CISCO SYSTEMS

ORDERING TOOL USER GUIDE

BEFORE YOU BEGIN

This section provides information you should know before you use Ordering Tool for the first time.

System Requirements

For best performance when using Ordering Tool, Cisco suggests that you follow the guidelines below.

Hardware

- Pentium 166 MHz (minimum); for optimal performance, Pentium 200 MHz or higher
- 126 MB RAM
- Monitor and display adapter cable of 256 colors at 800x600 resolution; for optimal performance, display adapter capable of 1024x768 resolution.

Software

- TCP/IP protocol installed and configured
- Operating system: Microsoft Windows 95, 98, 2000, or NT; Unix (Solaris); Linux
- HTML browser: Netscape/Mozilla 4.5 or higher; Microsoft Internet Explorer 6.0.

Network

- 56 KB modem connection or higher (sustained bandwidth); for optimal performance, 512 KB LAN connection.

Prerequisites

Before you can use Ordering Tool:
- Your company must have signed the Internet Commerce Agreement (ICA) with Cisco. An Internet Commerce Agreement is a contract signed by an individual, authorizing them to submit orders using the Ordering Tool.
- You must be a registered user of Ordering Tool to gain access.
- You must have logged in to Ordering Tool to create orders.

ORDERING TOOL OVERVIEW

Ordering Tool offers the following benefits to users who want to order Cisco products and services:
- A central home page from which you can create orders, access saved orders, and make use of features that save time in creating orders.
- Configuration checking of both product and service line items to ensure that the order is complete and correct.
- The ability to save common order elements (for example, contact names and addresses, product and service configurations, configurations, ShipSets) and reuse them.

Ordering Tool consists of two pages that are used to create orders:
- Home Page
- Main Order Form

Home Page

The Ordering Tool Home Page captures general business information about your company and the order.
From the Ordering Tool Home Page, you can:
- Create orders
- Acquire routed orders
- Retrieve saved orders
- Use features that save time in creating orers, such as default order information (through the Set Order Defaults link), order templates (through the Order Templates link), and saved addresses and contacts (through the Address Book link)
- Access documentation

For the Ordering Tool Home Page, you supply the following information for the current order:
- Type and description of the order
- Price list to be used
- Product and service discounts (if any)
- Intended use
- Deal ID
- Purchase Order number
- Requested Ship Date
- Quote number (if any)
- Referral Reason
- End User Country
- Federal Government (only visible to Federal Government entitled customers)

Main Order Form

On the Main Order Form you enter and configure specific products and services that make up your order.
In the Main Order Form, you can:
- Change header details or accept the defaults.
- Add, configure, and verify order configurations
- Group line items into ShipSets that will be delivered to specific locations.
- View an order summary.

The information on the order is organized into four tabs:
- **Main Order Form** tab: Enables you to order products and services one line at a time. You can verify your order for completeness and correct any configuration errors. You can save, route, and submit orders from this page.
- **Header Details** tab: Holds all billing, shipping, end-user, payment/tax, and order acknowledgment information for this order. Any changes made here override current defaults for this order only. For more details, see Header Details in this manual.
- **ShipSets** tab: Identifies the groups of line items that will ship to particular destinations. All items in a ShipSet must have the same requested destination, ship date, shipping preference, and shipping service level. If **Ship All Items Separately** is set to **No**, all of the items shipped from the same manufacturing organization are placed in one ShipSet in the order. For more details, see ShipSets in this manual.
- **All Order Details** tab: Provides a summary of all information related to this order on a single page. For more details, see All Order Details in this manual.

LOGGING IN TO ORDERING TOOL

To use Ordering Tool:
1. Log in to Cisco.com.
2. Click Ordering in the left navigation pane.
3. Click Ordering to display the full list of tools.
4. Click Ordering Tool to display the Ordering Tool home page.

SETTING ORDER DEFAULTS

When you set order defaults, you can save time and keystrokes by specifying elements that will be reused in different sections of the current order, as well as any future orders. You can change the values for individual sections in a specific order without changing defaults through the Header Details page.

You set order defaults from the **Ordering Tool Home** page, by clicking **Set Order Defaults**.

Ordering Tool Preferences determine how you want Ordering Tool to function while you are creating orders:
- **Update reminders**: Specifies whether you want to be prompted to update your order after entering a number of lines.
- **Alert pop-ups**: Enables/Disables warning alert pop-up messages as you add lines to your order.
- **Configuration Preferences**: Enables/Disables Guidance Alert, which checks for incompatibilities as you add an item to a product configuration.
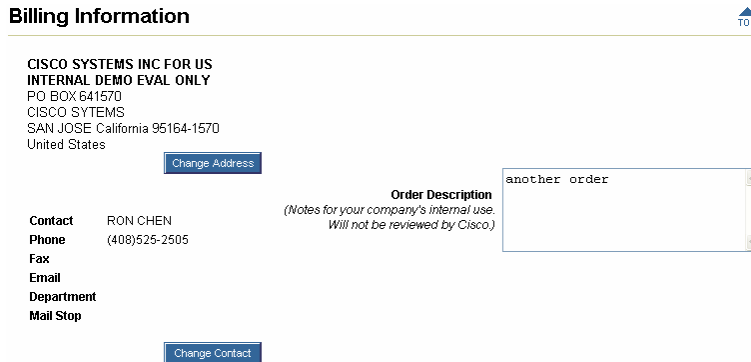
Billing Information

From this section you can set the default billing address and billing contact.

Setting the Default Billing Address

To set or change billing information:
1. Click the Billing hyperlink on the **Set Defaults** page.

2. Click the **Change Address** button to display a list of eligible addresses on the *My Addresses* tab of the *Address Book*.
3. Choose the address you would like to use as the default by clicking the button under the **Select** column.
4. If you would like to choose a billing contact, click on the *Assign Contact* tab to display a list of available billing contacts.
5. Choose the contact name to use as your default contact by clicking the corresponding button.
6. Click **Apply** to save your selections.

Setting Default Billing Contact Information

To set or change billing contact information:
1. Click the Billing hyperlink on the **Set Defaults** page.
2. If you want to choose a billing contact for the selected address, click the **Change Contact** button.
3. Choose the contact name to use as your default contact by clicking the corresponding button.
4. Click **Apply** to save your selections.

Shipping Address and Method

From this section you can set the default shipping address, shipping contact, and shipping method.

Setting Default Shipping Address Information

To set or change default shipping address information:
1. Click the Shipping Address & Method hyperlink on the **Set Defaults** page.
2. Click the **Change Address** button to display the **My Saved Addresses** page.
3. Choose the address you want to use as the default by clicking the button under the **Select** column or by searching for an address by clicking the **Search/Enter Addresses** tab. You can also select None, so that no default shipping address is specified.

    Note: You can only select from previously entered addresses on the **Set Defaults** page. You must enter a new address in an order and submit it before the address becomes available for selection on the **Set Defaults** page.

4. Click the **Apply** button, then click **OK** to confirm the change.

Setting Default Shipping Contact Information

To set or change default shipping contact information:
1. Click the Shipping Address & Method hyperlink on the **Set Defaults** page.
2. If you want to choose a shipping contact for the selected address, click the **Change Contact** button.
3. Choose the contact name to use as your default contact by clicking the corresponding button.
4. Click **Apply** to save your selections.

Setting or Changing the Default Shipping Method

To set or change default shipping method information:
1. Click the Shipping Address & Method hyperlink on the **Set Defaults** page.

2. Select a shipping preference from the **Shipping Preference** drop-down list.
3. Select a shipping service from the **Shipping Service** drop-down list.
4. On the **Ship All Items Separately** line, click **Yes** if you accept partial shipments from Cisco, or click **No** if you want the entire order to ship at one time.
5. In the **Shipping and Packaging Notes** box, enter any notes to be added to the packing slips and invoices.
6. In the **Carton Notes** box, enter any notes that should appear on the carton labels on the outside of the product shipping boxes.
7. Click **Save Defaults** to save your selections.

Pricing Information

To set or change **Pricing** information:
1. Click the Pricing Info hyperlink on the **Set Defaults** page.

2. Select the **Price List** from the drop-down list. (The list includes all of the price lists available to you based on the entitlement information in your User ID profile.)
3. Enter a **Product Discount** percentage that your company and Cisco Systems have agreed upon.
4. Enter a **Service Discount** percentage that your company and Cisco Systems have agreed upon.
5. Click **Save Defaults** to save your entries and return to the **Set Defaults** page.

Payment and Taxes

In this section you can set purchase order or credit card payments and the tax status of your order.

Setting Up a Purchase Order Payment

To set or change **Payment and Taxes** information:
1. Click the Payment & Taxes hyperlink on the **Set Defaults** page.

Payment & Taxes

Note: *You do **not** need to provide credit card information if you are paying by purchase order.*

Intended Use	Select One
Payment Method	Purchase Order

Taxable? ○ Yes ⦿ No

2. Select the intended use from the **Intended Use** drop-down list.
3. Select Purchase Order from the **Payment Method** drop-down list.
4. Specify whether your order is **Taxable?** By clicking either the **Yes** or **No** button.
5. Click **Save Defaults** to save your entries and return to the **Set Defaults** page.

Setting Up a Credit Card Payment

Ordering Tool provides a secure environment to enter your credit card number. The Ordering Tool ensures that you use the correct digit length and format when entering credit card numbers and encrypts the data for secure transmission.

The credit card payment option is not available worldwide. The following table summarizes the types of credit card orders supported for each region.

Table 1 Credit Card Support by Region

Region	Product	Column
Australia	Yes (AUS$)	Yes (AUS$)
Canada	Yes (CAN$)	Yes (CAN$)
Europe, Middle East, and Africa	N/A	N/A
Japan	N/A	N/A
United States	Yes (US$)	Yes (US$)

To set up a credit card payment:
1. Click the Payment & Taxes hyperlink on the **Set Defaults** page.
2. Select the type of purchase from the **Purchase Type** drop-down list.
3. Select Credit Card from the **Payment Method** drop-down list.

Credit Card	None Required (for P.O.)
Card Number	
Expiration Date	MM / YYYY
Name on Card	

4. Select the name of the credit card from the **Credit Card** drop-down list.
5. Enter the credit card number in the **Card Number** box.
6. Select the month (MM) and the year (YYYY) when the credit card expires from the **Expiration Date** drop-down lists.
7. Enter the full name of the card holder in the **Name on Card** box.
8. Enter the zip code for the credit card billing address in the **Credit Card Zip** box.
9. Specify whether your order is **Taxable?** by clicking either the **Yes** or **No** button.
10. Click **Save Defaults** to save your entries and return to the **Set Defaults** page.

In addition, you must enter your email address in both the Order Acknowledgements form and the Order Contacts form so that Cisco can contact you in the event that authorization fails.

Service Options

To set or change **Service Options** information:
1. Click the Service Options hyperlink on the **Set Defaults** page.

Service Options

Note: *You may change your service levels in one of two ways:*
  1) By changing them here prior to placing an order, OR
  2) After starting an order, you may change them at the line level for individual line items

Hardware Service Level [None ▾]
Software Service Level [None ▾]

2. Select the service level from the **Hardware Service Level** drop-down list.
3. Select the service level from the **Software Service Level** drop-down list.
4. Click **Save Defaults** to save your entries and return to the **Set Defaults** page.

Order Acknowledgments

An acknowledgment contact must be provided for credit card, government, and try-and-buy orders before they can be submitted.
To set or change **Order Acknowledgments** information:
1. Click the Acknowledgments hyperlink on the **Set Defaults** page.

Order Acknowledgements

Notes: *Your own default email is typically the routing recipient.*
  You can separate multiple email addresses with commas.

Name: First [Wayne] Last [Douglass]

Email: [wadougla@cisco.com]

Have Cisco send
order confirmation email
to this email address: [wadougla@cisco.com]
This may be the person responsible for tracking or processing your orders.

To receive shipping and scheduling acknowledgements, please sign up using the Notification Tool

2. Enter the first and last name of the person who usually tracks or processes your orders.
3. Enter the email address of the person who usually tracks or processes your orders.
4. Enter the email address of the person who usually tracks or processes your orders in the **Have Cisco send order confirmation email to this email address** box.
5. Click **Save Defaults** to save your entries and return to the **Set Defaults** page.

Order Contacts

To set or change **Order Contacts** information:
1. Click the Order Contacts hyperlink on the **Set Defaults** page.

Order Contacts

Note: *For questions regarding order, contact:*

Name: First [Wayne] Last [Douglass]
Phone: [+1 408 526-6066]
Fax: [0]
Email: [wadougla@cisco.com]

2. Enter the first and last name as it appears in your User ID. It can be changed upon initial login to Ordering Tool.
3. Enter the FAX number as it appears in your User ID. It can be changed upon initial login to Ordering Tool.
4. Enter the email address as it appears in your User ID. It can be changed upon initial login to Ordering Tool.
5. Click **Save Defaults** to save your entries and return to the **Set Defaults** page.
6. Click the Back button to return to the Ordering Tool Home Page.

CREATING ORDERS

Once you have logged in to Ordering Tool and set defaults, you are ready to create an order.
Scroll to the *Create an Order* section of the Ordering Tool. Some of the fields are already populated with values from your customized defaults.
You have the following options to create an order:

- If you are satisfied with the defaults, you can supply the business information for this order that is summarized in the following table. When you are finished, click **Continue** to display the **Main Order Form**.
- If you would rather create an order from a template that you have previously saved, click the Use Order Templates link at the top of the **Ordering Tool Home** page. See Creating an Order from a Template for more details.

Table 2 Required business information for your order

Field	Required Information
Order Type	Select one of these options: **Try and Buy Order:** Order type for customers and partners who buy directly from Cisco enabling them to try new Cisco equipment for 90 days before buying it (available according to customer entitlement). **Standard Order:** The basic order type used by Cisco customers to order Cisco products (no special handling involved). **Note:** E-rate, promotion, and U.S. government orders should be entered as standard orders. **Service Only Order:** Service Only orders contain only service items. Shipping information is unnecessary because no products will be shipped. **Trade-In Order:** Used if you are placing the order as part of the Cisco Technology Migration Plan (CTMP) or custom Trade-In (non-CTMP) programs. Requires CTMP Quote # or Customer Trade-In worksheet.
Defense Priorities & Allocation Systems (Federal DPAS Rating)	Applicable for US Federal government orders only
Price List	Select an appropriate price list for this order, based on the billing address, from the drop-down list. Once you have chosen a price list, you cannot change it for the current order.
Ordering Description	Enter a text description that uniquely identifies this order.
Product Discount	Enter the discount desired for this order, over and above the customer's contracted discount. Non-contractual customers must enter their agreed-upon discount with Cisco to have it applied to the order.
Service Discount	Service discounts are not populated automatically in the order. Enter the agreed-upon discount with Cisco to have it applied to the order.
Intended Use	**Use** Depending on order type, options include: **Resale:** if the equipment on the order will be resold to a third party. **Leasing**: if the equipment will be rented for a fixed term. **Internal Business Use/Infrastructure:** if the equipment will be used by your company or organization; not resold to a third party. **Service Provision Use:** if the equipment will be installed in a service provider facility that delivers network access to end users. **Lab:** if the equipment on the order will be used in a laboratory. **Stocking:** if the equipment will be placed in stock by a distributor for future resale. (Only distributors should specify Stocking.)
Deal ID	The Deal ID will be validated when users click on Continue. If the validation fails, users will get an alert message such as "Deal has been fully consumed, expired, invalid, or not approved. You may submit your order with this Deal ID, but doing so may delay your order." Users can click on OK and continue to process the order despite the warning message.
Purchase Order #	If you are paying by purchase order, enter your company's purchase order number for this order.

Field	Required Information
Purchase Order #	If you are paying by purchase order, enter your company's purchase order number for this order.
Requested Ship Date	Enter the date on which you want Cisco to ship your order in MM/DD/YYYY format. The date must be later than today's date, but no later than 90 days from today's date.
Quote Number QN	Enter the Quote Number, if appropriate. The Quote Number is supplied by the Account Manager.
Referral Reason	Select from the drop-down menu to appropriate reason.
End User Country	Select the country of the end user for whom the products are intended from the drop-down menu.

Creating a Standard Order

The Standard Order is the most common order type for ordering Cisco products. Standard Order is also the order type for:

- Promotional orders
- E-rate orders
- US federal government orders.

Create an Order Page

To create a Standard Order, select **Standard Order** from the **Order Type** drop-down list.

Enter the information for this order as explained in Table 1.

If your user profile indicates that you order for the US federal government, you will see the **Defense Priorities and Allocation Systems (Federal DPAS Rating)** box in which you must enter your code. For US federal government orders, select **Federal Government** in the **End User Market** drop-down list.

Click the **Continue** button to move to the next page.

Main Order Form

Specify the products and service you want to order, as explained in the Adding Items to an Order section of this manual.

Header Details

View/modify order information related to:

- Billing
- Shipping Address and Method
- End User
- Payment and Taxes
- Acknowledgments
- Order Contacts
- Non Standard Shipping Request
- Delivery Options

For a Standard Order, the *Payment & Taxes* section includes the following boxes for promotional orders:

- Erate Code
- Promotion Code

Payment and Taxes ▲ TOP

Note: You do **not** need to provide credit card information if you are paying by purchase order.
Warning: Payment terms cannot be selected because they are contractual. If there is a problem please explain in the order processing notes below.

Intended Use: Lab

Payment Method: Purchase Order

Purchase Order #:

Terms: 30 NET

Commission Code: Select One

Taxable? ● Yes ○ No

Tax Exemption Status: Customer not claiming a tax exemption.

Erate Code:

Promotion Code:

Order Processing Notes
These notes are reviewed by Cisco. Entries in this field may delay the processing and/or shipment of your order.

Credit Card: None Required (for P.O.)

Card Number:

Expiration Date: MM / YYYY

Name on Card:

Creating a Service Only Order

A Service Only Order follows the same pattern as a Standard Order, except that there is no need to specify **Shipping Address & Method** information.

Create an Order Page

To create a Service Only Order, select **Service Only Order** from the **Order Type** drop-down list.
Enter the information for this order as explained in Table 1.
Click the **Continue** button to move to the next page.

Order Type: Service Only Order — Help me choose

Price List: Global Price List in US Dollars

Order Description:

Product Discount: 0.0 % Service Discount: 0.0 %

Intended Use: Select One — Help me choose

Deal Id:

Purchase Order #:

Requested Ship Date: (MM/DD/YYYY)

Quote Number ON-:

Commission Code: Select One

End User Country: United States

Referral Reason: To Refer (Select A Reason)
For US and Canadian users only: Referral reason required if you intend to refer service for products on this order.

For Federal Goverment? ○ Yes ● No

Note: You can also route an order to another person. Learn how.

Order ID:

Key:

Acquire Order

Continue

Main Order Form

Specify the service you want to order, as explained in the Adding Items to an Order section of this manual.

Header Details

Because there is no product to ship in a Service Only Order, there is no need to specify **Shipping Address & Method** information.
View/modify order information related to:

- Billing
- End User
- Payment and Taxes
- Acknowledgments
- Order Contacts
- Non Standard Shipping Request
- Delivery Options

Creating a Trade-In Order

The Trade-In Order type is used if you are placing the order as part of the Cisco Technology Migration Plan (CTMP) or custom Trade-In (non-CTMP) programs. Information you need to supply as part of the order includes CTMP Quote # and an equipment list from your Customer Trade-In worksheet.

Create an Order Page

To create a Trade-In Order, select **Trade-In Order** from the **Order Type** drop-down list.
Enter the information for this order as explained in Table 1.
Click the **Continue** button to move to the next page.

Trade-In Information Page

When you select **Trade-In Order** from the **Order Type** drop-down list, a **Trade-In Information** page is generated for the trade-in information you need to supply. The **Trade-In Information** page is accessed by clicking the **Header Details** tab and clicking the Trade-In Information link.
The **Trade-In Information** page prompts for the following information:

- Trade-In program you are participating in and the CTMP quote number, if appropriate.
- RMA contact person. If your RMA contact is not on the list, enter contact information in the boxes provided.
- Trade-In return information. Click the **Add Trade-In Return Info** button to provide equipment information.

Trade-In Information

Instructions: **1.** Provide the Type of Program, CTMP Quote# and Credit amount per the program details. For more information about these fields see the Trade-In section in the Ordering Tool HELP.
2. Select or enter your RMA contact person and click Add Trade-In Return Info button to provide the Trade-In products.

Provide program information

Type of Program	Cisco Technology Migration Plan
CTMP Quote#	
Credit Amount	0.00

Select your RMA contact person

Select	Last Name	First Name	Mail Stop or Room #	Dept.	Phone #	Fax #
○	ATTN:					
○	BHAN	VIBOV				
○	CHEN	RON			(408)525-2505	
○	EFIRD	TREECE			(850)453-4141	
○	ESTERLECHNER	HEINZ				
○	HERCULES	MAYLENE				
○	HERMAN	NICK			(408)525-7054	
○	KOLEK	ROBERT			(408)526-8630	
○	MANN	CHRIS			()612-385-9341	
○	PAYABLE	ACCOUNTS				
○	SIOW	ANNIE				
○	THOMAS	ERIC				
○	TWEEDLY	ALEX				

If your RMA contact person is not listed above, please provide the following information.

(Required) Name	
(Required) Phone #	
(Required) Email	
Fax #	
Dept.	
Mail Stop/Room #	

[Add Trade-In Return Info]

[Save Order] **Last saved:** January 17, 2006 3:30:29 PM PST   [Check for Errors]   [Back to Order Form]

Main Order Form

Specify the products and service you want to order, as explained in the Adding Items to an Order section of this manual.

Header Details

View/modify order information related to:
- Billing
- Shipping Address and Method
- End User
- Payment and Taxes
- Acknowledgments
- Order Contacts
- Non Standard Shipping Request
- Delivery Options

HEADER DETAILS

Click the **Header Details** tab in the **Main Order Form** to display the **All Header Details** page.
View/modify order information related to:
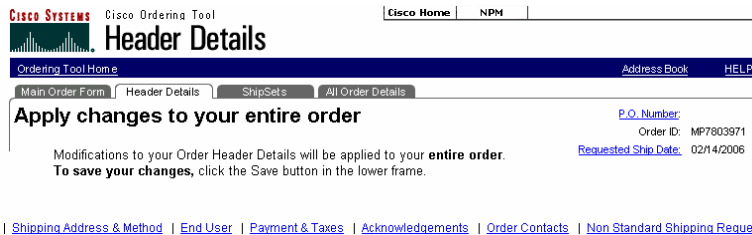
- Billing
- Shipping Address and Method
- End User
- Payment and Taxes
- Acknowledgments
- Order Contacts
- Non Standard Shipping Request
- Delivery Options

Billing

From this section you can change the billing address and billing contact

Changing the Billing Address

To change billing information:
1. Click the Billing hyperlink on the **All Header Details** page.
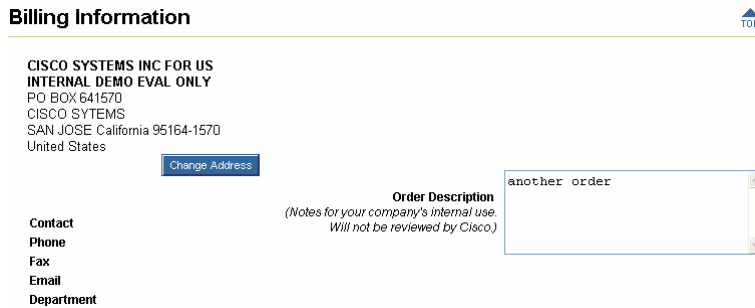
2. Click the Change Address button to display a list of eligible addresses on the *My Addresses* tab of the *Address Book.*
3. Choose the address you would like to use as the billing address by clicking the button under the **Select** column.
4. Click **Apply** to save your selections and display the **All Header Details** page with the new billing address.

Changing Billing Contact Information

To change billing contact information:
1. Click the Billing hyperlink on the **All Header Details** page.
2. If you want to choose a billing contact for the selected address, click the **Change Contact** button.
3. Choose the contact name to use as your billing contact by clicking the corresponding button, or click the **New Contact** button to enter a contact person if they are not listed.
4. Click **Apply** to save your selections and display the **All Header Details** page.

Shipping Address and Method

From this section you can set the default shipping address, shipping contact, and shipping method.

Changing Shipping Address Information

To change shipping address information:

1. Click the Shipping Address & Method hyperlink on the Header Details page.
2. Click the Change Address button to display the The Address Book page.
3. Click the Use one of My Saved Address hyperlink.
4. Select the address you want to use and click Apply.
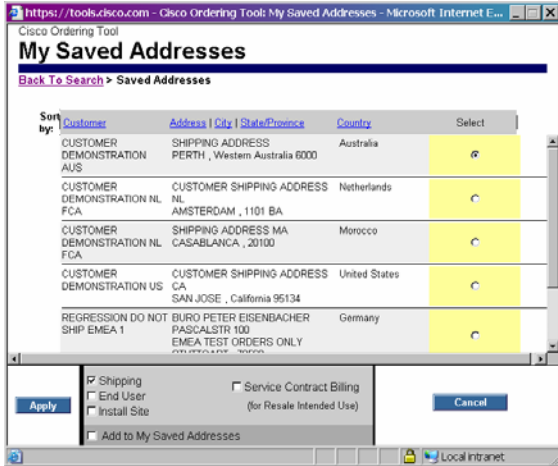
Note: If you do not find the address you want in **Use one of My Saved Address**, follow instructions below to *widen your search.* Click on the Back To Search hyperlink and type the 'Company Name' in the 'Company' field. Then click **Search** button. See screenshot on left.
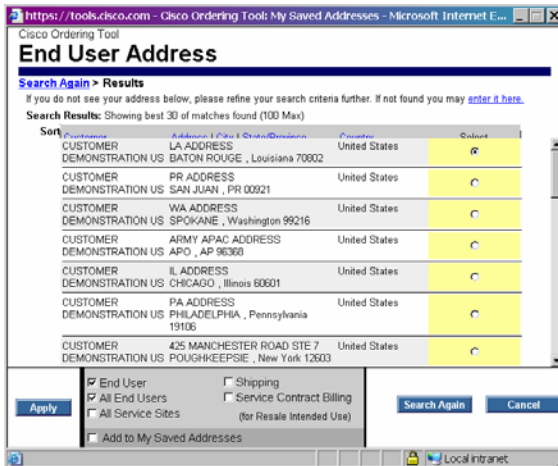
If you still do not want your address after widening your search and reviewing all the addresses, then you can click **enter it here** hyperlink (screenshot above) to bring up the Address Book page, and you can create a new address by free-form typing all the required and recommended fields. Then click **Apply**. See screenshot on left.
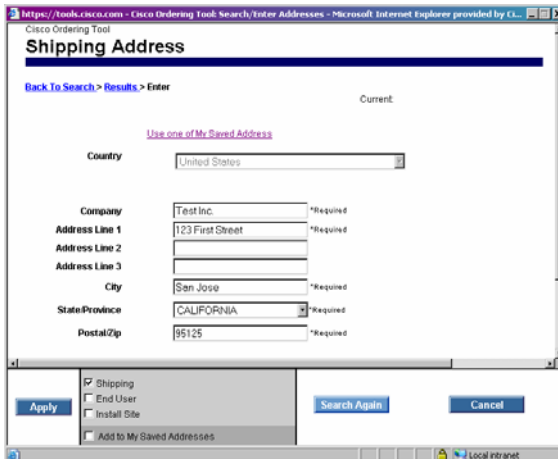
Once you have created the new address, you are now required to add new contact information associated with this new address. Complete required fields in the **Add New Contact** screen. Then click **Apply**. See screenshot on left.

Changing Shipping Contact Information

To change shipping contact information:
1. Click the Shipping Address & Method hyperlink on the **Header Details** page.
2. If you want to choose a shipping contact for the selected address, click the **Change Contact** button.
3. Choose the contact name to use as your contact by clicking the corresponding button.
4. Click **Apply** to save your selections and display the **Header Details** page.

Changing the Shipping Method

To set or change default shipping method information:
1. Click the Shipping Address & Method hyperlink on the **Header Details** page.
2. Make a selection from the **Shipping Preference** drop-down list.
3. Make a selection from the **Shipping Service** drop-down list.
4. On the **Early Shipment Accepted?** line, click **Yes** if you accept shipments before the requested ship date specified, or click **No** if you do not.
5. On the **Ship All Items Separately** line, click **Yes** if you accept partial shipments from Cisco, or click **No** if you want the entire order to ship at one time.
6. In the **Shipping and Packaging Notes** box, enter any special requirements for shipping or packaging.
7. In the **Carton Notes** box, enter any notes that should appear on the carton labels on the outside of the product shipping boxes.
8. Click **Save Order** to save your selections.

End User

Cisco requires End User information for resale orders, contract customers, and orders containing encryption items.

Changing End User Information

To change the End User address Information:
1. Click the End User hyperlink on the **Header Details** page.

2. Click the **Change Address** button to display the **The Address Book** page.
3. Click the address you want to use and click Apply

Note: If you do not find the address you want in the above steps, follow instructions on "widen the search"

and "add a new address" as outlined in "Changing Shipping Address Information" section.

Payment and Taxes

To modify Payment and Taxes Information:
1. Click the Payment & Taxes hyperlink on the **Header Details** page.

2. Select an **Intended Use** from the drop-down list.
3. If the **Payment Method** is **Purchase Order**, enter the purchase order number in the **Purchase Order #** box.
4. If the **Payment Method** is **Credit Card**, select the **Credit Card** name, enter the credit **Card Number**, select the month and year of the **Expiration Date**, and enter the name that appears on the card.
5. Select a **Commission Code** from the drop-down list, if applicable.
6. Click **Yes** or **No** on the **Taxable?** line.

7. Enter an **Erate Code** or **Promotion Code** supplied by Cisco for promotional orders.
8. Enter any **Order Processing Notes** (not to exceed 300 characters).
9. Click **Save Order** to save your selections.

Acknowledgments

An acknowledgment contact must be provided for credit card, government, and try-and-buy orders before they can be submitted.

To change **Order Acknowledgments** information:
1. Click the Acknowledgments hyperlink on the **All Header Details** page.

Order Acknowledgements

Notes: *Your own default email is typically the routing recipient.*
You can separate multiple email addresses with commas.
A valid order contact e-Mail address is required for all Credit Card, DPAS Rated US Government, and Try and Buy orders.

Name: First Wayne   Last Douglass

Email: wadougla@cisco.com

To receive shipping and scheduling acknowledgements, please sign up using the Notification Tool

2. Enter the first and last name of the person who usually tracks or processes your orders.
3. Select Fax, Email, or Neither as the method for sending acknowledgments. Enter a Fax number or Email address in the box, depending on your selection. If you selected Neither, enter nothing.
4. Click **Save Order** to save your entries.

Order Contacts

To change **Order Contacts** information:
1. Click the Order Contacts hyperlink on the **Set Defaults** page.

Order Contacts

For questions regarding this order, contact
Name: First Wayne   Last Douglass
Phone: +1 408 526-6066
Fax: 0
Email: wadougla@cisco.com

2. Enter the first and last name of the person who should be contacted about this order.
3. Enter the contact person's phone number.
4. Enter the contact person's FAX number.
5. Enter the contact person's email address.
6. Click **Save Order** to save your entries.

Non Standard Shipping Request

This section gives Billing Customer Routed customers the opportunity to enter a carrier and a carrier account number.

To specify non-standard shipping:
1. In the *Shipping Address & Method* section, select "Billing Customer Routed" in the **Shipping Preference** drop-down list.
2. Select a service level from the **Shipping Service Level** drop-down list.
3. Click the "Select End Customer Routed Carrier for this order" link located below the **Ship All Items Separately?** warning.

Non Standard Shipping Requests   ▲ TOP

Warning: *Please note that if the non-standard shipping carrier you requested below is not available, Cisco reserves the rights to use an appropriate carrier and carrier account number from your Shipment Routing Configurator profile to fulfill your order.*

Requested Carrier   Select One

Carrier Account Number   [   ]

4. When the *Non Standard Shipping Requests* section is displayed, select a carrier in the **Requested Carrier** field.
5. Enter the account number in the **Carrier Account Number** box.
6. Click the **Save Order** button.

Delivery Options

All delivery options are not always available for selection on orders.

Cisco will follow delivery option requests if available; however, not all delivery options are supported by all carriers or available in all ship-to regions. Delivery option requests will be passed on to the customer's selected carriers on Billing Customer Routed orders.

To specify delivery options:

1. In the *Shipping Address & Method* section, select a preference in the **Shipping Preference** drop-down list.
2. Select a service level from the **Shipping Service Level** drop-down list.
3. Click the "Select Delivery Options for this order" link located below the **Ship All Items Separately?** warning.
4. Click **Yes** for every delivery option you want.
5. If there is a text box for every option you have selected, enter appropriate information.

ADDING ITEMS TO AN ORDER

From the **Main Order Form**, you can:

- Add configurable products, spares, and service
- Configure products
- View shipping, billing, PO number, and requested ship date
- Submit an order or create order templates
- Access saved configurations, shared configurations, and search for terms
- Apply or modify the order hardware service level

Adding a New Line Item

To add a new line item:

1. In the **Enter, configure, and revise line item** section, click **New** under **Line #**.
2. In the **Enter Product** box, either enter the product number exactly as it appears in the price list or search for a product. (For more details on searching, see Searching for Items in this manual.)
3. Enter a quantity in the **Qty** box and a **Discount** percentage that your company and Cisco have agreed upon.
4. To add options for a configurable item, either use a saved configuration by clicking the **Get Saved Config** button, or select the line and click the **Configure** button.
5. To define service, click the **Service/Line Details** button.
6. Click **Save Order** to save changes.

Modifying a Line Item

To modify a line item:

1. In the **Enter, configure, and revise line item** section, click the **Line #** of the item you want to modify.
2. Make the required changes.
3. Click **Save Order** to save changes.

Deleting a Line Item

To delete a line item:

1. Click the button in the **Delete** column for the line item.
2. Click **Save Order** to delete the item.

Adding Service to a Line Item

A service line item can be added to an order and associated with a product configuration in two ways. The first way is to add service to a current order, and the second way is add service to hardware existing in another order (typically a previously submitted order).

To add service to a current order:

1. In the **Main Order Form**, add the line item and quantity
2. Add the service line item and quantity.
3. Click the **Save Order** button to save changes.
4. Click **Check for Errors**.
5. Correct any configuration errors until the configuration passes.
6. Click the *Incomplete* link for the service.
7. In the *Service Information* section, click the down arrow in the **Duration** list and select a time period (for example, 3 Years).
8. Click the radio button next to **New Contract** or **Existing Contract**, as appropriate.

9. In the Covered Product Information section, select from 'Duration' drop-down menu the years of service. (See screenshot below)
10. Click **Save Order** button.
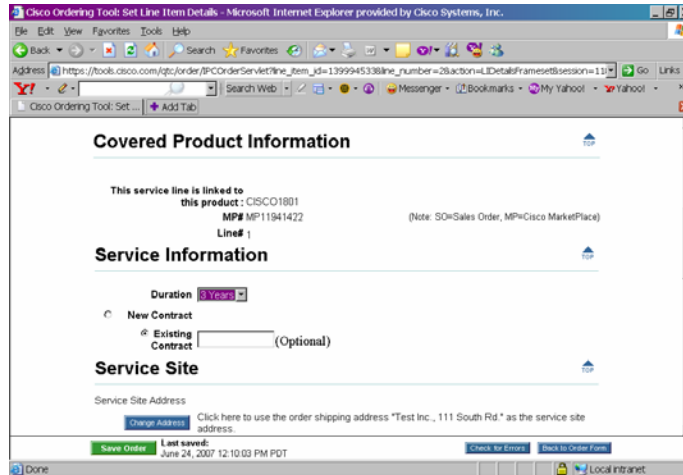
To add service to hardware existing in another order:

1. In the **Main Order Form**, add the service line item and quantity.
2. Click the **Save Order** button to save changes.
3. Click the *Incomplete* link for the service.
4. In the Service Information section, identify the product from drop-down menu under **Covered Product Information**. Then complete either "A" or "B". Then click the down arrow in the Duration list and select a time period.
5. Click the radio button to new Contract or Existing Contract, as appropriate.
6. Click **Save Order** button.
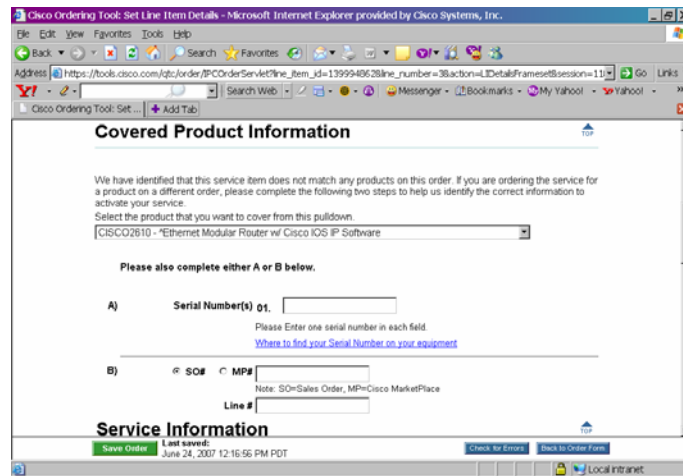
SEARCHING FOR ITEMS

If you don't know the details of the products you want to order, such as the product name or product number, you can use the Search for Items and Saved Configs page to find product information and complete the order.

Cisco Ordering Tool
Search for Items and Saved Configs

The **Search for Items and Saved Configs** page enables you to search the following:
- **Product Number**: Enter as much of the product number as you know.
- **Configuration Name**: Enter as much of the saved configuration name as you know.
- **Product Description**: Enter as much of the product description as you know (for example, router).
- **Search by Product Family**: Select a product family from the drop down list. Searching by product family takes precedence over other criteria you may have already entered.

Searching for Products

To search for an item (Refer to same screenshot as above):
1. Click the **Item Search** button to display the Search **for Items and Saved Configs** page.
2. Enter your search criteria.
3. Optionally check **Include my saved configuration**. Show another user's saved configuration, or **Show all my company's saved configuration** if you want to include these in your search.
4. Click the **Search** button to display the **Search for Items and Saved Configs: Results** page.

Cisco Ordering Tool
Search for Items and Saved Configs: Results

5. Select the items you want to add to you order by entering a quantity in the **Qty** column.
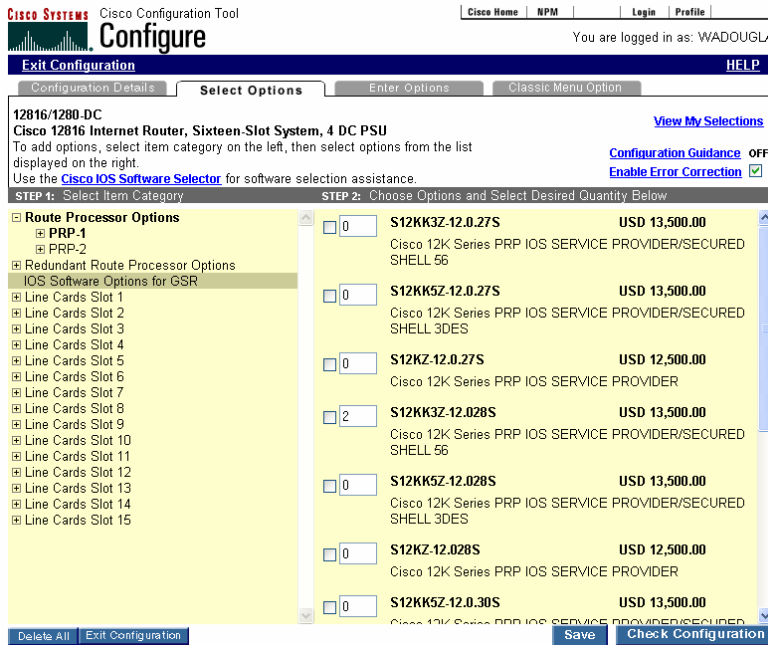6. Click the **Apply** button to display the Main Order Form with your items added to the list.

Searching for Spares

To search for a spare:
1. Click the **Item Search** button to display the **Search for Items and Saved Configs** page.
2. Click the Spares Search tab.
3. Enter your search criteria.

4. Click the **Search** button to display the **Search for Spares: Results** page.

5. Select the items you want to add to your order by entering a quantity in the **Qty** column.
6. Click the **Apply** button to display the **Main Order Form** with your items added to the list.

CONFIGURATION

Configuration is the process of selecting different options that will be included in the product you are purchasing.

Configuring a Line Item

To configure a line item:
1. On the **Main Order Form**, locate a line item that currently says <u>Unverified</u> in the **Status** column.
2. To select what will be configured, either click the <u>Unverified</u> hyperlink or select the **Line #** and click the **Configure** button.

3. In the left column, select an item category.
4. In the right column, select an option and enter a quantity.
5. If you want to save the configuration, click the **Save** button and enter a name for the configuration when prompted.
6. Click the **Check Configuration** button to verify that the item has all the necessary options to complete the configuration.
7. Click the **Add to Order** button to add the completed configuration to the order.

Using Saved Configurations

You can save and reuse major line configurations for new orders. If you frequently reorder the same products, you can click **Get Saved Configurations** on the **Main Order Form** and retrieve the entire configuration instead of configuring the same product each time you want to order it.
Saved configurations can only be shared by users from the same company and same bill-to addresses.

To used a saved or shared configuration:
1. On the **Main Order Form**, click the **My Saved Configs** button.

2. For each configuration you want to add to the order, enter a quantity in the **Qty** column.
3. When you are finished entering quantities, click the **Apply** button to display the **Main Order Form** with the added configurations.

If some of the configurations are in an <u>Unverified</u> status, a **Verify All Configs** button appears at the bottom of the Main Order Form. Clicking this button will check all the items on the order and reset the line status to *Verified* if the line passes the configuration check.

SHIPSETS

A Shipset is a grouping of products in an order that have the following identical elements:
▪ Shipping destination
▪ Requested ship date
▪ Shipping preference
▪ Shipping service level

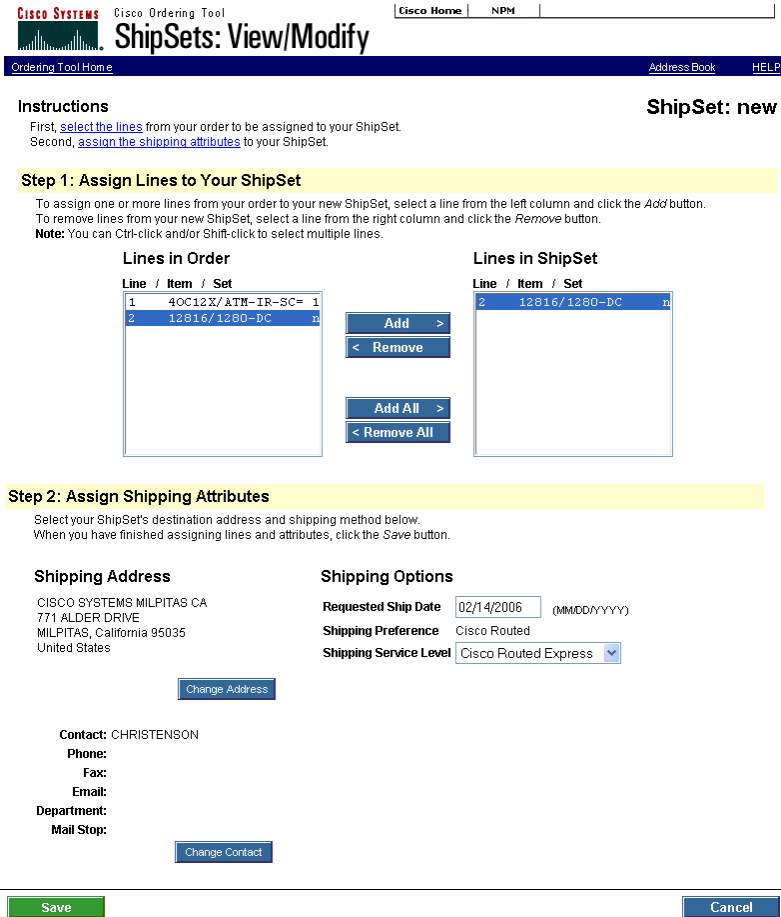An order with only one shipping destination for all products has one ShipSet. To save time, you can save a selected ShipSet to use as the basis for a new ShipSet.

You can ship to multiple destinations on one order by splitting the order into multiple ShipSets, then changing the ship-to address for each destination. Cisco may be required to break apart your ShipSets to accommodate shipments of line items that are manufactured in different locations around the world.

Creating a New ShipSet

To create a new ShipSet:
1. Click the **ShipSets** tab to display the **ShipSets** page.
2. Click the **New ShipSet** button at the bottom of the page to display the **ShipSets: View/Modify** page.

3. In the **Lines in Order** window, choose the lines you want to be part of the new ShipSet.
4. Click either the **Add** button to add a single line item or the **Add All** button to add all line items.
5. Once the lines have been added, choose a **Shipping Address** and **Shipping Options** for the new ShipSet.
6. When you are finished, click **Save** to display the **ShipSets** page.

Using an Existing ShipSet to Create a New ShipSet

To create a new ShipSet from an existing ShipSet:
1. Click the **ShipSets** tab to display the **ShipSets** page.
2. Select the ShipSet you want to use as the basis for a new ShipSet by clicking the button in the **Select** column.
3. Click the **Copy** button at the bottom of page to display the **ShipSets: View/Modify** page.
4. In the **Lines in Order** window, choose the lines you want to be part of the new ShipSet.
5. Click either the **Add** button to add a single line item or the **Add All** button to add all line items.
6. Once the lines have been added, choose a **Shipping Address** and **Shipping Options** for the new ShipSet.
7. When you are finished, click **Save** to display the **ShipSets** page.

Viewing and Modifying ShipSets

To view and modify ShipSets:
1. Click the **ShipSets** tab to display the **ShipSets** page.
2. Select the ShipSet you want to work on by clicking the button in the **Select** column.
3. Click the **View/Modify** button at the bottom of the page to display the **ShipSets: View/Modify** page.
4. If you want to add or remove items, in the **Lines in Order** window, choose the lines you want to add or remove from ShipSet.
   Click either the **Add** button to add a single line item or the **Add All** button to add all line items.
   Click either the **Remove** button to remove a single line item or the **Remove All** button to remove all line items.
5. Choose a **Shipping Address** and **Shipping Options** for the ShipSet.
6. When you are finished, click **Save** to display the **ShipSets** page.

Deleting a ShipSet

When a ShipSet is deleted, the items that make up that ShipSet are not deleted from the order but rather are added to another ShipSet in the order.
To delete ShipSets:
1. Click the **ShipSets** tab at the top of the **Main Order Form** to display the **ShipSets** page.
2. Select the ShipSets you want to delete by clicking the button in the **Select** column.
3. Click **Delete** to display the **ShipSets** page again.

OPEN ORDERS

An open order is one that has been created, but not yet submitted, usually because it not complete.
You can view, modify, and save an order as long as it is still open. Once the order is no longer open, you can change it only by using the Cisco Change Order Tool.

Accessing Open Orders

To access an open order:
1. On the **Ordering Tool Home Page**, click the <u>View Open Orders</u> link at the top of the page.

Open Orders

Instructions:
- **To open an order,** click Order ID link
- **To delete an order,** select order and click "Delete Order" to delete one or more orders from your list
- **To re-use information from an open order,** select the order and click "Save as Template"

#	Order ID	Type	Creation Date	Shipping To	Description	Price List	Select
1.	MP7851156	MAINT_ONLY	01/06/2006	N/A	Service only order	Global Price List in US Dollars	☐
2.	MP7845401	Trade-In Order	01/05/2006	N/A	Trade in order	Global Price List in US Dollars	☐
3.	MP7844794	STANDARD	01/05/2006	N/A	Fed Order	Global Price List in US Dollars	☐
4.	MP7811157	STANDARD	12/28/2005	N/A		Global Price List in US Dollars	☐
5.	MP7803971	STANDARD	12/27/2005	CISCO SYSTEMS MILPITAS CA	another order	Global Price List in US Dollars	☐
6.	MP7645502	INTERNAL	11/29/2005	N/A	My first order	Global Price List in US Dollars	☐
7.	MP7645500	INTERNAL	11/29/2005	N/A	My first order	Global Price List in US Dollars	☐

Delete Order
Save as Template

2. Click on the **Order ID** of the order you want to work on.
3. Make any modifications to the order.
4. Click the **Save** button.

Deleting Open Orders

To delete an open order:
1. On the **Ordering Tool Home Page**, click the <u>View Open Orders</u> link at the top of the page.
2. Click the box in the **Select** column next to the order you want to delete.
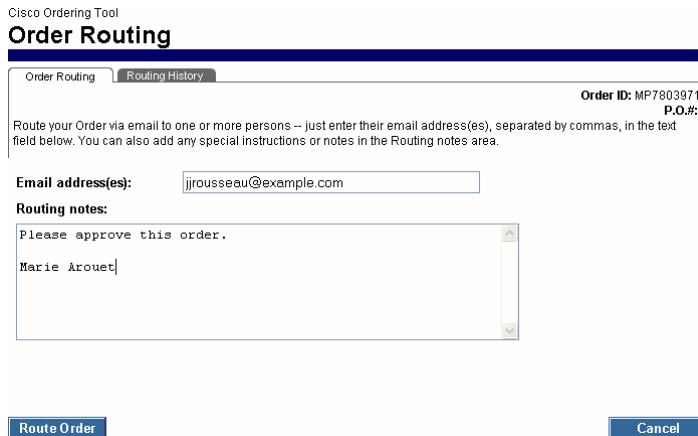3. Click the **Delete Order** button.

ORDER ROUTING

A routed order is an order created by one person and sent to someone else to complete, approve, or submit. If an order has been routed to you, you will receive an email message from the person who routed the order. The email message contains the Order ID and the Key to use to access the order in Ordering Tool.

Routing an Order

To route an order:

1. On the **Main Order Form** for an open order, click the **Route Order** button at the bottom of the page to display the **Order Routing** page.
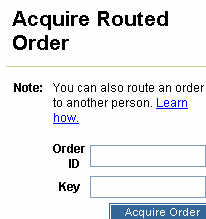
2. Enter the email address of the persons who should receive the routed order.
3. Enter any notes regarding the routed order in the **Routing notes** box.
4. Click the **Route Order** button.

An email message containing the order number, routing key, notes and order details is sent to the specified email address. The Ordering Tool Home page is displayed.

Acquiring a Routed Order

To acquire a routed order:

1. In the *Acquire Routed Order* section on the **Ordering Tool Home** page, enter the MP Number for the order from the email message in the **Order ID** box.

2. Enter the Key for the order from the email message in the **Key** box.
3. Click the **Acquire Order** button.

The **Main Order Form** for the order is displayed. From here you can review the order, and either submit, change, or route it to another person.

Viewing Routing History of an Order

To view the routing history of an order:
1. On the **Main Order Form** for an open order, click the **Route Order** button at the bottom of the page to display the **Order Routing** page.
2. Click the **Routing History** tab.

3. When you are done reviewing the information, click the **Close** button.

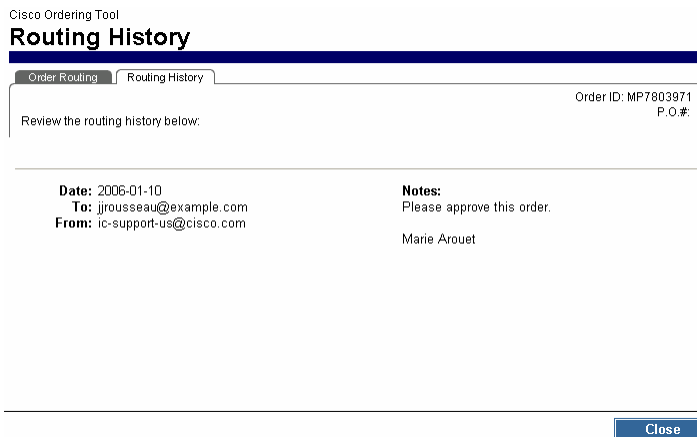The **Routing History** page is sorted chronologically, with the most recent date at the top of the list.

ERROR CHECKING

When you click **Error Checking** on the **Main Order Form**, you can view any errors or alerts that Ordering Tool has detected in your order.

Ordering Tool generates *alerts* for possible conflicts related to:
  ▪ Discounts
  ▪ Credit card information
  ▪ Desired ship date

Orders with alerts may be submitted, but the order may be delayed.
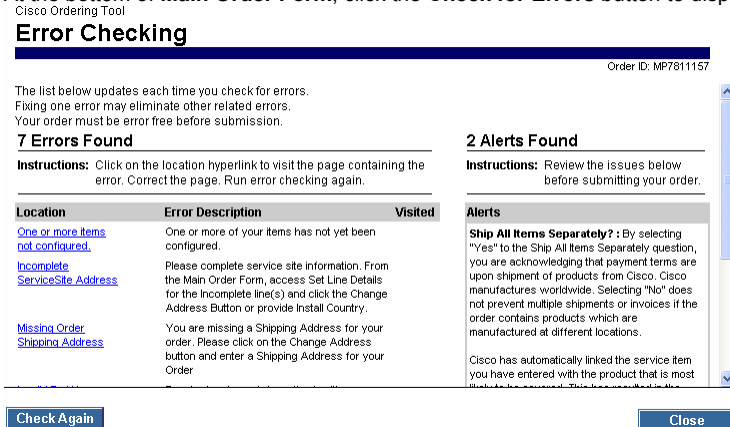
Ordering Tool generates *errors* for possible conflicts related to:
  ▪ Service availability
  ▪ Contract number
  ▪ Serial number
  ▪ Warranty Enhancement service

Order errors must be corrected before an order can be submitted.

To check your order for errors:
1. At the bottom of **Main Order Form**, click the **Check for Errors** button to display the **Error Checking** page.

2. Click the hyperlink for an error to go to the page where you can correct the error.
3. Once you have corrected the error, click the **Save Order** button.
4. Return to the **Error Checking** page to correct other errors, either by clicking the **Check for Errors** button within the order, or by clicking the **Check Again** button.

Service Order Validations

To help ensure service order data quality, the Ordering Tool enforces service information validations, which enable orders to be processed more quickly and accurately, resulting in faster service entitlement.

Service Availability

The Ordering Tool confirms whether the service is available for the selected location, product type, and customer type (see Table 3).

Table 3 Service Availability Validations

Ordering Tool Error Name (Displayed as a Hyperlink in Location Column of Ordering Tool Check for Errors)	Error Description	Can Order Be Submitted?
Location: The Ordering Tool validates whether the requested service level is available at the install site location. If the requested service is not available, an alternate service option is recommended based on availability.		
Install site not found	Install site not found in Cisco database.	Yes. Warning: order can be submitted.
Service level not available at location	Service level not available at location. No alternate service level (ASL) recommended.	No. Order cannot be submitted until customer provides correct information.
Zip/postal code required	Zip/postal code information required.	Yes. Warning: order can be submitted.
Service-product mapping error	Service part number not appropriate for covered product. Alternate Service Level (ASL) available.	No. Order cannot be submitted until customer orders service level that is available for linked product.
Product type: The Ordering Tool validates whether the requested service is available and/or applicable for a particular product.		
Service-product mapping error	Service part number not appropriate for covered product. No Alternate Service Level (ASL) available.	No. Order cannot be submitted until customer orders service level that is available for linked product.
Service part number discrepancy	SKU discrepancy. Service part number not appropriate for covered product.	No. Order cannot be submitted until customer orders service level that is available for linked product.
Customer type: The Ordering Tool validates whether the requested service is available and/or applicable to the type of customer (for example, service provider customers and federal customers).		
Eligibility error	Customer not eligible for service level selected on order. Alternate Service Level (ASL) information available.	No. Order cannot be submitted until customer orders service to which customer is entitled.
Eligibility error	Customer not eligible for service level selected on order. No Alternate Service Level (ASL) information available.	No. Order cannot be submitted until customer orders service to which customer is entitled.

Contract Number

When an existing service number is provided for a new service order, the Ordering Tool validates the contract number against the Cisco contract database (see Table 4).

Table 4 Contract Number Validations

Ordering Tool Error Name (Displayed as a Hyperlink in Location Column of Ordering Tool Check for Errors)	Error Description	Can Order Be Submitted?
Contract not found	Contract information order provided by customer does not exist in Cisco database.	No. Order cannot be submitted until customer provides correct information.
Bill-to address/contract address discrepancy	Bill-to ID on order does not match bill-to ID on service contract.	No. Order cannot be submitted until customer provides correct information.
Contract status error	Contract number has invalid status (for example, expired).	No. Order cannot be submitted until customer provides correct information.
Order service level/contract service level discrepancy	Service level on order does not match service level on contract.	No. Order cannot be submitted until customer provides correct information.

Serial Number

The Ordering Tool will validate product the serial number for M-type services ordered.

Table 5 Serial Number Validations

Ordering Tool Error Name (Displayed as a Hyperlink in Location Column of Ordering Tool Check for Errors)	Error Description	Can Order Be Submitted?
Serial number not found	Serial number not found in Cisco database.	No. Order cannot be submitted until customer provides correct information (new serial number or combination of PO number, MP number, and line number).
Product/serial number discrepancy	Product and serial number combination not valid.	No. Order cannot be submitted until customer provides correct information.
Multiple matches found: no match with original product ID	Multiple serial number records found; no match with original product ID.	No. Order cannot be submitted until customer provides correct information.
Product already covered	Product relating to serial number is currently covered by service contract.	No. Order cannot be submitted until customer provides correct information.
Serial number status error	Service cannot be ordered on product corresponding to serial number (serial number has invalid status such as returned to Cisco).	No. Order cannot be submitted until customer provides correct information.

Date

Customers can request a contract start date for M-type service lines. The Ordering Tool validates the contract start date for M-type maintenance-only lines. A sample error scenario could be a requested contract start date more than 90 days from the date of order.

The Ordering Tool validates the service coverage period, including the last date of support for service ordered. A sample error scenario could be a requested service duration that exceeds a product's possible last date of support.

Table 6 Date Validations

Ordering Tool Error Name (Displayed as a Hyperlink in Location Column of Ordering Tool Check for Errors)	Error Description	Can Order Be Submitted?
Contract start date exceeds limit	Requested contract start date more than 90 days from today.	Warning: order can be submitted.
Lead time check failed for contract start date	Requested contract start date before today's date plus service lead time.	Warning: order can be submitted.
Service duration exceeds product's last date of support	Service duration exceeds product's last date of support.	No. Order cannot be submitted until customer provides correct information.
Last date of support precedes contract start date	Last date of support precedes contract start date.	No. Order cannot be submitted until customer provides correct information.
Duration length is less than service level allows	Duration not correct for selected service level.	Warning: order can be submitted.
Duration length is more than service level allows	Maximum contract duration has been exceeded for service level.	Warning: order can be submitted.
Cisco defaulted the service coverage period	Requested start date not provided. Used today's date as basis for service coverage period validations.	Warning: order can be submitted.

Warranty Enhancement Service

The Ordering Tool validates information such as warranty availability and validity when customers request warranty enhancement service (see Table 7).

Table 7 Warranty Enhancement Service Validations

Ordering Tool Error Name (Displayed as a Hyperlink in Location Column of Ordering Tool Check for Errors)	Error Description	Can Order Be Submitted?
Warranty expired	User trying to order warranty enhancement service, and warranty has expired.	No. Order cannot be submitted until customer provides correct information.
Warranty will expire during contract duration	User trying to order warranty enhancement service, and warranty will expire during contract duration.	No. Order cannot be submitted until customer provides correct information.
Service cannot be validated	Service-level information on order could not be validated.	No. Order cannot be submitted until customer provides correct information.

ALL ORDER DETAILS

The **All Order Details** page displays a summary of the entire order for your review. You cannot change the information from this page. Instead you must use the **Main Order Form**, **Header Details**, and **ShipSets** pages to modify the order. Any changes made there are reflected in the **All Order Details** page.

Accessing the All Order Details Page

To access the **All Order Details** page, click the **All Order Details** tab.

Modifying Order Information

When reviewing the information in the **All Order Details** page, you may discover that the order requires some modification. The following table summarizes the sections of the order where you can modify certain types of information.

Table 8 Modifying Order Information

Information Requiring Modification	Page To Make Changes
Billing, shipping, contact, end user, payment and tax, order acknowledgment for all items in the order.	Click the **Header Details** tab.
Shipping address and method for some, but not all, items in the order.	Click the **ShipSets** tab.
End user for some, but not all, items in the order.	Select a line on the **Main Order Form** and click the **Service/Line Details** button.

MANAGING TEMPLATES

To save time, orders that have been saved, but not yet submitted, can be saved as order templates to generate future orders that will use the same elements (for example, billing address, shipping address, product configurations). All order information is copied to the template, except for MP#, PO#, and Order Description.

Creating a New Template

To save an order as a template:
Display the Ordering Tool Home page.
1. Click the View Open Orders link.
2. Select the order you want to save as a template.
3. Click **Save as Template**.
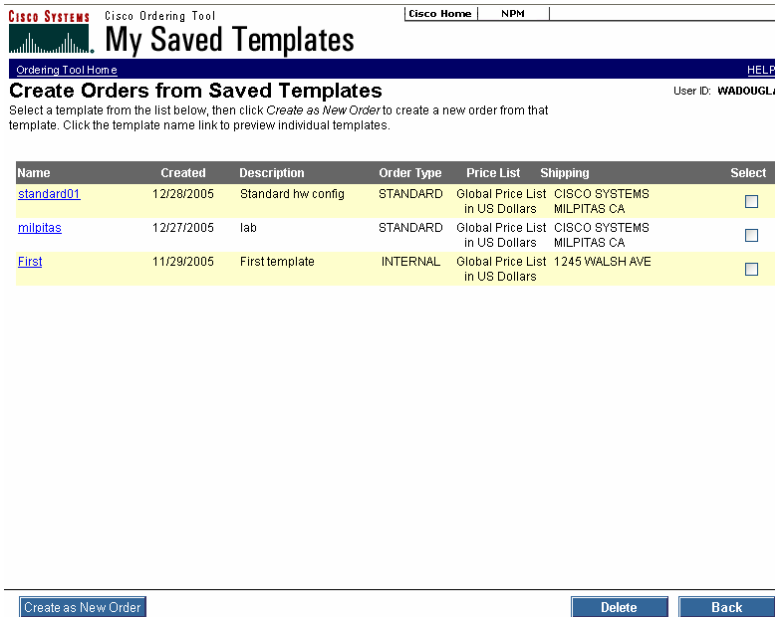4. Enter a name and a brief description for the new template.

5. Click **Save as Template** again.

Viewing and Modifying Saved Templates

To view or modify the templates you have already created:
1. On the **Ordering Tool Home** page, click either the Use Order Templates link or the Order Templates link in the navigation bar to display the **My Saved Templates** page.

2. Click on the template name link in the **Name** column to view template details If you choose to make changes here, you will be working on the template, not creating a new order.
3. Make any changes to the template and click the **Save** button.
4. To return to the **Ordering Tool Home** page, click the Ordering Tool Home link under the Cisco Systems logo in the upper left hand corner of the page.

Deleting a Template

To delete a template:
1. On the **Ordering Tool Home** page, click either the Use Order Templates link or the Order Templates link in the navigation bar to display the **My Saved Templates** page.
2. Click the button in the **Select** column for the templates you want to delete.
3. Click the **Delete** button.
4. When the confirmation message is displayed, click **Yes**.
5. To return to the **Ordering Tool Home** page, click the Ordering Tool Home link under the Cisco Systems logo in the upper left hand corner of the page.

Creating an Order from a Template

To create an order from a template:

1. Display the Ordering Tool Home page.
2. On the Navigation Bar, click Use Order Templates. Ordering Tool displays the My Saved Templates page.
3. Select the target template.
4. Click Create as New Order to display the Create an Order from a Template page.

Cisco Ordering Tool
Create an Order from a Template

Enter a description or your new order now, or you can modify
the description later from your order's Header Details screen.

Order Description   BASIC

[OK]   [Cancel]

5. Enter the order description and click OK.
   Ordering Tool displays the Main Order Form for the new order.

MANAGING ADDRESSES

The Ordering Tool Address Book is always accessible by clicking the Address Book link in the navigation bar at the top of both the Ordering Tool Home page and the Main Order Form. On the Main Order Form, click on the Shipping hyperlink.

The Ordering Tool will return the following screenshot:

Click on <u>Use one of My Saved Address</u> hyperlink

Note: If you do not find the address you want in the above steps, follow instructions on "widen your search" and "add a new address" as outlined in <u>Changing Shipping Address Information</u> section.

Applying an Address to Multiple Targets

Apply To checkboxes enable you to select an address to apply to more than one target area at a time. For example, you can apply a shipping address and service site location address with one operation.

To apply an address to more than one target:

1. From the **Main Order Form** page, click the **Header Details** tab.
2. Click **Change Address** in *the Shipping Address & Method* section.
3. Click the button in the **Select** column for the address.
4. Check all of the locations in the **Apply To** section where you want to use that address.
5. Click **Apply**.

Assigning an Existing or New Contact to an Address

On many orders you may want to assign a contact person to an address (for example, shipping address or billing address).
To apply a contact to an address:

1. From the **Main Order Form** page, click the **Header Details** tab.
2. Click **Change Address** in *the Shipping Address & Method* section.
3. Click **Use one of My Saved Addresses** button.
4. Select the address you want and click **Apply**.
5. At this step, you will be presented with either the **Select A Contact** screen if contacts are associated with the address or **Add New Contact** screen if no contact is associated with the address. (see screenshots below)
6. Select / enter appropriate information as requested and click the **Apply** button.