



ORDERING TOOL USER GUIDE

- BEFORE YOU BEGIN 4**
 - System Requirements 4
 - Hardware 4
 - Software 4
 - Network 4
 - Prerequisites 4

- ORDERING TOOL OVERVIEW 4**
 - Home Page 4
 - Main Order Form 5

- LOGGING IN TO ORDERING TOOL 6**

- SETTING ORDER DEFAULTS 6**
 - Billing Information 7
 - Setting the Default Billing Address 7
 - Setting Default Billing Contact Information 7
 - Shipping Address and Method 7
 - Setting Default Shipping Address Information 7
 - Setting Default Shipping Contact Information 7
 - Setting or Changing the Default Shipping Method 8
 - Pricing Information 8
 - Payment and Taxes 8
 - Setting Up a Purchase Order Payment 9
 - Setting Up a Credit Card Payment 9
 - Service Options 10
 - Order Acknowledgments 10
 - Order Contacts 10

- CREATING ORDERS 11**
 - Creating a Standard Order 12
 - Create an Order Page 12
 - Main Order Form 12
 - Header Details 12
 - Creating a Service Only Order 13
 - Create an Order Page 13
 - Main Order Form 13
 - Header Details 14
 - Creating a Trade-In Order 14
 - Create an Order Page 14
 - Trade-In Information Page 14
 - Main Order Form 15
 - Header Details 15

- HEADER DETAILS 16**
 - Billing 16
 - Changing the Billing Address 16
 - Changing Billing Contact Information 16
 - Shipping Address and Method 16
 - Changing Shipping Address Information 17
 - Changing Shipping Contact Information 17
 - Changing the Shipping Method 17
 - End User 18



- Changing End User Information..... 18
- Payment and Taxes..... 18
- Acknowledgments 19
- Order Contacts 19
- Non Standard Shipping Request..... 19
- Delivery Options 20

- ADDING ITEMS TO AN ORDER.....20**
 - Adding a New Line Item 20
 - Modifying a Line Item 20
 - Deleting a Line Item..... 20
 - Adding Service to a Line Item..... 20

- SEARCHING FOR ITEMS21**
 - Searching for Products 22
 - Searching for Spares 23

- CONFIGURATION.....24**
 - Configuring a Line Item 24
 - Using Saved Configurations 24

- SHIPSETS25**
 - Creating a New ShipSet 26
 - Using an Existing ShipSet to Create a New ShipSet 26
 - Viewing and Modifying ShipSets 27
 - Deleting a ShipSet..... 27

- OPEN ORDERS27**
 - Accessing Open Orders 27
 - Deleting Open Orders..... 27

- ORDER ROUTING29**
 - Routing an Order..... 29
 - Acquiring a Routed Order..... 29
 - Viewing Routing History of an Order 30

- ERROR CHECKING30**
 - Service Order Validations..... 31
 - Service Availability 31
 - Contract Number..... 32
 - Serial Number 32
 - Date 33
 - Warranty Enhancement Service 33

- ALL ORDER DETAILS34**
 - Accessing the All Order Details Page..... 34
 - Modifying Order Information 34

- MANAGING TEMPLATES34**
 - Creating a New Template..... 34
 - Viewing and Modifying Saved Templates 35
 - Deleting a Template 35
 - Creating an Order from a Template..... 36



MANAGING ADDRESSES36
Applying an Address to Multiple Targets.....37
Assigning an Existing or New Contact to an Address 38



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 orders, 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.

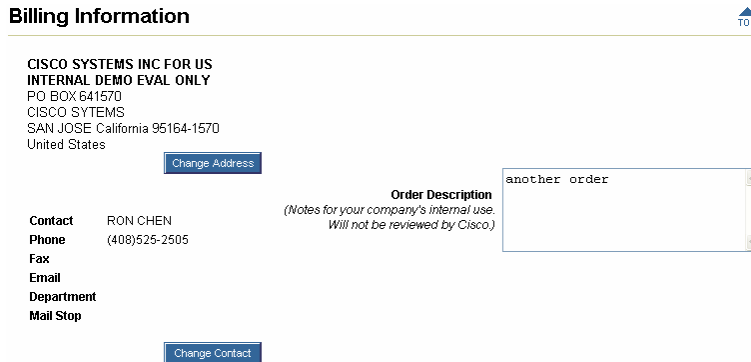
Billing Information

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.



Billing Information TOP

CISCO SYSTEMS INC FOR US
 INTERNAL DEMO EVAL ONLY
 PO BOX 641570
 CISCO SYTEMS
 SAN JOSE California 95164-1570
 United States

[Change Address](#)

Contact RON CHEN
Phone (408)525-2505
Fax
Email
Department
Mail Stop

[Change Contact](#)

Order Description
(Notes for your company's internal use. Will not be reviewed by Cisco.)
 another order

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.

Shipping Address & Method ▲ TOP

Any changes you make here will apply to your whole order.
To specify different information at the line level, go to the ShipSet tab.

CISCO SYSTEMS MILPITAS CA
771 ALDER DRIVE
MILPITAS California 95035
United States

[Change Address](#)

Requested Ship Date (MM/DD/YYYY) [Help me select Freight Options](#)

Shipping Preference

Shipping Service Level

Early Shipment Accepted? Yes No

Ship All Items Separately? Yes No

Contact CHRISTENSON

Phone

Fax

Email

Department

Mail Stop

[Change Contact](#)

Warning: By selecting "Yes" to the Ship All Items Separately question, you are acknowledging that payment terms are upon shipment of products from Cisco. Cisco manufactures worldwide. Selecting "No" does not prevent multiple shipments or invoices if the order contains products which are manufactured at different locations.

[Select Delivery Options for this order](#)
[Select End Customer Routed Carrier for this order](#)

Shipping & Packaging Notes
(Notes to appear on all packing slips & invoices)

Carton Notes
(Notes to appear on the carton labels)

[Save Order](#) Last saved: January 6, 2006 3:59:31 PM PST [Check for Errors](#) [Back to Order Form](#)

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.

Pricing Information

Note: You **cannot** change your price list once you have begun an order; however, you **can** modify discounts once inside an order.

Price List

Product Discount %

Service Discount %

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

Payment Method

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

Card Number

Expiration Date

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

Software Service Level

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 Last

Email:

Have Cisco send **order confirmation email** to this email address:
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 Last

Phone:

Fax:

Email:

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.

The screenshot shows a web browser window with the Cisco Systems Online Ordering Tool. The form contains the following fields and options:

- Order Type: Standard Order (dropdown)
- Price List: Global Price List in US Dollars (dropdown)
- Order Description: (text input)
- Product Discount: 0.0% (text input)
- Service Discount: 0.0% (text input)
- Intended Use: Resale (dropdown)
- Deal Id: (text input)
- Purchase Order #: (text input)
- Requested Ship Date: (text input with MM/DD/YYYY format)
- Quote Number QN: (text input)
- End User Country: United States (dropdown)
- Referral Reason: To Refer (Select A Reason) (dropdown)
- For Federal Government?: Yes (radio), No (radio)

A "Continue" button is located at the bottom right of the 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

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

- Erate Code
- Promotion Code



Payment and Taxes

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	Credit Card: None Required (for P.O.)
Payment Method: Purchase Order	Card Number: <input type="text"/>
Purchase Order #: <input type="text"/>	Expiration Date: MM / YYYY
Terms: 30 NET	Name on Card: <input type="text"/>
Commission Code: Select One	
Taxable? <input checked="" type="radio"/> Yes <input type="radio"/> No	
Tax Exemption Status: Customer not claiming a tax exemption	
Erate Code: <input type="text"/>	
Promotion Code: <input type="text"/>	
Order Processing Notes These notes are reviewed by Cisco. Entries in this field may delay the processing and/or shipment of your order.	
<input type="text"/>	

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.

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.

The screenshot shows the Cisco Systems Online Ordering Tool interface in Microsoft Internet Explorer. The browser title is "Cisco Systems: Online Ordering Tool - Microsoft Internet Explorer provided by Cisco Systems, Inc.". The address bar shows the URL: "https://tools.cisco.com/ftc/order/PCOrderServlet?DisplayNPP=1&session=118270923065975244140625019". The page content includes a red warning message: "authorized submitter within your organization." Below this, there are several form fields and dropdown menus:

- Order Type:** Standard Order (dropdown menu)
- Price List:** Global Price List in US Dollars (dropdown menu)
- Order Description:** (text input field)
- Product Discount:** 0.0 % (text input)
- Service Discount:** 0.0 % (text input)
- Intended Use:** Resale (dropdown menu)
- Deal Id:** (text input field)
- Purchase Order #:** (text input field)
- Requested Ship Date:** (text input field with format (MMDD/YYYY))
- Quote Number QN:** (text input field)
- End User Country:** United States (dropdown menu)
- Referral Reason:** To Refer (Select A Reason) (dropdown menu)
- For Federal Government?** Yes (radio button), No (radio button)

On the right side of the form, there are fields for **Order ID** and **Key**, and a **Acquire Order** button. A **Continue** button is located at the bottom right of the form area.

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

CTMP Quote#

Credit Amount 0.00

Select your RMA contact person

Select	Last Name	First Name	Mail Stop or Room #	Dept.	Phone #	Fax #
<input type="radio"/>	ATTN:					
<input type="radio"/>	BHAN	VIBOV				
<input type="radio"/>	CHEN	RON			(408)525-2505	
<input type="radio"/>	EFIRD	TREECE			(850)453-4141	
<input type="radio"/>	ESTERLECHNER	HEINZ				
<input type="radio"/>	HERCULES	MAYLENE				
<input type="radio"/>	HERMAN	NICK			(408)525-7054	
<input type="radio"/>	KOLEK	ROBERT			(408)526-8630	
<input type="radio"/>	MANN	CHRIS			0612-385-9341	
<input type="radio"/>	PAYABLE	ACCOUNTS				
<input type="radio"/>	SIOW	ANNIE				
<input type="radio"/>	THOMAS	ERIC				
<input type="radio"/>	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:

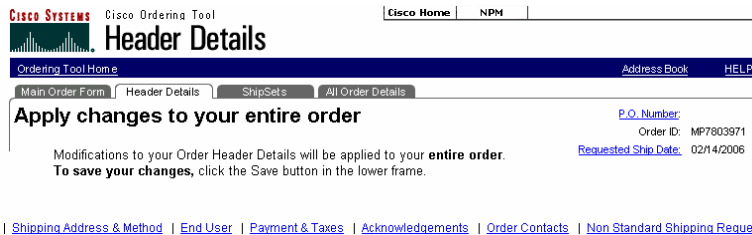
- Billing
- Shipping Address and Method
- End User
- Payment and Taxes
- Acknowledgments
- Order Contacts
- Non Standard Shipping Request
- Delivery Options

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



Sections: [Billing](#) | [Shipping Address & Method](#) | [End User](#) | [Payment & Taxes](#) | [Acknowledgements](#) | [Order Contacts](#) | [Non Standard Shipping Request](#) | [Delivery Options](#)

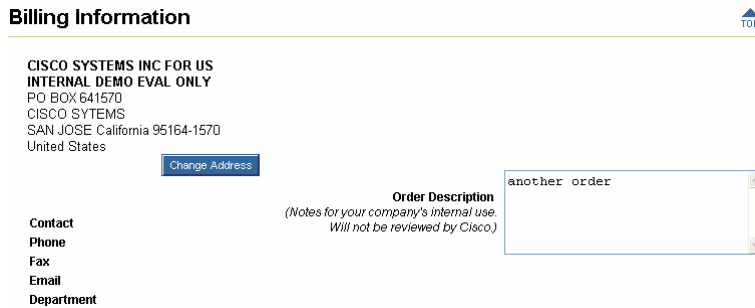
Billing

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.

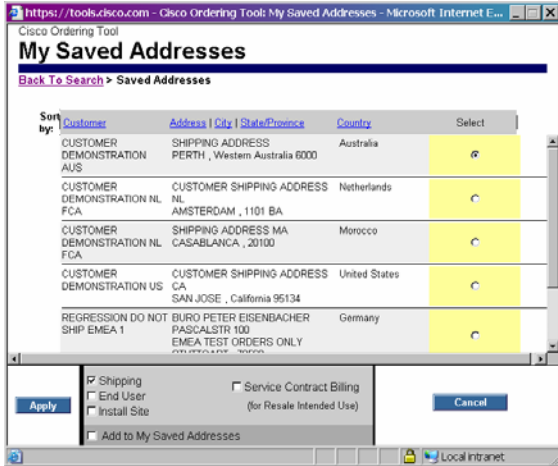
Shipping Address and Method

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

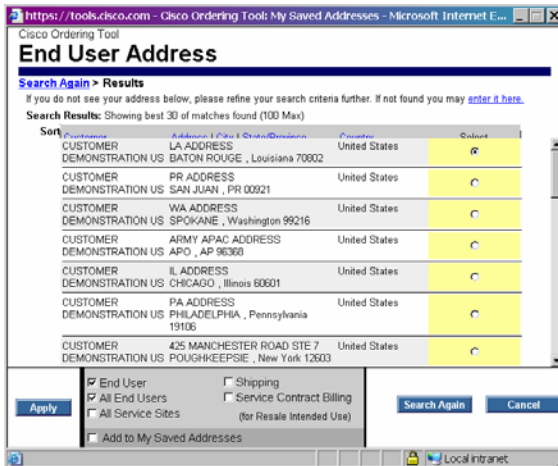
Changing Shipping Address Information

To change shipping address information:

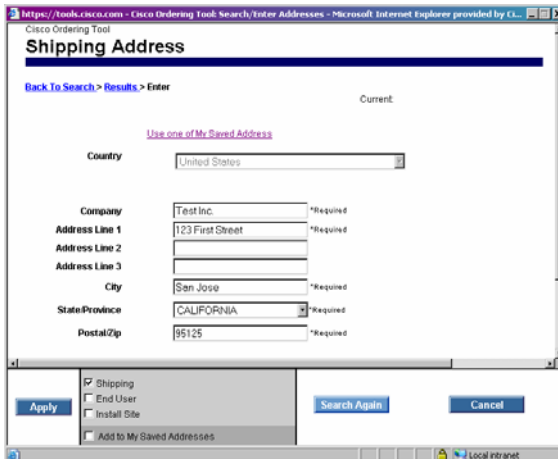
1. Click the [Shipping Address & Method](#) hyperlink on the Header Details page.
2. Click the [Change Address](#) button to display the [The Address Book](#) page.
3. Click the [Use one of My Saved Address](#) hyperlink.
4. Select the address you want to use and click [Apply](#).



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.

Shipping Address & Method



Any changes you make here will apply to your whole order.
To specify different information at the line level, go to the ShipSet tab.

CISCO SYSTEMS MILPITAS CA
771 ALDER DRIVE
MILPITAS California 95035
United States

[Help me select Freight Options](#)

Requested Ship Date (MM/DD/YYYY)

Shipping Preference

Shipping Service Level

Early Shipment Accepted? Yes No

Ship All Items Separately? Yes No

Contact
Phone
Fax
Email
Department
Mail Stop

CHRISTENSON

[Change Address](#)

[Change Contact](#)

Warning: By selecting "Yes" to the Ship All Items Separately question, you are acknowledging that payment terms are upon shipment of products from Cisco. Cisco manufactures worldwide. Selecting "No" does not prevent multiple shipments or invoices if the order contains products which are manufactured at different locations.

[Select Delivery Options for this order](#)
[Select End Customer Routed Carrier for this order](#)

Shipping & Packaging Notes
(Notes to appear on all packing slips & invoices)

Carton Notes
(Notes to appear on the carton labels)



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.

End User

Note: Required for Resale and Service Provision Intended Uses. Recommended for all Intended Uses.

CISCO SYSTEMS MILPITAS CA 771 ALDER DRIVE MILPITAS, California 95035 United States	Contact CHRISTENSON Phone Fax Email Department Mail Stop
---	---

[Change Address](#)
[Change Contact](#)

End User Market

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.

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 <input type="text" value="Lab"/> Payment Method <input type="text" value="Purchase Order"/> Purchase Order # <input type="text"/> Terms 30 NET Commission Code <input type="text" value="Select One"/> Taxable? <input checked="" type="radio"/> Yes <input type="radio"/> No Tax Exemption Status: Customer not claiming a tax exemption. Erate Code <input type="text"/> Promotion Code <input type="text"/> Order Processing Notes <small>These notes are reviewed by Cisco. Entries in this field may delay the processing and/or shipment of your order.</small> <input type="text"/>	Credit Card <input type="text" value="None Required (for P.O.)"/> Card Number <input type="text"/> Expiration Date <input type="text" value="MM"/> / <input type="text" value="YYYY"/> Name on Card <input type="text"/>
--	---

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 Last

Email:

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 Last

Phone:

Fax:

Email:

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



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

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

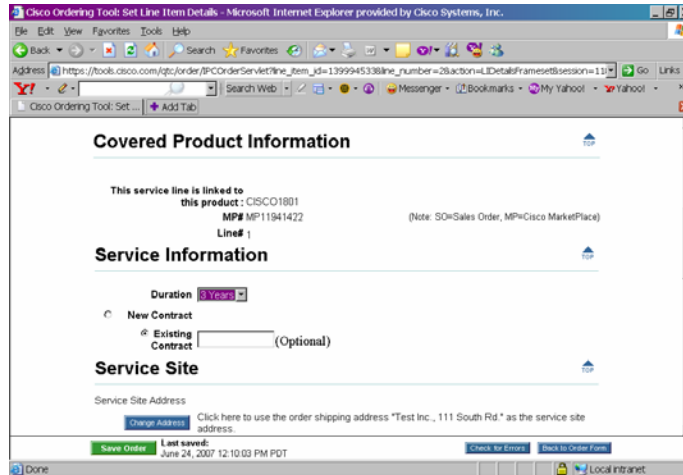
A service line item can be added to an order and associated with a product configuration in two ways. The first way is to add service to a current order, and the second way is add service to hardware existing in another order (typically a previously submitted order).

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.

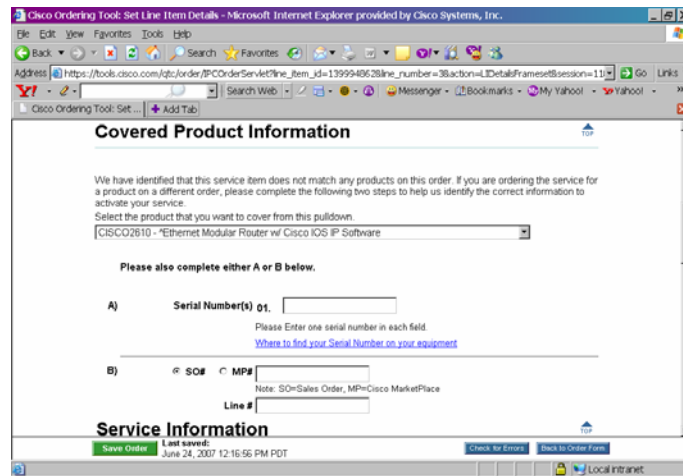


9. In the Covered Product Information section, select from 'Duration' drop-down menu the years of service. (See screenshot below)
10. Click **Save Order** button.



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

Item/Config Search | **Spared Search** | My Saved Configs

Indicate information for either a product or a saved config, then click Search.
Click the My Saved Configs tab to view your list of saved configurations.
Click Cancel to dismiss this screen.

P.O. Number:
Order ID: MP7803271
Line Number: New

Search for products and saved configurations

Product Number
Example: CISCO2501

Configuration Name

Product Description
Example: ATM

or Search by Product Family

Include my saved configurations
 Show another user's saved configurations
Enter up to five UserIDs separated by comma, as in:
jsmith, chendi, djgonzalez, rntanaka
UserID(s)
 Show all my company's saved configurations

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

Item/Config Search | **Spared Search** | My Saved Configs

To add items from this list to your order, indicate the quantity of the item(s) you want to add, and click Apply.
Click Search Again to begin a new search.
Click the My Saved Configs tab to view your list of saved configurations.

P.O. Number: OT-EP-05
Order ID: MP7811157
Line Number: **New**

Product / Description	List Price	Created / Updated	Status	Qty.
CON SAU-CICV525A SAU SVC, CIC V5 25000 bundle-Access Devices	24000.00	--	--	<input type="text"/>
CON SAU-CICV525H SAU SVC, Bundle x 25 Licenses	1200.00	--	--	<input type="text" value="1"/>
CON SAU-CICV526A SAU SVC, CIC 500,000 bundle (above 1st 1M)	45600.00	--	--	<input type="text"/>
CON SAU-CICV598 SAU SVC, CIC V5 50 license bundle	4900.00	--	--	<input type="text"/>
CON SAU-CICV5980 SAU SVC, CIC V5 500 license bundle	36000.00	--	--	<input type="text"/>
CON SAU-CICV598A SAU SVC, CIC V5 50000 bundle-Access Devices	36000.00	--	--	<input type="text"/>
CON SAU-CICV59H SAU SVC, Bundle x 50 Licenses	1800.00	--	--	<input type="text"/>

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.

Cisco Ordering Tool

Search for Spares

Item/Config Search | Spares Search | My Saved Configs

Select a spares category from the drop-down list, or enter specific product information, then click **Search**.
 Click the **Item/Config Search** tab to search for regular products or saved configurations.
 Click the **My Saved Configs** tab to view your list of saved configurations.
 Click **Cancel** to dismiss this screen.

P.O. Number: 123456
 Order ID: MP7803971
 Line Number: **New**

Search spares categories

Spares Category:

Or search for specific spare products

Product Number:

Product Description:

Example: Router

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

Cisco Ordering Tool

Search for Spares: Results

Item/Config Search | Spares Search | My Saved Configs

To add items from this list to your order, indicate the quantity of the item(s) you want to add, and click **Apply**.
 Click **Search Again** to begin a new search.
 Click the **My Saved Configs** tab to view your list of saved configurations.

P.O. Number: 123456
 Order ID: MP7803971
 Line Number: **New**

Product / Description	List Price	Created Updated	Status	Qty.
CAB-5-M120M120-10=	120.00	-- --	--	<input type="text"/>
Category 5 Telco (RJ-21X) cable, Male-120 to Male-120, 10 ft				
CAB-5-M120M120-5=	110.00	-- --	--	<input type="text"/>
Category 5 Telco (RJ-21X) cable, Male-120 to Male-120, 5 ft				
CAB-5-M120M120-5=	110.00	-- --	--	<input type="text"/>
Category 5 Telco (RJ-21X) cable, Male-120 to Male-120, 5 ft				
CAB-5-M180M120-10=	120.00	-- --	--	<input type="text"/>
Category 5 Telco (RJ-21X) cable, Male-180 to Male-120, 10 ft				
CAB-5-M180M120-10=	120.00	-- --	--	<input type="text"/>
Category 5 Telco (RJ-21X) cable, Male-180 to Male-120, 10 ft				
CAB-5-M180M120-5=	110.00	-- --	--	<input type="text"/>
Category 5 Telco (RJ-21X) cable, Male-180 to Male-120, 5 ft				
CAB-5-M180M120-5=	110.00	-- --	--	<input type="text"/>
Category 5 Telco (RJ-21X) cable, Male-180 to Male-120, 5 ft				
CAB-500RJ=	25.00	-- --	--	<input type="text" value="1"/>
RJ-45 to RJ-45 Cable, 14 Feet				
CAB-500RJ=				<input type="text"/>

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.

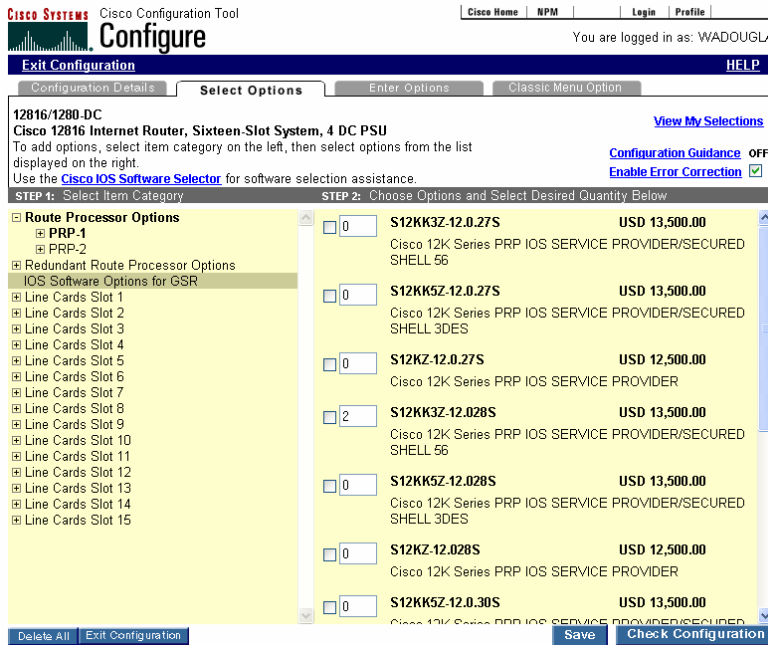
CONFIGURATION

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 Unverified in the **Status** column.
2. To select what will be configured, either click the Unverified hyperlink or select the **Line #** and click the **Configure** button.



The screenshot shows the Cisco Configuration Tool interface for a Cisco 12816 Internet Router. The main heading is "Configure" and the user is logged in as "WADOUGLA". The interface is divided into several sections:

- Configuration Details:** Shows the product name "Cisco 12816 Internet Router, Sixteen-Slot System, 4 DC PSU" and a "View My Selections" link.
- Select Options:** The active tab, showing a list of options on the left and a table of selected options on the right.
- Enter Options:** A tab for entering specific values for the selected options.
- Classic Menu Option:** A tab for navigating through a classic menu.

The "Select Options" section includes a tree view on the left with categories like "Route Processor Options", "IOS Software Options for GSR", and "Line Cards Slot 1" through "Line Cards Slot 15". The right side shows a table of selected options with columns for quantity, part number, description, and price.

Quantity	Part Number	Description	Price
0	S12KK3Z-12.0.27S	Cisco 12K Series PRP IOS SERVICE PROVIDER/SECURED SHELL 56	USD 13,500.00
0	S12KK5Z-12.0.27S	Cisco 12K Series PRP IOS SERVICE PROVIDER/SECURED SHELL 3DES	USD 13,500.00
0	S12KZ-12.0.27S	Cisco 12K Series PRP IOS SERVICE PROVIDER	USD 12,500.00
2	S12KK3Z-12.028S	Cisco 12K Series PRP IOS SERVICE PROVIDER/SECURED SHELL 56	USD 13,500.00
0	S12KK5Z-12.028S	Cisco 12K Series PRP IOS SERVICE PROVIDER/SECURED SHELL 3DES	USD 13,500.00
0	S12KZ-12.028S	Cisco 12K Series PRP IOS SERVICE PROVIDER	USD 12,500.00
0	S12KK5Z-12.0.30S	Cisco 12K Series PRP IOS SERVICE PROVIDER/SECURED SHELL 3DES	USD 13,500.00

At the bottom of the interface, there are buttons for "Delete All", "Exit Configuration", "Save", and "Check Configuration".

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 use a saved or shared configuration:

1. On the **Main Order Form**, click the **My Saved Configs** button.

Cisco Ordering Tool

My Saved Configs

Item/Config Search | Spares Search | My Saved Configs

To add saved configuration(s) or configuration set(s) to your order, indicate quantity of the configuration(s) and/or configuration set(s) and click **Apply**.
Click the **Item/Config Search** tab to begin a new search.
Click **Cancel** to close this screen and return to your order.

P.O. Number: OT-EPL-05
Order ID: MP7811157
Line Number: **New**

Product / Description	List Price	Created / Updated	Status	Qty.	Select
You have 3 saved configuration(s).					
12816/1280-DC Cisco 12816 Internet Router, Sixteen-Slot System, 4 DC PSU	210000.00	--	--	<input type="text"/>	<input type="checkbox"/>
Config Name: test2 Owner: WADOUGLA	--	12/27/2005 12/27/2005	Verified	<input type="text"/>	<input type="checkbox"/>
40C12X/ATM-IR-SC- 4-port OC12/STM4 ATM SM-IR ISE LC with SC connector	123000.00	--	--	<input type="text"/>	<input type="checkbox"/>
Config Name: test1 Owner: WADOUGLA	--	12/27/2005 12/27/2005	Unverified	<input type="text"/>	<input type="checkbox"/>
WS-C3550-48-SMI 48-10/100 + 2 GBIC ports: SMI	4995.00	--	--	<input type="text"/>	<input type="checkbox"/>
Config Name: ws-c3550 Owner: WADOUGLA	--	12/28/2005 12/28/2005	Verified	<input type="text"/>	<input type="checkbox"/>

Apply | Share Config | Delete | Cancel

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 Unverified 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.

Cisco Systems Cisco Ordering Tool

Cisco Home | NPM

ShipSets

Ordering Tool Home | Address Book | HELP

Main Order Form | Header Details | ShipSets | All Order Details

Select a ShipSet and click **View / Modify** to view and edit the details of that ShipSet,
or click **Copy** to copy the information to a new ShipSet,
or click **Delete** to delete one or more ShipSets.
Note: Lines in deleted ShipSets will revert back to the default ShipSet.
Click **New ShipSet** to create a new ShipSet.

P.O. Number: MP7803971
Order ID: MP7803971

ShipSet	Destination Address	Requested Ship Date	Shipping Preference	Shipping Service Level	Select
1	CISCO SYSTEMS MILPITAS CA 771 ALDER DRIVE MILPITAS, California 95035 United States	02/14/2006	Cisco Routed	Cisco Routed Express	<input type="checkbox"/>
2	CISCO SYSTEMS MILPITAS CA 771 ALDER DRIVE MILPITAS, California 95035 United States	02/14/2006	Cisco Routed	Cisco Routed Express	<input type="checkbox"/>

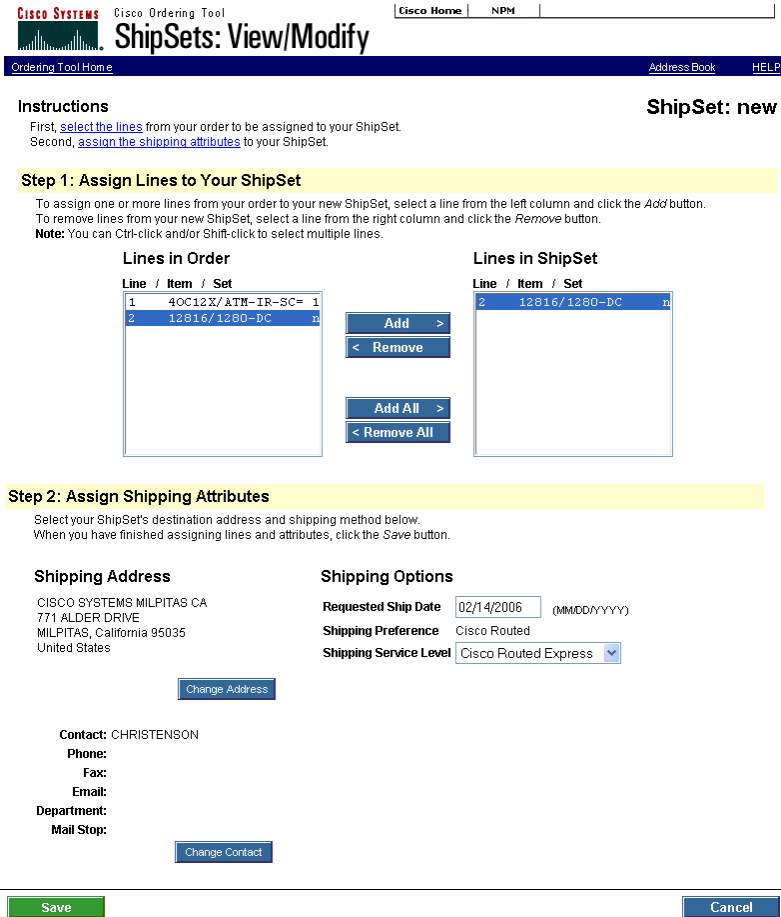
New ShipSet | View / Modify | Copy | Delete

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.



ShipSets: View/Modify

Instructions **ShipSet: new**

First, [select the lines](#) from your order to be assigned to your ShipSet.
Second, [assign the shipping attributes](#) to your ShipSet.

Step 1: Assign Lines to Your ShipSet

To assign one or more lines from your order to your new ShipSet, select a line from the left column and click the *Add* button.
To remove lines from your new ShipSet, select a line from the right column and click the *Remove* button.
Note: You can Ctrl-click and/or Shift-click to select multiple lines.

Lines in Order			Lines in ShipSet		
Line	Item	Set	Line	Item	Set
1	40C12X/ATM-IR-SC=	1	2	12816/1280-DC	
2	12816/1280-DC				

Buttons: Add, Remove, Add All, Remove All

Step 2: Assign Shipping Attributes

Select your ShipSet's destination address and shipping method below.
When you have finished assigning lines and attributes, click the *Save* button.

Shipping Address
CISCO SYSTEMS MILPITAS CA
771 ALDER DRIVE
MILPITAS, California 95035
United States
[Change Address](#)

Shipping Options
Requested Ship Date: 02/14/2006 (MM/DD/YYYY)
Shipping Preference: Cisco Routed
Shipping Service Level: Cisco Routed Express

Contact: CHRISTENSON
Phone:
Fax:
Email:
Department:
Mail Stop:
[Change Contact](#)

[Save](#) [Cancel](#)

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 the 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 [View Open Orders](#) link at the top of the page.

Open Orders TOP

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	<input type="checkbox"/>
2.	MP7845401	Trade-In Order	01/05/2006	N/A	Trade in order	Global Price List in US Dollars	<input type="checkbox"/>
3.	MP7844794	STANDARD	01/05/2006	N/A	Fed Order	Global Price List in US Dollars	<input type="checkbox"/>
4.	MP7811157	STANDARD	12/28/2005	N/A		Global Price List in US Dollars	<input type="checkbox"/>
5.	MP7803971	STANDARD	12/27/2005	CISCO SYSTEMS MILPITAS CA	another order	Global Price List in US Dollars	<input type="checkbox"/>
6.	MP7645502	INTERNAL	11/29/2005	N/A	My first order	Global Price List in US Dollars	<input type="checkbox"/>
7.	MP7645500	INTERNAL	11/29/2005	N/A	My first order	Global Price List in US Dollars	<input type="checkbox"/>

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 [View Open Orders](#) 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.

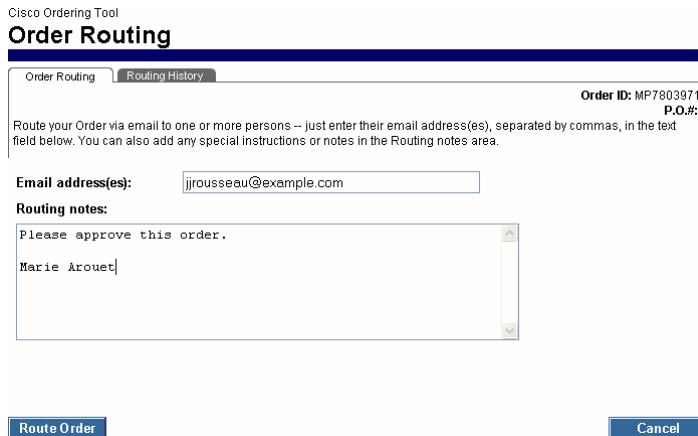
ORDER ROUTING

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.



Cisco Ordering Tool

Order Routing

Order Routing | Routing History

Order ID: MP7803971
P.O.#:

Route your Order via email to one or more persons -- just enter their email address(es), separated by commas, in the text field below. You can also add any special instructions or notes in the Routing notes area.

Email address(es):

Routing notes:

Please approve this order.
Marie Arouet

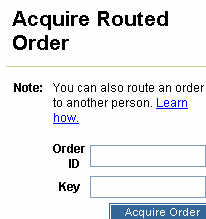
2. Enter the email address of the persons who should receive the routed order.
3. Enter any notes regarding the routed order in the **Routing notes** box.
4. Click the **Route Order** button.

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.



Acquire Routed Order

Note: You can also route an order to another person. [Learn how.](#)

Order ID

Key

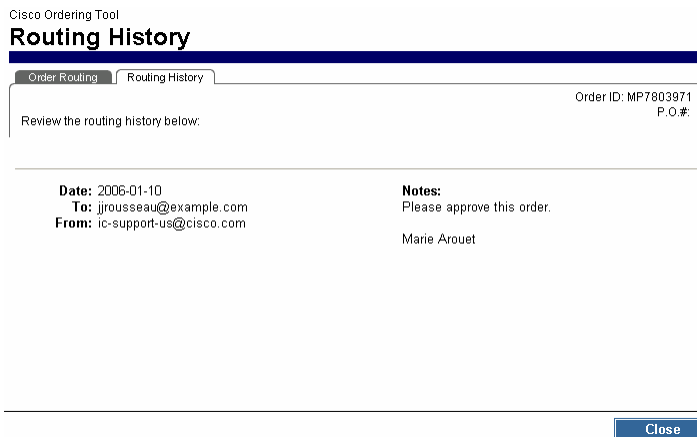
2. Enter the Key for the order from the email message in the **Key** box.
3. Click the **Acquire Order** button.

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.



Cisco Ordering Tool

Routing History

Order ID: MP7803971
P.O.#:

Review the routing history below:

Date:	To:	From:	Notes:
2006-01-10	jjrousseau@example.com	ic-support-us@cisco.com	Please approve this order. Marie Arouet

Close

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.

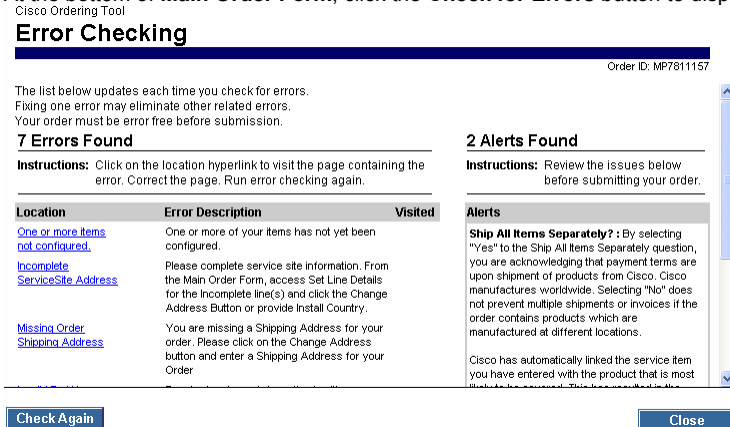
Ordering Tool generates *errors* for possible conflicts related to:

- 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.



Cisco Ordering Tool

Error Checking

Order ID: MP7811157

The list below updates each time you check for errors. Fixing one error may eliminate other related errors. Your order must be error free before submission.

7 Errors Found

Instructions: Click on the location hyperlink to visit the page containing the error. Correct the page. Run error checking again.

Location	Error Description	Visited
One or more items not configured.	One or more of your items has not yet been configured.	
Incomplete Service Site Address	Please complete service site information. From the Main Order Form, access Set Line Details for the Incomplete line(s) and click the Change Address Button or provide Install Country.	
Missing Order Shipping Address	You are missing a Shipping Address for your order. Please click on the Change Address button and enter a Shipping Address for your Order	

2 Alerts Found

Instructions: Review the issues below before submitting your order.

Alerts

Ship All Items Separately? By selecting "Yes" to the Ship All Items Separately question, you are acknowledging that payment terms are upon shipment of products from Cisco. Cisco manufactures worldwide. Selecting "No" does not prevent multiple shipments or invoices if the order contains products which are manufactured at different locations.

Cisco has automatically linked the service item you have entered with the product that is most

Check Again Close



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.

Billing Information

Billing Address

CISCO SYSTEMS INC FOR US INTERNAL DEMO EVAL ONLY
PO BOX 641570
CISCO SYSTEMS
SAN JOSE California 95164-1570
United States

Contact:

Phone:
Fax:
Email:
Department:
Mail Stop:

End User

Customer Name: CISCO SYSTEMS MILPITAS CA
Address: 771 ALDER DRIVE
City,State/Province: MILPITAS California
Postal Code: 95035
Country: United States
End User Market: Education

Contact: CHRISTENSON

Phone:
Fax:
Email:
Department:
Mail Stop:

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:

1. 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.

Cisco Ordering Tool

Save as a Template

If you want to save this order as a template in its current state, provide the following information:

Template Name

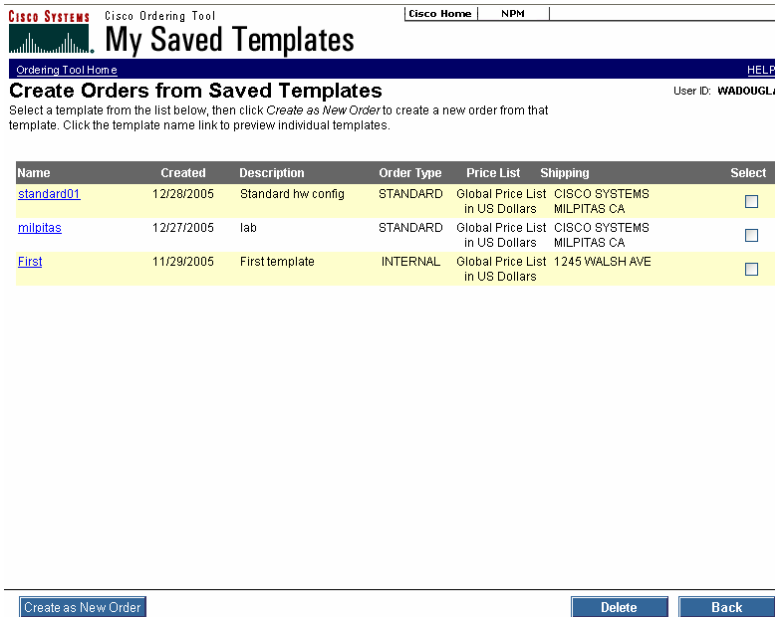
Template Description

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.



My Saved Templates

[Ordering Tool Home](#) [HELP](#)

Create Orders from Saved Templates User ID: WADOUGLA

Select a template from the list below, then click *Create as New Order* to create a new order from that template. Click the template name link to preview individual templates.

Name	Created	Description	Order Type	Price List	Shipping	Select
standard01	12/28/2005	Standard hw config	STANDARD	Global Price List in US Dollars	CISCO SYSTEMS MILPITAS CA	<input type="checkbox"/>
milpitas	12/27/2005	lab	STANDARD	Global Price List in US Dollars	CISCO SYSTEMS MILPITAS CA	<input type="checkbox"/>
first	11/29/2005	First template	INTERNAL	Global Price List in US Dollars	1245 WALSH AVE	<input type="checkbox"/>

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

Order Description

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 [Use one of My Saved Address](#) 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 [Changing Shipping Address Information](#) 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.

https://tools.cisco.com - Cisco Ordering Tool: Assign Contact - Microsoft Internet Expl...

Cisco Ordering Tool

Select A Contact

Choose Contact
The following contacts are available for this address. To override the current contact, select one from the table below and click the *Apply* button in the lower left.

Selected Address:
111 South Rd.
San Jose California 95125
United States

Sort by: [Last Name](#) | [First Name](#) | [Phone | Fax](#) | [Email](#) | [Select](#)

Receiving, Attn:	P	F	C
------------------	---	---	---

https://tools.cisco.com - Cisco Ordering Tool: Add New Contact - Microsoft Internet Expl...

Cisco Ordering Tool

Add New Contact

[Back to Search](#) > [Results](#) > [Enter Address](#) > Enter Contact

Attn: Receiving

- or -

First Name

Last Name *Required

Phone

Fax

Email

Shipping Service Contract Billing
(for Resale Intended Use)

End User Install Site

Add to My Saved Addresses