Overview

Cisco Commerce (CCW) provides you the capability to Modify, Renew, and Replace Subscriptions for your Active Orders. This Job Aid will walk you through the processes involved in executing these change operations. For further training on capabilities and processes in CCW see Cisco Commerce Operations Exchange.

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What is a Change Subscription Transaction?

If you need to make a change to your subscription you can:
1) Modify Your Subscription
2) Renew Your Subscription
3) Replace Your Current Subscription Offer with a New Offer

Modify My Subscription: Pick Modify My Subscription when you need to make a change (such as quantity change) to your active subscription for the current term. As an example, if you have an active WebEx subscription and you need to increase your quantity for 100 additional users (an Upsell scenario), you should pick modify.

Renew Your Subscription: Choose Renew Your Subscription to renew your subscription effective as of the renewal start date for the renewal term. Any changes you make (such as quantity changes) will be effective for the renewal term. If auto renewal has been turned on, any changes made will be effective for any future term as well.

Replace your Current Offer with a New Offer: Pick Replace Your Current Offer with a new Offer if you would like to switch your current subscription offer to a new offer (e.g.: Moving to a Flex offer), then your offer change will be effective as of the requested change date you select.

Initiate a Change Subscription

1. Log into the SaaS Portal by clicking on Cloud/SaaS Subscriptions under the Services and Subscriptions tab (or click here to access the Portal directly https://ccrc.cisco.com/subscriptions/landing).
2. To initiate a Change Subscription transaction, click on the three vertical dots (●) next to the desired subscription and select Modify/Renew Subscription.

3. Alternately, if you click on the Subscription ID, you can view details of the subscription and use the Modify/Renew Subscription button to initiate your change subscription.

4. Be advised, the One Time Discount label in Items lets you know if a One Time Discount has been applied to the subscription.

5. If One Time Discount is set to “Yes,” and you start the change subscription process, then a warning message will inform you that discounts for the subscription were applied as a one-time discount and that proceeding will require new discount negotiations with Cisco. Click Proceed if you wish to continue.

6. After Clicking on Modify/Renew Subscription, you’ll be taken to the page with details on the three actions you can take: Modify My Subscriptions, Renew My Subscription, and Replace My Current Offer with a New Offer.
Modify Subscription – Getting Started

1. To Start, click on **Modify My Subscription**

2. You’ll be redirected to CCW Configuration. At the Header-Level, you’ll see clear, simplified labels related to your subscription’s terms and billing: **Requested Change Date**, **Effective For**, **Automatically Renews for**, and **Billing Frequency**.

   **Note**: Some of you may be familiar with the previous labels we had utilized in the past: **Initial Term**, **Auto-Renewal Term**, and **Remaining Term**, etc. These labels have been since replaced for your convenience.

3. Click on the Pencil Icon (.mutable) next to **Modify Terms and Billing**, to be redirected to a page where you can make changes to terms and billing for your subscription.

4. You set a **Requested Change Date** by inputting the desired date directly into the text fields or by clicking on the Calendar icon (calendar) and selecting the desired date.

5. You’ll note that when making a change to the **Requested Change Date**, that the system provides you with a date range from which you can select a date.
6. Change the **End Date** by either keeping your current End Date or typing in the New Term Length.

7. Again, the system will provide you with some guidance. If you opt to select an **End Date** by designating a new term length (in months) then the system will provide you a range in months that you can use to apply a new End Date.

8. Based on the **Requested Change Date** and **End Date** you’ll see a summary of the length of the subscription and potential dates of the subscription based on the length selected.

9. You can toggle **Auto Renewal** On or Off for your subscription; as well as determine when your subscription will auto-renew (provided that you have auto-renewal enabled).

10. You can change the **Billing Frequency**, choosing to pre-pay for your subscription or to be billed on an Annual, Quarterly, or Monthly Basis.

11. Click **Done** when satisfied with your changes.

12. While modifying your subscription in Configuration, you can products, increase or decrease quantities, and remove items from your subscription; click on **Review Changes** when complete.
13. You’ll be presented with an offer summary, which will highlight the changes made. In the Line Action column, items will be highlighted as having been Added, Modified, or Removed.

14. In the Quantity Column Green Up Arrows (↑) and Orange Down Arrows (↓) will indicate Upsell and Downsell activities respectively and also indicate the change in value.

15. Click on Done.

16. Read the next pop-up carefully and completely. When you have read the information, click Done to accept the Terms and Conditions.
Modify Subscription Quoting

1. Your Modify Subscription Quote is now created! Click the pencil icon (✏️) next to the Quote Name and you can customize the name of your quote to be relevant to your needs; allowing you to label this quote in a manner that is easy to identify later.

2. Input the desired date into the text field and click Update

3. The Quote Summary will give you the upsell/downsell amount related to your New Estimated Charges

4. For more details on your Quote Summary, hover over View Full Summary to see Total List Price, Discounts, Credits (if applicable), and your Quote Total.

5. In the Items tab, The Net Change Summary provides you with information on Upsell/Downsell changes to the subscription for the Billing Amount, Monthly Recurring Cost, and Extended Net Price. This helps you see the difference between your initial subscription and your modified subscription; which is indicated as an Upsell (Green Text and arrow ↑) or Downsell (Orange Text and arrow ↓).
6. You can also reference your individual subscription items below; sorting them by either Net Price or Discount Details.
7. Click on Modify/Upsell and you’ll be return to CCW Configuration to make any further changes.
8. You can review the Terms and Billing Information that you had made earlier in Configuration.
9. Provide a Note to for this quote (maximum 300 characters) if desired.

10. You can review the individual items of your Modify Subscription Quote where items will be annotated as having been Modified, Added, and/or Removed.
11. Upsell ($) and Downsell ($) information will be indicated at the line-level where applicable. This difference in pricing will be indicated for both Billing Amount and Extended Net Price.

12. Items that have been Removed will be greyed out to indicate that these items are no longer part of this quote.
13. The **Review and Submit** Tab provides you a final review of participants in the quote you have generated. From here you can make edits to **End Customer**, **Service-To**, **Partner**, and **Cisco Contact Information**. Using the Pencil icon (🖌️) you can provide/edit **End Customer** contact information.

14. You can provide/update your **Partner** contact information using the pencil icon as well (🖌️).

15. You can select your **Cisco Channel Account Manager (CAM)** and a **Cisco Account Manager (AM)** to be associated with this quote.

16. When editing the **End Customer Contact**: A popup will appear where you can provide a name, telephone number and email. Click **Save** when complete.

17. When editing the **Partner Contact**: A popup will appear with applicable partner selections. Choose the desired Partner Contact and click **Select Partner**.
18. Making edits to the **Cisco Contact**: You can select a CAM from the drop-down Selection

19. Additionally, if you wish to assign an AM to your quote, click on **Select Cisco AM**.

20. A Pop-up appears where you can select from among applicable AMs. Click **Select Account Manager** when done.

21. If your quote contains Non-Standard Items, ensure that you assign a CAM and AM to your Quote. You’ll know if you have any non-standard items, via the informational message at the top of the screen.

22. For Quotes containing Non-Standard Items, you’ll note a key difference: the Submit button has been replaced with **Notify AM**. Click on Notify AM to submit your Quote for Approval.
23. Your non-standard Quote has been submitted for Approval. Once approved, you can continue with your order.

24. For your regular, standard quotes click on Submit when complete.

25. Your Modify Subscription Quote has been successfully submitted! Click on Create Order to proceed to the ordering process.

Renew Subscription – Getting Started

1. To start, click on Renew My Subscription.
2. You’ll be immediately redirected to CCW Configuration. You’ll note at the Header-Level, you’ll see clear, simplified labels related to your subscription’s renewal terms: Requested Renewal Date, Requested For, Automatically Renews for, and Billing Frequency.

3. Click on the Pencil Icon (✍️) next to Requested Terms and Billing, to be redirected to a page where you can make changes to your renewal information.

4. You can change the Renewal Start Date by providing the desired date directly into the text fields or by using the Calendar icon (📅) to select the desired dates.

5. The system provides you guidance and a date range for your Renewal Start Date.

6. Change the Renewal End Date by typing in your desired term length for renewal.

7. The system provides you with guidance on a range of durations (in months) that you can select from.

8. Based on the Renewal Start and End Dates you’ll see a summary of the term length and actual dates for the term.

9. You can toggle Auto Renewal On or Off for your subscription; as well as determine when your subscription will auto-renew (provided that you have auto-renewal enabled).

10. Change the Billing Frequency, by choosing to pre-pay for your subscription or to be billed on an Annual, Quarterly, or Monthly Basis.

11. Click Done when satisfied with your changes.
12. You can review the changes made to your subscription Renewal in the My Offer Summary section. Items will be annotated as having been **Added**, **Removed**, or **Modified** in the Line Action column.

13. Upsell/Downsell information will display in the Quantity Column (if there has been a quantity change).

14. Click **Done** when ready.

15. Read the next pop-up carefully and completely. When you have read the information, click **Done** to accept the Terms and Conditions.

**Renew Subscription - Quote**

1. Your Renew Subscription Quote is now created! Click the pencil icon (✏️) next to the Quote Name and you can customize the name of your quote to be relevant to your needs; allowing you to label this quote in a manner that is easy to identify.
2. Provide your updated text in the field and click **Update**. This is a particularly useful functionality, as it allows you to customize the name of your Renewal Quote in a way that makes it easily identifiable to you.

3. You’ll note in Quote Summary, that the high-level upsell/downsell amount will be displayed if applicable.

4. Hover over **View Full Summary** to get more information related to **Total List Price, Discounts, Credits**, and **Quote Total**.

5. In the **Items** tab The **Net Change Summary** provides you with high-level information on Upsell/Downsell changes to the subscription for the **Billing Amount, Monthly Recurring Cost**, and **Extended Net Price**.

6. Scrolling down you can get the header-level details of your Renewal Quote. Click on **Renew/Upsell** and you’ll be redirected to CCW Configuration, where you can make additional changes to your renewal quote.

7. Review your **Renewal Terms and Billing** Information.

8. If desired, you have the option of adding notes to your Quote.
9. Using the Pencil icon (✍️) you can provide/edit End Customer contact information
10. You can provide/update your Partner contact information using the pencil icon as well (✍️)
11. You can select your Cisco Channel Account Manager (CAM) and select a Cisco Account Manager (AM) associated with this quote.

12. When editing the End Customer Contact: A popup appears and you can provide a name, telephone number and email. Click Save when complete.

13. When editing the Partner Contact: A popup appears with applicable partner selections. Choose the desired Partner Contact and click Select Partner.
14. Making edits to the **Cisco Contact**: You can select a CAM from the drop-down Selection.

15. Additionally, if you wish to assign an AM to your quote, click on **Select Cisco AM**.

16. A Pop-up will appear where you can select from among applicable AMs. Click on **Select Account Manager**.

26. If your quote contains **Non-Standard Items**, ensure that you assign a CAM and AM to your Quote. You’ll know if you have any non-standard items, via the informational message at the top of the screen.

27. For Quotes containing Non-Standard Items, you’ll note a key difference: the Submit button has been replaced with **Notify AM**. Click on Notify AM to submit your Quote for Approval.
28. Your non-standard Quote has been submitted for Approval. Once approved, you can continue with your order.

17. For your standard quote, when satisfied click on Submit.

18. Your Renew Subscription Quote has been successfully submitted! Click on Create Order to proceed to the ordering process.
2. You’ll be able to select an array of compatible offers to replace with your current offer. Select a desired option.

3. Click Continue

4. If you click Cancel at this point, you’ll be redirected to the quote that has been automatically created for you. If you select Edit Options you’ll be prompted with the above menu item to select an offer to replace with your existing one.

5. After you’ve selected your replacement offer, then you’ll be redirected to CCW Configuration. You’ll note at the Header-Level, you’ll see clear, simplified labels related to your subscription’s renewal terms: Requested Change Date, Effective For, Automatically Renews for, and Billing Frequency.
6. Click on the Pencil Icon ( Modiﬁcation) next to New Terms and Billing, to be redirected to a page where you can make changes to your Terms and Billing information.

7. You can change the Requested Change Date by inputting the desired date directly into the test fields or leveraging the Calendar icon ( Select Date).

8. The System provides you with a date range to select for the Requested Change date.

9. Change the End Date by typing in your desired term length for renewal.

10. The System provides you with a range of months that you can use for this transaction.

11. Based on the Requested Change Date and End Date you’ll see a summary of the term length and actual dates for the term.

12. You can toggle Auto Renewal On or Off for your subscription; as well as determine when your subscription will auto-renew (provided that you have auto-renewal enabled).

13. You can change the Billing Frequency, choosing to pre-pay for your subscription or to be billed on an Annual, Quarterly, or Monthly Basis.

14. Click Done when satisfied with your changes.

15. Be sure to complete the conﬁguration of your replacement subscription and click Review Changes, when done.
16. Your **Offer Summary**, will let you review your replacement offer. Click **Done** when satisfied.

17. A pop-up will appear. Please be sure to read the full text and click **Done** to agree to the Terms and Conditions.
Replace Subscription - Quote

1. Your Replace Subscription Quote is now created! Click the pencil icon (✏️) next to the Quote Name and you can customize the name of your quote to be relevant to your needs; allowing you to label this quote in a manner that is easy to identify.

2. Provide your customized text for your Quote name, in the text field and click Update.

3. You’ll note in Quote Summary, that the high-level upsell/downsell amount will be displayed.

4. Hover over View Full Summary to get more information related to Total List Price, Discounts, Credits, and Quote Total.

5. In the Items tab The Net Change Summary provides you with high-level information on Upsell/Downsell changes to the subscription for the Billing Amount and Extended Net Price.
6. If you changed your billing model, please note that any net change to the **Billing Amount** will not display, and will be flagged with a blue star (звездочка).

   ![Net Change Summary Image]

7. Scroll down the page to get details on the items in your Replace Subscription Quote. If you select **Edit Options**, you’ll be re-directed to Configuration, where you can make changes to your quote.

8. Review your **Requested Terms and Billing**

9. Add a **Note**, if desired.

10. Continue to scroll down, and your line items in your quote will be annotated as having been **Added**, **Modified**, or **Removed**.

11. Associated Upsell/Downsell information will also display as applicable, annotated by a green up arrow (елочка) and a red down arrow (семечка) respectively.

12. Satisfied with your Quote, click **Continue** or select the **Review & Submit** tab.

13. In **Review & Submit**, you have a number of options to edit **End Customer**, **Service To**, **Partner**, and **Cisco Contact** information. Using the Pencil icon (пучок) you can provide/edit **End Customer** contact information.
14. You can provide/update your Partner contact information using the pencil icon as well.

15. You can select your Cisco Channel Account Manager (CAM) and select a Cisco Account Manager (AM) associated with this quote.

16. When editing the End Customer Contact: A popup appears where you can provide a name, telephone number and email. Click Save when complete.

17. When editing the Partner Contact: A popup appears with applicable partner selections. Choose the desired Partner Contact and click Select Partner.
18. Making edits to the **Cisco Contact**: You can select a CAM from the drop-down Selection

19. Additionally, if you wish to assign an AM to your quote, click on **Select Cisco AM**.

20. A Pop-up will appear where you can select from among applicable AMs. Click on **Select Account Manager**.

21. If your quote contains **Non-Standard Items**, ensure that you assign a CAM and AM to your Quote. You’ll know if you have any non-standard items, via the informational message at the top of the screen.

22. For Quotes containing Non-Standard Items, you’ll note a key difference: the Submit button has been replaced with **Notify AM**. Click on Notify AM to submit your Quote for Approval.

23. Your **non-standard** Quote has been submitted for Approval. Once approved, you can continue with your order.
24. For your regular, standard quotes click on **Submit** when complete.

25. Your Replace Subscription Quote has been successfully submitted! Click on **Create Order** to proceed to the ordering process.

**Consolidated Order Processes for Modify, Renew, and Replace Subscription**

The Overall process flow for processing a Modify, Renew, or Replace Subscription Orders are very similar in nature, so we’ve consolidated the materials for your ease of use into a single section.

1. In Order, just as in Quote, you can edit the name of your Order by using the pencil icon (✎).
2. You must also supply a **Purchase Order Number** by using the pencil icon (✎).
3. When you have entered the new name of your order, click **Update**; this provides you some additional customization to your order, making it easier to identify among your subscription orders more easily.
4. For your **Purchase Order Number**, you can input your own number or **Copy a Previous PO** number. Click **Update** to finalize your selection.
5. Finally, hovering over **View Full Summary** will display details on **Total List Price**, **Discounts**, **Credits**, **Total Effective Discount**, and **Order Total**.
Callout for Renew and Replace Subscription Orders: For Renew and Replace Subscription Orders, the order name will apply Renew or Replace text respectively into the order default name.

6. Scrolling down, you’ll be able to review the Net Change Summary, as in Quote.

7. Select Modify/Upsell, and you’ll be redirected to Configuration where you can make additional changes to your replace subscription order.

8. You can Modify Terms and Billing by using the pencil icon (✍). A pop-up will appear with the editable Terms and Billing information that you should be familiar with when creating your Replace Subscription Quote.

Callout for Renew and Replace Subscription Orders: The Label for Modify/Upsell will indicate Renew/Upsell (for Renewal Order) or Replace/Upsell (For Replacement Order). Core capability of this hyperlink remains the same. Also, as with Quoting, you’ll note some of the labels and fields for changing your terms and billing will be relevant to Renew and Replace subscription orders.

9. Provide a Provisioning Contact Email, using the pencil icon.
10. A Pop-up appears, asking that you provide the Provisioning contact email and confirm your selection. Click save.
11. You can provide an End Customer Email if you have one. Click Update.
12. You can assign a Smart Account by using the associated pencil icon (✍)
13. A Pop-up will appear, which will allow you to assign an End Customer Smart Account to your Order.
14. Provide any Notes to this Order if desired.
15. Again, as in order, your line items will be annotated as having been **Added** or **Modified**; with applicable upsell/downsell information.

**Note:** The Items that had been marked as **Removed** in Quote will not appear in the Order.

16. You can review the **Payment Info** for your Order and attach any associated purchase orders to your order.
17. In **Billing Information**, change your **Billing Contact**, **Business Contact**, and **Support Contact**; using the pencil icons (✏).

18. For all three options, a pop-up appears, prompting you to select a contact. You can also edit a given contact by clicking on the pencil icons (✏) within the pop-up.

19. A New Pop-up window appears, allowing you to edit contact details. Click **Save** when your edits are done.

20. Click **Use Selected Contact**.

21. As in Quote, you can review your **End Customer** Information and make edits to the End Customer Contact.

22. You can also similarly review and make edits to the **Service To** information.

23. The **Order Submission Notification** section lets Cisco know who to contact if there are any problems with the Order. Ensure that you review this information and provide any edits before completing.

24. You can add more recipients to receive notifications on this order (Use a comma to separate multiple emails).

25. Add any additional Order Notes if desired.

26. To agree to the **Terms and Conditions**, click the check box; you will not be able to submit your order until you agree to the terms and conditions.
27. When clicking on the **Terms and Conditions Check Box**, you’re agreeing to have read the Terms and Conditions. When you click the check box, a pop-up appears, giving you more details. To agree, click **Close**.

28. If you are satisfied with the information in your **Modify/Renew/Replace Subscription Order**, click **Submit Order**.

29. Congratulations! Your Order has been submitted! Click on **View Submitted Order** to access a read-only version of the order you just submitted. Click **View Submitted Order** to review a read-only version of your order.

**Viewing History for your Subscriptions**

**Tracking Change Status**

1. You can track the status of your in-progress changes easily by referencing the progress bar when viewing a subscription’s details.
Viewing Subscription History.

To gain more insights into the historical changes that have been applied to a subscription you can easily view a historical record by accessing it after having selected the desired subscription from the Subscription Workbench.

1. Access subscription history by clicking on the **History** tile (1).

![Subscription History](image)

**Note**: For all types of subscriptions in the history, we’ve ensured labels align with your experience in configuration, quoting, and ordering; and included the **One Time Discount Applied** label to these fields as well.

2. There are a number of different types of transactions that are highlighted in History. There are **New Purchases**

![New Purchase](image)

3. **Cancelled** Subscriptions will be annotated.

![Cancelled Subscription](image)

4. **Expired** Subscriptions will be available.

![Expired Subscription](image)

5. **Modified** subscriptions can be found.
6. Subscriptions that have been set for **Auto Renewal** will be identified.

7. If you have any subscriptions that you have **Manually Renewed**, you’ll find them here in the history.

8. Finally, if you have any subscriptions that you have **Replaced**, you’ll see them listed in your history.