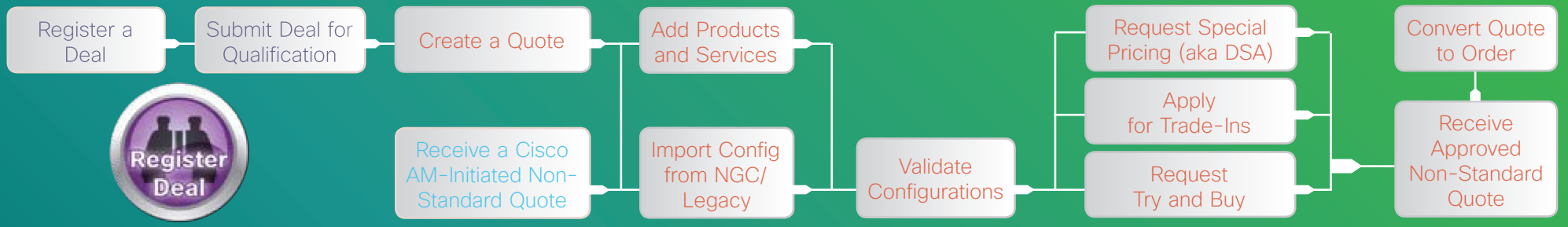
Sales – Deal

Use when registering for a promotion



How to...	Steps	Tips & Tricks
Register a Deal	Click on the **Deal** link from the Quick Start portlet and enter all required fields.	If your deal involves an End Customer buying in multiple countries or fulfilled by multiple Partner types (Self, Subsidiary, Disti As Agent or Agent Partner) in different countries, check the applicable box and refer to the Global Deal Training Guide.
Submit Deal for Qualification	Click the **Submit for Qualification** button on the **Review and Submit** tab.	Fill out the questions as completely as possible - the qualification questions will vary based on the promotion that is selected.
Create a Quote	Click on the **Deal ID** from the Deals and Quotes portlet on the CCW homepage.	You can add products and services after confirming that the billing information is correct.
View a Cisco AM-Initiated Non-Standard Quote	Click on the **Deal ID** from the Deals and Quotes portlet on the CCW home page. It will be seen under the Display filter "Deals Shared With Me."	If you do not see the Deal ID, contact your Cisco AM and ensure they have clicked **Collaborate** on their internal tools to give you view/edit access to that quote.
Add Products and Services	Type in the Product/Service SKU in **Add Product, Service or Software Subscription** field.	Select the appropriate **Buy Method** to start configuring the product or add services.
Import Config from NGC (Next Generation Configuration) or Legacy	Click on the **Import a Saved Configuration** link and select the correct configuration type.	If you are importing from NGC, you can only import configurations that are created by you in NGC or shared with you. Legacy Configuration tools that are compatible with CCW are: **MLC**, **DCT**, **ICT**, **Netformx**, **Solution Expert**, **Quote Builder**.
Validate Configurations	Click on the **Validate** link to make sure that there are no issues when submitting this quote for approval.	Validate an individual line or validate all lines by selecting all lines and clicking **Validate All**.
Request Special Pricing (aka DSA)	Click on the **Share** button or set up auto-share in **Workspace Profile and Preferences**.	Make sure the quote has been submitted for approval first. Indicate the requested discount in the Notes section on the **Review and Submit** tab. You will need your AM's Cisco ID in order to share.
Apply for Trade-Ins	Click on the **Trade-In** link within the **Quote** tab and add trade-in products.	You must be enrolled in the Cisco Technology Migration Program.
Request Try and Buy	Click on the **Try and Buy** link on the **Review and Submit** tab.	You must be enrolled in the Try and Buy program to use this functionality.
Receive Approved Non-Standard Quote	After confirming there are no issues, click on the **Submit Quote for Approval** link.	Check the status of your quote in the Deals and Quotes portlet on the CCW homepage.
Convert Quote to Order	Click on the **Deal ID** from the Deals and Quotes portlet on the CCW homepage and click on the **Create a New Order from this Quote** link.	You can **Split** quantities of major lines on the item selection screen when converting to order. Entering install site and end customer information during conversion is optional.

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Frequently Asked Questions

Category	Questions	Answers
Deals and Quotes	What is the difference between deals and quotes?	By registering for a Deal, you can create a quote that qualifies for programs and promotions. Quick Quotes are quotes using standard contractual pricing, which can be used to request Special Pricing.
Deal Registration	Will entering a Deal ID in the field populate the discount from the Deal ID on the order?	No, the user needs to submit a deal/quote to their AM/PAM to receive non-standard pricing.
Deal Registration	What can I do if my deal is Closed?	Once a deal is Closed, it may not be reopened and a new deal should be initiated.
Deal Extension	How do I extend my Deal expiration date?	For Expired Promotional Deals: If eligible for extension, you will get a notification email 14 days before the deal expires. Click on the link from the email and click on the **Request an Extension** button under Show Quote History. For Expired Quick Quotes: You can re-open and edit the deal and re-submit it again for approval.
Quote Approval	How do I know if the deal is approved?	The status of the Deal or Quote can be seen on the Workspace homepage under the Deal/Quote portlet.
Quotes Sharing	Can my colleagues in my company see or edit the quotes that I created?	You can share quotes on an individual basis using the **Share** utility, or you can set up Auto-Share lists in **Workspace Profile and Preferences**, within the **Sharing Preferences** tab.
Buy Methods	How do I split the Buy Method so that the order is fulfilled by different sources for the same product?	To enable more than one Buy Method (Cisco and/or multiple distributors) to fulfill the same item, click the **Split** link for the line you wish to change.
Editing Approved Quotes	What happens if I edit an Approved Quote to modify products/services?	The Deal status will change to Re-Opened and may require Cisco to reapprove the changes, depending on Cisco policy.
Export	How do I export the quote from CCW?	Click on the **Export** link from the Common Utilities link – Set up customized fields for .xls output by clicking **Save** after customizing.
Email	How do I email my quote?	Click on the **Email** link from the Common Utilities link – Enter email address to send an email of your quote. **NOTE:** this is not the same function as **Share**.
Print	How do I print a copy of my quote?	Click on the **Print** link in the **Items** tab and specify the details you would like to include/exclude.

Training

Partner Central

- Click Training from the CCW Homepage:
  http://www.cisco.com/web/partners/events/commerce_workspace.html
  Access currently available self-paced e-Learning, demos, presentations, videos, and quick reference guides.

Support

Get Help Online – Click Help from the CCW Homepage

- http://www.cisco.com/web/ordering/icw/feedback/index.html
- Review FAQs/Log a case.

Get Help on the Phone:

- Call the Partner Help Line: 1-800-GO-CISCO
- Call the PRT (Partner Relationship Team): 1-800-553-6387

Have Access Issues?

- Email: ic-support@cisco.com

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