Status	<input type="checkbox"/>	<a href="#">UNION NATIONAL COMMUNITY BANK MOUNT JOY, PA 17552, UNITED STATES</a>	01-SEP-2008	31-AUG-2010	6,144.00 USD	5,760.00 USD	complete	
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16.	Verify that all the quote information is correct.																									



## On Your Own Exercise 6: Generate a Renewal Quote

### Instructions

Try renewing a contract for one of your key customers. Go back to review the key steps, if necessary. When you are finished, try answering the questions below.

### Questions

1. You can find a contract to renew by using what types of search techniques in SCC New Quoting?
2. How many years does a customer have to renew a contract for in order to receive a multi-year discount?

---

**Note** The answers to these questions are located in the back of the User Guide.

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## Getting Additional Help

For additional information on SCC New Quoting for Indirect Resellers, go to:

<http://www.cisco.com/public/scc/>.

The SCC New Quoting Help page contains links to:

### **Quick Reference Guide**

The Quick Reference Guide includes short, step by step procedures for creating a renewal quote and can be used as a supplement to this user guide. Copies of the Quick Reference Guide can be downloaded in PDF format.

### **User Guide**

Copies of this user guide can be downloaded in PDF format.

### **E-Learning**

The SCC New Quoting for Indirect Resellers E-Learning course is available through the Cisco Partner E-Learning Connection (PEC). To access the PEC, go to:

[http://www.cisco.com/web/learning/le36/learning\\_partner\\_e-learning\\_connection\\_tool\\_launch.html](http://www.cisco.com/web/learning/le36/learning_partner_e-learning_connection_tool_launch.html).

# Answers to Discussion Questions

## Exercise 1

1. Register for and obtain your CCO User ID
2. The Quoting and Ordering Tab
3. Click the Administration Tab

## Exercise 2

1. Reseller address and contact information
2. 2 years
3. Edit the value and quantity fields, delete invalid fields, and access the product lookup tool to find the correct product ID.

## Exercise 3

1. Quote creation date, status and resellers. You can also search by the Quote Number, Distributor Invoice Number, Distributor PO number, or Reseller PO Number.
2. In addition to searching, customize header display, route, delete and order quotes.
3. Use the Customize View for Quote Header tool to add, remove, or move up or down the quote fields to display.
4. Current quotes

## Exercise 4

1. Complete.
2. Edit Install Site information, Register Site, Edit Dates for Sites and Products, Revert to Original Quote Begin Dates, Show Product Details..

## Exercise 5

1. Registration Wizard Site page, Registration Errors page.

## Exercise 6

1. Quick Search, Advanced Search, My Contracts.
2. 2