# Table of Contents

ABOUT THIS GUIDE ................................................................................................................................. 6

E-PROCUREMENT ........................................................................................................................................ 6

BENEFITS OF USING THE CISCO E-PROCUREMENT SOLUTION ............................................. 6

USING THE E-PROCUREMENT SOLUTION ............................................................................................ 6

PREREQUISITES .......................................................................................................................................... 7

RECOMMENDED FOR BEST PERFORMANCE ......................................................................................... 7

Hardware Requirements .................................................................................................................................. 7

Software Requirements ............................................................................................................................... 7

Network Requirements ............................................................................................................................... 8

CHAPTER ONE ............................................................................................................................................ 9

ACCESSING THE CISCO SITE .................................................................................................................... 9

CHAPTER OBJECTIVES ............................................................................................................................... 9

DEFINITIONS ............................................................................................................................................... 9

PUNCHING OUT TO THE E-PROCUREMENT SOLUTION ....................................................................... 9

CHAPTER TWO — ......................................................................................................................................... 14

ORDERING TOOL HOME PAGE .............................................................................................................. 14

CHAPTER OBJECTIVE ............................................................................................................................... 14

CHOICES ON THE ORDERING TOOL NAVIGATION BAR (SEE FIGURE F.1) ........................................ 15

WHAT WOULD YOU LIKE TO DO? SECTION (SEE FIGURE F.2) ............................................................. 15

CHAPTER THREE — ................................................................................................................................... 16

SETTING ORDER DEFAULTS .................................................................................................................... 16

CHAPTER OBJECTIVE ............................................................................................................................... 16

DEFINITIONS ............................................................................................................................................... 16

FREQUENTLY USED DEFAULT FIELDS .................................................................................................... 17

HOW TO SET THE ORDER DEFAULTS .................................................................................................... 18

Accessing the Default Settings .................................................................................................................. 18

Setting Ordering Tool Preference Defaults ............................................................................................... 19

Setting the Default Billing Address ........................................................................................................... 20

Setting Default Billing Contact Information ............................................................................................. 21

Setting Default Shipping Address Information .......................................................................................... 21

Setting or Changing the Default Shipping Contact ................................................................................ 22

Setting or Changing the Default Shipping Method .................................................................................. 22

Setting or Changing the Default Pricing Information .............................................................................. 23

Setting or Changing the Payment & Taxes Information ........................................................................... 26

Setting or Changing the Service Options Information ............................................................................ 27

Setting or Changing the Order Acknowledgements Information ............................................................ 27

Setting or Changing the Order Contacts Information ............................................................................... 28
<table>
<thead>
<tr>
<th>CHAPTER FOUR –</th>
<th>29</th>
</tr>
</thead>
<tbody>
<tr>
<td>CREATING AND USING ORDER TEMPLATES</td>
<td>29</td>
</tr>
<tr>
<td>CHAPTER OBJECTIVE</td>
<td>29</td>
</tr>
<tr>
<td>DEFINITION</td>
<td>29</td>
</tr>
<tr>
<td>HOW TO USE ORDER TEMPLATES</td>
<td>29</td>
</tr>
<tr>
<td>Saving an Order as a Template</td>
<td>29</td>
</tr>
<tr>
<td>MANAGING ORDER TEMPLATES</td>
<td>33</td>
</tr>
<tr>
<td>Preview a Template</td>
<td>33</td>
</tr>
<tr>
<td>Modify a Template</td>
<td>33</td>
</tr>
<tr>
<td>Create an Order from a Template</td>
<td>33</td>
</tr>
<tr>
<td>Delete a Template</td>
<td>34</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>CHAPTER FIVE –</th>
<th>35</th>
</tr>
</thead>
<tbody>
<tr>
<td>CREATE A SHOPPING CART</td>
<td>35</td>
</tr>
<tr>
<td>CHAPTER OBJECTIVE</td>
<td>35</td>
</tr>
<tr>
<td>HOW TO CREATE A SHOPPING CART</td>
<td>35</td>
</tr>
<tr>
<td>Begin to Create a New Shopping Cart</td>
<td>36</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>CHAPTER SIX –</th>
<th>39</th>
</tr>
</thead>
<tbody>
<tr>
<td>MAIN ORDER FORM</td>
<td>39</td>
</tr>
<tr>
<td>CHAPTER OBJECTIVES</td>
<td>39</td>
</tr>
<tr>
<td>Buttons on the Main Order Form</td>
<td>40</td>
</tr>
<tr>
<td>Fields for Entering Line Items</td>
<td>42</td>
</tr>
<tr>
<td>Additional Fields for Viewing and Modifying Line Items</td>
<td>43</td>
</tr>
<tr>
<td>MANAGING LINES ON THE MAIN ORDER FORM</td>
<td>44</td>
</tr>
<tr>
<td>Add New Line Items</td>
<td>44</td>
</tr>
<tr>
<td>Modifying an Existing Line Item</td>
<td>45</td>
</tr>
<tr>
<td>Deleting Line Items</td>
<td>45</td>
</tr>
<tr>
<td>Saving an Order</td>
<td>45</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>CHAPTER SEVEN –</th>
<th>46</th>
</tr>
</thead>
<tbody>
<tr>
<td>HEADER DETAILS</td>
<td>46</td>
</tr>
<tr>
<td>CHAPTER OBJECTIVE</td>
<td>46</td>
</tr>
<tr>
<td>DEFINITIONS</td>
<td>46</td>
</tr>
<tr>
<td>ENTERING ORDER DETAILS</td>
<td>47</td>
</tr>
<tr>
<td>Display the All Header Details Page</td>
<td>48</td>
</tr>
<tr>
<td>Changing the Billing Address</td>
<td>48</td>
</tr>
<tr>
<td>Changing the Billing Address</td>
<td>49</td>
</tr>
<tr>
<td>Adding or Changing the Billing Contact Person</td>
<td>49</td>
</tr>
<tr>
<td>Viewing the Shipping Address</td>
<td>50</td>
</tr>
<tr>
<td>Adding or Changing the Shipping Contact Person</td>
<td>51</td>
</tr>
<tr>
<td>Adding or Changing the Shipping Method Information</td>
<td>52</td>
</tr>
<tr>
<td>Adding or Changing End User Information</td>
<td>53</td>
</tr>
<tr>
<td>Adding or Changing Payment and Taxes Information</td>
<td>54</td>
</tr>
<tr>
<td>Adding or Changing Order Acknowledgments Information</td>
<td>56</td>
</tr>
<tr>
<td>Adding or Changing Order Contact Information</td>
<td>57</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>CHAPTER EIGHT –</th>
<th>58</th>
</tr>
</thead>
<tbody>
<tr>
<td>SHIPSETS</td>
<td>58</td>
</tr>
<tr>
<td>CHAPTER OBJECTIVES</td>
<td>58</td>
</tr>
<tr>
<td>HOW TO CREATE SHIPSETS FOR YOUR ORDER</td>
<td>58</td>
</tr>
</tbody>
</table>
CHAPTER NINE – .................................................................................................................. 64
ALL ORDER DETAILS ........................................................................................................ 64
CHAPTER OBJECTIVE ........................................................................................................ 64
DEFINITIONS ..................................................................................................................... 64
HOW TO USE THE ALL ORDER DETAILS PAGE .......................................................... 64
Accessing the All Order Details Page ............................................................................. 65
Modifying Order Information ....................................................................................... 66

CHAPTER TEN – ................................................................................................................. 67
ADDRESS BOOK ................................................................................................................. 67
CHAPTER OBJECTIVES .................................................................................................... 67
DEFINITIONS ..................................................................................................................... 67
HOW TO USE THE ADDRESS BOOK ............................................................................. 68
Maintaining Addresses ..................................................................................................... 68
Searching for a Shipping Address ................................................................................... 76
Applying an Address to Multiple Locations at Once .................................................... 79
Creating a New Contact ................................................................................................. 80

CHAPTER ELEVEN– .......................................................................................................... 83
CONFIGURE ....................................................................................................................... 83
CHAPTER OBJECTIVE .................................................................................................... 83
DEFINITION ....................................................................................................................... 83
HOW TO USE THE CONFIGURATOR TO CONFIGURE PRODUCTS FOR YOUR ORDER . 83
Configuring a Line Item .................................................................................................. 83
Example - How to Configure a CISCO776M .................................................................. 86

CHAPTER TWELVE – ........................................................................................................ 88
ITEM SEARCH .................................................................................................................... 88
CHAPTER OBJECTIVE .................................................................................................... 88
DEFINITIONS ..................................................................................................................... 88
HOW TO SEARCH FOR PRODUCTS FOR YOUR ORDER .............................................. 88
Searching for a Product .................................................................................................. 89
Searching for a Spare ...................................................................................................... 91
Searching My Saved Configs ....................................................................................... 93

CHAPTER THIRTEEN – .................................................................................................... 95
MY SAVED CONFIGS ........................................................................................................ 95
CHAPTER OBJECTIVE .................................................................................................... 95
DEFINITION ....................................................................................................................... 95
HOW TO USE SAVED CONFIGURATIONS .................................................................... 95
Using Your Saved Configurations .................................................................................. 95
Example of How to Configure a CISCO776M and Save the Configuration ...................... 97
CHAPTER FOURTEEN – Service/Line Details ........................................................................................................ 98
CHAPTER OBJECTIVE ........................................................................................................................................ 98
DEFINITIONS .................................................................................................................................................. 98
HOW TO USE THE LINE ITEM DETAILS SECTION ..................................................................................... 98
  Viewing Line Item Details for a Hardware Line Item ......................................................................................... 98
  Viewing Line Item Details for a Service Line Item ......................................................................................... 102
  Viewing Configuration Details ....................................................................................................................... 104

CHAPTER FIFTEEN – Error Checking .................................................................................................................. 106
CHAPTER OBJECTIVE ........................................................................................................................................ 106
DEFINITIONS .................................................................................................................................................. 106
HOW TO USE ERROR CHECKING .................................................................................................................. 106
  Checking your Order for Errors ...................................................................................................................... 106

CHAPTER SIXTEEN – Transferring the Shopping Cart Back to Ariba ................................................................. 109
CHAPTER OBJECTIVE ........................................................................................................................................ 109
DEFINITIONS .................................................................................................................................................. 109
TRANSFERRING THE CART BACK TO Ariba ................................................................................................. 109
RECEIVING EMAIL NOTIFICATIONS ............................................................................................................... 111
  Order Confirmation Message .......................................................................................................................... 111
  Order Received Message ............................................................................................................................... 113

GLOSSARY ........................................................................................................................................................ 115

Additional materials to learn more about the Ordering Tool an be found at: .................................................... 119
About this Guide

The E-Procurement Solution User Guide describes the punching-out, shopping cart creation, and order submission processes of the Cisco e Procurement process. Topics are presented in a sequential manner so that you can reference the information you need when using this solution. Advanced features, timesaving techniques, and ways to customize your shopping cart are also described in detail, including topics such as setting defaults and getting saved configurations.

Users familiar with the Cisco Ordering Tool will note the tight integration with the existing graphical user interface. However, use of this guide does not require a thorough understanding of the Cisco Ordering Tool.

E-Procurement

The Cisco E-Procurement solution allows customers using the Ariba procurement system to place orders directly with Cisco Systems. Users are punched out to the Cisco Ordering Tool to select products, but the transaction is finalized from within the Ariba procurement system.

Benefits of Using the Cisco E-Procurement Solution

- Online ordering of Cisco products within your existing Ariba setup
- ERP integration eliminates dual order entry
- No proprietary technical specifications
- Reduced order cycle times for faster product shipment

Using the E-Procurement Solution

The Ariba screen allows users to punch out to the Cisco Ordering Tool. The Ordering Tool Home page provides convenient access to the following ordering functions:

- Create an Order
  Create a new order.
- Open/Delete Saved Orders
  View and manage existing orders.
- Get Routed Order
  View orders routed to you for approval.
- Use Order Templates
  Build an order from a template or to modify a template.
- Set Defaults
  Set defaults or standard settings for all orders you create.
The Ordering Tool Home Page also allows users to return to the Ariba setup.

Prerequisites

- Internet, PC, and mouse skills
- CCO account with access to Commerce Tools and the E-Procurement solution
- Signed Internet Commerce Agreement (ICA) with Cisco. The ICA is a contract that sets forth information about doing business with Cisco.

Recommended for Best Performance

For the best performance when using the Cisco E-Procurement Solution, please follow these suggestions:

Hardware Requirements

- Pentium 166 MHz (minimum), Pentium 200 MHz or higher (recommended)
- 128 MB RAM
- TCP/IP protocol installed and configured
- Monitor and display adapter capable of 256 colors at 800x600 resolution

Hardware - Optimal Performance Recommendations

- Pentium 200 MHz
- Display adapter capable of 1024x768 resolution

Software Requirements

- Windows 95, 98, 2000 or NT
  - HTML Browser
    - Internet Explorer 4.01 Service Pack 1 or higher
    - Netscape 4.x
    - Internet Explorer 6 and Netscape 6.0 are not currently supported
- Unix (Solaris)
  - HTML Browser
    - Netscape 4.5 or higher
    - Netscape 6.0 is not supported
Linux
- HTML Browser
  Netscape 4.5 or higher
  Netscape 6.0 is not supported

Software - Optimal Performance Recommendations
- HTML Browser
  - Internet Explorer 5.5
  - Netscape 4.x

Network Requirements
- 56K Modem connection or higher (sustained bandwidth)

Network - Optimal Performance Recommendations
- 512K LAN connection
Chapter One
Accessing the Cisco Site

Chapter Objectives
- Identify the differences between single and dual login.
- Learn how to log into the E-Procurement solution.

Definitions
Login – Setting that determines how a user will enter the E-Procurement solution. There are two types of logins:

  - **Dual** – Allows Cisco to display a customized view of the application, including saved configurations, order templates, and user defaults.
  - **Single** – Cisco will display the same information for all users within a company.

Punchout – Process whereby an Ariba buyer goes from the Ariba environment to a supplier’s web site to create a shopping cart. This cart is then transferred back to the Ariba Buyer.

Punching out to the E-Procurement Solution
The following screenshots may vary from what you see on your screen depending on your E-Procurement implementation. While the exact Ariba screen displays may vary, the functionality will match the following descriptions.
A.1 Enter your User Name and Password

B.1 Click to create a new order
Figure C

C.1
Click to select
Punchout Catalog
**D.1**
Select Cisco Systems from the catalog.

**E.1**
Enter your CCO User Name and Password.
<table>
<thead>
<tr>
<th>Step</th>
<th>To Do This</th>
<th>What You Do</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Log into Ariba</td>
<td>Enter your username and password. (See Figure A.1)</td>
</tr>
<tr>
<td></td>
<td></td>
<td>The main Ariba screen is displayed.</td>
</tr>
<tr>
<td>2</td>
<td>Create a new order</td>
<td>Select <strong>New Order</strong>. (See Figure B.1)</td>
</tr>
<tr>
<td></td>
<td></td>
<td>The Catalog screen is shown.</td>
</tr>
<tr>
<td>3</td>
<td>Access the Punchout catalogs</td>
<td>Select <strong>Punchout Catalog</strong>. (See Figure C.1)</td>
</tr>
<tr>
<td></td>
<td></td>
<td>The Punchout catalogs are shown.</td>
</tr>
<tr>
<td>4</td>
<td>Access the Cisco catalog</td>
<td>Select <strong>Cisco Systems</strong> catalog from the options displayed. (See Figure D.1)</td>
</tr>
<tr>
<td></td>
<td></td>
<td>A prompt will ask you to enter your <strong>CCO User Name</strong> and <strong>Password</strong>.</td>
</tr>
<tr>
<td>5</td>
<td>Access the E-Procurement /Ariba Punchout Solution</td>
<td>Enter your CCO User Name and Password. (See Figure E.1)</td>
</tr>
<tr>
<td></td>
<td></td>
<td>The E-Procurement Solution displays the Ordering Tool functionality.</td>
</tr>
</tbody>
</table>
Chapter Two –

Ordering Tool Home Page

The central home page is your entry point for creating orders, saving order templates, and setting defaults.

Chapter Objective

To acquaint you with the features of the Ordering Tool Home page.

Figure F

F.1
Ordering Tool Navigation Bar

F.2
Select an option by clicking one of the buttons

What would you like to do?

Select a task from the option buttons below:

- Create an Order
- Use Order Templates
- Set Defaults

New Dynamic Configuration Tool

Coming Soon! Enhanced usability - increase productivity by eliminating the guesswork in complex configurations - these are just a few of the new features to be included in the new Dynamic Configuration Tool, soon to be released. This new tool will replace the current Configuration Tool.

Click here for information on the new Dynamic Configuration Tool, including training and overviews.
Choices on the Ordering Tool Navigation Bar  (See Figure F.1)

- **IC Agreement** – A contract between the customer’s company and Cisco Systems, Inc. that gives you (the customer) access to the ordering tool. The ICA agreement link is green if it has not been filled out. The link is grayed out if it has been filled out but you do not have permission to submit an order. Cisco does not recommend clicking on this link in the punchout environment.

- **Order Templates** – An unsubmitted order that has been named and saved for future use. If you regularly submit orders with the same product selections, you can create an order and save it as a template before submitting. The next time the order needs to be placed, the template can be accessed, modified slightly if necessary, and then submitted. The template remains for future use.

- **Defaults** – Preferred settings that you can pre-determine. The settings will automatically populate in every order created. This saves you time by automatically entering information that remains the same on all orders.

- **Training** – Links you to the Training, Events, and Seminars section of Cisco.com. Cisco does not recommend clicking on this link in the punchout environment.

- **Address Book** – Tool used for managing addresses.

- **Help** – Links you to detailed online help. Cisco does not recommend clicking on this link in the punchout environment.

What would you like to do? Section  (See Figure F.2)

The Home Page provides convenient access to ordering functions. To get more information about using these functions see the associated chapter.

- **Create an Order** – To build a new shopping cart. (See Chapter 5 for details.)

- **Use Order Templates** – To build an order from a template or to modify a template. (See Chapter 4 for details.)

- **Set Defaults** – To set defaults or standard settings for all orders you create. (See Chapter 3 for details.)
Chapter Three –
Setting Order Defaults

Chapter Objective
- To acquaint you with setting up order defaults; the standard information that is used on most of your orders.

Definitions
Carton Notes – Enter any notes you want to appear on carton labels, packing slip, and invoices (commercial and remittance) for all future orders.

Change Address – Displays the My Billing Addresses or My Saved Addresses page, where you can change addresses.

Change Contact – Displays the Select a Contact page within the Address Book, where you can change default contact information. The contact is the person with whom Cisco should communicate regarding billing or shipping questions. Click Change Contact in the Billing Information section for a billing contact, and Change Contact in the Shipping Address & Method section for a shipping contact.

Defaults – Preferred settings that you can predetermine. The settings will automatically populate in every order created.

Early Shipment Accepted? – Click Yes if you will allow Cisco to ship a partial order or all of your order prior to the requested ship date.

Freight Term/FOB – Indicates the seller and buyer’s responsibilities during transportation of purchased product from the manufacturing location, to title transfer, to the customer.

Ship All Items Separately – This selection informs Cisco if you want all line items shipped as if they are individual orders. No should be selected if you would like Cisco to ship products together whenever possible; be aware that this will extend shipset lead times. Yes should be selected if you would like Cisco to ship each line item as individual shipments.

Note that Cisco manufactures worldwide, so multiple line orders will typically arrive in separate deliveries. Selecting Ship All Items Separately - No will reduce the number of deliveries.

Shipment via – Choose the carrier for shipment of your order.

Shipping & Packaging Notes – Enter any default shipping and packaging notes that you want to appear on packing slips and invoices for all future orders. You can change this information if necessary on the Header Details page when you are creating an order.

Shipping Account #/Special Instructions – If you would like Cisco to bill your account number with the selected carrier, rather than invoicing you for the shipment, type the account number you have with the carrier. Also type any special shipping instructions.
Frequently Used Default Fields

Setting defaults saves you time with every order by auto-populating the following frequently used fields:

- Billing
- Shipping Address and Method
- Pricing
- Payment & Taxes
- Service Options
- Acknowledgements

When these fields are defined on the Set Defaults page, they will automatically populate each new order you create. You have the option to edit the fields within an order when necessary. For instance, when you need to make a change to the billing address on one order, do not change the default address; instead change the address within the applicable order. This maintains the defaults that are used for most orders, and allows you to customize each individual order as necessary.
How to Set the Order Defaults

From the *Ordering Tool Home* page click the **Set Defaults** button on the console.

**Figure G**

<table>
<thead>
<tr>
<th>Step</th>
<th>What You Do</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Click the <strong>Set Defaults</strong> button on the <em>Ordering Tool Home</em> page console. (Figure G.1)</td>
</tr>
</tbody>
</table>

The **Set Defaults** page appears displaying hyperlinks to update billing, shipping address & method, pricing information, payment & taxes, service options, and acknowledgements. (Figure H)
Figure H

H.1 Set your Ordering Tool preferences by choosing frequency of update reminders and warning box alerts.

H.2 Your default billing information is displayed here. To change the information click Change Address.

H.3 Click here to change your contact information.

H.4 Change the shipping address & method in this section.

H.5 Click on the Change Contact button to modify contact information.

H.6 Select and type in the pricing information for your company.

Pricing Information

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

<table>
<thead>
<tr>
<th>Pricing List</th>
<th>AUSTRALIA Price List AUDs Ex-Tax</th>
</tr>
</thead>
<tbody>
<tr>
<td>Product Discount</td>
<td>10%</td>
</tr>
<tr>
<td>Service Discount</td>
<td>25%</td>
</tr>
</tbody>
</table>
### Setting Ordering Tool Preference Defaults

Under the Ordering Tool Preferences (Figure H.1) section you can save changes to the following items:

<table>
<thead>
<tr>
<th>Step</th>
<th>To Do This</th>
<th>What You Do</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Set Preference – Update Reminders</td>
<td><strong>Update reminders</strong> – Use this feature to receive a reminder alert to save your order after you have completed entering the specified number of line items. Select your preference from the pull down menu.</td>
</tr>
<tr>
<td>2</td>
<td>Set Preference – Alert Pop-Ups</td>
<td><strong>Alert pop-ups</strong> – The tool automatically displays warning message pop-ups whenever appropriate. Alert pop-ups can be disabled in this section if you prefer not to view warning messages.</td>
</tr>
<tr>
<td>3</td>
<td>Set Preference – Save Defaults</td>
<td>Once you have made all of your choices, click the <strong>Save Defaults</strong> button in the bottom left corner of the page. Your selected entries are saved.</td>
</tr>
</tbody>
</table>

### Setting the Default Billing Address

The following steps provide details about setting and changing your default billing address.

<table>
<thead>
<tr>
<th>Step</th>
<th>What You Do</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Click the <strong>Billing</strong> hyperlink on the <strong>Set Defaults</strong> page. <strong>Set Defaults Billing Information section is displayed.</strong> (Figure H.2)</td>
</tr>
<tr>
<td>2</td>
<td>Click the <strong>Change Address</strong> button. <strong>A list of addresses is displayed on the My Billing Addresses tab of the Address Book.</strong></td>
</tr>
<tr>
<td>3</td>
<td>Choose the address you would like to use as your default by clicking the button under the <strong>Select</strong> column.</td>
</tr>
<tr>
<td>4</td>
<td>If you would like to choose a billing contact, click on the <strong>Assign Contacts</strong> tab. <strong>The list of available billing contacts is displayed.</strong></td>
</tr>
<tr>
<td>5</td>
<td>Choose the contact name you would like to use as your default contact by clicking the corresponding button.</td>
</tr>
</tbody>
</table>
Click the Apply button in the bottom left hand corner of the page.

Your saved entries are displayed on the Set Defaults page.

**Setting Default Billing Contact Information**
The following steps provide details about setting and changing your default billing contact person.

<table>
<thead>
<tr>
<th>Step</th>
<th>What You Do</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>If you would like to choose a billing contact for the selected address, click on the Change Contact button. (Figure H.3)  The list of available billing contacts is displayed.</td>
</tr>
<tr>
<td>2</td>
<td>Choose the Billing Contact name you would like to use as your default billing contact by clicking on the corresponding button.</td>
</tr>
<tr>
<td>3</td>
<td>Click the Apply button at the bottom left corner of the page.  Your saved entries are displayed on the Set Defaults page.</td>
</tr>
</tbody>
</table>

**Setting Default Shipping Address Information**
The following steps provide details about setting and changing your default shipping address.

<table>
<thead>
<tr>
<th>Step</th>
<th>What You Do</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Click the Shipping Address &amp; Method hyperlink on the Set Defaults page.  The Set Defaults Shipping Address &amp; Method section is displayed. (Figure H.4)</td>
</tr>
<tr>
<td>2</td>
<td>Click the Change Address button.  The My Saved Addresses page of the Address Book is displayed.</td>
</tr>
<tr>
<td>3</td>
<td>Choose the address you would like to use as your default by clicking on the button under the Select column or by searching for an address by clicking on the Search/Enter Addresses tab.  You also have to option to select None, so that no default shipping address is specified.</td>
</tr>
</tbody>
</table>
Click the **Apply** button in the bottom left hand corner of the page. Then click **OK** if you wish to make the change.

Your saved entries are displayed on the *Set Defaults* page.

### Setting or Changing the Default Shipping Contact
The following steps provide you with details about setting or changing your default shipping contact person.

<table>
<thead>
<tr>
<th>Step</th>
<th>What You Do</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>If you would like to choose a shipping contact for the selected address, click on the <strong>Change Contact</strong> button under the <strong>Shipping Address &amp; Method</strong> section. (Figure H.5) &lt;br&gt;The list of available <em>Shipping Contacts</em> is displayed.</td>
</tr>
<tr>
<td>2</td>
<td>Choose the <strong>Contact Name</strong> you would like to use as your default shipping contact by clicking on the corresponding button.</td>
</tr>
<tr>
<td>3</td>
<td>Click the <strong>Apply</strong> button in the bottom left corner of the page. &lt;br&gt;Your saved entries are displayed on the <em>Set Defaults</em> page.</td>
</tr>
</tbody>
</table>

### Setting or Changing the Default Shipping Method
Under the **Shipping Address & Method** (Figure H.4) section you can save changes to the following items:

<table>
<thead>
<tr>
<th>Step</th>
<th>To Do This</th>
<th>What You Do</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td><strong>Set Default – Shipping Account &amp; Special Instructions</strong></td>
<td><strong>Shipping Account #/ Special Instructions</strong> – Enter the account number for your shipment via company, or enter any special shipping instructions for the order.</td>
</tr>
<tr>
<td>2</td>
<td><strong>Set Default – Shipping Method</strong></td>
<td><strong>Shipment via</strong> – Select the carrier that you want to receive your shipment from in the pull down menu.</td>
</tr>
<tr>
<td>3</td>
<td><strong>Set Default – Freight Term/FOB</strong></td>
<td><strong>Freight Term/FOB</strong> – Select Freight on Board Term for your orders.</td>
</tr>
<tr>
<td>4</td>
<td><strong>Set Default – Early Shipment Acceptance</strong></td>
<td><strong>Early Shipment Accepted</strong> – Click Yes if you will accept shipments prior to the requested shipping date specified on the order.</td>
</tr>
</tbody>
</table>
Setting or Changing the Default Pricing Information
The following steps provide details about setting or changing your defaults for Pricing Information. (Figure H.6)

<table>
<thead>
<tr>
<th>Step</th>
<th>To Do This</th>
<th>What You Do</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Display the Pricing Information Section</td>
<td>Click the Pricing Info hyperlink. (Figure E.6)</td>
</tr>
<tr>
<td></td>
<td></td>
<td>The Pricing Information section is displayed.</td>
</tr>
<tr>
<td>2</td>
<td>Set Default – Price List</td>
<td>Select a Price List from the pull-down menu.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>This list includes all the price lists available to you, based on your entitlement information in your Cisco.com User ID profile.</td>
</tr>
<tr>
<td>3</td>
<td>Set Default – Product Discount Percentage</td>
<td>Enter the Product Discount percentage that your company and Cisco Systems have agreed upon.</td>
</tr>
<tr>
<td>4</td>
<td>Set Default – Service Discount Percentage</td>
<td>Enter the Service Discount percentage that your company and Cisco Systems have agreed upon.</td>
</tr>
<tr>
<td>5</td>
<td>Save Defaults</td>
<td></td>
</tr>
<tr>
<td>---</td>
<td>----------------</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Once you have made all of your choices, click the Save Defaults button in the bottom left hand corner of the page. This saves your entries and takes you back to the Set Defaults page.</td>
<td></td>
</tr>
</tbody>
</table>
Figure 1

I.1 Modify payment and tax information in this section

Payment & Taxes

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

<table>
<thead>
<tr>
<th>Purchase Type</th>
<th>Credit Card</th>
</tr>
</thead>
<tbody>
<tr>
<td>Select One</td>
<td>None Required for P.O.</td>
</tr>
<tr>
<td>Payment Method</td>
<td>Card Number</td>
</tr>
<tr>
<td></td>
<td>Expiration Date</td>
</tr>
<tr>
<td></td>
<td>Name on Card</td>
</tr>
<tr>
<td></td>
<td>Credit Card Zip</td>
</tr>
</tbody>
</table>

Yes ☐ No ☐
Order Processing Notes

I.2 Modify service options in this section

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 placing an order, you may change them at the line level for individual line items

Service Level: None

I.3 Modify the type of acknowledgement you’ll receive for orders in this section

Order Acknowledgements

Note: Your own default e-mail is typically the routing recipient. You can add multiple e-mail addresses with commas.

Sent to the following and scheduling acknowledgments to this person:

C. For. Email

Have Cisco send order confirmation email to this email address:

Send order progress reports to this email address:

I.4 Modify your contact name and information in this section

Order Contacts

Note: For questions regarding order, contact:

<table>
<thead>
<tr>
<th>Name:</th>
<th>First</th>
<th>Last</th>
</tr>
</thead>
<tbody>
<tr>
<td>Phone:</td>
<td>4083998600</td>
<td></td>
</tr>
<tr>
<td>Fax:</td>
<td>4083998600</td>
<td></td>
</tr>
<tr>
<td>Email:</td>
<td><a href="mailto:rop3@cc.com">rop3@cc.com</a></td>
<td></td>
</tr>
</tbody>
</table>
### Setting or Changing the Payment & Taxes Information

The following steps will show you how to change your defaults for the Payments & Taxes section.  (Figure I.1)

<table>
<thead>
<tr>
<th>Step</th>
<th>To Do This</th>
<th>What You Do</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Display the Payment &amp; Taxes Information</td>
<td>Click the Payment &amp; Taxes hyperlink.</td>
</tr>
<tr>
<td></td>
<td></td>
<td><strong>The Set Defaults Payment &amp; Taxes section is displayed.</strong></td>
</tr>
<tr>
<td>2</td>
<td>Set Default – Purchase Type</td>
<td><strong>Purchase Type</strong> – Choose the type of purchase you are making from this pull down menu.</td>
</tr>
<tr>
<td>3</td>
<td>Set Default – Payment Method</td>
<td><strong>Payment Method</strong> – Choose your payment method, either Purchase Order or Credit Card.</td>
</tr>
<tr>
<td>4</td>
<td>Set Default – Credit Card</td>
<td><strong>Credit Card</strong> – Choose the name of the credit card from the list. This selection is not required if your payment method is by purchase order.</td>
</tr>
<tr>
<td>5</td>
<td>Set Default – Credit Card Number</td>
<td><strong>Card Number</strong> – Enter the credit card number here.</td>
</tr>
<tr>
<td>6</td>
<td>Set Default – Credit Card Expiration Date</td>
<td><strong>Expiration Date</strong> – Choose the month (MM) and year (YYYY) when the credit card expires.</td>
</tr>
<tr>
<td>7</td>
<td>Set Default – Name on Credit Card</td>
<td><strong>Name on Card</strong> – Enter the full name that appears on the credit card.</td>
</tr>
<tr>
<td>8</td>
<td>Set Default – Zip Code for Credit Card Billing Address</td>
<td><strong>Credit Card Zip</strong> – Enter the zip code for the credit card billing address.</td>
</tr>
</tbody>
</table>
| 9    | Set Default – Taxable                           | **Taxable** – Choose whether or not your order is taxable.  
Not applicable for Australia and Canada. |
| 10   | Set Default – Order Processing Notes            | **Order Processing Notes** – Enter notes related to the processing of your order.  
This information cannot exceed 1900 characters. |
| 11   | Save Defaults                                   | Click on **Save Defaults** in the bottom left hand corner of the page when you have completed making changes.  
**This saves your entries and takes you back to the Set Defaults page.** |
### Setting or Changing the Service Options Information

The following steps show you how to change your defaults for the Service Options section.

(Figure I.2)

<table>
<thead>
<tr>
<th>Step</th>
<th>To Do This</th>
<th>What You Do</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Display the Service Options Information</td>
<td>Click the Service Options hyperlink.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>The Set Defaults Service Options section is displayed.</td>
</tr>
<tr>
<td>2</td>
<td>Set Default – Service Level</td>
<td>Choose the appropriate service option from the Service Level drop down list.</td>
</tr>
<tr>
<td>3</td>
<td>Save Defaults</td>
<td>Once you have made all of your choices, click the Save Defaults button in the bottom left corner of the page.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>This will save your entries and take you back to the Set Defaults page.</td>
</tr>
</tbody>
</table>

### Setting or Changing the Order Acknowledgements Information

The following steps show how to change defaults for the Order Acknowledgements section.

(Figure I.3)

<table>
<thead>
<tr>
<th>Step</th>
<th>To Do This</th>
<th>What You Do</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Display the Order Acknowledgements Information</td>
<td>Click the Acknowledgements hyperlink.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>The Set Defaults Order Acknowledgements are displayed.</td>
</tr>
<tr>
<td>2</td>
<td>Set Default – Shipping and Scheduling Acknowledgements</td>
<td>Send shipping and scheduling acknowledgements to this person – <strong>Type the first and last name</strong> of the person who usually tracks or processes your orders.</td>
</tr>
<tr>
<td>3</td>
<td>Set Default – Sending Acknowledgements</td>
<td><strong>Send acknowledgment via</strong> – Choose Fax, Email, or Neither, and enter the fax number or email address to the right, if you selected Fax or Email. If you picked Neither, do not enter anything in the field to the right of the choices.</td>
</tr>
<tr>
<td>4</td>
<td>Set Default – Sending Order Confirmation Emails</td>
<td><strong>Have Cisco send order confirmation email to this email address</strong> – Type the email address of the person who tracks or processes your orders. If there are multiple email addresses, separate them with commas.</td>
</tr>
</tbody>
</table>
### Setting or Changing the Order Contacts Information

The following steps show how to change your defaults for the Order Contacts section.

(Figure I.4)

<table>
<thead>
<tr>
<th>Step</th>
<th>To Do This</th>
<th>What You Do</th>
</tr>
</thead>
</table>
| 1    | Display the Order Contacts Information | Click the **Order Contacts** hyperlink.  
The Set Defaults Order Contacts section is displayed.                                                                                               |
| 2    | Set Default – Name                | **Name** – This default is the first and last name in your Cisco.com User ID. It can be changed upon initial login to the Ordering Tool.                                                             |
| 3    | Set Default – Phone Number        | **Phone** – This default is the phone number in your Cisco.com User ID. It can be changed upon initial login to the Ordering Tool.                                                               |
| 4    | Set Default – Fax Number          | **Fax** – This default is the FAX number in your Cisco.com User ID. It can be changed upon initial login to the Ordering Tool.                                                               |
| 5    | Set Default – Email Address       | **Email** – This default is the email address in your Cisco.com User ID. It can be changed upon initial login to the Ordering Tool.                                                               |
| 6    | Save Defaults                     | Click the **Save Defaults** button in the bottom left corner of the page to save all of the changes you made.  
This saves your entries and takes you back to the **Set Defaults** page.                                                                                           |
| 7    | Returning to the Ordering Tool Home page | Click on the **Back** button.  
The **Ordering Tool Home** page is displayed.                                                                                          |
Chapter Four –

Creating and Using Order Templates
You can save time by creating order templates for those orders that you frequently submit. You can then access your templates through the Order Templates link on the Home page, or by clicking the Use Order Templates button in the What Would You Like to Do? section.

Chapter Objective
- Learn how to create and access order templates.

Definition
Order Templates – An unsubmitted order that has been named and saved for future use. An order that is frequently submitted can be made into an order template, thus saving time when placing the same order in the future. The next time the order needs to be placed, the template can be accessed, modified slightly if necessary, and then submitted. The template remains for future use.

How to Use Order Templates

Saving an Order as a Template
The following steps show you how to save an order as a template.

<table>
<thead>
<tr>
<th>Step</th>
<th>What You Do</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>On the Ordering Tool Home page fill out the required fields to create an order (See Chapter 5) or choose an order under the Open Orders section. The Main Order Form of the Ordering Tool appears on screen.</td>
</tr>
<tr>
<td>2</td>
<td>After you have completed all the areas of the order that you want to include in the order template (address information, contacts, adding products), click the Save as Template button (Figure J.1) at the bottom of the Main Order Form. (Figure J) The Save as a Template page is displayed. (Figure K)</td>
</tr>
</tbody>
</table>

Note: Steps continue after the figures on the following page.
Figure J

Click to save your template

Figure K

Type a name for the template

Type a template description

Click to save the template
In this window enter the **Template Name** (Figure K.1) you will use to reference the template. Also enter the **Template Description** (Figure K.2) to add details about how the template is going to be used.

Once you have entered this information, click the **Save as Template** button. (Figure K.3) All order information is copied to the template except MarketPlace (MP) Number, Purchase Order Number, and Order Description.

The **Order Template** page appears on screen. (Figure L) It looks very similar to the **Main Order Form**.

Additional changes can be made to the template. Click **Save Template** to save all of the final changes just made.

You can now create an order from this template by clicking **Create as New Order**. You do not have to immediately use the new template. Click the Ordering Tool Home link under the Cisco Systems logo in the upper left corner of the Order Template page to return to the Ordering Tool Home page.

---

**Figure L**

Click to save your template
Figure M

N.1 – Click to delete the selected template.

N.2 – Click in the select box to choose a specific template.

N.3 – Click to delete the selected template.

M.1 – Click Use Order Templates

Figure N

What would you like to do?

Select a task from the option buttons below

Create a New Order
Use Order Templates
Set Details
Managing Order Templates
The following steps show you how to manage your order templates.

**Preview a Template**

<table>
<thead>
<tr>
<th>Step</th>
<th>What You Do</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>On the <em>Ordering Tool Home</em> page click the <strong>Use Order Templates</strong> button in the <em>What would you like to do?</em> section. (<a href="#">Figure M.1</a>)&lt;br&gt;&lt;br&gt;<em>My Saved Templates</em> page is displayed. (<a href="#">Figure N</a>)</td>
</tr>
<tr>
<td>2</td>
<td>Click on the <strong>template name link</strong> in the <strong>Name</strong> column. (<a href="#">Figure M.1</a>)&lt;br&gt;&lt;br&gt;The <em>Order Template</em> page appears where you can view the template details. At this point you will not actually be creating an order, you will be modifying only the template.</td>
</tr>
<tr>
<td>3</td>
<td>Return to the <em>Ordering Tool Home</em> page by clicking <strong>Back</strong>, or the link under the Cisco Systems logo in the upper left corner of the templates page.</td>
</tr>
</tbody>
</table>

**Modify a Template**

<table>
<thead>
<tr>
<th>Step</th>
<th>What You Do</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Click the <strong>template name</strong> in the <strong>Name</strong> column. (<a href="#">Figure N.1</a>)&lt;br&gt;&lt;br&gt;<em>The Order Template</em> page is displayed.&lt;br&gt;&lt;br&gt;At this point you are not creating an order, but modifying the template only.</td>
</tr>
<tr>
<td>2</td>
<td>Make any necessary changes to the template, and then save.</td>
</tr>
<tr>
<td>3</td>
<td>Return to the <em>Ordering Tool Home</em> page by clicking <strong>Back</strong>, or the link under the Cisco Systems logo in the upper left hand corner of the templates page.</td>
</tr>
</tbody>
</table>

**Create an Order from a Template**

<table>
<thead>
<tr>
<th>Step</th>
<th>What You Do</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Choose the <strong>template</strong> in the <strong>Select</strong> column for the order you want to create. (<a href="#">Figure M.2</a>)</td>
</tr>
<tr>
<td>2</td>
<td>Click the <strong>Create as New Order</strong> button. (<a href="#">Figure M.4</a>)&lt;br&gt;&lt;br&gt;A screen titled <em>Create an Order from a Template</em> is displayed. (<a href="#">Figure N</a>)</td>
</tr>
<tr>
<td>3</td>
<td>Enter the <strong>Order Description</strong> (<a href="#">Figure K.1</a>) and then click <strong>OK</strong>. (<a href="#">Figure N.2</a>)</td>
</tr>
</tbody>
</table>
The Main Order Form for the newly created order is displayed on your screen.

You can now click Back, or the Ordering Tool Home link under the Cisco Systems logo in the upper left hand corner of the page to return to the Ordering Tool Home page.

### Delete a Template

<table>
<thead>
<tr>
<th>Step</th>
<th>What You Do</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Click the box in the Select column for the template(s) you want to delete. (Figure M.2)</td>
</tr>
</tbody>
</table>
| 2    | Click the Delete button. (Figure M.3)  
A message asks you to confirm the deletion. Click Yes, Please Delete to complete the deletion. |
| 3    | You can now click Back, or the Ordering Tool Home link under the Cisco Systems logo in the upper left corner of the page to return to the Ordering Tool Home page. |

Figure O

[Image: Order: Create an Order from a Template - Netscape]

Cisco Ordering Tool  
Create an Order from a Template  
Enter a description or your new order now, or you can modify the description later from your order's Header Details screen.

O.1 Type a description for your order in the Order Description text box.
Chapter Five –

Create a Shopping Cart
This chapter provides you with information about creating a shopping cart. You’ve already set defaults; so some of the fields will be (filled-in) pre-populated. When you complete filling out the information on this page, you will then go to the Main Order Form to complete the remaining shopping cart information.

Any information you enter in the Creating Orders section of the Home Page will be lost if you click Use Order Templates or Set Defaults on the Ordering Tool navigation bar.

Chapter Objective
- Learn how to begin to create a shopping cart.

How to Create a Shopping Cart

Figure P

Click to create a shopping cart
**Begin to Create a New Shopping Cart**
The following steps show you how to start creating a shopping cart. Order type and price list entries must be made on this form; they are required fields. The remaining fields can be filled out or selected now too, or you can fill them out later.

<table>
<thead>
<tr>
<th>Step</th>
<th>What You Do</th>
</tr>
</thead>
</table>
| 1    | Click [Create an Order](#). ([Figure P.1](#)) on the *Ordering Tool Home* page.  
This is a required field.  
*Create an Order* is displayed on your screen. ([Figure Q](#)) |
| 2    | Select one of the following *Order Types*. This is a required field. ([See Figure Q.1](#)):  
**Standard** – The basic order type used by Cisco customers to order Cisco products.  
**Service Only** – Service Only orders contain only service items. Since products will not be shipped as a result of this order, shipping information is unnecessary.  
**Trade-In/Promotional** – Used to place orders for Cisco Technology Migration Plan (CTMP), Custom Trade-In (Non-CTMP programs), and other Promotional Programs.  
**Multinational** – Orders that are billed to one country and shipped to another, or the order is billed and shipped to one country with the intent of sending the equipment out of the country at a later date. Cisco provides import services at the destination country for Cisco Exported Multinational Orders. Import service charges are billed to you. |
| 3    | [Price List](#) ([Figure Q.2](#)) – Select the type of price list that your company and Cisco have agreed upon. |
| 4    | [Order Description](#) ([Figure Q.3](#)) – Enter text that uniquely describes your shopping cart.  
An order description can be a brief narrative, an order reference number, or a customer number. This description will not be included with the order when it is submitted. For information you want included with the submitted order, use the notes fields on other pages of the Ordering Tool. For a summary of the notes fields and their locations, see All Order Details. |
| 5    | [Product Discount](#) ([Figure Q.5](#)) – Enter the product discount percentage your company and Cisco Systems have agreed upon.  
This can also be entered at the line level on the Line Item Details page. |
| 6    | [Service Discount](#) ([Figure Q.4](#)) – Enter the service discount percentage your company and Cisco Systems have agreed upon.  
This can also be entered at the line level on the Line Item Details page. |
<table>
<thead>
<tr>
<th>7</th>
<th><strong>Purchase Type</strong> (Figure Q.6) – Choose from the following PO Types: Resale, Leasing, Internal Business Use/Infrastructure, Service Provision Use, and Demo/Eval.</th>
</tr>
</thead>
<tbody>
<tr>
<td>8</td>
<td><strong>PO #</strong> (Figure Q.9) – The value will come from your Ariba Buyer system once your purchase requisition is approved and submitted to Cisco.</td>
</tr>
</tbody>
</table>
| 9 | **Requested Ship Date** (Figure Q.8) – Enter the date on which you want Cisco to ship your order in MM/DD/YYYY format.  
A value entered in the Need By Date field within Ariba Buyer will be mapped to the requested ship date. If no date is selected, Cisco will default to tomorrow’s date. |
| 11 | **Service Level** (Figure Q.10) – Choose the appropriate service level. |
| 12 | **End User Information** (Figure Q.11)  
These fields are required for the following reasons: If the order is a contract order; if the purchase type for the order is resale; or if items on the order contain encryption.  
**Select End User** – Choose the name of the organization that will be the ultimate recipient of the equipment on this order, if the ultimate recipient is not your organization.  
**Add new End User** – Enter the end user company name if it is not in the list for Select End User.  
**End User City** – Enter the city where the end user organization is located.  
**State/Province** – Choose the end user company’s U.S. state or Canadian province, if applicable.  
**Country** – Choose the country where the end user company is located.  
**End User Market** – Choose the end user company’s vertical market. |
| 13 | **Click Continue** when you have completed all of the required information.  
(Figure Q.12)  
The Main Order Form is displayed. |
Create an Order

Instructions:
1. Fill out Basic Order Information
2. Fill out End User Information
3. Click Continue to go to the Order Form

Q.1 – Select an order type

Q.2 – Select a price list

Q.3 – Enter an order description

Q.4 – Enter a service discount

Q.5 – Enter in product discount

Q.6 – Select a purchase type

Q.7 – Enter the requested ship date

Q.8 – Enter a purchase order number

Q.9 – Enter a purchase order number

Q.10 – Select a service level

Q.11 – Select and enter end user information

Q.12 – Click Continue when you have finished filling out and selecting from the above fields.
Chapter Six –

Main Order Form
The Main Order Form is the central location from which most of your order information is supplied. The following list describes what can be done on the form:

- Add configurable products, spares and service
- Link to the Configurator to configure products
- View shipping, billing, PO number and requested ship date
- Submit your order or create order templates
- Access saved configurations and search for items

Chapter Objectives
- Learn how to enter new products, quantities, and discounts.
- Learn how to edit, delete and save order information.
Figure R

R.1 – Get Saved Configurations

R.2 – Configure products

R.3 – Clear selections

R.4 – Enter

R.5 – Perform a product search

R.6 – Enter service line details

R.7 – Save order

R.8 – Save order as a template

R.9 – Check order for errors

R.10 – Transfer order to Ariba

**Buttons on the Main Order Form**

**Get Saved Config** (Figure R.1) – Click this button to search for your saved configurations.

**Configure** (Figure R.2) – Click this button to select software, cables, memory, and other options associated with a product.

**Clear** (Figure R.3) – Click this button to delete all entered information. Deleted information will not be applied to the order.

**Enter** (Figure R.4) – Located on the editing console, the enter button applies the new or changed line item information to the order.

**Item Search** (Figure R.5) – This is useful when you are unsure of a product’s name. You can search by product number, product description, or product family.
Service/Line Details (Figure R.6) – Click on this button to choose service, provide end user, and ship set details at the line item level. You can also edit configuration details for already configured items.

Check for Errors (Figure R.7) – Click this button to have the Ordering Tool check your line item details and configurations for correctness and completeness. It displays a message if you need to make a correction.

Save Order (Figure R.8) – Click this button to save all new or revised information on the order form.

Save as Template (Figure R.9) – Click this button to save your order as a template.

Punch out to Ariba (Figure R.10) – Click this button to transfer your order to Ariba.

Verify All Configs – Selecting this button is equivalent to selecting each previously configured product line-by-line and running the configuration check. This button verifies any configurations currently loaded in the order that are still valid, and sets their status to verified. Any invalid configurations remain as unverified status.
Fields for Entering Line Items

Figure S

S.1 Enter the unit price
S.2 Enter the discount
S.3 Enter the quantity you want to purchase
S.4 Select the line number
S.5 Enter the product name

Unit Price (Figure S.1) – The price of the product calculated by taking the list price and applying any customer discounts.

Discount (Figure S.2) – The percentage of discount off the list price of products or services, as agreed upon by the customer’s organization and Cisco.

Qty. (Figure S.3) – The number of chassis you are ordering.

Line # (Figure S.4) – The line number of the product on your order. A value of new will remain until you complete the line and click Enter or press Enter on your keyboard.

Enter Product (Figure S.5) – Enter the unique part number identifying a product in this field.
Additional Fields for Viewing and Modifying Line Items

Figure T

T.1  Unit price is displayed here.

T.2  Enter the discount.

T.3  Shows the list price of the line item.

T.4  The quantity multiplied by the list price. Includes the discount percentage.

T.5  Shows the status of the line.

T.6  Click in the box to select the line to be deleted.

**Unit Price** (Figure T.1) – The price of the product calculated by taking the list price and applying any customer discounts.

**Discount** (Figure T.2) – The percentage of discount off the list price of products or services, as agreed upon by the customer’s organization and Cisco.

**List Price** (Figure T.3) – The price of a product as it appears on the base price list, in US dollars, prior to the application of any local currency exchange rates, country uplifts or wholesale discounts.

**Extended Price** (Figure T.4) – The total price for a line item.

**Status** (Figure T.5)

- **Complete**: Line item details, such as site or shipping information, are complete.
- **Incomplete**: Line items details are missing or incomplete. Clicking this link displays Line Item Details.

- **Unverified**: The configuration status of a product indicating that its configuration has *not* been completed and verified as correct.

- **Verified**: The configuration status of a product indicating that its configuration has been completed and verified as correct.

Delete (Figure T.6) – Click to check the box for deletion of the item upon saving the order.

### Managing Lines on the Main Order Form

#### Add New Line Items

The following steps show you how to enter new line items on an order. Some of the information is described in detail in other chapters.

<table>
<thead>
<tr>
<th>Step</th>
<th>What You Do</th>
</tr>
</thead>
</table>
| 1    | On the Ordering Tool Home page (Figure P) click on **Create an Order**. (Figure P.1)  

*Create an Order* is displayed. *(Figure Q)* |
| 2    | Complete the required fields to create an order on the Ordering Tool Home page (See Chapter 5) or choose an open order.  

*The Main Order Form* is displayed. |
| 3    | Select **New** for the Line #. |
| 4    | Enter the product number exactly as it appears in the price list.  

If you don’t know the product number, click **Item Search**. (See Chapter 13.) To order a spare part, enter an equal sign (=) at the end of the product number, for example **CAB-AC=**. |
| 5    | Enter the **Qty** (Quantity) and the **Discount** percentage your company and Cisco have agreed upon.  

*The Unit Price* is then automatically calculated. |
| 6    | To add options (minor lines) for a configurable item, either use a saved configuration by selecting **Get Saved Config** (See Chapter 14) or choose the line and click the **Configure** button. (See Chapter 12.) |
| 7    | To define service, end user, and shipset details at the line item level, click **Service/Line Details**. (See Chapter 13) |
Modifying an Existing Line Item
The following steps show you how to modify an existing line item on an order.

<table>
<thead>
<tr>
<th>Step</th>
<th>What You Do</th>
</tr>
</thead>
</table>
| 1    | Choose the line number in the Line # pull down menu for the item you want to modify.  
     | Line item data is displayed. |
| 2    | Modify information as needed. |

Deleting Line Items
The following steps show you how to delete a line item on an order.

<table>
<thead>
<tr>
<th>Step</th>
<th>What You Do</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Check the box in the Delete column for the line item.</td>
</tr>
</tbody>
</table>
| 2    | Click Save Order.  
     | The line item is deleted. |

Saving an Order
The following steps show you how to save an order.

<table>
<thead>
<tr>
<th>Step</th>
<th>What You Do</th>
</tr>
</thead>
</table>
| 1    | Click the Save Order button in the lower left corner of the page.  
     | The Save button turns blue. |
Chapter Seven –
Header Details
Header Details provides one location to manage details that apply to every line in your order. It contains many of the same fields as Set Defaults.

Chapter Objective
- How to change all the sections within the All Header Details section of the Ordering Tool.

Definitions
Carton Notes – Enter any notes you want to appear on carton labels, packing slip, and invoices (commercial and remittance) for all future orders.

Change Address – Displays the My Billing Addresses or My Saved Addresses page, where you can change the addresses.

Change Contact – Displays the Select a Contact page within the Address Book, where you can change default contact information. The contact is the person with whom Cisco should communicate regarding billing or shipping questions. Click Change Contact in the Billing Information section for a billing contact, and Change Contact in the Shipping Address & Method section for a shipping contact.

Cisco Prod. Number/Competitor Prod. Description – If you are returning Cisco product enter the Cisco Part Number or use the Search Products button to find valid Cisco Part Numbers. If you are returning a Competitive product enter the Competitive product description.

Delivery Option – Lets you choose whether or not to merge all items into one shipment. If you choose Merge Order, you override multiple shipsets.

Early Shipment Accepted? – Click Yes if you will allow Cisco to ship a partial order or all of your order prior to the requested ship date.

Freight Term/FOB – Indicates the seller and buyer’s responsibilities during transportation of purchased product from the manufacturing location, to Title Transfer, to the customer.

Equipment Manufacturer – Cisco Systems or a competitor.

Order Exporter (Multinational Orders Only) – You can choose between having Cisco handle the export paperwork for your orders or having your company handle the export/import paperwork.

Quantity – The number of chassis you are ordering.

Ship All Items Separately – This selection informs Cisco if you would like all line items shipped as if they are individual orders. No should be selected if you would like Cisco to ship products
together whenever possible; this extends shipset lead times. Yes should be selected if you would like Cisco to ship each line item as individual shipments.

Note that Cisco manufactures worldwide, so multiple line orders will typically arrive in separate deliveries. Selecting *Ship All Items Separately - No* will reduce the number of deliveries.

**Shipment via** – Choose the carrier for shipment of your order.

**Shipping & Packaging Notes** – Enter any default shipping and packaging notes that you want to appear on packing slips and invoices for all future orders. You can change this information if necessary on the Header Details page when you are creating an order.

**Shipping Account #/Special Instructions** – If you would like Cisco to bill your account number with the selected carrier, rather than invoicing you for the shipment, type the account number you have with the carrier. Also type any special shipping instructions.

**Entering Order Details**

Figure U
**Display the All Header Details Page**

The following step shows you how to display the All Header Details page.

<table>
<thead>
<tr>
<th>Step</th>
<th>What You Do</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>From within an order, click the <strong>Header Details</strong> tab (Figure U.1) at the top of the <strong>Main Order Form</strong> page. (Figure U)</td>
</tr>
</tbody>
</table>

The **All Header Details** page (Figure V) is displayed

---

**Figure V**

**All Header Details**

- **Apply changes to your entire order**
  - Modifications to your Order Header Details will be applied to your **entire order**.
  - To save your changes, click the **Save** button in the lower frame.

**Billing Information**

- **Address**
  - 1234 Main Street
  - ANAHEIM California 92804
  - United States

- **Contact**
  - Wu Jave
  - Phone: 1234-4567
  - Fax
  - Email: jave@regression.com
  - Department: Accounting
  - Mail Stop

---

V.1 Click to enter address changes

V.2 Click to enter contact changes
### Changing the Billing Address
The following steps show you how to change the billing address.

<table>
<thead>
<tr>
<th>Step</th>
<th>What You Do</th>
</tr>
</thead>
</table>
| 1    | From the *Billing Information* section click **Change Address**. *Make sure this Bill-to matches the Bill-to in your Ariba system.* When your order is submitted, Cisco only recognizes the Bill-to as noted in the punchout site. (Figure V.1)  
  
The *My Billing Addresses* page is displayed. |
| 2    | Choose the new billing address by clicking the button in the **Select** column. |
| 3    | Click **Apply**.  
  
The *All Header Details* page is displayed with the new billing address. |

### Adding or Changing the Billing Contact Person
The following steps show you how to add or change the Billing Contact Person.

<table>
<thead>
<tr>
<th>Step</th>
<th>What You Do</th>
</tr>
</thead>
</table>
| 1    | From the *Billing Information* section click **Change Contact**. (Figure V.2)  
  
The *Select a Contact* page is displayed. |
| 2    | Choose a new contact by checking the button in the **Select** column, or click the **New Contact** button to enter a contact person if they are not listed on the **Select a Contact** page |
| 3    | Click on **Apply**.  
  
The *All Header Details* page is displayed. |
Viewing the Shipping Address

Your Ship-to will most likely will be blank in the Cisco punchout site. Cisco takes the ship-to as it is passed on your Ariba PO.

Canadian Tax – If you are a Canadian user and shipping a product to a Canadian ship-to, a Canadian Tax must be entered. Canadian User must enter the ship-to address in the Cisco punchout site in order for the site to determine what tax values apply. In this screen, scroll down to the Payment and Taxes section; notice the Canadian Tax field. The Cisco punchout site has populated the valid Canadian Tax types based on the ship-to. Please select the appropriate one.
The following steps show you how to add or change the **Shipping Address**.

<table>
<thead>
<tr>
<th>Step</th>
<th>What You Do</th>
</tr>
</thead>
</table>
| 1    | In the *Shipping Address & Method* section click on *Change Address*. (Figure W.5)  
  
  The *My Saved Addresses* page is displayed. |
| 2    | Choose a saved address from *My Addresses*, or search from existing addresses by clicking the *Search* button.  
  
  The *Search* screen is displayed. |
| 3    | Enter search criteria or type a new address, and then click *Continue*.  
  
  The *Search Results* that met your criteria are displayed. |
| 4    | Choose the address by checking the button in the *Select* column. |
| 5    | Click on *Apply*.  
  
  The *All Header Details* page is displayed. |

**Adding or Changing the Shipping Contact Person**

The following steps show you how to add or change the shipping contact person.

<table>
<thead>
<tr>
<th>Step</th>
<th>What You Do</th>
</tr>
</thead>
</table>
| 1    | From the *Shipping Address & Method* section click on *Change Contact*. (Figure W.9)  
  
  The *Select a Contact* page is displayed. |
| 2    | Choose a new contact by checking the button in the *Select* column, or click the *New Contact* button to enter a contact person if they are not listed on the *Select a Contact* page |
| 3    | Click the *Apply* button in the bottom left corner.  
  
  The *All Header Details* page is displayed. |
## Adding or Changing the Shipping Method Information

In the Shipping Address & Method section you can save changes to the following items:

<table>
<thead>
<tr>
<th>Step</th>
<th>To Do This</th>
<th>What You Do</th>
</tr>
</thead>
</table>
| 1    | Requested Ship Date               | **Requested Ship Date** (Figure W.4) – Enter the date on which you want Cisco to ship your order in MM/DD/YYYY format.  
                                            The date must be later than today but no later than 120 days from today.                                                                 |
| 2    | Shipping Account #/Special Instructions | **Shipping Account #/ Special Instructions** (Figure W.3) – Enter the Account Number for your Shipment via company, or enter special shipping instructions for the order. |
| 3    | Shipment via                       | **Shipment via** (Figure W.2) – Choose the carrier you want to ship your product.                                                            |
| 4    | Freight Term/FOB                   | **Freight Term/FOB** (Figure W.1) – Choose a Freight on Board term.                                                                         |
| 5    | Delivery Option                    | **Delivery Option** (Figure W.6) – Choose if you want to merge your order.                                                                   |
| 6    | Early Shipment Acceptance          | **Early Shipment Accepted** (Figure W.7) – Click Yes to accept shipments prior to the requested ship date specified.                          |
| 7    | Partial Shipment Acceptance        | **Ship All Items Separately** (Figure W.8) – Click Yes if you will accept partial shipments from Cisco. Click No if you want the entire order to ship at one time. |
| 8    | Staging Information                | **Is this order part of an approved Professional Services Staging Project to be completed in San Jose, CA?** (Figure W.9)  
                                            – Choose this option if you are working on a staging project that will take place in San Jose, CA.                                    |
| 9    | Commission Code                    | **Commission Code** (Figure W.10) – Choose the appropriate name from the pull down menu.                                                  |
| 10   | Shipping and Packaging Notes       | **Shipping & Packaging Notes** (Figure W.11) – Additional notes that specify special requirements for Shipping or Packaging.           |
| 11   | Notes to Appear on Packaging       | **Carton Notes** (Figure W.12) – These are notes that need to appear on the carton labels that go on the outside of the boxes your product will be shipped in. |
| 12   | Saving Header Details              | Click **Save** to save all changes made on Header Details.  
                                            The **Save** button turns blue.                                                                                      |
End User

Note: Required for Resale and Service Provision purchase type. Recommended for.

Stock

Adding or Changing End User Information
The following steps show you how to add or change End User Information. End User information is required for all resale orders and contract orders. It is also required for all items containing encryption. In the End User Information section (Figure V) you can modify the following:

<table>
<thead>
<tr>
<th>Step</th>
<th>To Do This</th>
<th>What You Do</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Access the Address Book</td>
<td><strong>Change Address</strong> (Figure X.1) – Click the Change Address Button to access the Address Book.</td>
</tr>
<tr>
<td>2</td>
<td>Select an End User</td>
<td>Choose an end user and address from your list of Saved Addresses or search for a new one.</td>
</tr>
<tr>
<td>3</td>
<td>Apply End User to the Order</td>
<td>Apply the end user and address to your order.</td>
</tr>
<tr>
<td>4</td>
<td>Choose Market</td>
<td><strong>End User Market</strong> (Figure X.2) – Choose the end user company’s primary market in which they do business.</td>
</tr>
<tr>
<td>5</td>
<td>Saving the Order</td>
<td>Click <strong>Save Order</strong> to save all changes made on Header Details.</td>
</tr>
</tbody>
</table>

The **Save Order** button turns blue to indicate that changes are saved.
**Adding or Changing Payment and Taxes Information**

In the **Payment and Taxes** section (Figure U) you can modify the following:

<table>
<thead>
<tr>
<th>Step</th>
<th>To Do This</th>
<th>What You Do</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Choose the Purchase Type</td>
<td><strong>Purchase Type</strong> (Figure Y.1) – Choose the type of purchase for the order.</td>
</tr>
<tr>
<td>2</td>
<td>Choose the Payment Method</td>
<td><strong>Payment Method</strong> (Figure Y.2) – Choose Purchase Order or Credit Card.</td>
</tr>
<tr>
<td>3</td>
<td>Choose Purchase Order Payment Method Options</td>
<td>The following fields are required for a Purchase Order payment method:</td>
</tr>
<tr>
<td></td>
<td></td>
<td><strong>PO Number</strong> (Figure Y.3) – Provide your internal purchase order number.</td>
</tr>
<tr>
<td></td>
<td></td>
<td><strong>Terms</strong> (Figure Y.4) – Choose your payment terms. If anything other than 30 net, your order will go on hold for review.</td>
</tr>
<tr>
<td>4</td>
<td>Choose the Credit Card Payment Method Options</td>
<td>The following fields are required for a credit card payment method (Figure Y.5):</td>
</tr>
<tr>
<td></td>
<td></td>
<td><strong>Credit Card</strong> – Choose the name of the credit card.</td>
</tr>
<tr>
<td></td>
<td></td>
<td><strong>Card Number</strong> – Enter the credit card number.</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>---</td>
<td>---</td>
<td>---</td>
</tr>
<tr>
<td>Expiration Date – Choose the month (MM) and year (YYYY).</td>
<td>Name on Card – Enter the exact name that appears on the credit card.</td>
<td>Credit Card Zip – Enter the zip code for the credit card billing address.</td>
</tr>
<tr>
<td>Choosing if the Order is Taxable</td>
<td>Taxable (Figure Y.6) – Choose whether or not your order is taxable.</td>
<td>Users from Australia and Canada will see different options.</td>
</tr>
<tr>
<td>Entering the Order Processing Notes</td>
<td>Order Processing Notes (Figure Y.7) – Enter notes (up to 1900 characters) related to the processing of your order.</td>
<td>This information cannot exceed 1900 characters.</td>
</tr>
<tr>
<td>Saving the Order</td>
<td>Click Save Order to save all changes made on Header Details.</td>
<td>The Save Order button turns blue to indicate that changes have been saved.</td>
</tr>
</tbody>
</table>
Order Acknowledgements

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

Z.1  
Acknowledgements Contact Person 
Send shipping and scheduling acknowledgements to this person  
Jane Yu  
First name, last name  
wu@regression.com  
Fax number or email address based on your selection.  
If you selected neither, leave blank.

Z.2  
Send Acknowledgement Via  
Fax  
Email  
Neither

Adding or Changing Order Acknowledgments Information

In the Order Acknowledgments section (Figure Z) you can modify the following:

<table>
<thead>
<tr>
<th>Step</th>
<th>To Do This</th>
<th>What You Do</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Shipping and Scheduling Acknowledgements</td>
<td>Send shipping and scheduling acknowledgements to this person (Figure Z.1) – Type the first and last name of the person who tracks or processes your orders.</td>
</tr>
<tr>
<td>2</td>
<td>How to Send Acknowledgements</td>
<td>Send acknowledgement via (Figure Z.2) – Click Fax, Email, or Neither. Type in the fax number or email address based on your selection.</td>
</tr>
<tr>
<td>3</td>
<td>Saving the Order</td>
<td>Click Save Order to save all changes made on Header Details.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>The Save Order button turns blue to indicate the changes have been saved.</td>
</tr>
</tbody>
</table>
## Adding or Changing Order Contact Information

In the **Order Contacts** section (Figure AA) you can modify the following:

<table>
<thead>
<tr>
<th>Step</th>
<th>To Do This</th>
<th>What You Do</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Enter Name</td>
<td><strong>Name</strong> (Figure AA.1) – Provide the first and last name of the person who should be contacted if there are questions about the order.</td>
</tr>
<tr>
<td>2</td>
<td>Enter Phone Number</td>
<td><strong>Phone</strong> (Figure AA.2) – Provide the contact person’s phone number.</td>
</tr>
<tr>
<td>3</td>
<td>Enter Fax Number</td>
<td><strong>Fax</strong> (Figure AA.3) – Provide the contact person’s fax number.</td>
</tr>
<tr>
<td>4</td>
<td>Enter Email Address</td>
<td><strong>Email</strong> (Figure AA.4) – Provide the contact person’s email address.</td>
</tr>
<tr>
<td>5</td>
<td>Saving the Order</td>
<td>Click <strong>Save Order</strong> to save all changes made on Header Details.</td>
</tr>
</tbody>
</table>

The **Save Order** button turns blue to indicate that changes have been saved.
Chapter Eight – ShipSets

ShipSets are used to specify multiple destinations for items on an order. A shipset is a grouping of items within an order that have the same shipping destination, requested ship date, and freight terms/FOB. An order with one shipping destination has one shipset, the default shipset. To save time, you can copy a selected shipset as the basis for creating a new shipset.

You can ship to multiple destinations on one order submission by breaking your order into multiple shipsets, then changing the ship-to addresses as necessary. Please be advised that Cisco may be required to break apart your shipsets in order to accommodate shipments of line items that are produced in different locations worldwide.

Chapter Objectives
- Learn how to create a new shipset.
- How to use an existing shipset to create a new shipset.
- How to view and modify shipsets.
- How to delete a shipset.

How to Create ShipSets for Your Order

Figure BB
Creating a New ShipSet

The following steps will show you how to create a new shipset:

<table>
<thead>
<tr>
<th>Step</th>
<th>What You Do</th>
</tr>
</thead>
</table>
| 1    | On the **Ordering Tool Home** page fill out the required fields to create an order (see Chapter 4) or choose an order under the **Open Orders** section.  

   《The **Main Order Form** of the Ordering Tool is displayed.》 |
| 2    | On the **Main Order Form** (Figure BB) click the **ShipSets** tab (Figure BB.1) at the top of the page.  

   《The **ShipSets** page is displayed. (Figure CC)》 |
| 3    | Click on the **New ShipSet** button. (Figure CC.5)  

   《The **ShipSets: View/Modify** page (Figure DD) appears.》 |
| 4    | In the **Lines in Order** window choose the lines you want to be a part of the new shipset. (Figure DD.2)  

   《Click the **Add** button (Figure DD.3) for a line item or the **Add All** button (Figure DD.5) if you want all line items to be added.》 |
| 5    | Once the lines have been added you must choose the **Shipping Address** (Figure DD.8) and **Shipping Options** (Figure DD.7) for the new shipset.  

   《When you are finished click **Save**. (Figure DD.9)》 |
| 6    | The **ShipSets** page is displayed after you save. |
Figure CC

1. Select column
2. Delete button
3. Copy button
4. View/Modify button
5. New ShipSet button
Figure DD

E-Procurement User Guide
Internet Commerce

Step 1: Assign Lines to Your ShipSet

- Z.1 Lines In ShipSet
- Z.2 Lines In Order window
- Z.3 Add button
- Z.4 Remove button
- Z.5 Add All button
- Z.6 Remove All button
- Z.7 Shipping Options
- Z.8 Shipping Address

Step 2: Assign Shipping Attributes

- Z.9 Save Button
Using an Existing ShipSet to Create a New ShipSet
The following steps will show you how to use an existing shipset to create a new shipset.

<table>
<thead>
<tr>
<th>Step</th>
<th>What You Do</th>
</tr>
</thead>
</table>
| 1    | On the ShipSets page choose the shipset that you wish to use as a basis for the new shipset you want to create, then click Copy. (Figure CC.3)  
  The ShipSets: View/Modify page appears. |
| 2    | In the Lines in Order window choose the lines you want to be part of the new shipset. |
| 3    | Click the Add button or the Add All button if there are multiple lines to add. |
| 4    | Once the lines are added you must choose the Shipping Address and Shipping Options for the new shipset. |
| 5    | When you are finished click Save.  
  The ShipSet page is displayed after you save. |

Viewing and Modifying ShipSets
The following steps will show you how to view and modify shipsets.

<table>
<thead>
<tr>
<th>Step</th>
<th>What You Do</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>On the ShipSets page in the Select column (Figure CC.1) choose the shipset to modify and click the View/Modify button. (Figure CC.4)</td>
</tr>
<tr>
<td>2</td>
<td>In the Lines in Order and Lines in ShipSet (Figure DD.1) windows you can choose the lines you want to add or remove from the shipset.</td>
</tr>
<tr>
<td>3</td>
<td>Then click the Add button or the Add All button if you have multiple lines to be added. Click the Remove button (Figure DD.4) or the Remove All button (Figure Z.6) if you have multiple lines to be removed.</td>
</tr>
<tr>
<td>4</td>
<td>Once the lines have been added or removed you can also make changes to the Shipping Address and Shipping Options for the shipset.</td>
</tr>
</tbody>
</table>
| 5    | When you are finished click the Save button.  
  The ShipSet page will be displayed after you save. |
## Deleting a ShipSet

The following step shows you how to delete ShipSets.

<table>
<thead>
<tr>
<th>Step</th>
<th>What You Do</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Choose the shipset to be deleted by clicking the box in the Select column, then click Delete. The page is refreshed and redisplay the ShipSets page.</td>
</tr>
</tbody>
</table>
Chapter Nine – All Order Details

All Order Details summarizes your entire order. You are unable to change the information on this page; it is for review purposes only. Changes required to order information reflected on All Order Details must be changed on the Main Order Form, Header Details, and ShipSets.

Chapter Objective
- Learn to use All Order Details to review your order before submission to Cisco.

Definitions
Back to Order Form – Displays the Main Order Form.
Check for Errors – Checks your line item details and configurations for correctness and completeness, and displays a message if you need to make a correction.
Submit Order – Runs a check on the order for errors and submits complete orders to Cisco.

How to Use the All Order Details Page

Figure EE
## Accessing the All Order Details Page

The following step shows you how to access the All Order Details page.

<table>
<thead>
<tr>
<th>Step</th>
<th>What You Do</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>From within an order click the <strong>All Order Details</strong> tab (Figure EE.1) at the top of the <strong>Main Order Form</strong> page. (Figure EE)</td>
</tr>
</tbody>
</table>

The **All Order Details** page (Figure FF) is displayed.

---

**Figure FF**

- **FF.1** Main Order Form tab
- **FF.2** Header Details tab
- **FF.3** ShipSets tab
**Modifying Order Information**

There may be times when you are viewing All Order Details and discover that a change on the order is needed. The following steps show you how to access pages where those changes can be made:

<table>
<thead>
<tr>
<th>Step</th>
<th>To Do This</th>
<th>What You Do</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Change billing, shipping, contact, end user, payment and tax, or order</td>
<td>Click the <strong>Header Details</strong> tab. (Figure FF.2)</td>
</tr>
<tr>
<td></td>
<td>acknowledgment information for all items on the order</td>
<td>See Chapter 7 for more details on this section.</td>
</tr>
<tr>
<td>2</td>
<td>Assign a different shipping address and method to some, but not all items</td>
<td>Click the <strong>ShipSets</strong> tab. (Figure FF.3)</td>
</tr>
<tr>
<td></td>
<td>in the order</td>
<td>See Chapter 8 for more details on this section.</td>
</tr>
<tr>
<td>3</td>
<td>To modify end user information for some, but not all items on the order.</td>
<td>Click the <strong>Main Order Form</strong> tab (Figure FF.1), choose a line, and then click the <strong>Service/Line Details</strong> button.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>This will bring you to the <strong>Line Item Details</strong> page.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>See Chapter 14 for more details on the <strong>Line Item Details</strong> section.</td>
</tr>
</tbody>
</table>
Chapter Ten – Address Book

There are two ways to access the Address Book from within the Ordering Tool. An Address Book button is located on the top navigation bar throughout the Ordering Tool. Clicking any of the Change Address buttons within the Ordering Tool can also access the Address book.

My Addresses is a list of up to 50 addresses that you manage. You can add, delete and assign contacts to each address. My Addresses saves you time by allowing you to quickly select from your most frequently used addresses rather than performing a search for each address. Each time you access the Address Book, the My Addresses screen displays first.

Apply To checkboxes allow you to select an address for multiple target areas at the same time. For example, you can select your shipping address and service site location addresses with one action. You simply choose your address, check all the locations you want to use that address and click Apply. The address is populated into all the appropriate target areas.

Chapter Objectives

- Learn how to add a new address that you can use for future orders.
- Acquaint you with the Address Search Results page.
- Learn how to assign a default contact person for an address.
- Learn how to add a contact person for an address.

Definitions

Add to My Addresses – This will add a frequently used address to My Addresses list.
Existing Customer – Choose the customer for whom you want to add a new address.
New Customer Name – Add a new customer by entering their name in this field.
Postal/Zip – Enter the postal or zip code.
Search Again – Returns you to the Search Addresses page for another search.
State/Province – Choose the U.S. state or Canadian province if appropriate.
How to Use the Address Book

Figure GG

Maintaining Addresses
The steps below show you how to add an address, sort addresses and assign contacts to your address book.

<table>
<thead>
<tr>
<th>Step</th>
<th>What You Do</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>From the <em>Ordering Tool Home</em> page click the <em>Address Book</em> link on the top Navigation Bar. (Figure GG.1) The <em>Address Book</em> launches the <em>Manage My Addresses</em> page. (Figure HH)</td>
</tr>
<tr>
<td>2</td>
<td>Click <em>Add Address</em>. (Figure HH.1) The <em>Search Addresses</em> page is displayed. (Figure II)</td>
</tr>
<tr>
<td>3</td>
<td>Provide search criteria then click <em>Continue</em>. (Figure II.1) The number of addresses that matched your search is displayed in the upper left corner. A scroll bar is provided on the right to view all the matching addresses. The <em>Address Search Results</em> page (Figure JJ) is populated.</td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
<tr>
<td>---</td>
<td>---</td>
</tr>
</tbody>
</table>
| 4 | Select an address to add to My Addresses by clicking the check box on the far right of the address line in the Select column. (Figure JJ.1)  
The Add to My Addresses button (Figure JJ.2) turns blue. |
| 5 | Click Add to My Addresses.  
The Manage My Addresses page (Figure KK) is displayed with the new record added to the list. |
| 6 | On the Sort By line, click the blue underlined City label.  
The addresses are sorted alphabetically by city. |
| 7 | Select an address by clicking the addresses check box at the far right end of the line.  
The Assign Contact tab is enabled. |
| 8 | Click the Assign Contact tab. (Figure KK.1)  
The Assign Contact page is displayed. (Figure LL) |
| 9 | Select a contact and click the Apply button. (Figure LL.1)  
The Manage My Addresses page is displayed. Click the Close button to return to the Ordering Tool Home page. |
Figure HH

Click Add Address to add entries to the address book.
II.1
Make selections then click Continue
Figure JJ

JJ.1 Click the box to select the address to be added.

JJ.2 Click to add the address to your address book.
Figure KK

Click the assign contact tab to assign a contact to an address.
Figure LL.1
Assign a contact by clicking the radio button to the right of their name, then click apply.
Figure MM

**Billing Information**

- RECEPTION TEST - DO NOT USE
- 1234 Main Street
- ANAHEIM California 93004
- United States

**Order Description**
- Ordering Tool Test Order

**Contact**
- Wu Jase
- Phone: 123-4567
- Fax
- Email: wu@regression.com
- Department: Accounting
- Mail Stop

**Shipping Address & Method**

- RECEPTION TEST - DO NOT USE
- 10 SUNBURST
- IRVINE California 92612
- United States

**Requested Ship Date**
- 07/17/2001

**Shipment Type**
- UPS/FEDEX Express Plus 9-6 Days

**Freight Term/FOB**
- 3rd Party Collect Origin

**Delivery Option**
- None

Sections: Billing | Shipping Address & Method | End User | Payment & Taxes | Acknowledgments | Order Contacts
Searching for a Shipping Address
The following steps show you how to search for a shipping address for your order.

Note: To create new addresses type the address information for the new site and complete all applicable fields on the Search/Enter Addresses tab.

<table>
<thead>
<tr>
<th>Step</th>
<th>What You Do</th>
</tr>
</thead>
</table>
| 1    | From All Header Details, click the Change Address button (Figure MM.2) under the Shipping Address & Method section.  
The My Saved Addresses page (Figure NN) is displayed with the My Addresses tab (Figure NN1) highlighted. If an address was already specified for the order the Current Address (Figure NN.2) appears at the top of the window. |
| 2    | Click the Search Again button. (Figure NN.3)  
The Search/Enter Addresses page (Figure OO) is displayed |
| 3    | Enter search criteria into required fields by selecting an existing customer, providing the state/province (for U.S. and Canada) and country. City and Zip can be used to narrow your search. Click Continue. (Figure OO.1)  
Search results are returned sorted by address on the Address Search Results page. (Figure PP) |
| 4    | Select an address and click Apply. (Figure PP.1)  
The All Header Details screen is displayed with the new address. |
Figure NN

My Saved Addresses

Select an address to apply to your order from your list of saved addresses below. You may save up to 50 addresses.

Order ID: MP2192502
P.O. Number: 1112
Target Address: Header Shipping

Current Address:
REGRESSION TEST - DO NOT USE 10 SUNBURST
IRVINE, California 92612
United States

Search Again button

Current Address tab

Apply To checkboxes

All Service Sites checkbox

My Addresses tab

Search button

Add to My Saved Addresses button

My Addresses tab

Select: 1

Search Again button

All Service Sites checkbox

Apply button

Add to My Saved Addresses button
Figure 00

OO.1
Fill in the information on the page then click Continue
Applying an Address to Multiple Locations at Once
The following steps show you how to apply an address to multiple locations at once.

<table>
<thead>
<tr>
<th>Step</th>
<th>What You Do</th>
</tr>
</thead>
</table>
| 1    | From the All Header Details page, click Change Address under the Shipping Address & Method section.  
     | The My Saved Addresses page (Figure JNN) is displayed with the My Addresses tab active. |
| 2    | From My Saved Addresses page, select an address for the order and service sites. |
Check the All Service Sites check box (Figure NN.5) located in the Apply To checkboxes area. (Figure NN4)

Click Apply.

A dialogue box appears asking you to confirm your selection.

Click OK.

The All Header Details screen is displayed with the new address.

Creating a New Contact

The following steps show you how to create a new contact name for an address.

<table>
<thead>
<tr>
<th>Step</th>
<th>What You Do</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>From the All Header Details page, click Change Contact button under either Billing Information or Shipping Address &amp; Method. (Figure MM.2) The Select a Contact page (Figure QQ) is displayed with the Assign Contact tab (Figure Q.1) foremost and the selected address for the order shown.</td>
</tr>
<tr>
<td>2</td>
<td>Click New Contact. (Figure QQ.2) The Add New Contact page (Figure RR) is displayed.</td>
</tr>
<tr>
<td>3</td>
<td>Enter the new contact information and click the Apply button. (Figure RR.1) The All Header Details page is displayed with the new contact assigned to your address.</td>
</tr>
</tbody>
</table>
Figure QQ

QQ.1 Assign Contact tab

QQ2 New Contact button
Figure RR

Add New Contact

Current Customer: REREGRESSION TEST - DO NOT USE
Current Address:
1234 Main Street
ANAHEIM, California 92804
United States
Current Contact:
Jane

Order ID: MP2162562
P.O. Number: 1112
Target Address: Billing Address

Last Name: John
First Name: Chambers
Phone: 123-4567
Fax:
Email: johnchambers@xyz.com
Department:
Mail Stop:

Apply  New Contact  Cancel
Chapter Eleven—

Configure

Some products must be configured with cables and other pieces during the ordering process. This chapter introduces you to the configuration process.

Chapter Objective

- Learn how to access the Configurator tool.

Definition

Configuration – The process of choosing different options (cables, memory, cards) that will be included in the product you are purchasing.

How to Use the Configurator to Configure Products for Your Order

Configuring a Line Item

The following steps show you how to configure a line item.

<table>
<thead>
<tr>
<th>Step</th>
<th>What You Do</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>On the Main Order Form locate a line item that currently says Unverified in the Status column. (Figure SS.2)</td>
</tr>
<tr>
<td>2</td>
<td>You must first select what is to be configured. To make your selection, either click the Unverified hyperlink (Figure SS.4), or choose the line in the Line # pulldown menu. (Figure SS.3) Click the Configure. (Figure SS.1)</td>
</tr>
</tbody>
</table>

The Configurator appears on screen so that you can configure the product. (Figure TT)
Figure SS

SS.1 Configure button

SS.2 Status column

SS.3 Line # pulldown menu

SS.4 Unverified hyperlink
Figure TT

**E-Procurement User Guide**

Internet Commerce

CISCO760M ISDN Router w/ NT-1, 2 POTS, w/ 4-port Hub (U.S.)

This page displays all the configurable options for the model you selected.

- Select items in any category, starting with Software Options, if applicable.
- Click on any Update Selections button to add your selections to the configuration and check their validity.
- Click on any Final Check button when you are ready to check your configuration for completeness.

![Configurator](image)

**TT.1**
CISCO700 SOFTWARE OPTIONS

- Select options here.

**TT.2**
700 US DEFAULT SOFTWARE

- Select options here.

**TT.3**
POWER CABLES

- Select options here.

**TT.4**
Cisco700 Software Configuration Option

- Select options here.

**TT.5**
Final Check button

---

Copyright © Cisco Systems Inc. 1996-1997
**Example - How to Configure a CISCO776M**

The following steps show an example of how to configure a product in the Configurator. In this case it is a CISCO776M.

<table>
<thead>
<tr>
<th>Step</th>
<th>What You Do</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Under <em>CISCO700 SOFTWARE OPTIONS</em> (Figure TT.1) choose 700 US SW 700 US SOFTWARE OPTIONS.</td>
</tr>
<tr>
<td>2</td>
<td>Under <em>700 US DEFAULT SOFTWARE</em> (Figure TT.2) choose SF760-IR-US-4.3 IR 760-770 – 30 users, IP Routing.</td>
</tr>
<tr>
<td>3</td>
<td>Under <em>POWER CABLES</em> choose CAB-AC Power Cord, 110V. (Figure T.3)</td>
</tr>
<tr>
<td>4</td>
<td>Under <em>Cisco700 Software Configuration Option</em> choose SW-CONFIG-700-0001. (Figure TT.4)</td>
</tr>
<tr>
<td>5</td>
<td>Click <em>Final Check</em>. (Figure TT.5)</td>
</tr>
<tr>
<td></td>
<td>When the configuration is validated (Figure UU, the <em>Configuration Complete</em> page is displayed on screen.</td>
</tr>
<tr>
<td>6</td>
<td>On the <em>Configuration Complete</em> page you can save your configuration by entering a name for it in the <em>Configuration Name</em> field (Figure UU.1) and then clicking <em>Add to Order</em>. (Figure UU.2)</td>
</tr>
<tr>
<td></td>
<td>If you do not wish to save your configuration click <em>Add to Order</em> to return to the <em>Main Order Form</em>.</td>
</tr>
</tbody>
</table>
Figure UU

CISCO776M
ISDN Router w/ NT-1, 2 POTS, w/ 4-port Hub (U.S.)

Configuration Complete

Congratulations! You have successfully configured this product.
Click on Add to Order to add your chosen options to your order.
To save this configuration for future use, assign a name to the configuration in the space provided below, and then click on Add to Order.

Configuration Name: (50 Characters Max)
CISCO776M Config for San Jose

Add to Order

ListPrice: AUD 1,263.00

Update Selections | Final Check | Clear Selections
Chapter Twelve –

Item Search

There may be times when you do not have all the information needed to order a product, such as the product name or its number. For times when this is true, search the Cisco Product Database to find the missing information needed for the order.

Chapter Objective

- Learn how to search the Cisco product database

Definitions

Configuration Name – The title of your saved configuration.

Product Description – The brief description associated with the product number.

Product Number – The part number of the product, for example: CISCO2501.

Product Family – This is a group of related products and product numbers.

How to Search for Products for Your Order

Figure VV
**Searching for a Product**
The following steps show you how to search for a product.

<table>
<thead>
<tr>
<th>Step</th>
<th>What You Do</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>On the <em>Main Order Form</em> (Figure VV) click <strong>Item Search</strong>. (Figure VV.1) This takes you to the <em>Search for Items and Saved Configs</em> page. (Figure WW)</td>
</tr>
</tbody>
</table>
| 2    | On this page you can search by the following:  
  - **Product Number** (Figure WW.3) – Enter as much of the product number as you know, for example: CISCO2501, or CISCO025.  
  - **Configuration Name** (Figure WW.4) – Enter as much of the saved configuration name as you know.  
  - **Product Description** (Figure WW.5) – Enter as much of the product description as you know, for example: router.  
  - **Search by Product Family** (Figure WW.6) – Choose a product family by which to search. If you enter a product family, it takes precedence over other criteria you may have already entered. |
| 3    | After you have entered your search criteria click on **Search**. (Figure WW.7) The *Search for Items and Saved Configs: Results* page is displayed (Figure XX) |
| 4    | On this page choose the products you want to order by entering the appropriate quantity in **Qty (Quantity)** column. (Figure XX1) |
| 5    | Click **Apply** when you have entered all pertinent information. (Figure XX.3)  
  If you did not find the product you were looking for, click the **Search Again** button to be taken back to the *Search for Items and Saved Configs* page to change your search criteria. (Figure XX.2)  
  The *Main Order Form* is displayed and the product(s) are added as additional line(s) in your order. |
**Figure WW**

**WW.1** - My Saved Configs tab

**WW.2** - Spares Search tab

**WW.3** - Product Number

**WW.4** - Configuration Name

**WW.5** - Product Description

**WW.6** - Search by Product Family

**WW.7** - Search

---

**Figure XX**

**XX.1** - Qty. column

**XX.2** - Search Again button

**XX.3** - Apply button
Searching for a Spare
The following steps show you how to search for a spare product.

<table>
<thead>
<tr>
<th>Step</th>
<th>What You Do</th>
</tr>
</thead>
</table>
| 1    | On the *Main Order Form* click the *Item Search* button.  
      | This takes you to the *Search for Items and Saved Configs* page. |
| 2    | On this page click the *Spares Search* tab.  
      | *(Figure WW.2)* |
|      | The *Search for Spares* page is displayed.  
      | *(Figure YY)* |
| 3    | On this page you can search by the following:  
      | *Spares Category* *(Figure YY.1)* – Choose a spares category from the list.  
      | *Product Number* *(Figure YY.2)* – Enter as much of the spare number as you know,  
      | for example: CAB-AC=.  
      | *Product Description* *(Figure YY.3)* – Enter as much of the product description for  
      | the spare as you know, for example: cable.  
      | After you have entered your search criteria you will be taken to the *Search for  
      | Spares: Results* page.  
      | *(Figure ZZ)* |
| 4    | On this page choose the spares you want to order by entering the appropriate  
      | quantity in the field of the *Qty.* *(Quantity)* column.  
      | *(Figure ZZ.1)* |
| 5    | Once you have finished click *Apply*.  
      | *(Figure ZZ.3)* |
|      | You are returned to the *Main Order Form* and the product(s) are added as  
      | additional line(s) in your order. |
| 6    | If you did not find the product you were looking for, click the *Search Again* button  
      | to be taken back to the *Search for Spares* page so that you can change your search  
      | criteria.  
      | *(Figure ZZ.2)* |
Figure YY

YY.1 Spares Category
YY.2 Product Number
YY.3 Product Description

Figure ZZ

ZZ.1 Qty. column
ZZ.2 Search Again button
ZZ.3 Apply button
Searching My Saved Configs
The following steps show you how to search for your saved configurations.

<table>
<thead>
<tr>
<th>Step</th>
<th>What You Do</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>On the <em>Main Order Form</em> click the <em>Item Search</em> button. &lt;br&gt;The <em>Search for Items and Saved Configs</em> page is displayed.</td>
</tr>
<tr>
<td>2</td>
<td>Click the <em>My Saved Configs</em> tab. (Figure ZZ.1) &lt;br&gt;You are taken to the <em>My Saved Configs</em> page. (Figure AAA)</td>
</tr>
<tr>
<td>3</td>
<td>Review the list until you find the item you need. &lt;br&gt;If you cannot find the item, click on the <em>Item/Config Search</em> (Figure AAA.1) or <em>Spares</em> tab (Figure AAA.2) to enter information and perform a search. Other users may have saved configurations that you can access.</td>
</tr>
<tr>
<td>4</td>
<td>For each configuration, enter the quantity in the <em>Qty.</em> column. (Figure AAA.3)</td>
</tr>
<tr>
<td>5</td>
<td>When you finish entering the quantities for the configuration(s), click <em>Apply</em>. (Figure AAA.4)</td>
</tr>
<tr>
<td>6</td>
<td>The <em>Main Order Form</em> is displayed, and the product(s) are shown as additional line(s) on your order.</td>
</tr>
</tbody>
</table>
Figure AAA

AAA.1 Item/Config Search tab

AAA.2 Spares Search tab

AAA.3 Qty. column
Chapter Thirteen –
My Saved Configs
Using saved configurations can save you time. You can access all of the configurations you have saved. In addition, you can also access saved configurations that others within your organization have saved provided they give you access and you have the same billing information as the other user.

Chapter Objective
- Learn how to use saved configurations when submitting future orders with the same products.

Definition
Saved Configuration – A configuration that was created and saved for future use. It enables you to reuse the same major line configurations for new orders, thus saving time.

How to Use Saved Configurations

Using Your Saved Configurations
The following steps show you how to use your saved configurations.

<table>
<thead>
<tr>
<th>Step</th>
<th>What You Do</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>On the Main Order Form click Get Saved Configs. (Figure BBB.1)</td>
</tr>
<tr>
<td></td>
<td>This takes you to the My Saved Configs page.</td>
</tr>
<tr>
<td></td>
<td>A list of all the saved configurations that you may access is displayed. Review the list until you find the configuration you need. If you cannot find the configuration use the Item/Config Search (Figure. AAA1) or Spares tab (Figure AAA.2) to search for it. (See Chapter 12)</td>
</tr>
<tr>
<td>2</td>
<td>For each configuration, enter the quantity in the Qty. (Quantity) column. (Figure AAA.3)</td>
</tr>
<tr>
<td>3</td>
<td>When you finish entering the quantities for the configuration(s), click the Apply button. (Figure AAA.4)</td>
</tr>
<tr>
<td>4</td>
<td>The Main Order Form is displayed, and the product(s) shows as an additional line(s) on your order.</td>
</tr>
</tbody>
</table>
Figure BBB

BBB.1
Get Saved Config button
Example of How to Configure a CISCO776M and Save the Configuration
The following steps show you an example of how to configure a product in the Configurator, and save the configuration. In this case it is a CISCO776M.

<table>
<thead>
<tr>
<th>Step</th>
<th>What You Do</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Under <em>CISCO700 SOFTWARE OPTIONS</em> (Figure TT.1) choose 700 US SW 700 US SOFTWARE OPTIONS.</td>
</tr>
<tr>
<td>2</td>
<td>Under <em>700 US DEFAULT SOFTWARE</em> (Figure TT.2) choose SF760-IR-US-4.3 IR 760-770 – 30 users, IP Routing.</td>
</tr>
<tr>
<td>3</td>
<td>Under <em>POWER CABLES</em> (Figure TT.3) choose CAB-AC Power Cord, 110V.</td>
</tr>
<tr>
<td>4</td>
<td>Under <em>Cisco700 Software Configuration Option</em> (Figure TT.4) choose SW-CONFIG-700-0001.</td>
</tr>
<tr>
<td>5</td>
<td>Click <em>Final Check</em>. (Figure TT.5) You will then be taken to the <em>Configuration Complete</em> page (Figure UU) when the configuration is validated.</td>
</tr>
<tr>
<td>6</td>
<td>On the <em>Configuration Complete</em> page enter a name for your configuration in the <em>Configuration Name</em> field (Figure UU.1) then click <em>Add to Order</em>. (Figure UU.2) The <em>Main Order Form</em> is displayed.</td>
</tr>
</tbody>
</table>
Chapter Fourteen –

Service/Line Details
The Service/Line Details page allows you to set details that are specific to a particular line item. These include service options, end user information, service site information, shipsets, and notes. You will use this section in the following cases:

- Service must be added to a product.
- ShipSet information for a particular line item needs to be reviewed

When you are setting line item specific details, the changes only affect the specific line item.

Chapter Objective
- Learn how to set line item specific details for hardware and service line items.

Definitions
Major Line Item – This is usually the main product that you are ordering, for instance - a chassis.

Minor Line Item – This is usually an option associated with the main product that you are ordering, for instance - cable, memory, or an interface card.

How to Use the Line Item Details Section

Viewing Line Item Details for a Hardware Line Item
The following steps show you how to view details on hardware line items on the Line Item Details page. If the line you choose is not configurable you will not see the Service Options section on the Line Item Details page.
Figure CCC

CCC.1
Line #
Pulldown
Menu

CCC.2
Service/Line
Details
Button
Figure DDD

### Service Options Section

#### Note:
After modifying the options below, click Save to save your changes.

**Service Level:**
- SMArtNet BasicNet Service
  - [Select Service Level]

**Length:**
- 1 year
  - [Select Duration]

**Service Discount:**
- [Enter Discount]

### End User Section

#### Note:
End User information is required for Resale orders only.

**Select End User:**
- [Select End User]

**End User City:**
- [Select City]

**Country:**
- [Select Country]

**End User Market:**
- [Select End User Market]

### Ship Set Section

**Lines can be grouped together and assigned different shipping attributes via Ship Sets. Information about this line’s Ship Set is reported below.**

**Instructions:**
To modify the shipping attributes for this line, click the Modify Ship Set button.

**Shipment Information:**
- [View Shipment Information]

**Account Information:**
- [View Account Information]

**Freight Terms:**
- [View Freight Terms]

### Line Note Section

**Instructions:**
Attach a note to this line item.
<table>
<thead>
<tr>
<th>Step</th>
<th>What You Do</th>
</tr>
</thead>
</table>
| 1    | Choose a configurable line item in the Line # pull down menu. (Figure CCC.1) Click Service/Line Details (Figure CCC.2) on the Main Order Form.  
   The Line Item Details page is displayed. (Figure DDD) |
| 2    | On the Line Item Details page you can make changes to any of the following sections: |
| 2a   | Service Options (Figure DDD.2)  
   Service Level – Choose the service level that applies to the product.  
   Length – Choose one, two, or three years for the length of the service agreement.  
   Service Discount – Enter the service discount for the line item. |
| 2b   | End User (Figure DDD.3)  
   Select End User – If the end user is someone other than your organization, choose the name of the company that will be the ultimate recipient of this line item.  
   If not listed, add new End User – If the end user is not listed, you can enter the new end user company name.  
   End User City – Enter the city where the end user company is located.  
   State/Province – Choose the U.S. State or Canadian province where the end user company is located.  
   Country – Choose the country where the end user company is located.  
   End User Market – Choose the end user’s vertical market. |
| 2c   | Ship Set (Figure DDD.4)  
   The shipsets information for the line item appears here. To change it, click the Modify ShipSet button to take you too the ShipSets page to make modifications. (See Chapter 8) |
| 2d   | Line Note (Figure DDD.5)  
   You can enter a note specific to the line item. The notes box accepts up to 2,000 characters. |
**Viewing Line Item Details for a Service Line Item**
The following steps show you how to view service line items on the *Line Item Details* page.

<table>
<thead>
<tr>
<th>Step</th>
<th>What You Do</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Choose a service line item in the <em>Line #</em> pull-down menu (Figure CCC.1) on your order, then click <em>Service/Line Details</em> (Figure CCC.2) on the <em>Main Order Form</em>.</td>
</tr>
<tr>
<td></td>
<td>The <em>Line Item Details</em> page is displayed. (Figure EEE)</td>
</tr>
<tr>
<td>2</td>
<td>On the <em>Line Item Details</em> page you can make changes in the following sections:</td>
</tr>
<tr>
<td>2a</td>
<td><strong>Service Site</strong> (Figure EEE.1)</td>
</tr>
<tr>
<td></td>
<td><strong>Service Site Address</strong> – Click the <em>Change Address</em> button to select or enter a new address where the product will be installed.</td>
</tr>
<tr>
<td></td>
<td><strong>Maintenance Type</strong> – Select the appropriate maintenance type.</td>
</tr>
<tr>
<td></td>
<td><strong>Equipment Information</strong> – Enter the <em>Serial Number</em>, Sales Order or MP Number, and Existing Contract # depending on your selection in the Maintenance Type pull down menu.</td>
</tr>
<tr>
<td>2b</td>
<td><strong>Line Note</strong> (Figure EEE.2)</td>
</tr>
<tr>
<td></td>
<td>You can enter a note specific to the line item. The notes box accepts up to 2,000 characters.</td>
</tr>
</tbody>
</table>
Figure EEE

EEE.1 Service Site section

EEE.2 Line Note section
### Viewing Configuration Details

The following steps show you how to view Configuration Details. This is only for hardware line items, not service line items.

<table>
<thead>
<tr>
<th>Step</th>
<th>What You Do</th>
</tr>
</thead>
</table>
| 1    | Choose a configurable hardware line item on your order and click the **Service/Line Details** button on the **Main Order Form**.  

The **Line Item Details** page is displayed. |
| 2    | On the **Line Item Details** page (Figure CCC), click the **Configuration Details** tab (Figure CCC.1) at the top of the page.  

The **Configuration Details** page is displayed. (Figure FFF) This page lets you review configuration details for the line item and gives you access to the Configurator. |
| 3    | Under the **Status** column (Figure FFF.1) you will see one of the following statuses:  

- **Verified** – The line item is configured. Clicking this takes you to the Configurator.  

- **Unverified** – The line item is not configured, or its configuration needs to be checked. Clicking this link takes you to the Configurator.  

- **Complete** – Details such as site or shipping information is complete.  

- **Incomplete** – Information is missing or incomplete. Clicking this link saves your order and then takes you to **Line Item Details**. |
| 4    | From the **Configuration Details** page you can also choose another **Line #** (Figure BBB.2) of the item whose configuration details you want to view, or get a saved configuration by clicking the **Get Saved Config** button. (Figure FFF.3) (See Chapter 13) |
| 5    | You can also modify the following pricing fields on the **Configuration Details** page:  

- **Discount** (Figure FFF.4) – The discount percentage that your company and Cisco Systems have agreed upon. Though you cannot change your price list once you have begun an order, you can modify your discounts once inside an order. This is validated with your agreement with Cisco if you change the discount percentage.  

- **Unit Price** (Figure FFF.5) – The unit price for the line item. |
Figure FFF

**E-Procurement User Guide**

**Cisco Systems**

Cisco Ordering Tool

**Configuration Details**

You are working on this line:

<table>
<thead>
<tr>
<th>Line #</th>
<th>Product/Component and Description</th>
<th>Qty</th>
<th>Unit Price</th>
</tr>
</thead>
<tbody>
<tr>
<td>3</td>
<td>Cisco 2561 Ethernet/Dual Serial Router</td>
<td>11</td>
<td>2,679.00</td>
</tr>
</tbody>
</table>

Sub-Line: 1
- CAB-AC
  - Power Cord, 110V
  - Qty: 11
  - Unit Price: 2,679.00

Sub-Line: 2
- S2500-121051
  - Cisco 2500 Series IOS ENTERPRISE PLUS IPSEC 58
  - Qty: 11
  - Unit Price: 7,270.00

Sub-Line: 3
- MEM-1K160
  - Optional 16 MB of DRAM Memory
  - Qty: 11
  - Unit Price: 1885.00

Sub-Line: 4
- MEM-1K160 (Included)
  - Qty: 11
  - Unit Price: 1885.00

All contents are Copyright © 1993-2001 Cisco Systems, Inc. All rights reserved. Important Notices and Privacy Statement
Chapter Fifteen –

Error Checking
When you click Check for Errors on the Main Order Form, you can view any errors or alerts the system has found with your shopping cart. Because there is data that will be provided from your Ariba Buyer application, not all errors are applicable to your shopping cart. Any error associated with ship-to address or ship-to contact can be ignored, as this data will be provided from your Ariba PO. Additionally, if you enter a Need By Date in the Ariba Buyer, and want that value to be your Requested Ship Date, you can ignore the errors around Requested Ship date. All other errors should be resolved prior to transferring your shopping cart back to Ariba. If not, your order could be delayed, since Cisco is unable to complete orders missing critical information.

Chapter Objective
- Understand how the Error Checking functionality is used.

Definitions
Alert – A warning message that something on your order may cause the order to be put on hold once it is submitted. However, it will not prevent you from submitting the order.
Check Again – Checks your line item details and configurations to see if they are valid and complete, and displays a message if you need to make a correction.
Error Checking – Scans entire order for any errors that need to adjusted and also advises you of any holds that will be placed on the order.

How to Use Error Checking

Checking your Order for Errors
The following steps show you how to check your order for errors.

<table>
<thead>
<tr>
<th>Step</th>
<th>What You Do</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>At the bottom of the Main Order Form click the Check for Errors. (Figure GGG.1)</td>
</tr>
<tr>
<td></td>
<td>This takes you to the Error Checking page (Figure HHH)</td>
</tr>
<tr>
<td></td>
<td>Any errors are shown on the left side of the window. The error name will be displayed as a hyperlink.</td>
</tr>
<tr>
<td>2</td>
<td>If you click the hyperlink for that error you will be taken to the appropriate page within the Ordering Tool to correct the error. Otherwise you can navigate to the appropriate section of your order.</td>
</tr>
</tbody>
</table>
3. Once you have corrected the error, click **Save Order**, and return to the **Error Checking** window to correct remaining errors.

4. There are two ways to return to the **Error Checking** window:
   1. Click the **Check for Errors** button within your order.
   2. Click the **Check Again** button (Figure HHH1) to reload the Error Checking page. Continue this process until you have resolved all errors for your order.

5. On the right hand side of the window you may see different alerts for your order. These alerts will not prevent you from submitting your order, but they are issues that you may want to resolve before submitting your order.

---

<table>
<thead>
<tr>
<th>Line</th>
<th>Product</th>
<th>Qty</th>
<th>List Price</th>
<th>Discount</th>
<th>Unit Price</th>
<th>Extended Price</th>
<th>Status</th>
<th>Delete</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>GSC02801</td>
<td>11</td>
<td>1405.00</td>
<td>85.0%</td>
<td>224.25</td>
<td>2468.75</td>
<td>Installed</td>
<td></td>
</tr>
<tr>
<td>2</td>
<td>GSC02801</td>
<td>11</td>
<td>462.00</td>
<td>85.0%</td>
<td>462.00</td>
<td>5028.00</td>
<td>Installed</td>
<td></td>
</tr>
<tr>
<td>3</td>
<td>GSC0778M</td>
<td>3</td>
<td>469.00</td>
<td>85.0%</td>
<td>469.00</td>
<td>703.50</td>
<td>Installed</td>
<td></td>
</tr>
</tbody>
</table>

---

**Figure GGG**

**GGG.1 Check for Errors button**
## Error Checking

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.

### 3 Errors Found

<table>
<thead>
<tr>
<th>Location</th>
<th>Error Description</th>
<th>Visited</th>
</tr>
</thead>
<tbody>
<tr>
<td>One or more Items not configured</td>
<td>One or more of your items has not yet been configured.</td>
<td></td>
</tr>
<tr>
<td>Invalid Shipping Customer</td>
<td>The shipping Customer is missing or incomplete.</td>
<td></td>
</tr>
<tr>
<td>Incomplete ShipTo Validation</td>
<td>The shipping address is missing or incomplete. Please ensure a street address, city and country are specified.</td>
<td></td>
</tr>
</tbody>
</table>

### 0 Alerts Found

Instructions: Review the issues below before submitting your order.

<table>
<thead>
<tr>
<th>Alerts</th>
</tr>
</thead>
</table>

Figure HHH 1

Check Again button
Chapter Sixteen –

Transferring the Shopping Cart Back to Ariba
The preceding chapters have shown how to configure and prepare an order. To finalize your purchase, your shopping cart must be transferred back to Ariba for final order submission.

Chapter Objective
- Learn how to transfer a cart back to Ariba.
- Submit the order to Cisco Systems.

Definitions
Order Confirmation message – Cisco originated email notification sent when the submitted order is received and complete.

Order Received message – Cisco originated email notification sent when the submitted order is received, but incomplete.

Transferring the Cart Back to Ariba
Once you have completed your order, it can be placed by transferring the shopping cart to Ariba and submitting the information to Cisco Systems.
III.1
Transfer the cart back to Ariba

Figure III

Your order has been processed.

You MUST click the button for the order to be transferred to your system for approval. Once the order is approved, Cisco will be notified and processing of the order will commence.

Thank you for shopping@cisco.

JJJ.1
Click the Click for Approval button to place order

Figure JJJ
Step | What You Do
---|---
1 | At the bottom of the Main Order Form click the Transfer Cart to Ariba button. (Figure HHH.1) A page displaying the order process message is displayed. (Figure JJJ)
2 | Select Click for Approval to place order with Cisco. (See Figure JJJ.1) Your Ariba screen is displayed.

**Receiving Email Notifications**
Dependent on the order, you will receive an email notification from Cisco, which reflects one of the following types.

**Order Confirmation Message**
An order confirmation message is sent if the order has been successfully placed. The subject will state Cisco-Ariba Order Confirmation and include both the Ariba PO and the Cisco MP number.

```
To: brgulanvi@cisco.com, moorea-business@cisco.com
Subject: Cisco-ARIBA Order Confirmation - Ariba Order DO88974, Ariba Requisition PR331121, Cisco Order MP2355167
Cc: moorea-test@cisco.com

Your Order has been successfully submitted to Cisco
```

**NETWORKING PRODUCTS PURCHASE ORDER**

<table>
<thead>
<tr>
<th>Order Processing Notes</th>
<th>None.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Shipping and Packaging Notes</td>
<td>GL Account Number = 020031122 Internet Commerce CS</td>
</tr>
<tr>
<td>Carton Note</td>
<td>None.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Shipping Address</th>
<th>Billing Address</th>
</tr>
</thead>
<tbody>
<tr>
<td>Company: San Jose - OCC</td>
<td>CISCO SYSTEMS INC (FOR US INTERNAL DEMO EVAL ONLY)</td>
</tr>
<tr>
<td>Address1: 470 W. Trimble Rd.</td>
<td>PO BOX 641570</td>
</tr>
<tr>
<td>City: San Jose</td>
<td>SAN JOSE</td>
</tr>
<tr>
<td>State: CA</td>
<td>CA</td>
</tr>
<tr>
<td>Zip: 95134</td>
<td>95164-1570</td>
</tr>
<tr>
<td>Country: United States</td>
<td>United States</td>
</tr>
</tbody>
</table>

Contact: Brian Glanville 408 853-6336 Bld
FOR QUESTIONS REGARDING THIS ORDER CONTACT:

Name: Brian Glanville
Phone: 408 853-6336
Fax:
Email: brglanvi@cisco.com

ORDER ACKNOWLEDGEMENT INFORMATION

Name: Brian Glanville
Email: brglanvi@cisco.com

Payment Information
Payment Method: Purchase Order
PO Number: DO88974
Payment Terms: 30 NET
Department Id: 020010004
Project Id: test project#
Deal ID - Description: None
Tax Information
Taxable: No
PO Type: Internal Use
Shipping Information
Requested Ship Date: 10/10/2001
FreightTerm/FOB: Prepaid and Absorbed / Destination
Ship Via: FedEx: 3 Days Express Saver
Shipper Account:
Early Shipment: No
Ship All Items Separately: No
Approved PS Staging Project: No

Identification: MP2355167 BRGLANVI
Description:
Order Type: INTERNAL
Commission Code: null
Price List: Global Price List US Availability

<table>
<thead>
<tr>
<th>LINE ITEM DETAILS</th>
<th>LIST</th>
<th>UNIT</th>
<th>EXTENDED PRICE</th>
<th>PRICE</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.0 CAB-AC=</td>
<td>50.00</td>
<td>5</td>
<td>85.00%</td>
<td>7.50</td>
</tr>
<tr>
<td>AC Power Cord, US</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Subtotal: 37.50
Order Received Message

An order confirmation message is sent if the order is missing critical information. The subject will state *Cisco-Ariba Order Received* and include both the Ariba PO and the Cisco MP number. The missing critical fields will be highlighted.

To: brglanvi@cisco.com, moorea-business@cisco.com  
Subject: Cisco-ARIBA Order Received - Ariba Order DO88974, Ariba Requisition PR331121, Cisco Order MP2355167  
Cc: moorea-test@cisco.com

Your order has been received by Cisco, however it is missing the data noted below. We are working to enter this data and complete your order at which time you will receive an order confirmation email. Please ensure this data is included in your future Cisco orders.

Missing Freight Term/FOB

NETWORKING PRODUCTS PURCHASE ORDER

Order Processing Notes

None.

Shipping and Packaging Notes

GL Account Number = 020031122 Internet Commerce CS

Carton Note

None.

<table>
<thead>
<tr>
<th>Shipping Address</th>
<th>Billing Address</th>
</tr>
</thead>
<tbody>
<tr>
<td>Company: San Jose - OCC</td>
<td>CISCO SYSTEMS INC (FOR US INTERNAL DEMO EVAL ONLY)</td>
</tr>
<tr>
<td>Address1: 470 W. Trimble Rd.</td>
<td>PO BOX 641570</td>
</tr>
<tr>
<td>Address2:</td>
<td></td>
</tr>
<tr>
<td>Address3:</td>
<td></td>
</tr>
</tbody>
</table>

City: San Jose  
State: CA  
Zip: 95134  
Country: United States  

Contact: Brian Glanville 408 853-6336 Bld  
Phone: 14088536336  
Fax:  
Email: brglanvi@cisco.com

Department:  
Mail Stop:  

FOR QUESTIONS REGARDING THIS ORDER CONTACT:  
Name: Brian Glanville  
Phone: 408 853-6336
Fax:  
Email: brglanvi@cisco.com

**ORDER ACKNOWLEDGEMENT INFORMATION**

Name: Brian Glanville  
Email: brglanvi@cisco.com

**Payment Information**

Payment Method: Purchase Order  
PO Number: DO88974  
Payment Terms: 30 NET  
Department Id: 020010004  
Project Id: test project#  
Deal ID - Description: None

**Tax Information**

Taxable: No  
PO Type: Internal Use

**Shipping Information**

Requested Ship Date: 10/10/2001  
FreightTerm/FOB: Prepaid and Absorbed / Destination  
Ship Via: FedEx: 3 Days Express Saver  
Shipper Account:  
Early Shipment: No  
Ship All Items Separately: No  
Approved PS Staging Project: No

Identification: MP2355167 BRGLANVI  
Description:  
Order Type: INTERNAL  
Commission Code: null  
Price List: Global Price List US Availability

--------------------------------------------------------------------------------------------------------------------------

**Ship Set 2**

**LINE ITEM DETAILS**

<table>
<thead>
<tr>
<th>LINE ITEM</th>
<th>PART #/DESCRIPTION</th>
<th>LIST PRICE</th>
<th>UNIT QTY</th>
<th>DISC</th>
<th>EXTENDED PRICE</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.0 CAB-AC=</td>
<td>AC Power Cord, US</td>
<td>50.00</td>
<td>5</td>
<td>85.00%</td>
<td>7.50</td>
</tr>
</tbody>
</table>

Subtotal: 37.50
Glossary

Acquire Order – Displays the Main Order Form for the order identified by the Order ID and Key fields.

Add to My Addresses – This will add a frequently used address to your My Addresses list.

Address Book – Tool used for managing your addresses.

Alert – A warning message that something on your order may cause it to be put on hold once it is submitted. However, it will not prevent you from submitting the order.

All Order Details Page – This section summarizes the entire order. Information on this page is static and for review purposes only.

Back to Order Form – Displays the Main Order Form.

Billing – The address where the invoice will be sent.

Carton Notes – Enter any notes you want to appear on carton labels, packing slip, and invoices (commercial and remittance) for all future orders.

Change Address – Displays the My Billing Addresses or My Saved Addresses page, where you can change the addresses.

Change Contact – Displays the Select a Contact page within the Address Book, where you can change default contact information. The contact is the person with whom Cisco should communicate regarding billing and/or shipping questions. Click Change Contact in the Billing Information section for a Billing Contact, and Change Contact in the Shipping Address & Method section for a shipping contact.

Check Again – Checks your line item details and configurations to see if they are valid and complete, and displays a message if you need to make a correction.

Check for Errors – Checks your line item details and configurations for correctness and completeness, and displays a message if you need to make a correction.

Cisco Prod. Number/Competitor Prod. Description – If you are returning Cisco product enter the Cisco Part Number or use Search Products button to find valid Cisco Part Numbers. If you are returning a Competitive product enter the Competitive product description

Clear – Clears all information from the editing console without applying it to the order.

Complete – Line item details, such as site or shipping information, are complete.

Configurator – The tool used to select software, cables, memory, and other options associated with a product.

Configuration – The process of choosing different options (cables, memory, cards) that will be included in the product you are purchasing.

Configuration Details Page – Displays the minor lines of configured products and allows the user to edit the discounts of the minor lines in a product.
Configuration Name – The title of your saved configuration.
Configure – To select software, cables, memory, and other options associated with a product.
Defaults – Preferred settings that you can pre-determine. The settings will automatically populate in every order created. This saves you time from entering information that remains the same on all orders.
Delete – Removing an item from the order upon saving the order.
Delivery Option – Lets you choose whether or not to merge all items into one shipment. If you choose Merge Order, you override multiple ShipSets.
Discount – The percentage of discount off the list price of products or services, as agreed upon by your organization and Cisco.
Early Shipment Accepted? – Click Yes if you will allow Cisco to ship a partial or all of your order prior to the requested ship date.
Email Acknowledgement – The email you receive that summarizes the order placed.
End User – The ultimate recipient of the equipment on an order.
Enter Product – The field where you enter the unique part number identifying a product.
Equipment Manufacturer – Cisco Systems or another company who makes the product.
Error Checking – Scans entire order for any errors that need to adjusted and also advises user of any holds that will be placed on the order.
Existing Customer – Choose the customer for whom you want to add a new address.
Extended Price – The total price for a line item.
Freight Term/FOB – Indicates the seller’s and buyer’s responsibilities during transportation of purchased product from the manufacturing location, to Title Transfer, to the customer.
Get Saved Config – To search for saved configurations.
Header Detail Page – This section is used to manage the details, which apply to every line of an order.
IC Agreement – A contract between the customer’s company and Cisco Systems, Inc. that gives the customer access to the ordering tool. The ICA agreement link is green if it has not been filled out. The link is grayed out if it has been filled out but you do not have permission to submit an order.
Incomplete – Line items details are missing or incomplete. Clicking this link displays Line Item Details.
Item Search – This is useful when you are unsure of a product’s name but would like to place an order. The search can be done by product number, product description, or product family.
Key – A combination of letters and numbers used to access a routed order.
Line Items Details Page – This page allows you to modify additional details for a major line including service site addresses, maintenance type, contract number, or equipment serial numbers.

Line # – The line number of the product on your order. A value of New for the line will remain until you complete the line and press Enter or press Enter on your keyboard.

List Price – The price of a product as it appears on the base price list, in US dollars, prior to the application of any local currency exchange rates, country uplifts or wholesale discounts.

Main Order Form – This section is the central location of the ordering tool where products, quantities, and discounts are entered.

Major Line Item – This is usually the main product that you are ordering, for instance – a chassis.

MarketPlace Number (also known as MP Number or Order ID) – The identifying number for an order.

Merge In Transit – A delivery program for customers who wish to receive all items on a purchase order at the same time, with a single remittance invoice. This optional program is offered at an additional cost and is designed to simplify the receiving and remittance processes by eliminating multiple shipments and invoices, making it even easier to do business with Cisco.

Minor Line Item – This is usually an option associated with the main product that you are ordering, for instance - a cable, memory, or an interface card.

Multinational Order – An order that is billed to one country and shipped to another. It can also signify that the order is billed and shipped to one country with the intent of sending the equipment out of the country at a later date.

New Customer Name – Enter a new customer name in this field as needed.

Open Order – An order created but not yet submitted.

Order Exporter (Multinational Orders Only) – You can choose between having Cisco handle the export paperwork for your orders and having your company handle the export/import paperwork.

Order ID – The MarketPlace (MP) number assigned to each order.

Order Templates – An unsubmitted order that has been named and saved for future use. If a customer regularly submits an order with the same product selections, they can create the order and save it as a template before submitting it. The next time the order needs to be placed, the template can be accessed, modified slightly if necessary, and then submitted. The template remains for future use.

Order Type – The type of order to be placed: internal, evaluation, standard, service-only, multinational, or trade in.

Ordering Tool Home Page – This page is where you begin to create a new order, view an open order, access a routed order, or access the Set Defaults page.
PO (Purchase Order) Number – The purchase order reference number used to identify the order within your organization.

Postal/Zip – Enter the postal or zip code.

Price List – The list from which you may order products.

Product Description – The brief description associated with the product number.

Product Family – This is a group of related products and product numbers.

Product Number – The part number that is used to order the product. For example: CISCO2501.

Punchout – Process whereby an Ariba Buyer user goes from the Ariba environment to a supplier Web site to create a shopping cart. This cart is then transferred back to the Ariba Buyer application.

Purchase Type – Indicates the purpose of the order.

Quantity (Qty.) – The number of chassis you are ordering.

Routed Order – An order created by one user and sent to another user, to be retrieved by that user with the Order ID and a key.

Save as Template – Saves your order as a template that can then be used for future orders.

Save Order – Saves all new or revised information on the order form.

Search Again – Returns you to the Search Addresses page for another search.

Service Only Order – An order that contains only service/maintenance items.

Service Options – You can choose the service level, service length, and service discount.

Service Site – The location where the product resides.

Service/Line Details – Enables you to choose service, provide end user, and shipset details at the line item level. Also enables you to edit configuration details for already configured items.

Set Defaults – This section is used to set pre-determined fields that automatically populate each time the ordering tool is used.

Ship All Items Separately – Select Yes if you would like to receive each line item as an individual shipment. Select No when you want all products shipped together whenever possible (this will extend ShipSet lead times).

As Cisco manufactures worldwide, multiple line orders will typically still arrive in separate deliveries, though selecting Ship All Items Separately No will reduce the number of deliveries.

Ship Early – This selection informs Cisco if it is permissible to ship product prior to the Requested Ship Date. No should be selected if you want Cisco to ship as close as possible to the Requested Ship Date.

Shipment via – Choose the carrier for shipment of your order.

Shipping – The address where the order will be shipped.
Shipping & Packaging Notes – Enter any default shipping and packaging notes that you want to appear on packing slips and invoices for all future orders. You can change this information if necessary on the Header Details page when you are creating an order.

Shipping Account #/Special Instructions – If you would like Cisco to bill your account number with the selected carrier, rather than invoicing you for the shipment, type the account number you have with the carrier. Also type any special shipping instructions.

ShipSets – A grouping of items within an order that have the same shipping information.

Standard Order – A traditional order placed for Cisco products or a combination of Cisco products and services.

State/Province – Choose the U.S. state or Canadian province if appropriate.

Submit Order – Runs a check on the order for errors and submits complete orders to Cisco.

Trade-In Order – The order type used to place Cisco Technology Migration Plan (CTMP), Custom Trade-In (Non-CTMP programs), or other Promotional Programs orders.

Unit Price – The price of the product calculated by taking the list price and applying any customer discounts.

Unverified – The configuration status of a product indicating that its configuration has NOT been completed and verified as correct.

Verified – The configuration status of a product indicating that its configuration has been completed and verified as correct.

Verify All Configs – Selecting this button is equivalent to selecting each previously configured product line by line and running the configuration check. This button will verify any configurations currently loaded in the order that are still valid and set their status to verified; any invalid configurations will remain in the Unverified status.

Additional materials to learn more about the Ordering Tool can be found at: