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Introduction

This user guide provides general information within Cisco Service Contract Center (CSCC).

Important Note: To search for a word in this User Guide, press ‘Ctrl F’ on your keyboard, enter the word into the ‘Find what:’ field, and press ‘Enter’. Navigate through the document by clicking ‘Find Next’ to locate additional instances of the word.

Note: Throughout the Distributor user guide, 2-Tier Partner will be referred to as “Reseller”.

Note: Currently the only fully supported web browsers in CSCC are:

- Internet Explorer version 9, 10 and 11 (IE 10 and 11 only in compatibility mode, Enable compatibility mode by clicking the appropriate button in your address bar, as shown below) for Windows 7

- Google Chrome and Mozilla Firefox for Windows 7, and MAC OS X

Note: For best system performance, ensure that you have cleared the cache of your internet browser (includes temporary files and cookies).

1 About Cisco Service Contract Center

This section provides an introduction to Cisco Service Contract Center (CSCC).

1.1 Overview

Cisco Service Contract Center (CSCC) is the integrated web-based solution that Cisco 1-Tier, Distributors, 2-Tier Partners, Service Providers and Direct Customers use to quote, manage, and book service orders and manage service contracts and renewal opportunities. CSCC can help you drive service growth and profitability over time and increase efficiency by simplifying the way you manage and sell Cisco services.

1.2 Background

CSCC replaces the legacy tools, Service Contract Center (SCC) and the Interim Quoting Tool (IQT). Before CSCC, service sales teams and partners utilized eight to ten different tools, which complicated and prolonged the sales process.

The following are the key benefits CSCC offers over legacy tools:

- **Generate Accurate Quotes Faster**
  
  CSCC can help you increase productivity by providing a flexible and efficient quoting process. Using CSCC, you can:
  
  - Put multiple contracts and service levels on one quote.
  
  - Compare pricing of different service levels.
  
  - Upload a spreadsheet of items directly into a quote.

- **Proactively Manage Your Business**
  
  CSCC helps you reduce the time it takes to renew a service contract by providing new capabilities to manage your renewal opportunities. Using CSCC, you can:
  
  - See which customers will need to renew contracts within the next year.
• View, download, and act on accurate upcoming renewal business opportunities in an easy and flexible manner.

• **Streamline Processes**

  CSCC is designed to automate and integrate many of your existing processes in a manner that is flexible enough to accommodate the many ways you do business. Now you can:
  
  • Proceed from OCM to quote and from quote to order with the click of a button.
  • Access your personal address book to quickly locate the correct address to use.
  • Enter products into your quote in a variety of ways, using the method that best meets your needs.

1.3 **Key Functionality**

The following are the key CSCC functional areas:

• **Basic Functions**
  
  • Search the CSCC database using a broad range of search criteria
  • View predefined reports
  • Get help and obtain useful information on CSCC functions

• **Quoting and Ordering**
  
  • Generate quotes and orders quickly
  • View and manage multiple contracts and service levels on one quote
  • Upload spreadsheet of items directly into quote
  • Compare pricing of different service levels

• **Contract Manager**
  
  • Manage contract accuracy
  • Add products to a contract
  • Move products from one contract to another

1.4 **Key Concepts**

Understanding the following key concepts will enable you to make better use of Cisco Service Contract Center.

1.4.1 **CSCC and the Service Contract Lifecycle**

CSCC is an integrated solution that enables you to manage your Cisco Services business through all stages of the service contract lifecycle. The following activities carried out in CSCC directly correspond to the stages of the contract lifecycle:

**CSCC Quick Quote** – Generate validated service pricing for a list of equipment. Once all the information on a quote is correct and validations have been run on the data, the quote can be ordered and converted to a valid service contract. For more information, see the section [Building a New Quote & Obtaining a Quick Price/Quote](#) in the Cisco Service Contract Center Distributor User Guide – Quick Quoting.
1.5 Key Terms

Understanding the following terminology, which is used throughout this guide, will help you succeed in effectively using CSCC.

- **Serial Number** – The unique number associated to the product which needs to be covered for service. Most products will need to be added to a quote/contract using a serial number to be eligible for service coverage.

- **PAK Number** – This refers to the Product Activation Key, which is typically an alphanumeric string that is entered either when registering or when installing a software product to fully activate the product.

- **Service Level** – A type of service offered by Cisco. Service levels are typically associated with a class of products and a service level agreement that stipulates service availability periods and response times.

- **Bill To ID** – The ID number associated to any company that purchases products or services from Cisco. Your Bill To ID should be stored in your system Preferences so that it can be applied to any quotes you create. Your company may have multiple Bill To IDs, and you can use multiple Bill To IDs when quoting or managing contracts.

- **Global Ultimate (GU)** – The data point used in Cisco’s records to associate all branches of a corporation to a common, overarching entity. The Global Ultimate can be thought of as the top of the corporate hierarchy for a company that has more than 50% ownership in multiple units, branches or subsidiaries. An organization may have multiple Bill To IDs and related Customer Numbers; however, they should all roll up to a single GU. Since one organization may have multiple Bill To IDs, the Global Ultimate is the common denominator used by the system to ensure that covered products are renewed using a Bill To ID within the same organization. If a quote is created and the quote Bill To ID and source contract Bill To ID fall under different GU IDs, a Takeover situation will occur.

- **Global Ultimate ID** – The unique ID number associated to a single Global Ultimate.

- **Takeover** – When an end customer makes a value-based decision to select an alternate partner to provide service (in other words, to take over their Cisco service contract). When the new partner creates a quote for service on the covered item, the system recognizes that the quote Bill To ID and source contract Bill To ID fall under different GU IDs. This is considered a Takeover because the item is not being renewed within the same organization.

- **Alternate Bill To ID Quote** – A quote for a covered product where the Bill To ID on the quote is different from the Bill To ID on the source contract, but both of these Bill To IDs fall under the same Global Ultimate. Two key considerations in Alternate Bill To ID quoting scenarios are:
  - Credits will not be applied to an Alternate Bill To ID quote when performing a midterm service level change, and
  - The user quoting the covered equipment must be registered to the source contract under which the quoted products are currently covered.

- **Installed-At Site ID** – The system generated number associated to a given address in Cisco’s records. Every product needs to be mapped to an Installed-At Site ID to verify service availability in the desired location. You can search for Installed-At Site ID’s and store them using the Address Management capability in the CSCC Address Book.

- **Multi-National Quoting** – A quoting scenario where the Bill To address is located in a different country from the Installed-At Site address.

- **Multiple Quote Upload** – A quoting scenario where you can upload multiple quotes at once via a template.

- **Instance Number/ID** – A system-generated identifier assigned to a Cisco product when that product is added to the installed base (that is, when it is shipped or otherwise distributed to a particular Cisco customer and site).
2 About the CSCC User Guide

This section describes the purpose, audience, and organization of the CSCC User Guide.

2.1 Purpose

The Cisco Service Contract Center (CSCC) User Guide provides detailed information on the CSCC Quoting functionality along with procedures that enable the efficient use of CSCC.

2.2 Audience

The CSCC Distributor User Guide is intended for the External Distributor User.

2.3 Organization

The CSCC User Guide is organized into the following sections, which directly align with the key CSCC functional areas:

- **Navigation and Basics** – Instructions for navigating the CSCC user interfaces and descriptions and procedures for basic functionality.
- **Quick Quoting** – Description of CSCC quoting tools and procedures for creating quotes, validating quotes, and resolving validation errors.
Navigation and Basics

This section provides detailed instructions for navigating the CSCC user interfaces and using the following basic CSCC functionality:

- Getting Started
  - Requesting Access to CSCC
  - Logging Into CSCC
  - Setting Preferences
  - Registering Contracts
- Basic Functions
  - Searching CSCC
  - Address Management
  - Creating a New Address
  - Using Request Status
  - Using CSCC Reports
  - Offline OCM and POM Reports
  - Using Important Links
  - Using the Toolkit
  - Getting Help

3 CSCC Basics: Getting Started

This section covers basic functions required to get users started using Cisco Service Contract Center.

3.1 Guidelines for Optimal Performance

The following table describes the hardware, operating system, and browser configurations that will provide optimal performance when using Cisco Service Contract Center.

<table>
<thead>
<tr>
<th>Item</th>
<th>Recommendations</th>
</tr>
</thead>
<tbody>
<tr>
<td>Hardware</td>
<td>1 GB RAM 40 GB hard disk (60 GB optimal) 1.7 GHz processor</td>
</tr>
<tr>
<td>Connectivity: Wired versus wireless</td>
<td>Wired</td>
</tr>
<tr>
<td>Applications</td>
<td>Close all active CPU-heavy applications</td>
</tr>
<tr>
<td>CSCC Windows open</td>
<td>Keep the number of active windows to a minimum</td>
</tr>
</tbody>
</table>
### Item | Recommendations
--- | ---
Browsers and software | Certified for Internet Explorer 8.x and Explorer 9.x with Windows 7. Inconsistent user interface displays may occur when using Safari and Chrome. Additionally, users who are currently using Internet Explorer 6.x or 7.x and who wish to upgrade to Internet Explorer 8.x must first uninstall Internet Explorer 6.x/7.x completely from their system and then install Internet Explorer 8.x. Users may face problems using CSCC if they don’t perform this step. Internet Explorer 10.x is fully functional in the system when using the compatibility mode on it.

Bandwidth | Minimum 256 kbps per user

Network Latency (information only) | Maximum 50 ms to apps.cisco.com. Latency will affect performance increasingly above 50 ms.

### 3.2 Requesting Access to CSCC

In order to use Cisco Service Contract Center, you have to first request access by following the steps below.

**Note:** Requesting access to CSCC requires that you have a CCO User ID. If you do not have a CCO ID, you must first register with cisco.com at the following URL: [http://tools.cisco.com/RPF/register/register.do](http://tools.cisco.com/RPF/register/register.do).

- If you already have a 2-Tier CCO ID for CSCC as a Distributor but need to order directly from Cisco, you will need to set up a separate/additional 1-Tier CCO ID.
- If you already have a 1-Tier CCO ID for CSCC as a 1-Tier Partner or Distributor ordering directly from Cisco but need to order through distribution, you will need to set up a separate/additional 2-Tier CCO ID for distribution. Your current 1-Tier CCO ID CANNOT be used for regular 2-Tier access.

Once you set up your CCO ID, please associate with your company profile in Partner Self Service at the following URL: [http://apps.cisco.com/WWChannels/GETLOG/login.do](http://apps.cisco.com/WWChannels/GETLOG/login.do). For more information please reference the 'Associating CCO ID with Company Profile Tip Sheet'.

If you have a CCO ID, follow these steps:

1. Launch a web browser and navigate to the following URL
2. The following screen appears. Enter your CCO user ID and password and follow the on-screen instructions to complete the Partner Registration Tool.
3.3 Logging into CSCC

1. Launch your web browser and navigate to the following URL:


   If this is not the first time you have logged in to CSCC, you might be taken directly into the application. Otherwise, continue with the following steps.

2. In the ‘Connect to tools.cisco.com’ popup window, enter your CCO ‘User name’ and ‘Password’. If you have forgotten your ‘CCO User name’ or ‘Password’, send a blank email to cco-locksmith@cisco.com.

   Note: Multiple users using a single CCO ID is not recommended and can cause inconsistency in the tool.

3. Optional: Click the ‘Remember my password’ checkbox if you would like to save your CCO ‘User name’ and ‘Password’.
4. Click ‘OK’.

CSCC Dashboard Screen

Important Note: The “Close Window” functionality has been removed from ALL the screens accessed from the Estimates/Quotes tab.

5. The Dashboard screen, which contains summary information, appears.
3.3.1 Logout

A 'Logout' hyperlink is on the CSCC Header, which will allow you to log out of CSCC.

As soon as you click the 'Logout' link, you will be reminded to save any uncommitted changes before you are logged out of the current session, as well as any other concurrent sessions opened. You will then be presented with a CSCC Login screen

**Note:** CSCC times out after 10 minutes of inactivity. Please log out and log back in if you have been inactive for longer than 10 minutes.

3.4 Getting Help

There are two ways to get help while using Cisco Service Contract Center:

- You can use the field-level online help popup windows and associated links to get help on a specific screen element such as a field or drop-down menu.
- You can use the 'Open a Case' link in the 'Toolkit' to access a wide range of resources from the Cisco Support organization, including the Web 2.0–enabled CSCC Community.

The following sections describe these help options in more detail.

3.4.1 Field-Level Online Help

While you use CSCC, you will notice online help icons - ![Help Icon] - next to a number of screen elements. Clicking one of these icons launches a popup window that provides the following features to help you understand the system and use it more easily:

- A definition or basic description of that particular field or function.
- Basic usage instructions for the field or function.
- Links to more-detailed information about that particular field or function.
- A 'Was this content useful' link enabling you to comment via e-mail on the effectiveness of the help content.
The links to more-detailed information take you to specific instructions within the Support Articles section of the CSCC Community. (For more information, see the section Support from Cisco: The CSCC Community.)

### 3.4.2 Header Level Online Help Link & Support from Cisco: The CSCC Community

The “Help” link at the top right corner of the CSCC screen can be used to access the Cisco Service Contract Center Community. Support Center Resources such as support articles, videos, forums, documentation and blogs are all available for your support to help users resolve questions and issues for themselves and remain as self-sufficient as possible. The primary vehicle for delivering these resources is the Service Support Center CSCC Community, a fully Web 2.0–enabled support environment.

To access the CSCC resources available from Cisco Support, follow these steps:

1. Click the ‘Help’ hyperlink.

The CSCC Community page appears, providing you with support articles, documentation, discussion forums, and blogs specifically relevant to CSCC.
2. If you do not find the answer you need in the CSCC Community and still need to open a case with Support, navigate back to Cisco Service Contract Center and click on “Open a Case”.

Open a Case Hyperlink

The Customer Service Central case submission system, which you can use to submit cases for assistance from Support, will be displayed for more information see Open a Support Case:
3.4.3 Opening a Support Case

Cisco is migrating to a new case management tool: Customer Service Central for all customer service queries. To help ensure that your support case is resolved in a timely manner, please create all new cases through this new portal.

Please follow these step-by-step instructions to open a support case within Cisco Service Contract Center:

1. Navigate to the top, right corner of the Cisco Service Contract Center quoting screen and click the Open a Case link.

2. Within your Customer Service Central module, click the Open a Case tab and choose the appropriate categories for your support case and click Continue.
3. Include **CSCC for 2 Tier/Distribution** on your case. This is a key step to ensure your case is routed properly. Completely fill in all the details by including as much information as possible to help ensure your support case is resolved in a timely manner. Once complete, click **Submit**.

**Important Note:** Depending on what category was selected above, you will need to do one of the following:

- Choose **CSCC for 2 Tier/Distribution** from the appropriate dropdown menu
- Enter **CSCC for 2 Tier/Distribution** in the appropriate text field provided

Below are 2 examples of the many different case options:
Customer Service Central – Select CSCC for 2 Tier/Distribution – Creating a Quote Case

Select ‘CSCC for 2 Tier/Distribution’ to ensure correct routing of case.

Customer Service Central – Select CSCC for 2 Tier/Distribution – General Inquiry Case

Enter ‘CSCC for 2 Tier/Distribution’ to ensure correct routing of case and click ‘Submit’
Note: In the case template that appears for your selections, all fields with a red asterisk must be populated. You also have the option to save as a draft if you are not ready to submit by clicking Save Draft.

3.5 Setting

3.6 Default Preferences
This section describes how to set your default Preferences in CSCC

Important Note: All users must set their preferences when logging into CSCC for the first time. If you do not set your preferences, you may not be able to create quotes or proceed to order. This is absolutely critical to ensure that you receive expected results when using CSCC.

3.6.1 About CSCC Preferences
CSCC ‘Preferences’ provide a number of parameters you can set to customize your CSCC user experience. Preferences determine everything from the display of the user interface to the default values used when you create quotes.

It is critical that you set your Preferences before using CSCC. These Preferences are used on Contracts and Quotes you create and modify, so common errors like the following may occur if Preferences are not set properly:

- If your default Bill To ID is not set, you may have issues when creating quotes.
- If your default Service Level is an Advanced Services (AS) Service Level, you will be unable to add Serial Numbers to a Contract, Estimate, or Quote, since Advanced Services are sold independently of products. You can make correct selections if the defaulted Levels are incorrect during quick quote/quick price process.
- Your preferences will not be saved until you log out of CSCC and then log back into CSCC.

If you create a quote with Install Site validation disabled and an incorrect Install Site Country specified in Preferences, pricing could be incorrect, since service pricing varies based on geography.

3.6.2 Setting Your Preferences
To set your Preferences, follow these steps:

1. Click Preferences in the upper right of any CSCC screen.

Step 1: Click the ‘Preferences’ hyperlink

2. The Preferences popup window appears. Navigate through the three Preferences tabs to set Preferences specific to that function: General, or Quotes. (See the section Preferences Settings for detailed information on the Preferences you can set on each tab.)

Note: The Preferences window is now re-sizeable by dragging the window in/out.
3. Click Save Preferences. An alert will appear instructing you to exit CSCC and log back in.

**Important Note:** You must close your browser or Logout and log back in before Preferences will take effect.

### 3.6.3 Preferences Settings

There are three different CCO user roles for Distributors:

1. Distributor Administrator
2. Role for Purchasing/Ordering
3. Role for Creating Quote

**Important Note:** There are different preference settings for each distributor role. Users with access to each unique role need to set their own preferences:
### User Role Preferences to Set

<table>
<thead>
<tr>
<th>User Role</th>
<th>Preferences to Set</th>
</tr>
</thead>
<tbody>
<tr>
<td>Distributor Administrator</td>
<td>Distributor Administrator General, Distributor Administrator Quotes, Notifications</td>
</tr>
<tr>
<td>Role for Purchasing/Ordering</td>
<td>General, Quotes, Notifications</td>
</tr>
<tr>
<td>Role for Creating Quote</td>
<td>General, Quotes, Notifications</td>
</tr>
</tbody>
</table>

### Distributor Administrator Preferences:

#### 3.6.3.1 General Tab for the Distributor Administrator User:

![Preferences Popup-General Tab-for Distributor Administrator](image)

- **Note:** If this box is checked, the Reseller WILL receive a copy of the Reseller Order Completion Summary Report.

- **Note:** If this box is checked, an order completion email can be sent to the Install Site contact(s) as well.

A checkbox “Install Site Contract Notification” is available in User Preferences as well as on the Quote Summary Details and Quick Quote screens.

Distributor Administrator roles see this checkbox in the General tab of User Preferences.

Please note that this checkbox is not available in User Preferences for Distributor Quoting and Ordering roles. When a quote is converted to a contract, an order completion email can be sent to the Install Site contact(s) as well. This also notifies the contacts about the steps to be followed when the service on a covered product is required.
• When a quote is converted to a contract, an order completion email is sent to the Install Site contact(s).

• The email has an excel attachment that provides details of the products covered.

• In the reports, users only see the items that are ordered under the Cisco Branded Service (CBS).

---

Order Completion Email

- **Language**: The language you will see on the CSCC user interface. Select English, French, Spanish, Portuguese, or Japanese.

  **Note**: When you change the language on the CSCC user interface, some elements, such as values in drop-down menus, remain in English as illustrated below.

---

**Dashboard Sections Expanded**: You have the option to choose which Contracts, Request Status you want to see expanded. The sections of the CSCC Dashboard you want to appear expanded when you log in. By default, all sections are collapsed so the page will load quickly. Check a box to show that section expanded when you log into the system.

**Always use Enterprise Dollar SKU for Quoting**: Distributor Administrator can choose whether to use Enterprise SKU for orders. (The Distributor must be Enterprise SKU enabled for this function to be shown).

• If you check the box, the ‘ENT SKU’ column will automatically generate a value of ‘Y’ in the Multiple Quote Upload Template.
• **Set Reseller Price as:** The Disti Admin is able to set the reseller price by marking up or marking down the price a certain percentage from the cost.

• **Notification Email Address:** Preferred email address to receive notifications from Cisco.

• **Ship-to ID:** Click on the radio button to proceed to the *Ship To Selector-Context to Contracts* popup.
  - You can search by *Ship to Name* and *Ship To Number* and add default Ship To IDs in user’s address book.
  - Enter Ship To Name and/or Ship To Number. You also have the option of filtering your search results by Country, State/Province, and City.
  - Click Search for Ship To
  - Ship To search results will populate under Ship To Addresses header
  - You have option of selecting Ship Tos and adding them into your Address Book for future reference. Click “Add to Address Book” if you’d like to save the selected Ship Tos for future reference.

• **Bill-to ID:** Click on the radio button to proceed to the *Bill To Selector* popup.
  - Enter Bill To Name and/or Bill To Number. You also have the option of filtering your search results by Country, State/Province, and City.
  - Click Search for Bill To
  - Bill To search results will populate under Bill To Addresses header
You have the option of selecting Bill Tos and adding them into your Address Book for future reference. Click “Add to Address Book” if you’d like to save the selected Bill Tos for future reference.

**Note:** When searching, the WILDCARD search feature is available for Bill To ID. For more information, see the section [Wildcard Search](#).

### Preferences Popup – General Tab-Bill To ID-Bill To Selector

- **Invoice Dollar SKU Option:** Distributor Administrator has the option to choose fixed dollar SKU or Dollar Adjustable

- **Send Reseller Order Completion Report:** By selecting, the Reseller Order Completion Report will be automatically sent to the reseller once the quote is converted into a contract.
  - The box will default to being checked. Distributor Administrators MUST verify their selection in Preferences before ordering a quote. If the box is not checked, the Reseller Order Completion Report will not be automatically sent to the reseller.
  - It is the Disti Admin’s responsibility to inform other Disti Admins and the Disti Ordering role of what has been set in Preferences so when quotes are ordered, all ordering roles are aware of what has been set.

**Important Note:** You must close your browser or logout and log back in before Preferences will take effect.
3.6.3.2 General Tab for Disti Purchasing/Ordering & Quoting User Roles:

Preferences Popup-General Tab-for Disti Purchasing/Ordering & Quoting User Roles

- **Language:** The language you will see on the CSCC user interface. Select English, French, Spanish, or Japanese.

  **Note:** When you change the language on the CSCC user interface, some elements, such as values in drop-down menus, remain in English as illustrated below.

Portions of Cisco Service Contract Center Displayed in Preferred Language

- **Dashboard Sections Expanded:** You have the option to choose which Contracts, Request Status you want to see expanded. The sections of the CSCC Dashboard you want to appear expanded when you log in. By default, all sections are collapsed so the page will load quickly. Check a box to show that section expanded when you log into the system.

- **Always use Enterprise Dollar SKU for Quoting:** Distributor Administrator can choose whether to use Enterprise SKU for orders. (The Distributor must be Enterprise SKU enabled for this function to be shown).

3.6.3.3 Quotes Tab for ALL Disti Roles:

3.6.3.3.1 Quotes Tab for Distributor Roles – General and Financial
Preferences Popup –Quotes Tab – General and Financial Section

- **Channel:** The sales channel you are selling into. Select 1T (1-Tier Partner), DC (Direct Customer) or Distribution. **Note:** Distributor users MUST select DISTRIBUTION.

- When quoting in both the Quick and Standard quoting workflows, the Channel dropdown should default to Distribution. If it happens to default to 1T, you will need to select Distribution from the Channel dropdown and then select Save Preferences.

  **Note:** When saving preferences, you must close your browser or logout and log back in for the changes to take effect. Upon logging back in, your Channel should now default to Distribution on the Quick Price/Quote screen in the Quick Quoting workflow and the Quote Summary Details screen in the Standard Quoting workflow.

- **Intended Use:** The intended use for the services you are quoting. Select Resale or Internal Business Use to ensure that taxes and pricing are calculated appropriately.

- **Display Partner Discount (Quote UI):** Handling of partner discounts in Quote displays. Select ‘Yes’ from the dropdown to default the Partner Discount checkboxes on the Quoting screen in Quick Quoting and the Quote Summary Details screen in Standard Quoting to being checked. Select ‘No’ to default them to being unchecked. Displaying full prices without discounts can be useful when communicating with your end-customers.

- **Display Partner Discount (Quote Download/Export):** Handling of partner discounts in Quote reports. Select ‘Yes’ to default the Partner Discount checkboxes to being checked for the Download, Notify, Email and Export actions. Select ‘No’ to default them to being unchecked. Displaying full prices without discounts can be useful when communicating with your end-customers.

- **Always Show in Standard Flow:** Check this box to ALWAYS have quotes open up in the Standard Quoting workflow. If this box is NOT checked, quotes will open based on their type:

- **Quick Quote** – Quote does NOT exceed 500 (major + minor) lines and/or 20 install sites.
**Standard Quote** – Quote exceeds 500 (major + minor) lines and/or 20 install sites.

**Important Note:** You must close your browser or Logout and log back in before Preferences will take effect.

### 3.6.3.3.2 Quotes Tab for Distributor Roles – Customers and Sites

![Preferences Popup – Quotes Tab – Customers and Sites Section](image)

- **Install Site Country:** The Install Site Country used by default on your Quotes. For best results, select the country in which all or most of your end customers are located.

  **Note:** If you don’t set Install Country in Preferences, tool will default to the Install Country from your CCO Profile

**Important Note:** You must close your browser or Logout and log back in before Preferences will take effect.

### 3.6.3.3.3 Quotes Tab for Distributor Roles -Service Level & Co-Term
Preferences Popup – Quotes Tab – Service Level & Co-Term Section

- **Hardware Service Level, Software Service Level, and Software Subscription**: The Service Levels used by default on your Quotes. By default, SNT - SmartNet is selected for hardware and SAS - Software Application Support is selected for software. Software Subscription is not defaulted as typically users will not quote software subscription. If you do not have specific service levels you quote most of the time, these defaults, which are quite common, will allow for smoother processing of simple Estimates and Quotes, and may help prevent issues when quoting.

Some of the service levels that were previously considered compatible are no longer compatible and cannot reside on the same contract.

For a list of impacted service level combinations, click here.

- **Hardware Service, Software Service, and Software Subscription Durations**: The Service and Subscription Durations used by default on your Quotes. Select the service and subscription durations you estimate and quote most frequently.
  - 12, 24, 36, 48, or 60 months for hardware and software service
  - 12, 24, 36, 48, or 60 months for UCSS Software Upgrade Subscription

The maximum standard Technical Services is 60 months. Users have the ability to quote and order standard Technical Support Services (excluding Combined Services) with service durations of up to and including 60 months without a Deal ID. Service quotes containing other non-standard terms (i.e., non-standard discounting in years 4 and 5) will continue to require an approved Deal ID to submit the quote.

Standard service dollar threshold is $3 million. Thus, approved Deal IDs are not required to validate quotes up to $3 million. Quotes over $3 million still require an approved Deal ID.

- **Co-Term Flag and Date**: Co-termination settings used by default on your Quotes. Check Co-Term Flag and enter a Co-Term Date to automatically set co-termination on new Quotes.

- **Auto Error Resolution**: The Auto Error Resolution checkbox defaults the Auto Error Resolution checkboxes found in the Upload sections of Quick Price/Quote, Step 3: Quoting screen in Quick
Quoting, and the Preferences section of the Quote Summary Details screen in Standard Quoting. The checkbox automatically resolves Service Availability, Target Contract, Serial Number, and Begin and End date errors by applying the system generated preferred value.

**Note:** Preferences can be modified at any time. In addition, many of the default settings on the Quotes tab can be overridden at the Quote, and Line Item levels.

**Important Note:** You must close your browser or Logout and log back in before Preferences will take effect.

### 3.6.3.4 Notifications Tab for all Users:

![Preferences Popup – Notifications Tab – Distributor Administrator](image)

![Preferences Popup – Notifications Tab – Purchasing/Ordering & Quoting User Roles](image)

- **Critical Email Alerts:** Provide the preferred email address(es) to receive an email version of the critical alert message popup provided upon login. Multiple email addresses can be added if separated by a comma. Receiving the email does not stop the popup upon login, but provides an additional copy of the critical alert message. This field is not mandatory, so leave the tab blank if you do not want an emailed critical alert message.

**Important Note:** You must close your browser or Logout and log back in before Preferences will take effect.

### 3.6.3.5 Manage User Roles Tab:

**Purpose:** To provide the Distributor Administrator user the ability to assign other users at their company various distributor roles:

1. Disti Admin
2. Disti Purchasing/Ordering
3. Disti Quoting
Distributor Administrator General Tab - Manage CCO User

- **Distributor Name:** The Distri Name is auto-populated based on Distri Admin’s company information.
- **Distributor ID:** The Distri ID is auto-populated based on Distri Admin’s company information.
- **Assign/Change User Roles:** Assign or change user roles of existing users by selecting from the dropdown.
- **Remove User ID:** Click on the cross mark next to the desired CCO User ID to be deleted. The removed User ID can be re-added by using the “Add User(s)” function (see step C above) only if the User ID is a valid distributor at the time of adding.
- **Add User(s) - Enter CCO User ID(s) separated by commas in input field:** Distributor Administrator will need to enter CCO User IDs for each user they wish to associate to their company and grant access to.
  
  **Note:** Each CCO user ID can only have one assigned role. Distri Admin can assign or change roles for multiple users at a time.

- **User Role:** Select the appropriate User Role (Distri Admin, Distri Ordering, or Distri Quoting) for the particular Distributor CCO ID(s) you entered and click **Add New User(s).**
  
  **Note:** When assigning a new user role, the system will check to see if the new CCO ID already exists in SMS3. If so, the system will migrate the CCO ID’s Address Book from SMS3 into CSCC.

- **Restore Defaults:** Select to restore the system defaults which will overwrite your current changes.
- **Save Preferences:** Select to save your current changes.

**Important Note:** You must close your browser or Logout and log back in before Preferences will take effect.

### 3.7 Registering Contracts

Once you have access to Cisco Service Contract Center (CSCC), you have the flexibility to gain access to contracts that are not in your view. In order to gain access, you must register the contracts within Cisco Service Contract Center. For contract registration to be successfully completed, the bill to in the user’s profile
must be in the same corporate structure as the contract bill to, or the name of the contract bill to must match
the name preference in the user’s profile. For detailed instructions on registering contracts, see the section
Registering Contracts.

4 Searching CSCC
Cisco Service Contract Center provides a number of ways to search for data. This section provides detailed
instructions for using this functionality.

4.1 Conducting Basic Search
You can conduct Basic Searches from any Cisco Service Contract Center screen by navigating to the Search
CSCC dropdown box in the upper right hand corner of the screen and selecting one of the following options,
each of which will take you to a different results page:

- ‘Quick Price Number’: 2-Tier users will be able to generate & save a ‘Quick Price’ Number on the ‘Pricing’
screen and reference it at a later date. You can search for lines on a quote by entering your Quick Price
Number from the ‘Search CSCC’ dropdown menu on the Basic search screen.
- ‘Contract Number’: The search results will take you to the Contract Summary Details screen.
- ‘Serial Number / PAK Number’: For covered equipment, if the result is a single contract, the results screen
is ‘Line Items’. If there are multiple contracts, the results screen is ‘Contract Manager’. If you click the
Product ID hyperlink from your search result, you can view the product warranty details and additional
product information.
- ‘Product PO’: For covered equipment, if the result is a single product, the results screen is ‘Line Items’. If
there are multiple contracts, the results screen is ‘Contract Manager’ where you can select the specific
contract that you would like to view. Searching by Product PO is also useful when searching for
uncovered equipment under a Product Purchase Order.
- ‘Product SO’: For covered equipment, if the result is a single product, the results screen is ‘Line Items.’ If
there are multiple contracts, the results screen is ‘Contract Manager’ where you can select the specific
contract that you would like to view. Searching by Product SO is also useful when searching for
uncovered equipment under a Product Sales Order.
- ‘ASPT Quote Number’: The results screen will be the Quote Summary Details.
- ‘Project Number’: This search option will be visible but is not available for Distributors and Resellers, if
you choose this option, an error message will appear.
- ‘Instance Number’: If the searched product is covered on a contract, the results screen is ‘Line Items’, if
the searched product is uncovered, the results screen is ‘Contract Manager’. When a product result is
displayed, you can click the Product ID hyperlink to view the additional details about the product.
- ‘License and Subscription Data’: This search option allows you to search for related software licenses and
subscription information (i.e. related software PAK numbers) associated with the software(s) installed on
a given hardware equipment. For covered equipment, if the result is a single contract, the results screen
is ‘Line Items’. If there are multiple contracts, the results screen is ‘Contract Manager’.
- ‘Host ID’: Search by Host Id will return both covered and uncovered hardware/license data, including
configurations if applicable, of a given Host Identifier. The Search Results screen that is rendered is the
same as when searching by License and Subscription Data. If the Host Identifier information found is
covered on a single contract, the ‘Line Items’ screen for that contract appears. If the information found is
uncovered and/or covered under multiple contracts, the ‘Contract Manager’ screen displays.

CSCC will support searching by and quoting by Host ID with special characters.

SourceFire customers will be able to:
To use Search CSCC, follow the steps below:

1. On the Dashboard, navigate to the top right of the screen and click the ‘Search CSCC’ dropdown.
2. From the ‘Search CSCC’ dropdown, select an option (e.g., ‘Contract Number’).
3. Navigate to the field next to the ‘Search CSCC’ dropdown and type in the corresponding information in the textbox (e.g., contract number).
4. Navigate to the right of the textbox and click ‘GO’.
5. Depending on what you search by, either the Contract Manager screen, Contract Summary Details screen, Contract Line Items screen, Quoting screen, or Quote Summary Details screen will appear for the completed search.

**Note:** The appropriate screen will appear based on what is set in your preferences. If the option, ‘Always Show in Standard Flow’ is selected in your preferences, the quote will open to the Quote Summary Details screen in the Standard quoting workflow regardless of the quote type. If not selected, the quote will open in the Quick Quoting workflow if the quote is under 500 (major + minor) lines and/or 20 install sites, otherwise it will open in the Standard Quoting workflow.
Contract Manager Screen

Contract Line Items Screen
Contract Summary Details Screen

Quoting Screen – Quick Quoting Workflow
4.2 Conducting Advanced Search

The ‘Advanced Search’ popup window enables you to search among all contracts, opportunities, and quotes depending on what information you need. In addition, Advanced Search allows you to enter multiple search parameters to lookup information which meets your preferred criteria.

**Note:** ‘Advanced Search’ can be accessed from any main screen within Cisco Service Contract Center. For more information on the Mass Serial Number (SNIF) functionality that is available within the Advanced Search popup window, see the section [Generating a SNIF Report](#).

You are also able to open multiple Advanced Search instances within the same CSCC session without overriding an existing search.

**Note:** If you are performing the same type of Advanced Search for multiple Advanced Searches (i.e. ‘Contracts’ is selected from the ‘Search For’ dropdown for all the search instances) AND are using the same selector icon types (i.e. Installed-at Customer Name, Bill To ID, etc.) to filter for results, then the previous searches will be overridden. The overrides only apply to filters that use the selector icons.

**Note:** When conducting a search via Advanced Search, the search will return up to 500 results on the UI. Results over 500 will be sent offline. You will receive a popup prompting you to enter a Request Name. At least 5 characters must be entered to enable the ‘Continue’ button. Clicking continue will generate a Request ID. When you click on the Request ID, the results will be generated online.

---

**Advanced Search – Search Exceeded Threshold Popup**
To use Advanced Search, follow the steps below.

1. Navigate to the upper right-hand corner of any main CSCC screen.
2. Click the 'Advanced Search' hyperlink.

The ‘Advanced Search’ hyperlink

3. In the ‘Search For’ dropdown menu, select the type of search to perform. You can perform a search for 'Contracts', 'Quotes/Estimates', and 'Mass Serial Number (SNIF)'.
   
   **Note:** In the ‘Quotes/Estimates’ search option, you will only be able to search for Quotes. Estimates don’t apply.

4. The ‘Advanced Search’ popup window appears with two tabs: ‘Search’ tab and ‘Results’ tab. By default, the ‘Search’ tab is shown.

5. In the ‘Filters’ section, select the appropriate search criteria
   
   - ‘Quick Price Number’ / ‘Quote Number’
   - ‘Contract Number’
   - ‘Installed-at Customer Name’
   - ‘Installed-at Customer and Site ID’
   - ‘Bill To ID’
   - ‘Contract Begin Date From/To’
   - ‘Contract Earliest End Date From/To’
   - ‘Contract Label’
   - ‘Service Level’
   - ‘CCO User ID’: When searching by CCO User ID, 1 or more of the header level attribute will need to be populated (Contract Number, Installed-at Customer Name, Installed-at Customer and Site ID, or Bill To ID). This search option is for searching for contracts that are registered to that specific CCO User ID.

   **Note:** When searching, the WILDCARD search feature is available for Installed-at Customer Name, Installed-at Customer and Site ID, and Bill To ID. For more information, see the section [Wildcard Search](#).

   **Note:** In the ‘Line Level Search Filters’ section, the ‘Covered Product Status’ multi-checkbox field can only be used in conjunction with the ‘Serial Number(s) / PAK Number(s)’ or ‘Instance Number(s)’ field, and will therefore be enabled only when the user enters a search criteria in either of these fields.
**Note:** In the ‘Line Level Search Filters’ section, the ‘Include Related Licenses/Subscriptions’ box can be checked when searching for Licenses/Subscriptions. When searching for PAK numbers, if this checkbox is selected, the search results will include details of related licenses and subscriptions. This checkbox will be enabled only after an input is entered in the ‘Serial Number(s) / PAK Number(s)’ search field first.

**Advanced Search – Contracts – Filter Options**

6. Navigate to the bottom right-hand corner of the ‘Advanced Search’ popup window and click the ‘Search’ button.

7. Same steps above apply for Quotes/Estimate search option. The ‘Channel’ filter dropdown option will default to “Distribution” and is static.

**Note:** The “Channel” filter dropdown option will default to “1T” for the 1T pilot users buying through distribution. In order to search for distribution quotes, the 1T pilot user must select ‘Distribution’ in the channel dropdown.

8. Enter ‘Quick Price Number’ in the ‘Quote #’ box.
9. Bill To Name is a dropdown of distributors. In the dropdown, Distributors will only see themselves and Resellers will see all the Distributors who can sell into their territory.

10. Search for a quote using the source contract number through the Source Contract filter.

Advanced Search – Quotes – Filter Options

Step 7: Defaults to ‘Distribution’ and is static

Step 8: Enter Quick Price Number dropdown.

Step 9: Select Distributor from dropdown.

Step 10: Enter the source contract number.
**Note:** When searching CSCC, a minimum of 2 characters is needed for Customer Name, Install Site Name, and Bill-to Name.

The 2 character minimum applies when you:
- Enter 2 characters without a wildcard
  - Example: CA
- Enter a wildcard (%) followed by 2 characters
  - Example: %CA
- Enter 2 characters followed by a wildcard (%)
  - Example: CA%

**Note:** Quote Reference Number will be added to Advanced Search under “More Filters.” To search using Quote Reference Number, enter a minimum of 3 characters. Distributors need to ensure their channel is set to “Distribution” or you will receive an error and no results will be found.

11. If you are performing a Contract or Quotes search and the search results exceed the system threshold amount, a message will appear notifying you, that the search you are about to perform has exceeded the maximum threshold. You can cancel this search and further refine your search criteria and try again or continue with your search offline and a Request ID will be generated. From this screen, you can also give your offline search a Request Name so that it can be easily identified from the Request Status screen.

- If you click ‘Cancel’, the message will close and the Advanced Search popup window will be displayed.
- If you click ‘Continue’, you will receive a message that ‘The search you have selected to perform will be processed offline with the following Request ID [#]. Please refer to the Request Status page for updates on this request by clicking the Request ID.’ You can track your request from the Request Status screen using the name you provided or by clicking the ‘Request ID’ hyperlink in the message. When your request status is listed as ‘Completed’, you can click the ‘Reference ID’ hyperlink to be directed to the screen where your results will display.

**Note:** The image below shows the ‘Results’ tab if you search for contracts. Other types of searches will result in a different format for the ‘Results’ tab. Contracts ‘Advanced Search’ may display the ‘Results’ tab as a version of Contract Manager, Contract Summary Details, or Line Items. If you search for opportunities, the door and arrow icon in the ‘Opp. #’ column indicates that this is an outsourced opportunity, dealt with by an outsourced sales affiliate. The arrow and person icon indicates this is a partner opportunity, where a partner is responsible for driving and closing the renewal.

![Results tab - Contracts](image)

View the Results screen (Contract Search Results shown in this example)

‘Results’ tab - Contracts

When searching for quotes, the results will display under the ‘Results’ tab in the ‘Quotes Search Results’ table. From the Search Results screen, you have the option to navigate to the ‘Action’ dropdown menu and select
Cancel, Download, Download Customized Report, Setup PO Line Reference, Grant Access, Proceed To Order, Reactivate, View Sample Invoice, and Cancel Order Submission. You can toggle between the ‘Search’ and ‘Results’ tab without clearing results, or returning to default values. Clicking ‘Refresh’ will clear out all results.

Note: When clicking on the quote # hyperlink in the Quote Search Results, you will be taken to the Quoting Screen of Quick Quote.

The options to Email and Copy are not available for Distributors and Resellers, if you choose these options; an error message will appear at the header or function:

- **Email** - This functionality is not available for Distribution quotes from this page. Click on the quote number to open the quote and perform this action.
- **Copy** - This functionality is not available for Distribution quotes from this page. Click on the quote number to open the quote and perform this action.

- **Cancel** - You have the ability to cancel a single or multiple quotes. To perform this action follow the steps below:
  1. Select a quote checkbox from the Quote Search Results. Once you have selected a quote, the Action dropdown will be activated.
  2. From the Action dropdown, select ‘Cancel’ and click ‘GO’. A popup window will appear asking you to confirm the cancellation.
  3. Once you accept the cancellation, you will receive the following message at the top of the Advanced Search screen:

![Advanced Search](image)

Step 1: Select a quote.
Step 2: Select ‘Cancel’ and click ‘GO’.

‘Results’ tab – Quotes – Cancel
Advanced Search Header Level Message

- **Download** – You will have the ability to download a single or multiple quotes from the Advanced Search screen. To perform this action follow the steps below:

  1. Select a quote checkbox from the Quote Search Results. Once you have selected a quote, the Action dropdown will be activated.
  2. Select “Download” from the ‘Action’ Dropdown and click ‘GO’
  3. A ‘Multiple Quote Download’ popup will appear to download the quotes into the new Q3FY13 Download Template.
  4. The Multiple Quote Download Report will be delivered via email.

Advanced Search Action Dropdown – Download

Select a quote checkbox(es), select ‘Download’ from the Action dropdown, and click ‘GO’
Multiple Quote Download Popup

**Note:** 'Display Partner Discount' box will be checked if it's selected in Preferences. To hide Partner Discount information in the quote download, uncheck the 'Display Partner Discount' checkbox. The 'Display Partner Discount' checkbox must be selected for the Quote Net Amount to match the Service Amount on the Sample Invoice.

---

CSCC Quote 4057250 has been routed from CARWILLI

<table>
<thead>
<tr>
<th>To:</th>
<th><a href="mailto:cscc-admin@cisco.com">cscc-admin@cisco.com</a></th>
</tr>
</thead>
<tbody>
<tr>
<td>Sent:</td>
<td>Mon 4/3/2011 5:16 PM</td>
</tr>
<tr>
<td>From:</td>
<td>Carre Williams (carwili)</td>
</tr>
<tr>
<td>Size:</td>
<td>54690477, with Discounts, 2 KB</td>
</tr>
</tbody>
</table>

---

Dear CSCC USER,

The report request has been generated for 54690477

Thank You,
Cisco

For corporate legal information please click here:

This is a system generated email. Please do not reply.

---

Multiple Quote Download Email
Multiple Quote Download Report

Note: There is no limit to how many quotes can be downloaded at once.

- **Download Customized Reports** – Customized Reports are available from the Action dropdown to receive as an .xls spreadsheet via email.
  1. Select a quote(s) from the Quote Search Results. Once you have selected a quote, the Action dropdown will be activated.
  2. Select “Download Customized Reports” from the ‘Quote Actions’ Dropdown and click ‘GO’
  3. A ‘Customized Report’ popup will appear to create the customized report by:
     a. Selecting specific columns to include in your report (similarly to the Column and Row selector)
     b. Changing the column order in your report
     c. Saving up to 25 report templates or ‘configurations’ at a time, which will be tied to your CCO user ID
     d. Deleting your configurations at any time
     e. Creating custom reports on the fly, i.e., without the use of a configuration
     f. Clicking on any column name to see its description.
  4. The Customized Download Report will be delivered via email.
Select a quote checkbox(es), select ‘Download Customized Reports’ from the Action dropdown, and click ‘GO’

Note: To help easily identify reseller information in downloaded reports, reseller information is available in the Custom Download Report function to include:

- Maintenance Sales Order Number
- First/Last Name
- Address
- Email
- Phone
Custom Quote Download Report

Custom Report Column Selection

Please note that this customized report cannot be used as a template to upload your quotes. Please use the quote download report without customization if you wish to upload your quote.

Choose Configuration: NEW

Available Columns

- PARTNER:SELLER EMAIL
- PARTNER:SELLER PHONE
- PARTNER:SELLER ADDRESS
- PARTNER:SELLER ADDRESS2
- PARTNER:SELLER ADDRESS3
- PARTNER:SELLER ADDRESS4
- PARTNER:SELLER CITY
- PARTNER:SELLER COUNTRY
- PARTNER:SELLER FIRST NAME
- PARTNER:SELLER LAST NAME

Selected Columns

- QUOTE NUMBER
- PARTNER REFERENCE
- BILL TO NAME
- BILL TO ID
- QUOTE AMOUNT
- QUOTE NET TOTAL AND FEE AMOUNT
- DATE QUOTED
- LAST MODIFIED
- HON STRID

Custom Quote Download Report

Customized Quote Report

Note: There is no limit to how many quotes can be downloaded at once.

- Setup PO Line Reference – PO Line Reference is designed for users who are set up for electronic data interchange (EDI), and therefore receive EDI invoices. PO Line Reference helps these users match order lines to invoice lines. The system recognizes EDI-invoice users by their Bill To IDs and PO Line Reference eligibility.

If you are an EDI-invoice partner, the ‘Setup PO Line Reference’ checkbox appears on the ‘Order Input’ popup window when you order a quote. Checking this box marks your order as a PO Line Reference order before you submit the order.
Using Advanced Search, you can set up P.O. Line Reference for a single or multiple quotes that have been submitted for ordering with the ‘Setup PO Line Reference’ checkbox selected.

1. When you order the quote(s), click the ‘Setup P.O. Line Reference’ checkbox on the ‘Order Input’ popup window before clicking ‘Submit’.

2. Return to Advanced Search and display the quote(s) for which you want to set up PO Line Reference. Use the ‘Statuses to Include’ filter to limit your view to quotes in ‘Order in Progress’ status.

3. Select a single or multiple quotes from the Advanced Search results.

4. Select ‘Setup PO Line Reference’ from the ‘Action’ drop-down list and click ‘GO’.

The ‘Order Preview’ screen appears. This screen displays all the summarized lines for all quotes included in the Purchase Order. These lines are summarized based on the standard grouping logic, which creates a different summarized line based on:

- Quote Number
- Contract Number
- Service Level
- Revenue Source Code
- Start Date
- End Date
- Installed At Site

Each summarized order line will show a PO Line Reference field you can populate.

Ensure that you have setup PO Line Referencing when ordering your quote(s).
5. Populate the 'PO Line Reference' text field for each appropriate line with an alphanumeric or null value.

6. Click one of the following buttons:
   - **Cancel** – This button will cancel out of setting up the PO Line Referencing for the moment and return to the Quote Summary Details screen.
   - **Email** – This button allows you to email the Order Preview screen to one or more email addresses.
   - **Submit with PO Line Reference** – This Button will allow you to submit the order with the PO Line Referencing you have entered for each summarized order line.
   - **Save Only** – This button will allow you to save the Order Preview screen for future use.

The confirmation pop-up window will appear.

7. Please note that any POLR-enabled BID has to go through an order booking validation to ensure that the PO Line Reference number is entered for all order lines.
   - You need to enter the POLR value utilizing the new page that displays after clicking **Proceed to Order**. As a result, POLR displays on your invoices.

8. All order lines require a POLR number (up to 6 characters including special characters), which could be either system defaulted or user entered, to be attached prior to order submission.

9. When you click **Proceed to Order** and if the BID is POLR enabled:
   a. The **Order Quote** screen displays a message stating that the BID is set up to include a PO Line Reference value.
   b. Order lines appear at the bottom of **Order Quote** screen.
Purchase Order Line Information Message 1

- If your BID is POLR enabled, you MUST EDIT the system generated POLR values.
- After entering the PO Line Reference information, click **Submit Order with PO Line Reference**.

Purchase Order Line Information Message 2

- If a PO Line Reference field is blank for any line and you click **Submit Order with PO Line Reference**, a pop-up window appears with a message.
- You cannot proceed with the order until the field is completed.
10. On other hand, when ordering a single quote with more than 500 lines, and the BID is PO Line Reference enabled, when you click Proceed to Order:
   a. The Order Quote pop-up window appears with a message advising you to submit the PO Line Reference details once the email notification is received.
   b. Click Submit Order. The Quote Summary Details screen displays with an error message.

   **Note:** You will not be able to proceed with the order until the field is completed.
• When you receive the email notification, log into CSCC and go to the **Quote Summary Details** screen.

• Open the **Action** menu and select **Setup the PO Line Reference** (As-is)

• Click **GO**.

---

Dear Cisco Service Contract Center User,

The following Quote #5655965 that were submitted for Ordering on 10-OCT-14, are ready for PO Line Reference setup. The Order Submission ID for the Order is 99333333.

This is the first notification, please take action to login back into CSCC and navigate to the Quote and use the Setup PO Line Reference function to add the PO Line Reference details.

If no action is taken by 15-OCT-14 to update the PO Line Referencing details and submit the Order, then the PO Line Reference setup will become invalid, and the Quote status will change to a Valid status where the function to "Proceed To Order" and setup the PO line Reference must be followed again.

Thank you,
Cisco Service Contract Center.

This is a system generated email. Please do not reply.

---

• The **Order Preview** screen appears with a message informing you that the system has entered default values.

• Edit the values as required in the **Order Summary Details** section.

---

**Order Preview Screen**

• After entering all PO Line Reference information, click **Submit with PO Line Reference**.

• In the **Email** pop-up window, confirm the email or enter another email ID.

• Click **Send Email**.
Email Pop-up Window

- On the confirmation pop-up window, click Proceed. The Quote Summary Details screen displays the message: Order Preview has been submitted successfully.

Hard Stop Error Message

**Note:** The Quick Quoting workflow does not support the POLR functionality. Use the CSCC Standard Quoting workflow to submit such orders.

Switch to Standard Quoting Workflow
11. Click ‘Proceed’ to submit the order. Otherwise, click ‘Cancel’ to exit and return to the ‘Order Preview’ screen.

- An email with the ‘Order Preview’ in PDF format attached is sent to the CCO User ID associated with the quote.
- The quote will proceed with ordering.
- An invoice will be generated displaying the PO Line Reference setup for the summarized lines.
- **View Sample Invoice** - A Sample Invoice is available from Advanced Search to receive as an .xls spreadsheet via email for more than 500 lines and as an offline report for less than 500 lines. The users will have an option to access and download sample invoices comprising consolidated files that would include the quote details, invoice SKU information and additional details of their own version of information and reseller version of information.

- The Sample Invoice can be downloaded for **less than 500 lines** and **for more than 500 lines**.
- You will filter for quotes in any of the following statuses:
  - Valid
  - Invalid Orderable
  - Order In-progress
  - Order Failed Submission
  - Order Revalidated
  - Order Submitted
  - Conversion In-Progress
  - Order Complete

  - Select a quote(s) from the quote table by checking the appropriate box
  - Select “View Sample Invoice” from the ‘Quote Actions’ Dropdown and click ‘GO’

*Note:* You have the ability to request a sample invoice report for multiple quotes. To view sample invoice for multiple quotes, select the checkbox for each quote to be included. Quotes selected must:

- Be in the same status
- Have the same Taxability Value
- Not have Federal and Non-Federal Quotes included in the same combination
1. You will receive the following popup if you require a **Sample Invoice with less than 500 lines**. Once you select the version of the Sample Invoice you choose to access and click OK, the report will be generated offline and will be saved on your desktop.

2. The following popup would appear if you require a **Sample Invoice with more than 500 lines**, with your email address populated from your CCO profile. You can add additional recipients in the cc line. You will also see radio buttons with the options to ‘View My Invoice’ (the default) or ‘View Reseller Invoice’. Selecting ‘View Reseller Invoice’ will allow you to generate a Sample Invoice without any Distributor pricing information. You will also have to select the check box for **Include detailed quote Information** to request a Sample Invoice with quote details. Once you’ve selected the version, click Submit.
Sample Invoice email popup

A message will appear that your request has been submitted and an email will be sent when the request is completed. When finished, click close.

View Sample Invoice—Request Submit popup

When quoting with Fixed Dollar SKUs, the Sample Invoice now shows an ‘Invoice Summary’ section where users can see the Fixed Dollar SKUs rolled up including the total quantity and total amount specific to that SKU.

The Sample Invoice will appear as follows for Fixed Dollar SKU quotes:

Note: The ‘Quote Number’ column will not be shown if the report is for a single quote.

Sample Invoice for Fixed Dollar SKU Quotes
When quoting with Fixed Dollar SKUs, the Sample Invoice calculation will use the Distributor Contractual/Standard discount ($1-Std Discount) or $1K-Std Discount) to calculate the unit price for Fixed Dollar SKUs making the quantity variable and the Unit Price static.

This will cause a nuance between the Unit Price on the Sample Invoice and the UI. The invoice will show the unit price consistently across both the sample and actual invoice. A note will be shown on the Sample Invoice, the Quote Summary Report, the Finalize Order and Order Quote screen letting the user know the prices may appear different due to the rounding differences.

**Note:** The ‘Display Partner Discount’ checkbox must be selected for the Quote Net Amount on the UI to match the Service Amount on the Sample Invoice.
Fixed Dollar SKUs – Discrepancy in Amount from Sample Invoice and UI based on rounding differences

- **Grant Access** - You can grant another user access to quotes which you have created using the ‘Grant Access’ functionality from the Results Action dropdown. This would be performed if you would like other users within your organization to have access to quotes you have created/worked on. You can select the specific access level you would like the user to have, as well as set the date range for which the user will have access to the quote(s). Using this functionality, you also have the ability to revoke access if necessary.

  *Note:* Distributor CCOs may not be granted access to quotes; they get implicit access just by being associated with the Distributor on the quote. Reseller CCOs however will can be granted access.

  *Note:* Users are able to add multiple CCO User IDs when separated by comma in the ‘CCO User Id’ field, only limited by the field character space.

1. Select quote checkbox(es) from the Quote Search Results. Once you have selected a quote, the Action dropdown will be activated.
2. Select ‘Grant Access’ from the Action dropdown and click ‘GO’ and a ‘Grant Access’ popup will appear.

**Note:** Quantity needs to be calculated and rounded to a whole number. This may result in the ‘Invoice Service Amount’ differing from the ‘Net Quote Amount’ on the user interface.

**Note:** The ‘Display Partner Discount’ checkbox must be selected for the Quote Net Amount to match the Service Amount on the Sample Invoice.
Advanced Search - Grant Access Popup Window

3. Enter a valid CCO User ID.
4. Set the Permission Level:
   - ‘View Only’ – User can view the quote, but cannot make edits.
   - ‘View / Modify’ – User can view the quote and make edits.
   - ‘Revoke’ – User can revoke access to the quote.

**Note:** Revoking access only revokes access to the quote; it does not revoke access to a contract. Users should open a support case to revoke access to contracts.

5. Enter the access ‘Begin Date’. You can enter the current date or any future date. (If a ‘Begin Date’ is not entered or selected, the ‘Begin Date’ is defaulted to today's date).

6. Enter the access ‘End Date’. You can enter the current date or any future date. If the ‘End Date’ is not entered or selected, the ‘End Date’ is defaulted to 180 Days (roughly 6 months) after the current date.

7. Click ‘Submit Access’ button.

**Note:** When clicking the “Submit Access” button, if the quote does not have a Reseller Bill To ID, access cannot be granted/revoked. The Grant Access popup will NOT appear and a hard stop error popup will be shown stating that the Reseller Bill To ID must be entered prior to granting quote access.

Error Message Popup Window – No Reseller Bill To ID on Quote

8. An email is sent to the user who has been granted access to the quote(s).

- **Proceed to Order (Single or Multiple Quotes)** - CSCC gives users with Distributor Ordering and Distributor Administrator roles the ability to select a single or multiple quotes for ordering from the Advanced Search screen.
   1. Select a single or multiple quote checkbox(s) from the Quote Search results. Once you have selected a quote, the Action dropdown will be activated. You can select multiple quotes if you would like them to be ordered under a single PO.
2. Select ‘Proceed to Order’ from the Action dropdown.

3. The Order Quote popup window will appear. You must enter your P.O. number for the ordering process to proceed. In addition, you can enter a Partner Reference for the quote(s) being ordered. You should also verify that the email is entered correctly (it will default to your CCO email address).

   **Note:** If a quote fails validation, the status of the quote will become Invalid rather than Order Failed Submission status. This will give you the opportunity to fix any errors and resubmit the quote.

   Fixing the errors earlier in the ordering process will reduce the number of Order Failed Submission Quotes and shorten the ordering lifecycle.

   **Note:** The P.O. Number field in the Order Quote popup window is limited to 40 alphanumeric characters in length. The following special characters will trigger an error and must be removed:

   % & ' | ^ $ " \ * ; < @ [ ] { }

4. Select ‘Submit Order’ once the necessary data has been entered. Once your quote has been submitted, you will see a message at the header of Advanced Search with the quote number(s) entered, the PO details and the Order Submission ID.

5. You should also receive the Quote Acknowledgment Summary report for the quote(s) which you ordered. The Quote Acknowledgement Summary report will come with an attachment that contains the header and line level details of the quote(s) that were ordered. For more information.

   **Note:** Receiving this report signifies that an order was submitted; however it does not represent contract conversion. You will receive an “Order Complete” email once the quote reaches ‘Order Complete’ status and is converted to a contract.

   - **Reactivate** - If needed, you can reactivate a cancelled quote from the Advanced Search screen. Follow the steps below for more information.
1. To reactivate the canceled quote, navigate to the Advanced Search screen.
2. Select ‘Canceled Quotes Only’ from the ‘Statuses To Include’ filter option.
3. Click ‘Search’.
4. Only cancelled quotes appear in the results.
5. Select one or more quote checkboxes, or click on a cancelled quote number link. Clicking a cancelled quote number link will direct the user to the Quote Summary Details screen. You can also reactivate from this screen.
6. Select ‘Reactivate’ from the Action dropdown and click ‘GO’ and a header level message will appear in Advanced Search stating that quote has been reactivated.
Advanced Search – Reactivate

Advanced Search Header Level Message

- **Cancel Order Submission** - CSCC gives users with Distributor Ordering and Distributor Administrators roles the ability to create a multiple quote order submission, where multiple quotes are grouped into one order under a single PO. After the multiple quote order is submitted, if one or more of the quotes fail validations, the entire order submission will be held and will not proceed to booking.

In this situation, you have the option to decouple the successfully passed quote(s) from the quotes that failed using the Cancel Order Submission function. This will allow successfully passed quotes to be booked and entitled with minimal delay.

Follow the steps described below to perform the Cancel Order Submission function on a multiple quote order submission:

1. Within the Advanced Search screen, select the Order Failed Submission (OFS) quote on which you would like to perform the Cancel Order Submission function in the ‘Statuses To Include’ filter option to easily identify and navigate to the OFS quote(s).

2. Click ‘Search’.

3. Only OFS quotes appear in the results.
4. Select one or more OFS quote checkboxes and select ‘Cancel Order Submission’ from the Action dropdown and click ‘GO’.

Advanced Search – Order Failed Submission Status
5. The ‘Cancel Order Submission’ popup window will appear displaying the failed quote(s) and the successfully passed quote(s) within the same Order Submission ID. The OFS quote(s) will be pre-selected for ‘Quotes to Decouple’.

6. Click ‘Proceed to Cancel Order Submission’ to decouple the OFS quote(s) from the successfully validated quote(s), thereby allowing the valid quotes to proceed to booking.

7. A message will display informing you that the OFS quote was successfully decoupled from the passed quote(s).
8. Once the successfully passed quote(s) are decoupled from the OFS quote(s), you will need to revisit the OFS quote(s) in order to resolve, revalidate and resubmit them for ordering.

   **Note:** When a decoupled quote is revalidated and resubmitted, the Order Input popup window will pre-populate with the original PO information. Decoupled OFS quotes will produce a new Order Submission ID and separate Sales Orders and Invoices.

- **Merge entire Contract into Another Contract**

   The Advanced Search page provides the option to open the 'Merge entire Contract into Another Contract' pop-up window.
4.3 Generating a SNIF Report

To generate a SNIF report, you download a template file, populate it with serial numbers / PAK numbers, instance numbers, or product numbers, or some combination of the three, and then upload the populated file into the system. CSCC then processes the report and sends it to you via e-mail.

The following are the specific steps for generating a SNIF report:

1. Click the 'Advanced Search' hyperlink at the top right corner of any screen. The Advanced Search screen will appear.
2. Select 'Mass Serial Number (SNIF)' from the 'Search By' dropdown. The bottom of the screen displays the Mass Serial Number Search fields and controls.
3. Click the 'Download Sample Input File' hyperlink to download the SNIF upload template. You should use this file to ensure that your upload will be processed correctly.
   
   Save the template to your local drive and populate the file with the appropriate instance numbers, serial numbers / PAK numbers, and product numbers. This file becomes your SNIF input file.
4. Return to the Advanced Search window and use the 'File to upload' field and 'Browse' to locate the completed SNIF input file on your local drive and select it for upload.
5. By default, the 'Email Results To' field will be populated with your e-mail address. If you would like to send the SNIF report to additional e-mail addresses, enter them in this field, separated by commas.

   Note: To clear the form, you can click 'Clear All Fields' at any time.

Advanced Search screen; Mass Serial Number Search (SNIF)
6. When you have completed your entries, click ‘Search.’ You will receive a confirmation message, along with a request ID for the offline request associated with your SNIF report. Use the request id to track your search on the Request Status screen.

![Advanced Search](image)

**Advanced Search Confirmation Message**

The search is an offline process. All results will be emailed to the email address indicated on the Advanced Search screen.

The screenshot below displays the different possible results that may return in a SNIF report:

![Example SNIF Report](image)

**Example SNIF Report (Limited Number of Columns Shown)**

**Note:** SNIF reports do not show contract information for Partially Entitled items. The reports only show product information for these items.

**Note:** The columns, Distributor Bill to ID and Distributor Bill to Name will only show values will for non-Disti users. The values will not be included and the columns will remain blank for the Disti user.

### 4.3.1 Serial Number / PAK Number, Instance Number, and Host ID Search Results for Covered/Uncovered Products

Using Search CSCC, Advanced Search, and Serial Number Information Finder (SNIF) you can search for coverage information by Serial Number / PAK Number and Instance Number. Using Search CSCC, Advanced Search you can search for coverage information by Serial Number / PAK Number, Instance Number, and Host ID.

The amount of information you are able to view when searching for equipment is dependent on your access to the contract which the Serial Number / PAK Number, Instance Number, or Host ID is associated to, as well as the item’s purchase/coverage history for uncovered items. For that reason, being registered to the necessary contracts is very important.

On searching for a product using its Serial Number / PAK Number, Instance Number, or Host ID the search results will display the complete configuration of that line. This applies to searches conducted using Basic Search and Advanced Search. If a major line is searched, the major line along with all its minor lines will be displayed. If a minor line is searched, it will be displayed along with its major line. Other minor lines under that major will not be displayed. A message will be displayed at the bottom of the screen to indicate that the search results include minor lines (as applicable).
4.3.1.1 Searching for Covered Products

If the product you are searching for is covered, you must be registered to the contract the product is on to have full access to view the product details and coverage information. You can see a Partial Entitlement view of the product information (excludes coverage info) if a Bill To ID in your list of registered contracts matches to the unregistered contract Bill To ID the product is covered under.

If you have full access to the covered and only one contract exists for the searched Serial Number / PAK Number, Instance Number, or Host ID, you will be directed to the contract’s Line Items page. If multiple contracts contain the searched Serial Number / PAK Number, Instance Number, or Host ID, you will be taken to the Contract Manager screen.

Search results for a covered item with full access – Contract Line Items screen

Search results for a covered item with full access – Contract Manager screen

Partial Entitlement means that you have access to view the covered product; however, you are not registered to the corresponding service contract, so no coverage information will display. Partially Entitled items are marked by an asterisk (*).

Search results for a covered item with partial access (Partial Entitlement) are marked by a (*).

Search results for a covered item with partial access (Partial Entitlement)
If you are not registered to the contract containing the covered Serial Number / PAK Number, Instance Number, or Host ID of interest and a Bill To ID connection cannot be verified by the system, your results will display as shown below:

Search results for a covered item with no access

### 4.3.1.2 Searching for Uncovered Products

When searching for a product that is uncovered, the system must determine whether or not you have access to that item. Therefore, it is important to ensure that you are registered to all the necessary contracts. If the product is uncovered (never been on a contract or recently expired/terminated from a contract), a customer on your registered contracts must match one of the following records to view the product information:

- Product Bill To Customer
- Product Ship To Customer
- Product End User Customer
- Product Reseller Customer
- The customer of the most recently expired/terminated service contract linked to the product.

If the uncovered product(s) being searched for belong to a contract on an inactive Bill To ID, the system will verify your access to either of the following:

- Other Bill To IDs or contracts for the Customer ID associated with the inactive Bill To ID
- Another Customer ID that rolls up to same Global Ultimate (GU), if you do not have access to the Customer ID associated with the inactive Bill To ID

If you have access to the uncovered Serial Number / PAK Number, Instance Number, or Host ID of interest, your results will display as shown below:

Search results for a recently expired/terminated item with full access

If no results are found when you conduct a Serial Number / PAK Number, Instance Number, or Host ID search, one of the following results will display:
### Error Message and Reason

<table>
<thead>
<tr>
<th>Error Message</th>
<th>Reason</th>
</tr>
</thead>
<tbody>
<tr>
<td>You do not have access privileges for this covered item(s). Please modify and resubmit your search.</td>
<td>The Serial Number / PAK Number, Instance Number, or Host ID entered is for a product that is covered, but the user does not have access to it.</td>
</tr>
<tr>
<td>You do not have access privileges for this uncovered item(s). Please modify and resubmit your search.</td>
<td>The Serial Number / PAK Number, Instance Number, or Host ID entered is for a product that is not covered, but the user does not have access to it.</td>
</tr>
<tr>
<td>The item(s) is out of circulation and not eligible for service coverage. Please modify and resubmit your search.</td>
<td>The Serial Number / PAK Number, Instance Number, or Host ID entered is for an item that is inactive in the Install Base and can no longer be serviced.</td>
</tr>
<tr>
<td>No records found. Please modify and resubmit your search.</td>
<td>The Serial Number / PAK Number, Instance Number, or Host ID entered is for an item that was not found in the database and does not meet any the above criteria. This typically indicates that an invalid Serial Number / PAK Number, Instance Number, or Host ID was entered.</td>
</tr>
</tbody>
</table>

**Note:** For more information on understanding SNIF Report results messaging, please reference the section above, [Generating a SNIF Report](#).

### 4.4 Address Management

Address Management enables you to search and save addresses in one place, thereby increasing productivity and minimizing duplication.

Address Management is performed using the Address Book, a tabbed user interface that enables you to search for and store Bill-To and install site addresses you frequently use. Within the Address Book, you can:

- Search for addresses based on various criteria.
- Add existing install site and Bill-To addresses to the Address Book for easy access.
- Delete addresses from the Address Book.
- Begin the process of adding new install sites to the system.
- Download your Address Book to a modifiable excel file format.
- View the Address Book for Install Site as well as Reseller Bill-To-ID

To locate an install site address and add it to your Address Book, follow these steps:

1. Roll over the ‘General’ tab and click ‘Address Management’ in the secondary menu.

   ![Click Address Management](image)

   **Step 1:** Roll over the ‘General’ tab and click ‘Address Management’ in the secondary menu.
2. The ‘Address Management’ screen appears.

Address Management Screen

3. Select your search options, either ‘Reseller Bill To’ or ‘Installed-At Site’.
   a. When clicking the Reseller Bill-To-ID/Install-At Site ID picker while quoting to access the Address Book, you will see the following alphabetically sorted by default:
      i. **Site Name** column in the **Site Addresses** table when searching for an Install Site
      ii. **Bill To Name** column in the **Addresses** table when searching for a Reseller BID
4. You can search for Reseller BIDs within the Address Book.
   a. Search for a Reseller BID in the local Address Book by entering a partial name in the **Reseller Bill To Name** field.
   b. Select a Bill-To country from the **Country** drop-down menu.
   c. Click **Search for Bill To**.
d. CSCC generates search results against the selected criteria.

Address Book – Results

5. You can search the Cisco Enterprise Database for a Reseller BID or an Install Site by clicking the Global Search Results tab, formerly known as the Search Results tab.

Address Book – Global Search Results

6. Enter your search criteria in the ‘Search Filters’ section of the screen. At a minimum, the ‘Installed-At Site Name’ or ‘Country’ is required. You should enter as much information as is known about the site to yield better search results.

   Note: Since the ‘Address 1’ field only yields results for exact searches and is case sensitive, it is recommended to search by City, State, and Postal Code instead of entering an address in the address fields.

7. Click ‘Search for Site’.

   Note: The Search function is very smart. It knows common abbreviations such as ‘St.’ for ‘Street’ or ‘No’ for ‘North’. It also knows common company abbreviations, such as ‘UPS’ for ‘United Parcel Services’.
Address Management Screen – Click ‘Search for Site’

8. View search results in the ‘Search Results’ tab of the table at the bottom of the Address Management screen. The search results may be sorted by any column, making it easier for you to find the results for which you are searching.

   Note: The maximum number of addresses that can be shown is 200. If the search results return more than 200 addresses, the user will be asked to refine their search.

9. Click the checkbox next to the address search results you want to save in your install site Address Book.

10. Click ‘Add Site to Address Book’.

‘Search Results’ Table

11. Click the ‘Address Book: Install Site(s)’ to view the install site addresses saved in your personal Address Book.
12. Each column can be sorted by clicking the sorting arrow in the column header. By default, ‘Installed-At Sites’ sort in chronological order with the most recently added sites listed first. The five most recently added sites have a new icon next to the Site ID.

13. You may only view your Bill-To Address Book, which is comprised of the Bill-To addresses of your registered contracts. By default, Bill-To addresses in the Address Book sort by ‘Date Added’.

To download your Address Book into a modifiable excel file format, select ‘Download My Address Book’. Bill To IDs can be deleted by selecting Bill To ID and clicking ‘Delete’.

Step 11: View ‘Address Book: Install Sites(s)’
14. You may delete an address from the Address Book by using the 'Delete' button. This removes the address from the Address Book, but not the database. This applies for Install Sites and Bill To IDs.

15. If you cannot find the right address through the search, you can create a new Install Site address with the 'Create New' button. The search criteria will be copied into the fields on the create screen.

16. In case you are unable to create a new address with the 'Create New' button, you can file a case using the 'Open a Case' link within the Toolkit located in the upper right hand corner of the screen.

4.5 Creating a New Address

If the particular Install Site address you would like to use is not available, you may create it, but only after verifying that it does not already exist. You will receive an informational message that your address information has been validated at the time of creation, if the address was created with validated/normalized address attributes.

Note: When new addresses are created, they need to be validated by the system through Export Compliance checks. This may result in a quote line associated with the address becoming invalid after initial creation. If this occurs, wait 1-2 hours before re-validating your quote. If you are still unable to validate the line after 24 hours, open a case.

1. Roll over the ‘General’ tab, and click ‘Address Management’ in the secondary menu.
2. The ‘Address Management’ screen appears.

3. Enter details for the search in the ‘Search Filters’ section. At a minimum, either the ‘Installed-At Site Name’ or ‘Country’ is required.

4. Click ‘Search for Site’.
5. View search results in the ‘Search Results’ tab of the table at the bottom of the Address Management Screen. Your results are not displayed and you need to create a new address. The ‘Create New’ button is enabled after performing the search.

6. If your search criteria results in any match in the database, an updated message is displayed confirming that the addresses already exist in the system.

Address Book: Address Already Exist in the System

7. If your search does not result in any match, click the ‘Create New’ button.

8. The ‘Create New Site’ popup window appears. Any search criteria that you entered will be populated in the fields of the ‘Create New Site’ screen.
Address Book (Create New Site) screen

9. You must enter or select entries for all required items, designated by a red asterisk. The required fields will differ based on your country.

Since the Country is selected from a List of Values (LOV) from the UI, the system does not display the “Country not recognized” error.

*Note:* The ‘Site Name’ dropdown field populates with all of the names that the search associated with your initial ‘Installed-At Site’ search. If the name that you are looking for is not listed, you may enter a new site name in the ‘Installed-At Site’ textbox. The system searches for any existing names, and if a match is found, the ‘Site Name’ dropdown automatically populates with the value. A message appears asking you to select from the ‘Site Name’ dropdown.

10. Once you have populated all of the required fields, click the ‘Create New Site’ button.

Address Book (Create New Site) screen

11. If the values you provided are not correct, then the system displays an updated error message specifying the wrong attributes you provided. This lets you correct the wrong values and proceed with the address creation process.
Intuitive Error Messages

12. The address is validated and appears in the Address Book. If there are any errors during validation, please reference the CSCC Error Guide, or open a case using the Toolkit in the top right corner.

Address Book

4.6 Wildcard Search

When searching, the WILDCARD search feature is available where you can now search without having to enter an exact match for the first word of the name to find the desired result when searching for:

- Installed-at Site Name
- Bill To Name
- Customer Name

4.6.1 Wildcard Search Fields/Screens

The following fields/screens include search filters where the WILDCARD search can be used:

<table>
<thead>
<tr>
<th>CSCC Screen</th>
<th>Click the Search Filter Selector for</th>
<th>Enter Wildcard Search for</th>
</tr>
</thead>
</table>

Step 10: The address information appears in the Address Book
<table>
<thead>
<tr>
<th>Feature</th>
<th>Installed-at Customer Name</th>
<th>Customer Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>Contract Manager</td>
<td>Installed-at Customer and Site ID</td>
<td>Installed-at Site Name</td>
</tr>
<tr>
<td>MassMAT Override Selector (Internal Users only)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Advanced Search (Contracts)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Quote Manager</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Advanced Search (Contracts)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Quick Price/Quote</td>
<td>Bill To ID</td>
<td>Bill To Name</td>
</tr>
<tr>
<td>Quote Summary Details Screen</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Contract Manager</td>
<td></td>
<td></td>
</tr>
<tr>
<td>User Preferences → Quotes → Customers/Sites</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Asset Management</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Advanced Search (Contracts)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>User Preferences → General → Manage Distributor Profile (Dist Admin &amp; Internal Users Only)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Advanced Search (Quotes/Estimates)</td>
<td>Reseller Bill To ID</td>
<td>Bill To Name</td>
</tr>
<tr>
<td>Quote Manager</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Asset Management</td>
<td>Installed-at Site ID</td>
<td>Installed-at Site Name</td>
</tr>
</tbody>
</table>
WILDCARD search can be used in the Customer Name field.

WILDCARD search can be used in the Installed-At Site Name field.

When clicking the selectors, the following screens appear where WILDCARD search can be used (see below).
### 4.6.2 Using Wildcard Search

WILDCARD search can be used by entering the following:

<table>
<thead>
<tr>
<th>Enter</th>
<th>Search Results</th>
</tr>
</thead>
<tbody>
<tr>
<td>%Value</td>
<td>Returns all data that ends with your entry</td>
</tr>
<tr>
<td></td>
<td><em>For example, %national will return everything that ends with “national”</em></td>
</tr>
<tr>
<td>Value%</td>
<td>Returns all data that begins with your entry</td>
</tr>
<tr>
<td></td>
<td><em>For example, national% will return everything that begins with “national”</em></td>
</tr>
<tr>
<td>%Value%</td>
<td>Returns all data containing your entry</td>
</tr>
<tr>
<td></td>
<td><em>For example, %national% will return everything that includes “national”</em></td>
</tr>
<tr>
<td>Value%Value or Value%Value or Value%</td>
<td>Returns all data that begins with your entry and ends with your second entry</td>
</tr>
</tbody>
</table>

**Note:** A maximum of 250 results will display. The value entered must be at least three characters when conducting a wildcard search with a wildcard at the beginning and at the end of the search (%CAL%), or at least two characters when conducting a search with a wildcard in front or after the characters (ex: %CA, CA%), and no more than three wildcards can be used in a search entry.

### 4.6.3 Wildcard Search Error Messages

When using WILDCARD search, errors will appear if 3 scenarios are present:
1. If the search finds more than 250 results, the following error message will appear: “More than 250 records match your search criteria, please refine your search.”

   ![Error Message – More than 250 Search Results](image)

2. If less than 3 characters are entered, the following error message will appear: “Minimum 3 characters are required for searching the Customer Name. For wildcard search, please enter minimum 3 characters between wildcards. Please modify and resubmit your search.”

   ![Error Message – Less than 3 Characters Entered](image)

3. If more than 3 wildcards are used, the following error message will appear: “Maximum 3 wildcards can be used for searching the Installed at Site Name. Please modify and resubmit your search.”

   ![Error Message – More than 3 Wildcards Used](image)
5 Validations in CSCC

Validations are required before ordering quotes. Validations are run to verify that the information provided on a quote is accurate. Validations also ensure that your quote has the key quote data that will ensure proper processing. If any line on your quote is missing a Serial Number/PAK Number/Product Id, Install Site, Service Level, Target Contract (can be ‘NEW’) or coverage begin/end date, you will receive a header level error message. This is to ensure that you have key values applied to all quote lines before proceeding with additional validations. Validations are also important because they help generate accurate prices and discounts.

When quoting in Cisco Service Contract Center, the time frame for a quote to be converted into a contract is 24-48 hours due to the amount of validations that are ran on the quote. The time it takes for validations to pass on a quote with no errors varies depending on the number of lines on the quote. CSCC performs both Basic and Full Validations on the quote before ordering.

5.1 Validating Quotes

You can validate a quote prior to ordering using the ‘Validate’ and ‘Validate and Save’ functions on the Quote Summary Details, Line Items and Pricing, and Error Details screens in Standard Quoting or the ‘Save’ function on the Quoting screen in Quick Quoting. The following sections provide detailed information on quote validations in CSCC. (For instructions on resolving errors that may be preventing you from fully validating a quote, see the section Error Details Screen in the Cisco Service Contract Center Distributor User Guide – Standard Quoting).

- Basic vs. Full Validations
- Online vs. Offline Validations

5.2 Basic vs. Full Validations

Basic Validations are run against major and minor lines using serial numbers and configuration details. Upon completion of Basic Validations, pricing is updated and discount percentages are displayed for all lines on the quote that do not have hard-stop errors. (For information on error types, see the section Viewing Error Details in the Cisco Service Contract Center Distributor User Guide – Standard Quoting).

Once a line on the quote has passed Basic Validations and has a status of ‘Valid,’ it is not re-checked when you run Basic Validations again. Only invalid lines are checked when you run Basic Validations again. Once all lines on the quote have a status of ‘Valid’ and no error lines remain, you are prompted to run Full Validations as a final step before ordering.

For lines on the quote that do have errors, you must make edits to the lines to resolve the errors before you can order the quote. (For detailed instructions, see Error Details Screen – Resolving Validation Errors in the Cisco Service Contract Center Distributor User Guide – Standard Quoting).

Once you have resolved all Basic Validation errors, Full Validations can be run.

Note: Full Validations can only be run offline.

Full Validations include the following:

- Export Compliance validations to ensure that there are no embargoed countries or restricted parties among the Install Sites on your quote.
- Validations for Service Level upgrades.
- Install Site validations.
- Source contract validations for takeover lines.
5.3 Online vs. Offline Validations

When performing Basic Validations in CSCC, you are given the option to perform these validations either online or offline. (For detailed validations steps, see Running Basic Validations and Running Full Validations.)

**Note:** Full Validations can only be run offline.

**Online Validations** – Online validations should be used when working with a small quote or a quote with few invalid lines. If you run Basic Validations Online, the quote cannot be modified while Pass 1 validations are running. (A progress bar at the top of the screen informs you of the status of each round of Basic Validations). After Pass 1 completes, the quote is unlocked for modifications during Pass 2. The prices displayed on the quote are not accurate until both passes of validations are complete.

**Note:** If you validate a quote using the ‘Validate’ button instead of the ‘Validate and Save’ button, validations will be run online unless your quote is too large to be processed online. Therefore, ‘Validate and Save’ is the recommended option for validating a quote.

**Offline Validations** – The Offline option should be used for Basic Validations when you are validating a large quote or a quote with several invalid lines. If you use this option, Pass 1 is skipped and you can modify the quote while validations for Pass 2 are run. When offline validations are processed, a Request ID is generated so you can track the progress of the validations using the Request Status screen, which is accessible from the General tab. While the validations are processing, you can use CSCC for other operations. You can also choose to be notified by email when your validation processing is complete.

5.4 Running Basic Validations

To run Basic Validations on a quote, follow the steps below:

1. Open the quote which you would like to validate. The Quote Summary Details for the quote appears.
2. Click ‘Validate and Save’. Choose Online or Offline

**Note:** You can also click ‘Validate and Save’ on the Line Items and Pricing screen or the Error Details screen.
Quote Summary Details – Validate and Save

- **Online process:**
  a) A progress bar appears with the percent complete as Pass 1 validations are run. While the progress bar is running, modifications to the quote cannot be made.
  b) The progress bar closes.
  c) The quote is unlocked for modifications while Pass 2 validations are being run.

- **Offline process:**
  a) A header level message lets you know your request has been submitted and you are provided with a Request number.
  b) The validations run offline and you are free to continue using Cisco Service Contract Center.
  c) Select the Request Number hyperlink or roll over the ‘General’ tab and click ‘Request Status’ in the secondary menu.
  d) Find the request with the given Request Number to view the status of the request.
  e) If the Request Status is ‘Complete,’ click the associated Quote number to access the quote.

Step 2: Click ‘Validate and Save’
3. Once Pass 2 Basic Validations are complete, access the quote via the Quote Manager or the Request Status screen.

4. Click ‘Line Items and Pricing’ in the tertiary menu to view the pricing details.

5. If there are errors on your quote, resolve all errors before proceeding to order. (For instructions on resolving errors, see Error Details Screen – Resolving Validation Errors in the Cisco Service Contract Center Distributor User Guide – Standard Quoting).

5.5 Running Full Validations

To run Full Validations on a quote that has passed Basic Validations and has no invalid lines remaining, follow the steps below:

1. Once your quote passes its final round of Basic Validations, you will be prompted to perform ‘Full Validations’ offline. If you have been validating your quote online, the following popup message will appear.

   **Popup Message – Perform Full Off-Line Validations**

   2. Select ‘Perform Full Off-Line Validations’ if you are ready to proceed to order. Select ‘Refresh and Return to Quote’ if you have additional to work to do on the quote such as adding lines.

      If you choose ‘Refresh and Return to Quote,’ when you do return, you will see the following header message on the Quote Summary Details screen:

   **Quote Summary Details Header Message – Basic Validations Passed**

      **Note:** You will continue to see this message in the Quote Summary Details header once Basic Validations have passed and no errors remain on the quote.

      3. Once you see either of the above messages, click ‘Full Validations’ from the popup window to process offline validations. You can also click ‘Validate and Save’ and select ‘Offline’ in the Processing Options popup to run Full Validations.

      **Note:** If a few days have passed since your quote became ‘Valid’, it is recommended that you fully validate the quote once again to ensure that CSCC catches any changes to the source or target contract to avoid quote ordering failures. You can do so by running ‘Validate and Save’ in offline mode from a quote. If there are no changes to the base data, you should not see any errors and the quote price will not be affected.

6 Quote Statuses

When an action is performed or an update is made, the status of a quote may change at the line or header level. Use the tables below to identify what each status represents and follow the related steps to change the status if applicable.
Note: If an edit to a quote does not update the status within 8 hours, open a case.
The quote status can also be seen on the Line Items and Pricing and Error Details screens.
Even if a quote has not been referenced for 6 months or longer, it will not be deleted and stay in the database.

6.1 Header Level Statuses

The following statuses relate to Quotes:

<table>
<thead>
<tr>
<th>Quote Header Status</th>
<th>Description</th>
<th>Additional Information</th>
</tr>
</thead>
<tbody>
<tr>
<td>Blank</td>
<td>Quote has not been saved or validated. No status is assigned yet.</td>
<td>Save or validate to update the status. The quote can be cancelled if necessary.</td>
</tr>
<tr>
<td>Entered</td>
<td>Quote has been saved, but not validated.</td>
<td>Quote details are validated against contract and product details. Edits to the quote are required if the details do not match. The quote can be cancelled if necessary.</td>
</tr>
<tr>
<td>Invalid</td>
<td>Quote has one or more hard-stop errors or warnings after quoting validations have</td>
<td>Navigate to the Error Details screen to resolve any errors.</td>
</tr>
<tr>
<td>Quote Header Status</td>
<td>Description</td>
<td>Additional Information</td>
</tr>
<tr>
<td>---------------------</td>
<td>-------------</td>
<td>------------------------</td>
</tr>
<tr>
<td></td>
<td>been run.</td>
<td>Validate and/or validate and save again after resolving errors. If a line has a warning and is not auto-fixable, internal users can process an override for the line. The quote can be cancelled if necessary.</td>
</tr>
<tr>
<td>Valid</td>
<td>Quote has passed quoting validations and has no quote lines with hard-stop errors or warnings. The duplicate line check has not yet identified multiple entries of the same quote line. All lines must be in a 'Valid' or 'Internally Validated' status.</td>
<td>Once a quote is valid, the quote can be submitted for order. The quote can be cancelled if necessary.</td>
</tr>
<tr>
<td>Cancelled</td>
<td>Quote has been cancelled while in 'Entered', 'Invalid', 'Valid' or 'Order in Progress' status. Quotes with any status after 'Order Submitted' cannot be cancelled.</td>
<td>When a quote is cancelled, the lines are set to Invalid. A cancelled quote can be reactivated. Once a cancelled quote is reactivated, it can be edited, validated and ordered as a normal quote. Refer to the section 'Reactivate' in 'Conducting Advanced Search' for more information.</td>
</tr>
</tbody>
</table>

The following statuses relate to Ordered Quotes (for more information on ordering quotes, see section Finalize Order Screen in the Cisco Service Contract Center Distributor User Guide – Quick Quoting or Ordering in the Cisco Service Contract Center Distributor User Guide – Standard Quoting):
<table>
<thead>
<tr>
<th>Order Status</th>
<th>Description</th>
<th>Additional Information</th>
</tr>
</thead>
<tbody>
<tr>
<td>Order in Progress</td>
<td>Quote has been submitted for ordering and passed screen and local validations.</td>
<td>During this status, quote is read-only. Order will be processed offline. The quote can be cancelled if necessary.</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Order Failed Submission</td>
<td>Quote fails the offline ordering validation process with one or more hard-stop errors or warnings.</td>
<td>All fields are editable on the quote. Once all errors have been resolved and the quote status is ‘Order Revalidated’, the quote can be resubmitted for order. Only partners or an internal Sales Agent can resubmit the quote for ordering again using the ‘Proceed To Order’ function. The quote can be cancelled if necessary.</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Order Revalidated</td>
<td>Quote is eligible for order resubmit from Advanced Search, Quote Manager, or Quote Summary Details, after correcting errors and performing revalidations either online or offline.</td>
<td>Quote can be modified. Price impacting purchase order changes should be submitted by a partner. The quote can be cancelled if necessary.</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Order Submitted</td>
<td>Quote has successfully passed the online ordering validations and has been summarized using the grouping logic. The summarized order lines have been submitted to ERP for booking.</td>
<td>Quote is read-only for all users. The quote is ineligible for cancellation. Contact support if the quote needs to be cancelled in this status. A PDF must be run to cancel the quote and the Sales Order must be cancelled.</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Order Booked</td>
<td>Quote has been successfully booked in ERP.</td>
<td>Quote is read-only for all users. The quote is ineligible for cancellation. Contact support if the quote needs to be cancelled in this status. A PDF must be run to cancel the quote and the Sales Order must be cancelled.</td>
</tr>
<tr>
<td>Order Status</td>
<td>Description</td>
<td>Additional Information</td>
</tr>
<tr>
<td>----------------------</td>
<td>-----------------------------------------------------------------------------</td>
<td>---------------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Conversion in Progress</td>
<td>Quote has passed booking validations and is in the process of quote conversion.</td>
<td>Quote is read-only for all users. The quote is ineligible for cancellation. Contact support if the quote needs to be cancelled in this status. A PDF must be run to cancel the quote and the Sales Order must be cancelled.</td>
</tr>
<tr>
<td>Conversion Failed</td>
<td>Quote has failed the offline quote conversion validations with one or more hard-stop errors.</td>
<td>Quote is read-only for partners. Internal user to assist with editing fields. The quote is ineligible for cancellation. Contact support if the quote needs to be cancelled in this status. A PDF must be run to cancel the quote and the Sales Order must be cancelled.</td>
</tr>
<tr>
<td>Conversion Resubmitted</td>
<td>Quote has been resubmitted for quote-to-contract conversion with no hard-stop errors.</td>
<td>Only an internal CS-Ops user may resubmit the quote for conversion. Quote becomes read-only for all users. The quote is ineligible for cancellation. Contact support if the quote needs to be cancelled in this status. A PDF must be run to cancel the quote and the Sales Order must be cancelled.</td>
</tr>
<tr>
<td>Entitled</td>
<td>Quote has been successfully converted to a target contract and Service Entitlement coverage is in place.</td>
<td>Contract can be viewed on Contract Manager screens. The CSM-HOLD is not yet released, so the quote has not yet been invoiced. Quote is read only for all users. A PDF must be run to cancel the quote and the Sales Order must be cancelled.</td>
</tr>
<tr>
<td>Order Complete</td>
<td>Quote for which conversion to contract is successful and the CSM-HOLD has been released.</td>
<td>The Sales Order will close and an invoice is created. Quote is read-only for all users. The quote is ineligible for cancellation. Contact support if the quote needs to be cancelled in this status. A PDF must be run to cancel the quote and the Sales Order must be cancelled.</td>
</tr>
</tbody>
</table>
### 6.2 Line Level Statuses

The following statuses relate to Quote lines:

<table>
<thead>
<tr>
<th>Quote Line Status</th>
<th>Description</th>
<th>Additional Information</th>
</tr>
</thead>
<tbody>
<tr>
<td>Blank</td>
<td>Quote line has not been saved or validated. No status is assigned yet.</td>
<td>Save or validate to update the status.</td>
</tr>
<tr>
<td>Pre-Validation Failure</td>
<td>This status results from a failure importing or adding lines. Failure occurs before clicking <strong>Validate</strong> or <strong>Validate and Save</strong> for quote lines.</td>
<td>View and resolve any pre-validation errors on the Error Details screen.</td>
</tr>
<tr>
<td>Invalid</td>
<td>Quote lines have one or more hard-stop errors or warnings after quoting validation are run.</td>
<td>Navigate to the Error Details screen to resolve any errors. Validate and/or validate and save again after resolving errors. If a line has a warning and is not auto-fixable, internal users can process an override.</td>
</tr>
<tr>
<td>Internally Validated</td>
<td>Quote lines with warnings have been overridden by an internal user.</td>
<td>An internal user can override a warning by keeping the current value of the line. Hard-stop errors, however, cannot be overridden by an internal user. Any edits to the line will change the status of the line.</td>
</tr>
<tr>
<td>Valid</td>
<td>Quote lines have passed quoting validations and have no quote lines with hard-stop errors or warnings.</td>
<td>Quote line is priced and price protected. When all quote lines are in 'Valid' or 'Internally Validated' status, the quote can proceed to order.</td>
</tr>
<tr>
<td>Converted</td>
<td>Quote line has been successfully converted to the target contract.</td>
<td>Quote and quote lines become read only for all users.</td>
</tr>
</tbody>
</table>

The following statuses relate to Pricing and will be captured at the line level:

<table>
<thead>
<tr>
<th>Price Status</th>
<th>Description</th>
<th>Additional Information</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
### Price Status

<table>
<thead>
<tr>
<th>Price Status</th>
<th>Description</th>
<th>Additional Information</th>
</tr>
</thead>
<tbody>
<tr>
<td>Estimated</td>
<td>List price is calculated for the line at the end of Pass 1 validations using summarized data.</td>
<td>No discounts are applied. Reflects a quick price that was delivered to the Estimate or Quote.</td>
</tr>
<tr>
<td>Validated</td>
<td>Net price is calculated for the line at the end of Pass 2 validations using configuration detailed data.</td>
<td>This status represents a discounted price that can be price protected.</td>
</tr>
<tr>
<td>New</td>
<td>Line is added to a Quote, but pricing and discounting has not been invoked through Validate or Validate and Save.</td>
<td>Click Validate or Validate and Save to apply pricing and discounting.</td>
</tr>
<tr>
<td>Changed</td>
<td>Line was modified and a price impacting change occurred. Line becomes 'Invalid' and requires validation.</td>
<td>Price impacting changes will cause the list and net prices, discounts, and price protection dates to be cleared from the display.</td>
</tr>
<tr>
<td>Error</td>
<td>Line has hard-stop errors and cannot be priced. If a line is price protected, and a price impacting change occurs with a hard-stop error, the status will be updated to 'Error' and price protection will be lost.</td>
<td>Navigate to the Error Details screen to resolve errors and revalidate by clicking Validate or Validate and Save.</td>
</tr>
</tbody>
</table>

### Export Compliance

As part of submitting a quote for ordering, Cisco Service Contract Center will run an ‘export compliance’ check to ensure that the install site data on the quote is not an embargoed country or a restricted party.

You will no longer get an Export Compliance error (SCEXP1004) on the quote when new site is involved.

The SCEXP1004 error (shown below) will display only when the EC system is down or in case of any technical disruption between EC and CSCC.

#### Export Compliance Error

If you have questions about export controls please visit: [http://www.cisco.com/web/about/doing_business/legal/global_export_trade/export_hold/exportops.html](http://www.cisco.com/web/about/doing_business/legal/global_export_trade/export_hold/exportops.html)
8 Using CSCC Reports

The ‘Reports’ section in Cisco Service Contract Center has a number of functions. Your first step is to choose a report using the ‘Report Type’ dropdown. When a user selects a ‘Report Type’, a filter criteria section appears. This is where a user can enter the input fields and click the ‘Run Report’ button.

8.1 Type of Reports

The following reports are available:

- **Minimum Duration One Time Usage Report**: This report takes the equipment-list provided in an uploaded file (either Instance ID or Serial Number) then reports if/when the One Time Allocation for coverage less than 12 months (12m) has been used.

- **Order Completion Summary Report (1T/Reseller)** – This report is emailed to Reseller users upon order completion. To view the report from the ‘Reports’ sub menu, you need to provide the PO Number and Quote Number or SO Number of the order. You can view this report in the ‘Standard’ format or the ‘Customized’ format. This report can be viewed by distributors and internal users as well as Resellers and 1T Partners.

- **Order Completion Summary Report (Distributor view)** – This report is emailed to the user upon order completion. To view the report from the ‘Reports’ sub menu, you need to provide the PO Number and Quote Number of the order. You can view this report in the ‘Standard’ format or the ‘Customized’ format. This report can be viewed by distributors and internal users. Resellers do not have access to this report.

- **Order Summary Report**: After a quote has been ordered and a sales order has been generated, an Order Summary Report can be downloaded from the “Reports” section under the “General” tab for quotes you have access to by providing the Sales Order number or the Quote and Purchase Order numbers. An email will be sent that includes the Request ID and an excel spreadsheet attachment which includes the Sales Order, Purchase Order and Invoice numbers as well as the Group ID, Start and End Date and Install Site information. The Report will reconcile the Purchase Orders that were entered upon ordering with the Invoice(s) that were generated.

- **Quote Acknowledgement Summary Report** – This report is emailed to users upon order submission. To view this report, user needs to user to provide the Quote Number of the order. You can view this report in the ‘Standard’ format or the ‘Customized’ format.

- **User Contract Registration Report**: Provides a list of all contracts registered under your CCO User ID. Contracts can be sorted by User, Contract Number, or Bill To.
The following table lists the available CSCC reports and shows which user roles have Read access.

<table>
<thead>
<tr>
<th>Reports</th>
<th>Read Access</th>
</tr>
</thead>
<tbody>
<tr>
<td>User Contract Registration Report</td>
<td>Disti Admin</td>
</tr>
<tr>
<td></td>
<td>Disti Quoting</td>
</tr>
<tr>
<td></td>
<td>Disti Ordering</td>
</tr>
<tr>
<td>Order Summary Report</td>
<td>Disti Admin</td>
</tr>
<tr>
<td></td>
<td>Disti Ordering</td>
</tr>
<tr>
<td>Minimum Duration One Time Usage Report</td>
<td>Disti Admin</td>
</tr>
<tr>
<td></td>
<td>Disti Quoting</td>
</tr>
<tr>
<td></td>
<td>Disti Ordering</td>
</tr>
<tr>
<td>Order Completion Summary Report (1T/Reseller)</td>
<td>Disti Admin</td>
</tr>
<tr>
<td></td>
<td>Disti Quoting</td>
</tr>
<tr>
<td></td>
<td>Disti Ordering</td>
</tr>
<tr>
<td></td>
<td>Internal Users</td>
</tr>
<tr>
<td></td>
<td>Resellers</td>
</tr>
<tr>
<td>Order Completion Summary Report (Distributor view)</td>
<td>Disti Admin</td>
</tr>
<tr>
<td></td>
<td>Disti Quoting</td>
</tr>
<tr>
<td></td>
<td>Disti Ordering</td>
</tr>
<tr>
<td></td>
<td>Internal Users</td>
</tr>
<tr>
<td>Quote Acknowledgement Summary Report</td>
<td>Disti Admin</td>
</tr>
<tr>
<td></td>
<td>Disti Quoting</td>
</tr>
<tr>
<td></td>
<td>Disti Ordering</td>
</tr>
<tr>
<td></td>
<td>Internal Users</td>
</tr>
</tbody>
</table>

### 8.2 Generating a CSCC Report

The following steps illustrate how to generate a CSCC report, using the Order Completion Summary Report as an example.

1. Roll over the ‘General’ tab and click ‘Reports’ in the secondary menu.

![General Tab Secondary Menu](image)
5. Click the ‘Report Type’ dropdown and select a type of report.

6. After selecting a report, provide the PO number and the Quote number to view the quote.

7. Select the type of report you want: ‘Standard’ or ‘Customize’.

8. When ‘Customize’ options is selected, a ‘Custom Report Column Selection’ section will appear where you can select header level and line level attributes to create a customized report by:
   - Selecting specific columns to include in your report (similarly to the Column and Row selector)
   - Changing the column order in your report
   - Saving up to 25 report templates or 'configurations' at a time, which will be tied to your CCO user ID
   - Deleting your configurations at any time
   - Creating custom reports on the fly, i.e., without the use of a configuration
   - Clicking on any column name to see its description.
9. After this, the ‘Specify Report Options’ section appears. Here you can filter what contracts you see in the report based on ‘Contract Registration’, ‘Order Summary’, etc.

10. Click the ‘Report Format’ dropdown to select a format.

11. Enter an email and/or CC in the ‘Send Email to’ and ‘Email CC’ fields.
Specify Report Options

12. Click ‘Run Report’ to execute the report.

13. Once the report is run, the following message is generated ‘The Email report has been successfully sent to the User’. The report output will be emailed to the email address indicated in the ‘Send Email to’ and ‘Email CC’ fields. You can check the status of the request in the Request Status screen.

8.3 Formatted Order Summary Reports

You can download a formatted version of the Order Summary and Order Completion Summary reports. You can do this by selecting the Formatted Report checkbox while downloading these reports.
• If you select the **Formatted Report** checkbox while downloading a report in the standard report format, the header level details will be reformatted without the possibility of column customization.

• If you select the **Formatted Report** checkbox while downloading a report in the customized report format, the header level details will be reformatted, with the possibility of column customization.

### 8.4 Order Completion Email Notification for a CSCC Report

The Order Completion Email Notification now includes a Reseller report in addition to what is currently sent to the Distributor. The report will be emailed to the Reseller automatically when:

- Disti creates and orders the Quote for the Reseller
- Quote is created by Reseller and ordered by the Disti
- Quote access has been granted to additional resellers either by the Disti or by the Reseller
- Internal creates the quote and the Disti submits the order
- Internal creates the quote and the Internal (with ordering capability) submits the order
The following header values are present in the reports:

**Disti Report Header:**
- Quote Number
- Quote Type
- Bill to ID
- Bill to Name
- Bill To Address1
- Bill To Address2
- Bill To Address3
- Bill To City
- Bill To State
- Bill To Postal
- Reseller Bill To Country
- Total List Price
- Total Net Price
- Service Fee Total
- Taxability
- Distributor Name
- Quote Notes
- Address 3
- Address 4
- City
- State
- Province
- Postal Code
- County

**Reseller Report Header:**
- Quote Number
- Quote Type
- Reseller Bill to ID
- Reseller Bill to Name
- Reseller Bill To Address1
- Reseller Bill To Address2
- Reseller Bill To Address3
- Reseller Bill To City
- Reseller Bill To State
- Reseller Bill To Postal
- Reseller Bill To Country
- Total List Price
- Total Net Price
- Service Fee Total
- Taxability
- Distributor Name
- Quote Notes
- Reseller Contact Name
- Reseller Email Address
- Reseller PO
- Address 3
- Address 4
- City
- State
- Province
- Postal Code
- County
Order Completion Summary Report – Disti View

Order Completion Summary Report – Reseller View

Note: An email address must be provided on the quote for the Reseller to receive the auto-generated email notification. In user Preferences, by selecting the “Send Reseller Order Completion Report” box, the Reseller Order Completion Report will be automatically sent to the reseller once the quote is converted into a contract.

- The box will default to being checked. Distributor Administrators MUST verify their selection in Preferences before ordering a quote. If the box is not checked, the Reseller Order Completion Report will not be automatically sent to the reseller.
- It is the Disti Admin’s responsibility to inform other Disti Admins and the Disti Ordering role of what has been set in Preferences so when quotes are ordered, all ordering roles are aware of what has been set.
- On the Quick Quote screen, when a user downloads the quote where the quote duration is more than one year and Display Partner Discount box is not checked, the net price on the CSCC user interface and in the downloaded report is for the full duration of the quote.

9 Warranty Information

All Cisco hardware and software products are covered by warranty for a minimum of 90 days. Some products have longer warranty coverage periods. Cisco warranties apply to the End User, and are not transferable.
Warranty support varies by Product and Region. Please refer to the tables below for details on how warranties are supported, answering the following questions:

- What is the warranty type for your product? (Enhanced Limited Lifetime Warranty [ELLW], Unified Computing System [UCS], and Small Business are exceptions)
- In what country was the equipment purchased? Point of Sale (POS)
- From whom did you purchase your product? Cisco? Partner?

<table>
<thead>
<tr>
<th>WARRANTY TYPE</th>
<th>All Warranties Except ELLW, UCS, and Small Business Product Warranties</th>
</tr>
</thead>
<tbody>
<tr>
<td>Point of Sale (POS)</td>
<td>Purchased from Cisco</td>
</tr>
<tr>
<td>US/CANADA/AU/NZ</td>
<td>Return Material Authorization (RMA) support from Cisco</td>
</tr>
<tr>
<td></td>
<td>No Technical Assistance Center (TAC) support</td>
</tr>
<tr>
<td>REST OF WORLD</td>
<td>RMA support from Cisco</td>
</tr>
<tr>
<td></td>
<td>No TAC support</td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>WARRANTY TYPE</th>
<th>ELLW Product Warranties</th>
</tr>
</thead>
<tbody>
<tr>
<td>Point of Sale (POS)</td>
<td>Purchased from Cisco</td>
</tr>
<tr>
<td>US/CANADA/AU/NZ</td>
<td>RMA and 90-day TAC support from Cisco</td>
</tr>
<tr>
<td>REST OF WORLD</td>
<td>RMA and 90-day TAC support from Cisco</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>WARRANTY TYPE</th>
<th>UCS Product Warranties</th>
</tr>
</thead>
<tbody>
<tr>
<td>Point of Sale (POS)</td>
<td>Purchased from Cisco</td>
</tr>
<tr>
<td>US/CANADA/AU/NZ</td>
<td>RMA support from Cisco</td>
</tr>
<tr>
<td></td>
<td>No TAC support</td>
</tr>
<tr>
<td>REST OF WORLD</td>
<td>RMA support from Cisco</td>
</tr>
<tr>
<td></td>
<td>No TAC support</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>WARRANTY TYPE</th>
<th>SMALL BUSINESS Product Warranties</th>
</tr>
</thead>
<tbody>
<tr>
<td>Point of Sale (POS)</td>
<td>Purchased from Cisco</td>
</tr>
<tr>
<td>US/CANADA/AU/NZ</td>
<td>RMA and one-year TAC support from Cisco Small Business Support Center</td>
</tr>
<tr>
<td>REST OF WORLD</td>
<td>RMA and one-year TAC support from Cisco Small Business Support Center</td>
</tr>
</tbody>
</table>

For more questions on warranty, please see [http://www.cisco.com/en/US/prod/warranty_qa_guest.html#t1q1](http://www.cisco.com/en/US/prod/warranty_qa_guest.html#t1q1).
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Note: RMA requests are only available for products covered under a service contract. For products under warranty but not under a service contract, a TAC support case is required.

To change Install Site IDs for warranty support, please refer to the Upload Templates in the Upload Manager Job Aid.

For Covered Products:
- The Site-to-Site at Site-Level Move template will move all products within a contract from one site to another. Please allow 24-48 hours for the site to be updated.
- The Site-to-Site at Product-Level Move template will move specified products within a contract from one site to another. Please allow 24-48 hours for the site to be updated.

For Uncovered Products:
- The Uncovered Equipment Move at Product Level template will be used to update the Install Site. Please allow 24-48 hours for the site to be updated.

Note: The Install Site ID must be created in the system previously, otherwise it needs to be added using the Search and Create Ship To template. Please allow 24-48 hours for the Site ID to update.

10 Critical Alert Messages

Upon logging into CSCC a critical alert message popup will appear when there are critical alert messages to review. To view the message in full, click on “More” and the message will open in a new window.

CSCC Critical Alert Message Popup

To view previous messages, click the “Show All” link to navigate to the Message Archive screen.
To dismiss the popup, click “OK.” The alert will continue to appear each time you log into CSCC. To prevent a critical alert message from appearing again upon login, click the checkbox next to “Do not display this message again” and click “OK.” The selected message will no longer appear upon login.

To dismiss the critical alert message popup, select “Do not display this message again” and click “OK”

11 Distributor Log-In Agreement

Once the Critical Alert messages have been cleared, you will see an acknowledgement popup as a legal reminder of your obligations when using CSCC where you will need to agree by clicking “OK”.
CSCC Distributor Log-In Agreement
Administration

12 Registering Contracts
This functionality does not currently work for Distributors. In order to gain access, you must open a support case, so a CPE agent can grant you access to the contract.

13 Automatic Case Creation

Cisco Service Contract center automatically creates support cases for certain occurrences within the tool. Currently, there is no automatic confirmation that a case has been generated, leading to duplicate cases being created for the same issue.

The following list describes the instances in which a support case will be generated on your behalf:

1. Quote conversion failures
2. Quotes that are stuck in the quoting and ordering process
3. Failed order submissions
4. Cancellation and credit for a non-serviceable line in a contract when you request a return materials authorization (RMA)

These cases are routed to a support queue, and you will be informed of any updates throughout the process. Within 24 hours you can also view the status of your case through the Right Now tool. Cases are typically resolved within 24 to 48 hours, and you will be notified by email upon the resolution of a case.

If you have any questions regarding the status of the open case, please directly respond to the email notifications that you have received.