

Ordering Tool



The **Cisco**
Ordering Tool
User Guide



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About This Guide

The *Ordering Tool User Guide* describes the basic process of creating an order using the Ordering Tool. Topics are presented in a sequential manner so you can reference the information you need when using the tool. Advanced features, timesaving techniques, and ways to customize your orders are also described in detail. These topics include: Setting defaults, using ship sets, getting saved configurations, line item details, and item searching.

Benefits of Using the Ordering Tool

- A central home page from which you can create orders, access saved orders, and use features that save time in creating orders.
- The ability to assign different shipping destinations and contact people to items on the same order.
- Time saving features such as default order information, order templates, and saved configurations.

Using the Ordering Tool

- The Home Page provides convenient access to the following ordering functions:
 - **Create an Order** Create a new order.
 - **Open/Delete Saved Orders** View and manage existing orders.
 - **Get Routed Order** View orders routed to you for approval.
 - **Use Order Templates** Build an order from a template or to modify a template.
 - **Set Defaults** Set defaults or standard settings for all orders you create.

Prerequisites

- You must be a registered user of the Ordering Tool to access the tool.
- Your company must have a signed ICA (Internet Commerce Agreement) with Cisco. (The ICA is a contract that sets forth information about doing business with Cisco online through the Ordering Tool)
- You must have logged into the Ordering Tool to access the functionality outlined in this user guide.

Logging into the Ordering Tool

- 1 – Type <http://www.cisco.com/en/US/partner/ordering/index.shtml> in your browser website address field. Ensure that you log in prior to trying to access the Ordering Tool. The ordering page is displayed.
- 2 – Click the Ordering Tool Link. The Ordering Tool Home page is displayed.



Recommended for Best Performance

For the best performance when using the Ordering Tool, please follow these suggestions:

Hardware Requirements

- Pentium 166 MHz (minimum), Pentium 200 MHz or higher (recommended)
- 128 MB RAM
- TCP/IP protocol installed and configured
- Monitor and display adapter capable of 256 colors at 800x600 resolution
- Hardware - Optimal Performance Recommendations
- Pentium 200 MHz
- Display adapter capable of 1024x768 resolution

Software Requirements

- Windows 95, 98, 2000 or NT
- Unix (Solaris)
- Linux
- HTML Browser
 - Netscape 4.5 or higher
 - Netscape 7.0 is supported
 - Internet Explorer 6

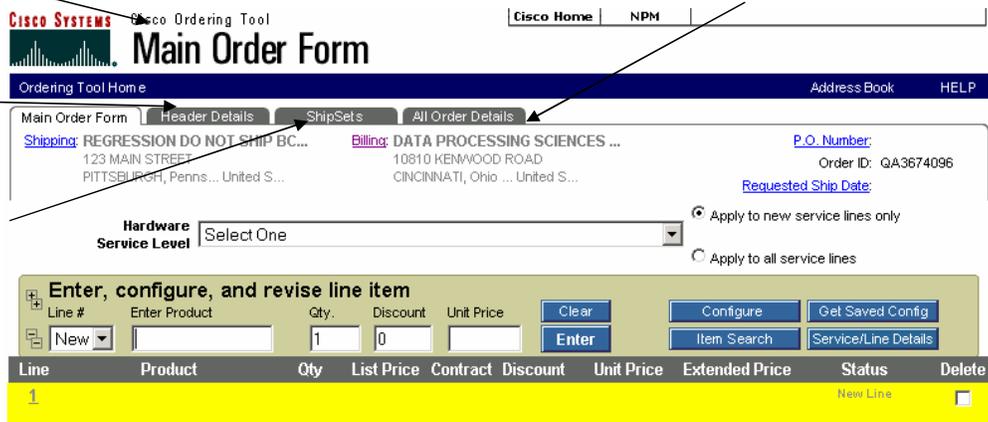
Software - Optimal Performance Recommendations

- HTML Browser
 - Internet Explorer 6.0
 - Netscape 7.0

Network Requirements

- 56K Modem connection or higher (sustained bandwidth)
- Network - Optimal Performance Recommendations
- 512K LAN connection

A Quick Overview of the Ordering Tool



The screenshot shows the 'Main Order Form' interface. At the top, there is a navigation bar with 'Cisco Home' and 'NPM'. Below this is a blue header with 'Ordering Tool Home', 'Address Book', and 'HELP'. The main content area has tabs for 'Main Order Form', 'Header Details', 'ShipSets', and 'All Order Details'. The 'Main Order Form' tab is active, showing shipping and billing information. Below this is a 'Hardware Service Level' dropdown menu set to 'Select One', with radio buttons for 'Apply to new service lines only' (selected) and 'Apply to all service lines'. At the bottom, there is a section titled 'Enter, configure, and revise line item' with input fields for 'Line #', 'Enter Product', 'Qty.', 'Discount', and 'Unit Price', along with 'Clear', 'Enter', 'Configure', 'Get Saved Config', 'Item Search', and 'Service/Line Details' buttons. Below this is a table with columns: Line, Product, Qty, List Price, Contract, Discount, Unit Price, Extended Price, Status, and Delete. The first row is highlighted in yellow and contains the number '1' in the 'Line' column and 'New Line' in the 'Status' column.

Figure A.1: Main Order Form

Figure a. 4: All order Details page

Figure A.2: Header details Page

Figure A.3: ShipSets Tab

The Ordering Tool improves the workflow and ease of creating orders. It is separated into four main sections:

- **Main Order Form** (Figure A.1) – the central location for accessing most of the tool functionality; products, discounts, and quantities are entered on this form.
- **Header Details** (Figure A.2) – one location to manage details that apply to every line on the order.
- **ShipSets** (Figure A.3) – used to specify multiple destinations for items on an order.
- **All Order Details** (Figure A.4) – used to view a summary of the order.

Chapter One –

Ordering Tool Home Page

The central home page is the entry point for creating orders, opening previously saved orders, and acquiring routed orders.

Chapter Objective

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

Figure B



Choices on the Ordering Tool Navigation Bar (See Figure B.1)

- **IC Agreement** – A contract between the customer’s company and Cisco Systems, Inc. that gives you (our customer) access to the ordering tool. The ICA agreement link is green if it has not been filled out. The link is grayed out if the ICA has been filled out but you do not have permission to submit an order.
- **Order Templates** – An un-submitted order that has been named and saved for future use. If you regularly submit orders with the same product selections, you can create an order and save it as a template before submitting. The next time the order needs to be placed, the template can be accessed, modified slightly if necessary, and then submitted. The template remains for future use.
- **Defaults** – Preferred settings that you can pre-determine. The settings will automatically populate in every order created. This saves you time by automatically entering information that remains the same on all orders.
- **Training** – Links you to the Training, Events, and Seminars section of Cisco.com.
- **Address Book** – Tool used for managing addresses.
- **HELP** – Links you to detailed online help.



What would you like to do? Section (See Figure B.1)

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

- **Create an Order** – To build a new order. (See Chapter Four for details)
- **View Open Orders** – To view and manage existing orders.
- **Get Routed Order** – To view orders routed to you for approval. (See Chapter Fourteen for details)
- **Use Order Templates** – To build an order from a template or to modify a template. (See Chapter 3 for details)
- **Set Defaults** – To set defaults or standard settings for all orders you create. (See Chapter Two for details)

Chapter Two – Setting Order Defaults

Chapter Objective

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

Definitions

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

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

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

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

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

Shipping Preference/Shipping Service Level – Indicates the seller and buyer's responsibilities during transportation of purchased product from the manufacturing location, to Title Transfer, to the customer.

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

Note: Cisco manufactures worldwide, so multiple line orders typically arrive in separate deliveries. Selecting *Ship All Items Separately – No* – reduces the number of deliveries.

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

Service Options – There are now two pull down menus one for Software Service Level and one for Hardware Service Level. These pull down menus will make it easier to order Software Service by providing a separate software service level drop down in the Set Defaults section of the Ordering Tool as well as on the Create an Order Page. If you have set the Hardware and Software Service Level dropdown in the “Set Defaults” section as we mentioned earlier, your selections will auto populate on the “Create an Order” Page.



Frequently Used Default Fields

Setting defaults saves you time with every order by pre-populating frequently used fields in the following sections of the order:

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

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

How to Set the Order Defaults

Figure C



C.1
Click Set Defaults to add or change information that will be commonly used on most of your orders

Accessing the Default Settings

Step	What You Do
1	<p>Click the Set Defaults button on the <i>Ordering Tool Home</i> page console. (Figure C.1)</p> <p>The Set Defaults page appears displaying hyperlinks to update Billing, Shipping Address & Method, Pricing Info, Payment & Taxes, Service Options, Acknowledgements, Order Contacts (Figure D)</p>



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Figure D

D.1
Ordering Tool
Preferences
section

Cisco Ordering Tool | Cisco Home | NPM | **Set Defaults** | Address Book | HELP

Save time!

Default settings can save you time by pre-populating your order form with regular, preferred settings for major sections of every order.

Once set, your defaults will be used in the relevant sections of each new order you create.

Ordering Tool Preferences

Update reminders Remind me to update my order after entering lines to the order form

Alert pop-ups Disable all warning alert boxes
 Allow all warning alert boxes

Configuration Preferences Disable Guidance alert
 Enable Guidance alert
[Help me choose](#)

Sections: [Billing](#) | [Shipping Address & Method](#) | [Pricing Info](#) | [Payment & Taxes](#) | [Service Options](#) | [Acknowledgements](#) | [Order Contacts](#)

D.2
Billing
Information
section

Billing Information TOP

RYLAND CHILE
BLVD
XXXX
MEXICO CITY
Mexico

[Change Address](#)

Contact
Phone
Fax
Email
Department
Mail Stop

[Change Contact](#)

Recycle your settings!

The Ordering Tool Defaults permit you to set up and re-use many header details for every order you place!

D.3
Change Contact

D.4
Shipping
Address &
Method

Shipping Address & Method TOP

[Help me select Freight Options](#)

Shipping Preference

Shipping Service Level

[Change Address](#)

Contact
Phone
Fax
Email
Department
Mail Stop

Early Shipment Accepted? Yes No

Ship All Items Separately? Yes No

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

Carton Notes
(Notes to appear on the carton labels)

D.5
Change Address

D.6
Pricing
Information

Pricing Information TOP

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

Price List

Product Discount %

Service Discount %

Setting Ordering Tool Preference Defaults

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

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

Setting the Default Billing Address

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

Step	What You Do
1	Click the Billing hyperlink on the Set Defaults page. <i>Set Defaults Billing Information</i> section is displayed. (Figure D.2)
2	Click the Change Address button. <i>A list of eligible addresses is displayed on the My Addresses tab of the Address Book.</i>
3	Choose the address you would like to use as your default by clicking the button under the Select column.
4	If you would like to choose a billing contact, click on the Assign Contact tab. <i>The list of available billing contacts is displayed.</i>
5	Choose the contact name you would like to use as your default contact by clicking the corresponding button.
6	Click the Apply button in the bottom left corner of the page. <i>Your saved entries are displayed on the Set Defaults page.</i>

Setting Default Billing Contact Information

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

Step	What You Do
1	<p>If you would like to choose a billing contact for the selected address, click on the Change Contact button. (Figure D.3)</p> <p style="text-align: center;"><i>The list of available billing contacts is displayed.</i></p>
2	<p>Choose the Billing Contact name you would like to use as your default billing contact by clicking on the corresponding button.</p>
3	<p>Click the Apply button in the bottom left corner of the page.</p> <p style="text-align: center;"><i>Your saved entries are displayed on the <i>Set Defaults</i> page.</i></p>

Setting Default Shipping Address Information

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

Step	What You Do
1	<p>Click the Shipping Address & Method hyperlink from the <i>Set Defaults</i> page.</p> <p style="text-align: center;"><i>Set Defaults Shipping Address & Method</i> section is displayed. (Figure D.4)</p>
2	<p>Click the Change Address button.</p> <p style="text-align: center;"><i>The My Saved Addresses page of the Address Book is displayed.</i></p>
3	<p>Choose the address you would like to use as your default by clicking on the button under the Select column or by searching for an address by selecting the Search/Enter Addresses tab. You can also select <i>None</i>, so that no default shipping address is specified.</p>
4	<p>Click the Apply button in the bottom left corner of the page, then click OK if you wish to make the change.</p> <p style="text-align: center;"><i>Your saved entries are displayed on the <i>Set Defaults</i> page.</i></p>

Setting or Changing the Default Shipping Contact

The following steps provide you with details about setting or changing your default shipping contact person.

Step	What You Do
1	<p>If you would like to choose a shipping contact for the selected address, click on the Change Contact button under the Shipping Address & Method section.</p> <p style="color: #004a60; font-style: italic;">The list of available <i>Shipping Contacts</i> is displayed.</p>
2	<p>Choose the Contact Name you would like to use as your default shipping contact by clicking on the corresponding button.</p>
3	<p>Click the Apply button in the bottom left hand corner of the page.</p> <p style="color: #004a60; font-style: italic;">Your saved entries are displayed on the <i>Set Defaults</i> page.</p>

Setting or Changing the Default Shipping Method

Under the Shipping Address & Method (Figure D.4) section you can save changes to the following items.

Step	To Do This	What You Do
1	Set Default – Shipping Preference	This menu will allow you to select a shipping preference of either “Cisco Routed” or “Billing Customer Routed” Please note that the “Customer Routed” option has been renamed “Billing Customer Routed”
2	Set Default – Shipping Service Level	This menu will allow you to select the shipping service level of your choice: Standard, Express, or Premium
3	Set Default – Early Shipment Acceptance	Early Shipment Accepted – Click Yes if you will accept shipments prior to the requested shipping date specified on the order.
4	Set Default – Ship All Items Separately	Ship All Items Separately – Click Yes if you will accept partial shipments from Cisco. Click No if you want the entire order to ship at one time.
5	Set Default – Shipping & Packaging Notes	Shipping & Packaging Notes – Additional notes that can be added to an order to specify special requirements for shipping or packaging.

6	Set Default – Notes to Appear on Packaging	Carton Notes – These are notes that need to appear on the carton labels that go on the outside of the product boxes being shipped.
7	Save Defaults	Click the Save Defaults button in the bottom left corner of the page to save all of the information you have entered. <i>This saves your entries and takes you back to the Set Defaults page.</i>

Setting or Changing the Default Pricing Information

The following steps provide details about setting or changing your defaults for Pricing Information (Figure D.6).

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

Figure E

E.1
Modify payment and tax information in this section

Payment & Taxes TOP

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

Purchase Type	<input type="text" value="Resale"/>	Credit Card	<input type="text" value="None Required (for P.O.)"/>
Payment Method	<input type="text" value="Purchase Order"/>	Card Number	<input type="text"/>
		Expiration Date	MM / YYYY
		Name on Card	<input type="text"/>
		Credit Card Zip	<input type="text"/>

Taxable? Yes No

E.2
Modify service options in this section

Service Options TOP

Note: You may change your service levels in one of two ways:
 1) By changing them here prior to placing an order, OR
 2) After starting an order, you may change them at the line level for individual line items

Hardware Service Level	<input type="text" value="None"/>
Software Service Level	<input type="text" value="Software Application Support Plus Upgrades"/>

E.3
Modify the type of acknowledgement you'll receive for orders in this section

Order Acknowledgements TOP

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

Send **shipping and scheduling** acknowledgements to this person:
Person's name.

Fax Email
You must provide fax number or email address if you select either fax or email. If you selected neither, leave blank.

Have Cisco send **order confirmation email** to this email address:
This may be the person responsible for tracking or processing your orders.

Send **order progress reports** to this email address:
Typically use this email address for workflow routing.

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

Order Contacts TOP

Note: For questions regarding order, contact:

Name:	First <input type="text" value="TEST"/>	Last <input type="text" value="USER"/>
Phone:	<input type="text" value="800-553-6387"/>	
Fax:	<input type="text" value="0"/>	
Email:	<input type="text" value="tuser@cisco.com"/>	

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Setting or Changing the Payment & Taxes Information

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

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



Setting or Changing the Service Options Information

The following steps show you how to change your defaults for the Service Options section. (Figure E.2)

Step	To Do This	What You Do
1	Display the Service Options Information	Click the Service Options hyperlink. <i>The Set Defaults Service Options section is displayed.</i>
2	Set Default – Hardware Service Level	Choose the appropriate service level from the Hardware Service Level drop down list.
3	Set Default – Software Service Level	Choose the appropriate service level from the Software Service Level drop down list.
4	Save Defaults	Once you have made all of your choices, click the Save Defaults button in the bottom left corner of the page. <i>This saves your entries and takes you back to the Set Defaults page.</i>

Setting or Changing the Order Acknowledgements Information

The following steps show you how to change your defaults for the Order Acknowledgements section. (Figure E.3)

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

5	Set Default – Sending Order Progress Reports	<p>Send order progress reports to this email address – Enter the email address of the person(s) who needs to know about the progress of the order. If you have multiple email addresses separate each with a comma.</p> <p>The order progress reports email address is the default address you see when you choose Route Order. (See Chapter Fourteen for Order Routing Details)</p>
6	Save Defaults	<p>Once you have made all of your choices, click the Save Defaults button in the bottom left hand corner of the page.</p> <p><i>This saves your entries and takes you back to the Set Defaults page.</i></p>

Setting or Changing the Order Contacts Information

The following steps show you how to change your defaults for the Order Contacts section. (Figure E.4)

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

Chapter Three –

Creating and Using Order Templates

You can save time by creating order templates for those orders that you frequently submit. You can then access your templates through the Order Templates link on the Home page, or by clicking the Use Order Templates button in the “What would you like to do?” section.

Chapter Objective

- Learn how to create and access order templates.

Definition

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

How to Use Order Templates

Saving an Order as a Template

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

Step	What You Do
1	<p>On the Ordering Tool Home page fill out the required fields to create an order (See Chapter 4) or choose an order under the Open Orders section.</p> <p style="color: #004a60; font-style: italic;">The <i>Main Order Form</i> of the Ordering Tool is displayed.</p>
2	<p>After you have completed all the areas of the order that you want to be part of the order template (address information, contacts, adding products) you will click the Save as Template button (Figure F.1) at the bottom of the Main Order Form (Figure F).</p> <p style="color: #004a60; font-style: italic;">The <i>Save as a Template</i> page is displayed. (Figure G)</p> <p>Note: Steps continue after the figures on the following page.</p>

Figure F

F.1
Save as
Template
button

Figure G

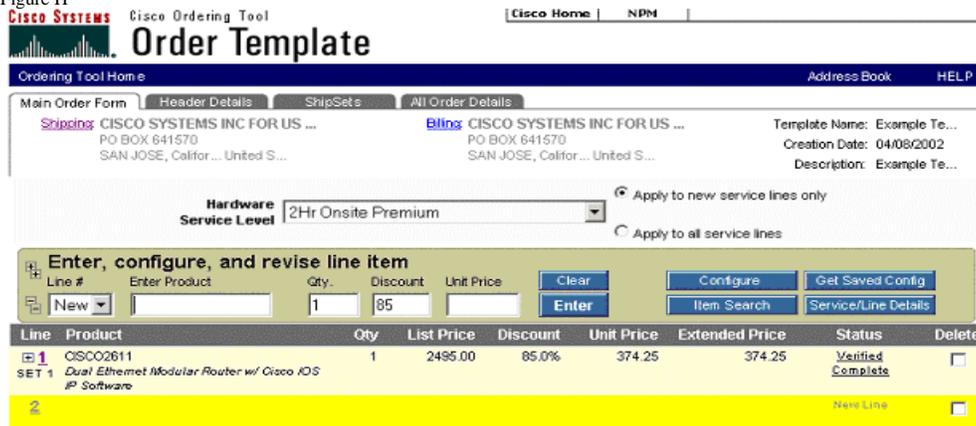
G.1
Type in a
name for
the template

G.2
Type a
template
description

G.3
Click to
save the
template

3	In this window enter the Template Name (Figure G.1) you will use to reference the template. Enter the Template Description (Figure G.2) to add details about how the template is going to be used.
4	Once you have entered this information, click the Save as Template button. (Figure G.3) All order information is copied to the template except MarketPlace (MP) Number, Purchase Order Number, and Order Description. <i>You are taken to the Order Template page (Figure H). It looks very similar to the Main Order Form.</i>
5	Additional changes can be made to the template. Click Save Template to save all of the final changes just made. You can now click Create as New Order to create an order from this template. You do not have to immediately use the new template. Click the Ordering Tool Home link under the Cisco Systems logo in the upper left corner of the Order Template page to return to the Ordering Tool Home page.

Figure H



H.1 Click to save your order as a template

Save Template

Create as New Order

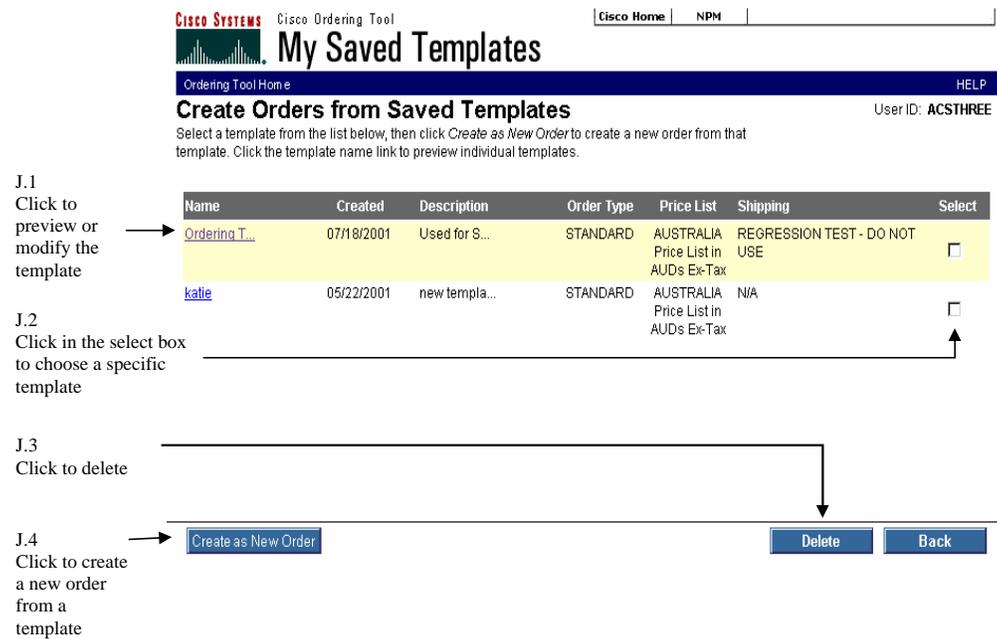
Linetotal: 0.00
Subtotal: 374.25
(Includes Minor Lines)

Check for Errors

Figure I



Figure J



Managing Order Templates

The following steps show you how to manage your order templates.

Preview a Template

Step	What You Do
1	On the <i>Ordering Tool Home</i> page click the Use Order Templates button in the <i>What would you like to do?</i> section. (Figure I.1) <i>My Saved Templates</i> page is displayed. (Figure J)
2	Click on the template name link in the <i>Name</i> column. (Figure J.1) The <i>Order Template</i> page appears where you can view the template details. At this point you will not actually be creating an order, you will be modifying only the template.
3	Return to the <i>Ordering Tool Home</i> page by clicking the link under the Cisco Systems logo in the upper left hand corner of the templates page.

Modify a Template

Step	What You Do
1	Click the template name in the <i>Name</i> column. (Figure J.1) <i>The Order Template</i> page is displayed. At this point you are not creating an order, but modifying the template only.
2	Make any necessary changes to the template, and then save.
3	Return to the <i>Ordering Tool Home</i> page by clicking the link under the Cisco Systems logo in the upper left hand corner of the templates page.

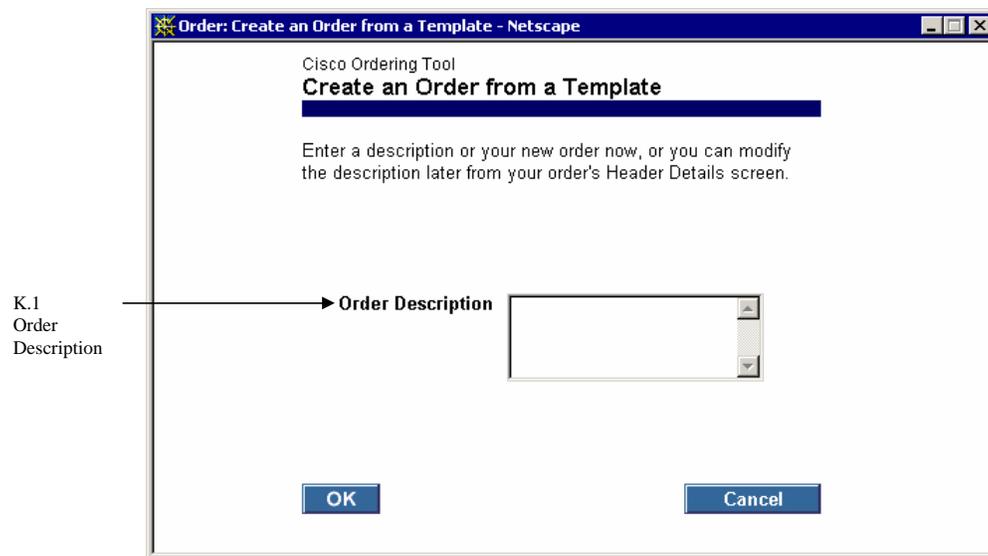
Create an Order from a Template

Step	What You Do
1	Choose the template in the Select column for the order you want to create. (Figure J.2)
2	Click the Create as New Order button (Figure J.4). <i>A small screen titled Create an Order from a Template</i> is displayed. (Figure K).
3	Enter the Order Description (Figure K.1) and click OK (Figure K.2).
4	The Main Order Form for the newly created order is displayed on your screen.
5	You can now click the Ordering Tool Home link under the Cisco Systems logo in the upper left hand corner of the page to return to the <i>Ordering Tool Home</i> page.

Delete a Template

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

Figure K



Chapter Four –

Create an Order

This chapter provides you with information about creating an order. You have already set defaults; so some of the fields will be pre-populated (filled in). When you complete filling out the information on this page, then go to the Main Order Form to complete the remaining order information.

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

Chapter Objective

- Learn how to begin to create an order.

How to Create an Order

Figure L



Begin to Create a New Order

The following steps will show you how to start creating an order. Order type and price list entries must be made on this form; they are required fields. The remaining fields can be filled out or selected on this form or you can fill them out later.

Step	What You Do
1	<p>Click Create an Order. (Figure L.1) on the <i>Ordering Tool Home</i> page.</p> <p style="color: blue;"><i>Create an Order</i> is displayed on your screen. (Figure M).</p>
2	<p>Select one of the following Order Types; this is a required field. (Figure M.1):</p> <p>Standard – The basic order type used by Cisco customers to order Cisco products.</p> <p>Service Only – Service Only orders contain only service items. Since products will not be shipped as a result of this order, shipping information is unnecessary.</p> <p>Trade-In/Promotional – Used to place orders for Cisco Technology Migration Plan (CTMP), Custom Trade-In (Non-CTMP programs), and other Promotional Programs.</p>
3	<p>Price List (Figure M.2) – Select the type of price list that your company and Cisco have agreed upon.</p>
4	<p>Order Description (Figure M.3) – Enter text that uniquely describes your order. An order description can be a brief narrative, an order reference number, or a customer number. This description will not be included with the order when it is submitted. For information you want included with the submitted order, use the notes fields on other pages of the Ordering Tool. For a summary of the notes fields and their locations, see All Order Details.</p>
5	<p>Product Discount (Figure M.4) – Enter the product discount percentage your company and Cisco Systems have agreed upon.</p> <p style="color: blue;">This can also be entered at the line level on the <i>Line Item Details</i> page.</p>
6	<p>Service Discount (Figure M.5) – Enter the service discount percentage your company and Cisco Systems have agreed upon.</p> <p style="color: blue;">This can also be entered at the line level on the <i>Line Item Details</i> page.</p>
7	<p>Purchase Type (Figure M.6) – Choose from the following PO Types: Resale, Leasing, Internal Business Use/Infrastructure, Service Provision Use, and Demo/Eval.</p>
8	<p>PO # (Figure M.7) – Enter your purchase order number.</p> <p style="color: blue;">This field is required if you entered a PO Type.</p>
9	<p>Requested Ship Date (Figure M.8) – Enter the date on which you want Cisco to ship your order in MM/DD/YYYY format.</p> <p>The date must be later than today but no later than 90 days from today. This field can be left blank for now, but must be filled in prior to submitting the order.</p>



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10	Quote Number QN (Figure M.9) – Enter QN if applicable (provided by the Account Manager)
11	Commission Code (Figure M.10) – Choose the appropriate commission code.
12	Hardware Service Level (Figure M.11) – Choose the appropriate service Level
13	Software Service Level – Choose the appropriate service level
14	End User Information (Figure M.12) These fields are required in the following circumstances: if the order is a contract order, if the Purchase Type for the order is Resale, or if items on the order contain encryption. Select End User – Choose the name of the organization that will be the ultimate recipient of the equipment on this order, if not your organization. Add new End User – Enter the end-user company name if it is not in the list for Select End User. Country – Choose the country where the end-user company is located. End User Market – Choose the end-user company's vertical market.
15	Click Continue when you have completed all of the required information. (Figure M.13) <i>You are taken to the Main Order Form.</i>

Figure M

Create an Order

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

M.1	Basic Order Info	Order Type	Internal Order Help me choose
M.2		Price List	Global Price List EMEA Availability
M.3		Order Description	<input type="text"/>
M.4		Product Discount	40.0 %
M.5		Service Discount	0.0 %
M.6		Purchase Type	Resale Help me choose
M.7		Purchase Order #	<input type="text"/>
M.8		Requested Ship Date	<input type="text"/> (MM/DD/YYYY)
M.9		Quote Number QN	<input type="text"/>
M.10		Commission Code	Select One
M.11		Hardware Service Level	None
M.11		Software Service Level	None
M.12	End User Info <small>(Required for most purchase types and programs. Learn more)</small>	Select End User	Select One <small>If not listed, add new End User</small> <input type="text"/>
		Country	Netherlands
M.13		End User Market	Select One

[Continue](#)



Chapter Five –

Main Order Form

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

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

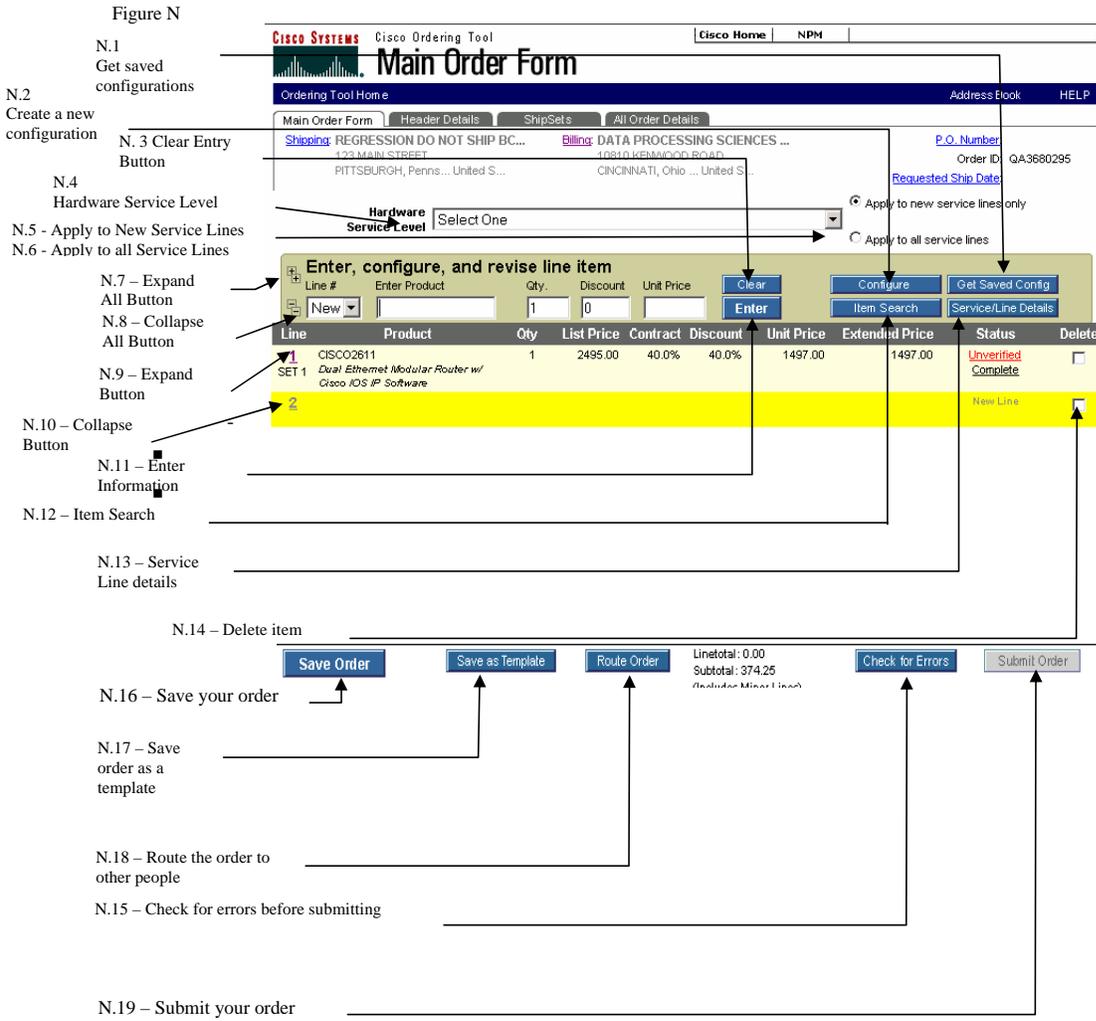
Chapter Objectives

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



Ordering Tool User Guide

Internet Commerce





Buttons on the Main Order Form

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

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

Clear (Figure N.3) – Click this button to remove information from the editing console.

Hardware Service Dropdown (Figure N.4) - This option will allow you to select or modify your Hardware Service Level while you are creating your order. *(Please note that if you would like to change your Software Service Level while creating your order, this must be done on a line by line basis)*

Apply to New Service Line Only (Figure N.5) - If you would like to add Hardware Service to every NEW **Hardware** product line that is being entered, select your preferred Hardware Service Level from the Hardware Service Dropdown and then select the radio button titled “Apply to new service line only”.

Apply to all Service Lines (Figure N.6) - If you would like to add Hardware Service to ALL products that are visible on the Main Order Form including any new products that are added, select your preferred Hardware Service Level from the Hardware Service Dropdown and then select the radio button titled “Apply to all service lines”.

Expand All (Figure N.7) – Click this button to expand all major lines that contain minor line options

Collapse All (Figure N.8) – Click on this button to collapse all major lines that contain minor line options

Expand (Figure N.9) – Click on this button to expand only that major line

Collapse (Figure N.10) – Click on this button to collapse only that major line

Enter (Figure N.11) – Located on the editing console, the enter button applies the new or changed line item information to the order.

Item Search (Figure N.12) – This is useful when you are unsure of a product’s name. You can search by product number, product description, or product family.

Service Line Details (Figure 13) – Click on this button to choose service, provide end user, and ship set details at the line item level. You can also edit configuration details for already configured items.

Delete (Figure N.14) - Delete line item.

Check for Errors (Figure N.15) – Click this button to have the tool check your line item details and configurations for correctness and completeness. It displays a message if you need to make a correction.

Save Order (Figure N.16) – Click this button to save all new or revised information on the order form.

Save as Template (Figure N.17) – Click this button to save your order as a template.

Route Order (Figure N.18) – Enables you to route the order to another person for approval. A routed order is created by one user and sent to another user. The second user retrieves the order by typing in the Order ID and a key on the Ordering Tool Home page.

Submit Order (Figure N.19) – Click this button to submit your order to Cisco. The order is automatically checked for errors.

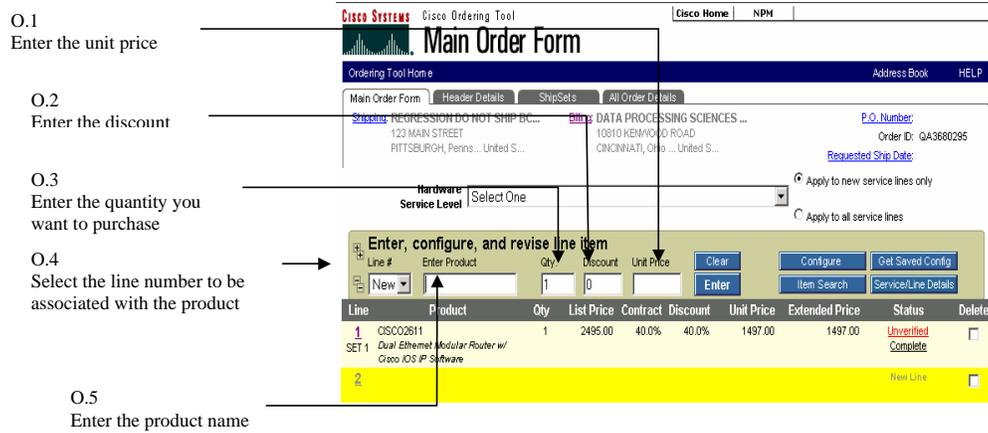


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Verify All Configs – Selecting this button is equivalent to selecting each previously configured product line-by-line and running the configuration check. This button verifies any configurations currently loaded in the order that are still valid, and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

Fields for Entering Line Items

Figure O



The screenshot shows the 'Main Order Form' interface. Callouts O.1 through O.5 point to the following fields:

- O.1:** Points to the 'Unit Price' column in the table.
- O.2:** Points to the 'Discount' column in the table.
- O.3:** Points to the 'Qty' (Quantity) column in the table.
- O.4:** Points to the 'Line #' column in the table.
- O.5:** Points to the 'Enter Product' field above the table.

Line	Product	Qty	List Price	Contract	Discount	Unit Price	Extended Price	Status	Delete
1	OSCO2611 Dual Ethernet Modular Router w/ Cisco IOS IP Software	1	2495.00	40.0%	40.0%	1497.00	1497.00	Unverified Complete	<input type="checkbox"/>
2									<input type="checkbox"/>

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

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

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

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

Enter Product (Figure O.5) – Enter the unique part number identifying a product in this field.

Additional Fields for Viewing and Modifying Line Items

Figure P

Annotations:

- P.1:** Enter the discount (points to Hardware Service Level dropdown)
- P.2:** Unit price is displayed here (points to Unit Price column)
- P.3:** Shows the list price of the line item (points to List Price column)
- P.4:** The quantity multiplied by the list price. Includes discount % (points to Extended Price column)
- P.5:** Shows the status (points to Status column)
- P.6:** Click in the box to select the line to be deleted (points to Delete checkbox)

Line	Product	Qty	List Price	Contract	Discount	Unit Price	Extended Price	Status	Delete
1	CISCO2611	1	2495.00	40.0%	40.0%	1497.00	1497.00	Unverified	<input type="checkbox"/>
SET 1	Dual Ethernet Modular Router w/ Cisco IOS IP Software							Complete	<input type="checkbox"/>
2									<input type="checkbox"/>

Discount (Figure P.1) – The percentage of discount off the list price of products or services, as agreed upon by the customer’s organization and Cisco.

Unit Price (Figure P.2) – The price of the product calculated by taking the list price and applying any customer discounts.

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

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

Status (Figure P.5)

- **Complete:** Line item details, such as site or shipping information, are complete.

- **Incomplete:** Line items details are missing or incomplete. Clicking this link displays Line Item Details.
- **Unverified:** The configuration status of a product indicating that its configuration has *not* been completed and verified as correct.
- **Verified:** The configuration status of a product indicating that its configuration has been completed and verified as correct.

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

Managing Lines on the Main Order Form

Add New Line Items

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

Step	What You Do
1	Select New for the Line # .
2	Enter the product number exactly as it appears in the price list. If you don't know the product number, click Item Search (See Chapter 11). To order a spare part, type an equal sign (=) at the end of the product number, for example CAB-AC= .
3	Enter the Qty (Quantity) and the Discount percentage your company and Cisco have agreed upon. <i>The Unit Price is automatically calculated.</i>
4	To add options (minor lines) for a configurable item, either use a saved configuration by selecting Get Saved Config (See Chapter 12) or choose the line and click the Configure button. (See Chapter 10).
5	To define service, end user, and ShipSet details at the line item level, click Service/Line Details (see Chapter 13).

Modifying an Existing Line Item

The following steps show you how to modify an existing line item on an order.

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



Deleting Line Items

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

Step	What You Do
1	Check the box in the Delete column for the line item.
2	Click Save Order . The line item is deleted.

Saving an Order

The following step shows you how to save an order.

Step	What You Do
1	Click the Save Order button in the lower left corner of the page. The <i>Save</i> button turns blue.



Chapter Six –

Header Details

Header Details provides one location to manage details that apply to every line in your order. It contains many of the same fields as Set Defaults.

Chapter Objective

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

Definitions

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

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

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

Company Grouping: This will be displayed if there are at least two company groupings available in the profile for that user.

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

Merge in transit – Lets you choose whether or not to merge all items into one shipment. If you choose Merge Order, you override multiple ShipSets.

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

Shipping Preferences – Indicates whether Cisco (Cisco Routed) or the customer (Billing Customer Routed) will be responsible for shipping the products.

Shipping Service Level – Indicates the shipping service level.

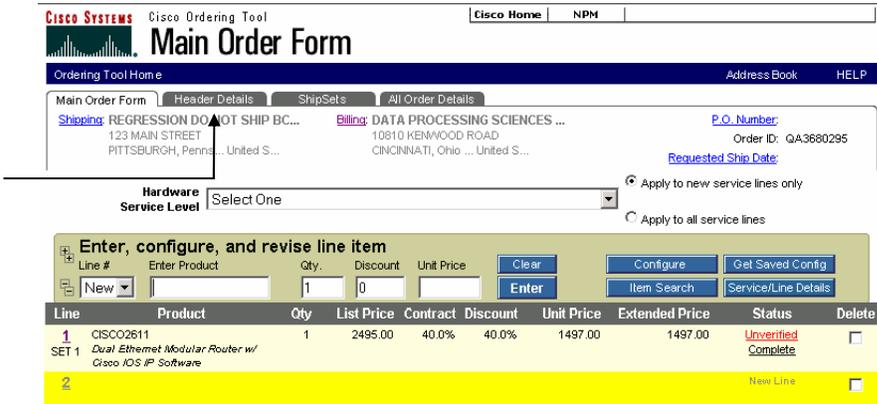
Ship All Items Separately – This selection informs Cisco if you would like all line items shipped as if they are individual orders. No should be selected if you would like Cisco to ship products together whenever possible (this extends ShipSet lead times). Yes should be selected if you would like Cisco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

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

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

Entering Order Details

Figure Q



The screenshot shows the 'Main Order Form' interface. At the top, there are navigation tabs: 'Main Order Form', 'Header Details', 'ShipSets', and 'All Order Details'. The 'Header Details' tab is active. Below the tabs, there are shipping and billing addresses. A 'Hardware Service Level' dropdown menu is set to 'Select One'. Below this, there are radio buttons for 'Apply to new service lines only' (selected) and 'Apply to all service lines'. A section titled 'Enter, configure, and revise line item' contains input fields for 'Line #', 'Enter Product', 'Qty.', 'Discount', and 'Unit Price', along with 'Clear', 'Enter', 'Configure', 'Get Saved Config', 'Item Search', and 'Service/Line Details' buttons. Below this is a table with columns: Line, Product, Qty, List Price, Contract, Discount, Unit Price, Extended Price, Status, and Delete. The table contains one row with a yellow highlight under the 'New Line' button in the 'Delete' column.

Line	Product	Qty	List Price	Contract	Discount	Unit Price	Extended Price	Status	Delete
1	CISCO2611 Dual Ethernet Modular Router w/ Cisco IOS # Software	1	2495.00	40.0%	40.0%	1497.00	1497.00	Unverified Complete	<input type="checkbox"/>
2									New Line <input type="checkbox"/>

Q.1
Header
Details Tab

Display the All Header Details Page

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

Step	What You Do
1	<p>From within an order, click the Header Details tab (Figure Q.1) at the top of the Main Order Form page (Figure Q).</p> <p style="text-align: center;"><i>The All Header Details page (Figure R) is displayed</i></p>

Figure R

R.1
Click to enter address changes

R.2
Click to enter contact changes

Changing the Billing Address

The following steps show you how to change the billing address.

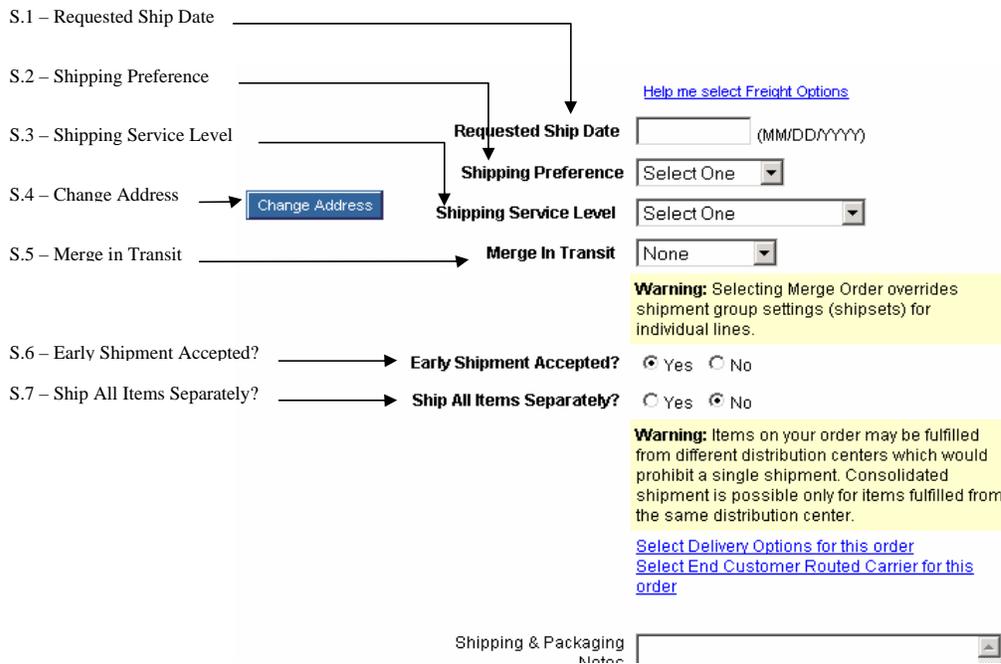
Step	What You Do
1	From the <i>Billing Information</i> section click the Change Address button. (Figure R.1). <i>The My Addresses page is displayed.</i>
2	Choose the new billing address by clicking the button in the Select column.
3	Click Apply . <i>The All Header Details page is displayed with the new billing address.</i>

Adding or Changing the Billing Contact Person

The following steps show you how to add or change the **Billing Contact Person**.

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

Figure S



The screenshot shows a configuration page for shipping options. On the left, seven steps (S.1-S.7) are listed with arrows pointing to specific elements on the page:

- S.1 - Requested Ship Date points to the "Requested Ship Date" text label.
- S.2 - Shipping Preference points to the "Shipping Preference" text label.
- S.3 - Shipping Service Level points to the "Shipping Service Level" text label.
- S.4 - Change Address points to a blue "Change Address" button.
- S.5 - Merge in Transit points to the "Merge In Transit" text label.
- S.6 - Early Shipment Accepted? points to the "Early Shipment Accepted?" text label.
- S.7 - Ship All Items Separately? points to the "Ship All Items Separately?" text label.

The page contains the following form elements:

- Requested Ship Date:** A text input field with a placeholder "(MM/DD/YYYY)".
- Shipping Preference:** A dropdown menu currently showing "Select One".
- Shipping Service Level:** A dropdown menu currently showing "Select One".
- Merge In Transit:** A dropdown menu currently showing "None".
- Early Shipment Accepted?:** Radio buttons for "Yes" (selected) and "No".
- Ship All Items Separately?:** Radio buttons for "Yes" and "No" (selected).

Two warning messages are displayed in yellow boxes:

- Warning:** Selecting Merge Order overrides shipment group settings (shipsets) for individual lines.
- Warning:** Items on your order may be fulfilled from different distribution centers which would prohibit a single shipment. Consolidated shipment is possible only for items fulfilled from the same distribution center.

At the bottom, there are two links: "Select Delivery Options for this order" and "Select End Customer Routed Carrier for this order". A "Shipping & Packaging Notes" field is partially visible at the bottom.

Adding or Changing the Shipping Address

The following steps show you how to add or change the **Shipping Address**.

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

Adding or Changing the Shipping Contact Person

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

Step	What You Do
1	From the <i>Shipping Address & Method</i> section click on Change Contact . <i>The Select a Contact page is displayed.</i>
2	Choose a new contact by clicking the button in the Select column, or click the New Contact button to enter a contact person if they are not listed on the Select a Contact page.
3	Click the Apply button in the bottom left corner. <i>The All Header Details page is displayed.</i>

Adding or Changing the Shipping Method Information

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

Step	To Do This	What You Do
1	Requested Ship Date	Requested Ship Date (Figure S.1) – Enter the date on which you want Cisco to ship your order in MM/DD/YYYY format. The date must be later than today but no later than 90 days from today.
2	Shipping Preference	Shipping Preference (Figure S.2) – choose freight routing
3	Shipping Service Level	Shipping Service Level (Figure S3) – choose the preferred service level
4	Merge in transit	Merge in Transit (Figure S.5) – Choose if you want to merge your order.
5	Early Shipment Acceptance	Early Shipment Accepted (Figure S.6) – Click “Yes” to accept shipments prior to the requested ship date specified.
6	Ship All Items Separately	Ship All Items Separately (Figure S.7) – Click “Yes” if you will accept partial shipments from Cisco. Click “No” if you want the entire order to ship at one time.
9	Shipping and Packaging Notes	Shipping & Packaging Notes – Additional notes that specify special requirements for Shipping or Packaging.
10	Notes to Appear on Packaging	Carton Notes – These are notes that need to appear on the carton labels that go on the outside of the boxes your product will be shipped in.
11	Saving Header Details	Click Save to save all changes made on Header Details. <i>The Save button turns blue.</i>

Figure T

[TOP](#)

End User

Note: Required for Resale and Service Provision purchase types. Recommended for all purchase types.

CUSTOMER DEMONSTRATION NL
 CUSTOMER SHIPPING ADDRESS NL
 AMSTERDAM 1101 BA
 Netherlands

Contact DUTCH CONTACT
Phone
Fax
Email
Department
Mail Stop

T.1 – Change Address →

T.2 – End User Market → **End User Market**

Adding or Changing End User Information

The following steps show you how to add or change the **End User Information** (Figure T). End User information is required for all resale orders and contract orders. It is also required for all items containing encryption.

Step	To Do This	What You Do
1	Access the Address Book	Change Address (Figure T.1) – Click the Change Address button to access the Address Book.
2	Select an End User	Choose an end user and address from your list of Saved Addresses or search for a new one. “STOCK” and “END USER UNKNOWN” are now displayed at the bottom of the list.
3	Apply End User to the Order	Apply the end user and address to your order.
4	Choose Market	End User Market (Figure T.2) – Choose the end user company’s primary market in which they do business.
5	Saving the Order	Click Save Order to save all changes made on Header Details. The <i>Save Order</i> button turns blue to indicate that changes are saved.

Figure U

[TOP](#)

Payment and Taxes

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

U.1 Credit Card Information → **Payment and Taxes**

U.2 Purchase Type → **Purchase Type**

U.3 Payment Method → **Payment Method**

U.4 Purchase Order → **Purchase Order #**

U.5 Terms → **Terms**

U.6 Deal ID → **Deal ID**

U.7 Commission Code → **Commission Code**

U.8 Taxable → **Taxable?** Yes No

U.9 Order Processing Notes → **Order Processing Notes**

These notes are reviewed by Cisco. Entries in this field may delay the processing and/or shipment of your order.

Credit Card

Card Number

Expiration Date /

Name on Card

Credit Card Zip

Adding or Changing Payment and Taxes Information

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

Step	To Do This	What You Do
1	Choosing the Purchase Type	Purchase Type (Figure U.2) – Select the type of purchase for the order.
2	Choosing the Payment Method	Payment Method (Figure U.3) – Select “Purchase Order” or “Credit Card”.
3	Choosing Purchase Order Payment Method Options	The following fields are required for a Purchase Order payment method: PO Number (Figure U.4) – Provide your internal purchase order number. Terms (Figure U.5) – Select your payment terms. If anything other than 30 net, your order will go on hold for review.
4	Choosing the Credit Card Payment Method Options	The following fields are required for a credit card payment method (Figure U.1): Credit Card – Select the name of the credit card. Card Number – Enter the credit card number.



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		<p>Expiration Date – Select the month (MM) and year (YYYY).</p> <p>Name on Card – Enter the exact name that appears on the credit card.</p> <p>Credit Card Zip – Enter the zip code for the credit card billing address.</p>
5	Entering a Deal ID	<p>Deal ID (Figure U.6) – Enter your Deal ID, The Ordering Tool now validates the Deal ID. (Remember, the Deal ID is provided by your Account Manager.) If the Ordering Tool states your ID is unverified, you may still submit the order, but be subject to some processing delays.</p>
6	Enter a Commission Code	<p>Commission Code (Figure U.7) – Choose the appropriate name from the pull down.</p>
7	Choosing if the Order is Taxable	<p>Taxable (Figure U.8) – Choose whether or not your order is taxable. Users from Australia and Canada will see different options.</p>
8	Entering the Order Processing Notes	<p>Order Processing Notes (Figure U.9) – Enter notes (up to 300 characters) related to the processing of your order.</p> <p>This information cannot exceed 300 characters. <i>Please note, these notes are reviewed by Cisco, and may delay the shipment of your order.</i></p>
9	Saving the Order	<p>Click Save Order to save all changes made on Header Details.</p> <p><i>The Save Order button turns blue to indicate that changes are saved.</i></p>

Figure V



Order Acknowledgements

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

V.1
Acknowledgements
Contact Person

→ Send **shipping and scheduling** acknowledgements to this person:
First name, last name

V.2
Send Acknowledgement Via

→ Fax Email
 Neither

You must provide fax number or email address if you select either fax or email.
If you selected neither, leave blank.

Adding or Changing Order Acknowledgments Information

In the **Order Acknowledgments** section (Figure V) you can modify the following.

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

Figure W

Order Contacts ▲ TOP

For questions regarding this order, contact

<p>W.1 - Name</p> <p>W.2 - Phone</p> <p>W.3 - Fax</p> <p>W.4 - Email</p>	<p>→</p> <p>→</p> <p>→</p> <p>→</p>	<table style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 10%;">Name:</td> <td style="width: 40%; border-bottom: 1px solid #ccc;">First Jane</td> <td style="width: 10%; text-align: center;">Last</td> <td style="width: 40%; border-bottom: 1px solid #ccc;">WU</td> </tr> <tr> <td>Phone:</td> <td colspan="3" style="border-bottom: 1px solid #ccc;">123-4567</td> </tr> <tr> <td>Fax:</td> <td colspan="3" style="border-bottom: 1px solid #ccc;"></td> </tr> <tr> <td>Email:</td> <td colspan="3" style="border-bottom: 1px solid #ccc;">jwu@regression.com</td> </tr> </table>	Name:	First Jane	Last	WU	Phone:	123-4567			Fax:				Email:	jwu@regression.com		
Name:	First Jane	Last	WU															
Phone:	123-4567																	
Fax:																		
Email:	jwu@regression.com																	

Adding or Changing Order Contact Information

In the **Order Contacts** section (Figure W) you can modify the following.

Step	To Do This	What You Do
1	Enter Name	Name (Figure W.1) – Provide the first and last name of the person who should be contacted if there are questions about the order.
2	Enter Phone Number	Phone (Figure W.2) – Provide the contact person’s phone number.
3	Enter Fax Number	Fax (Figure W.3) – Provide the contact person’s fax number.
4	Enter Email Address	Email (Figure W.4) – Provide the contact person’s email address.
5	Saving the Order	<p>Click Save Order to save all changes made on Header Details.</p> <p style="color: #004a7c; font-style: italic;">The <i>Save Order</i> button turns blue to indicate that changes have been saved.</p>



Delivery Options



Please note: Cisco will follow delivery option requests if available, however not all delivery options are supported by all carriers or available in all ship-to regions. Delivery option requests will be passed on to the customer's selected carriers on Billing Customer Routed orders.

Attention Billing Customer Routed customers: Delivery Options selected on this page will over-ride Delivery Options selected via the Shipment Routing Configurator Tool.

Authorized Receiving Party

Yes No

Use this option if you have a preferred person you would like to sign for the shipment. Provide contact name and phone number

Consularization/Legalization

Yes No

Selection of this option requires shipper to forward shipping documentation to destination country embassy or designated agent for validation

Certificate of Origin

Yes No

Consignee requests shipper or shipper's freight forwarder to provide certificate of origin

Contact prior to delivery

Yes No

Please provide a primary and backup name and phone number of the person you would like to be contacted prior to delivery

Carrier will call

Yes No

Shipper will confirm carrier assignment with delivery party at time of shipment. Please provide contact name and phone number

Specific delivery time

Yes No

Please provide the time window you would like to request the delivery to take place. Carrier will make reasonable effort to deliver during this time period

Inside delivery required

Yes No

Do not deliver shipment to receiving dock, instead deliver to a location, name, and phone number you provide that is typically inside the office

Preshipment Inspection Required

Yes No

When Selecting this option, your forwarder will make appointment with the Pre-Inspection Agency to examine Goods and Shipping Documents at forwarder's location. Inspection Agency's fees to be absorbed by consignee

Remove packaging

Yes No

Select this option if you would like the carrier to remove packaging after delivery

Special transport required

Yes No

Provide type of specialized transportation you would like to request

Entering Delivery Options

In the **Delivery Options** section you can request delivery options.

Step	What You Do
1	In the <i>Shipping Address & Method</i> section, make a selection in the Shipping Preference and Shipping Service Level field
2	Click the “Select Delivery Options for this order” link located below the Ship All Items Separately? warning in the <i>Shipping Address & Method</i> section. <i>The Delivery Options section is displayed.</i>
3	Click the “Yes” button for the delivery option you would like to request. <i>Please note that all delivery options are not available in all scenarios. Delivery option availability vary depending on your freight profile, shipping preference and location.</i>
4	If there is a text box for the delivery option that you have selected “Yes”, enter appropriate information in the text box. <i>Text boxes are required when you select “Yes” for the delivery option and you will need enter information in the text box before leaving the page or change the request to “No”.</i>
5	Click the Save Order button.

NOTE: Cisco will make every attempt to follow these delivery option instructions. However, all delivery options are not available for all scenarios. For Billing customer-routed orders, the delivery option requests will be passed on to the customer's selected carrier.

Non Standard Shipping Requests



Warning: Please note that if the non-standard shipping carrier you requested below is not available, Cisco reserves the rights to use an appropriate carrier and carrier account number from your Shipment Routing Configurator profile to fulfill your order.

Requested Carrier

Carrier Account Number



Non Standard Shipping Requests

This section will give Billing Customer Routed Customers the opportunity to enter a carrier and a carrier account number, which will override what has been set up in their Shipment Routing Configurator Profile. *(Please note that Cisco Routed Customers will not be able to override carrier information here)*

Step	What You Do
1	In the <i>Shipping Address & Method</i> section, choose “Billing Customer Routed” in the Shipping Service Level field.
2	Choose a service level from the Shipping Service Level field.
3	Click the “Select End Customer Routed Carrier for this order” link located below the Ship All Items Separately? warning in the <i>Shipping Address & Method</i> section. <i>The Non Standard Shipping Requests section is displayed.</i>
4	Choose a carrier in the Requested Carrier field.
5	Enter the account number in the Carrier Account Number field.
6	Click the Save Order button.

Chapter Seven –

ShipSets

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

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

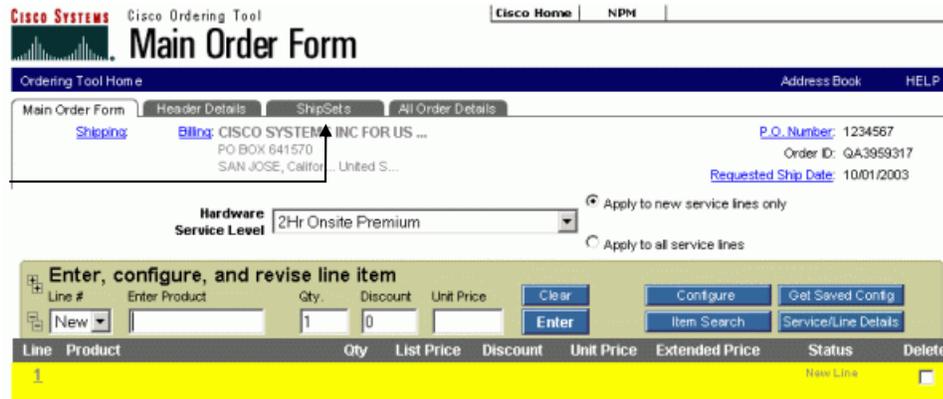
Chapter Objectives

- Learn how to create a new ShipSet.
- Learn how to use an existing ShipSet to create a new ShipSet.
- Learn how to view and modify ShipSet.
- Learn how to delete ShipSet.

How to Create ShipSets for Your Order

Figure X

X.1
ShipSets tab



The screenshot displays the 'Main Order Form' in the 'ShipSets' tab. At the top, there are navigation links for 'Cisco Home' and 'NPM'. The main header includes 'Ordering Tool Home', 'Address Book', and 'HELP'. The order details section shows 'Billing: CISCO SYSTEMS INC FOR US ...' with address 'PO BOX 641570, SAN JOSE, Califor... United S...'. Order information includes 'P.O. Number: 1234567', 'Order ID: QA3959317', and 'Requested Ship Date: 10/01/2003'. The 'Hardware Service Level' is set to '2Hr Onsite Premium' with options to 'Apply to new service lines only' or 'Apply to all service lines'. The 'Enter, configure, and revise line item' section has fields for 'Line #', 'Enter Product', 'Qty', 'Discount', and 'Unit Price', along with 'Clear', 'Enter', 'Configure', 'Item Search', and 'Get Saved Config' buttons. A table at the bottom shows a single line item with a quantity of 1 and a list price of 0.

Line	Product	Qty	List Price	Discount	Unit Price	Extended Price	Status	Delete
1		1	0				New Line	<input type="checkbox"/>



Creating a New ShipSet

The following steps show you how to create a new ShipSet.

Step	What You Do
1	On the Main Order Form (Figure X) click the ShipSets tab (Figure X.1) at the top of the page. <i>The ShipSets page is displayed (Figure Y).</i>
2	Click on the New ShipSet button (Figure Y.5). <i>The ShipSets: View/Modify page (Figure Z) appears.</i>
3	In the Lines in Order window choose the lines you want to be part of the new ShipSet. (Figure Z.2)
4	Click the Add button (Figure Z.3) for a line item or the Add All button (Figure Z.5) if you want all line items to be added.
5	Once the lines have been added you must choose the Shipping Address (Figure Z.8) and Shipping Options (Figure Z.7) for the new ShipSet.
6	When you are finished click Save (Figure Z.9). <i>The ShipSets page is displayed after you save.</i>

Figure Y

The screenshot shows the Cisco Ordering Tool interface for ShipSets. At the top, there is a navigation bar with 'Cisco Home' and 'NPM'. Below that is a header with 'ShipSets' and tabs for 'Main Order Form', 'Header Details', 'ShipSets', and 'All Order Details'. A message box contains instructions: 'Select a ShipSet and click View/Modify to view and edit the details of that ShipSet, or click Copy to copy the information to a new ShipSet, or click Delete to delete one or more ShipSets. Note: Lines in deleted ShipSets will revert back to the default ShipSet. Click New ShipSet to create a new ShipSet.' On the right, order details are shown: 'P.O. Number: JESSEC - GCC DEMO 050803' and 'Order ID: MP3692706'. Below the message is a table with columns: ShipSet, Destination Address, Requested Ship Date, Shipping Preference, Shipping Service Level, and Select. The table contains one row with ShipSet '1' and a checkbox. At the bottom, there are four buttons: 'New ShipSet', 'View / Modify', 'Copy', and 'Delete'. Annotations Y.1 through Y.5 point to the 'Select' column, the 'Delete' button, the 'Copy' button, the 'View / Modify' button, and the 'New ShipSet' button respectively.

ShipSet	Destination Address	Requested Ship Date	Shipping Preference	Shipping Service Level	Select
1	UNSYS AMSTERDAMSEVEG 268 AMSTELVEEN 1182 HN Netherlands	08/31/2003	Cisco Routed	Cisco Routed Standard	<input type="checkbox"/>

Figure Z

Instructions

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

ShipSet: 1

Step 1: Assign Lines to Your ShipSet

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

Lines in Order

Line	Item	Set
3	CISCO2501	1

Lines in ShipSet

Line	Item	Set
3	CISCO2501	1

Step 2: Assign Shipping Attributes

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

Shipping Address

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

Shipping Options

Shipment via: UPS INTL: Express Plus 3-6 days
 Freight Term/FOB: 3rd Party Collect / Origin
 Requested Ship Date: 07/31/2001 (MM/DD/YYYY)
 Account Number/Shipping Instructions: 1212121

Save Button

Using an Existing ShipSet to Create a New ShipSet

The following steps show you how to use an existing ShipSet to create a new ShipSet.

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

Viewing and Modifying ShipSets

The following steps show you how to view and modify ShipSets.

Step	What You Do
1	On the ShipSets page in the Select column (Figure Y.1) choose the ShipSet to modify and click the View/Modify button (Figure Y.4).
2	In the Lines in Order and Lines in ShipSet (Figure Z.1) fields you can choose the lines you want to add or remove from the ShipSet.
3	Then click the Add button or the Add All button if you have multiple lines to be added. Click the Remove button (Figure Z.4) or the Remove All button (Figure Z.6) if you have multiple lines to be removed.
4	Once the lines have been added or removed you can also make changes to the Shipping Address and Shipping Options for the ShipSet.
5	When you are finished click the Save button. <i>The ShipSet page is displayed after you save.</i>



Deleting a ShipSet

The following step shows you how to delete ShipSets.

Step	What You Do
1	Choose the ShipSet to be deleted by clicking the box in the Select column, then click Delete . The page is refreshed and redisplay the <i>ShipSets</i> page.

Chapter Eight –

All Order Details

All Order Details page summarizes the entire order. You are unable to change the information on this page; it is for review purposes only. Required changes are made on the Main Order Form, Header Details, and ShipSets. The changes are reflected on the All Order Details page.

Chapter Objective

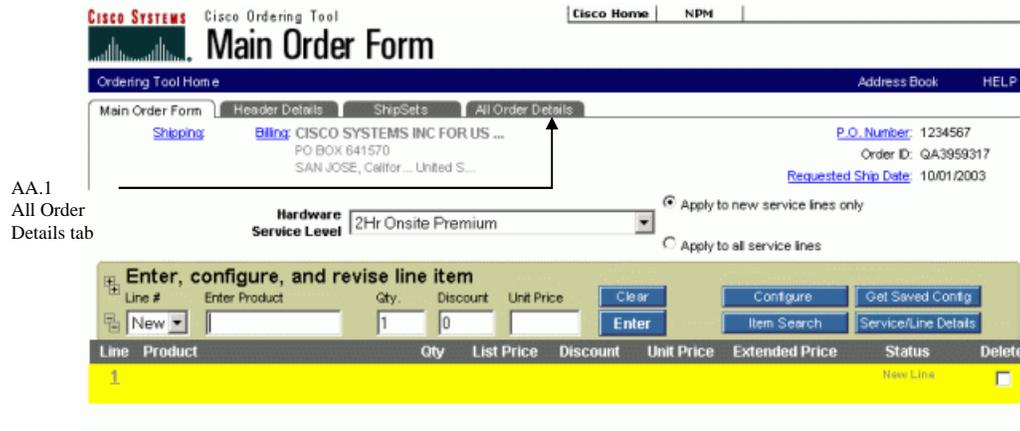
- Learn to use All Order Details to review your order before submission to Cisco.

Definitions

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

How to Use the All Order Details Page

Figure AA



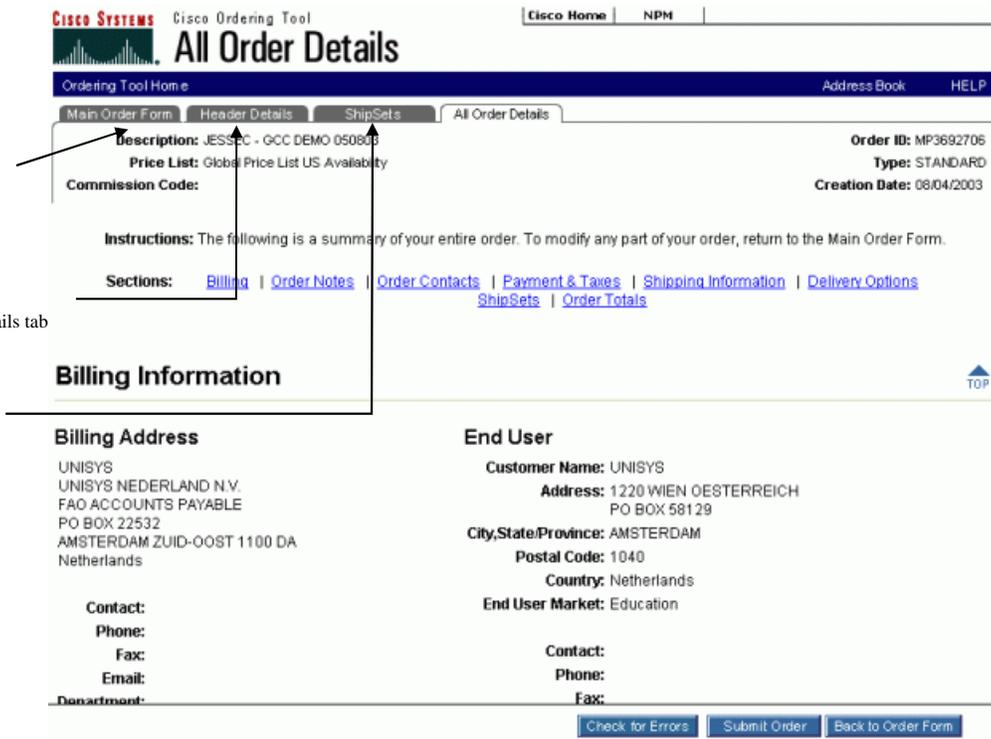
AA.1
All Order
Details tab

Accessing the All Order Details Page

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

Step	What You Do
1	<p>From within an order click the All Order Details tab (Figure AA.1) at the top of the Main Order Form page (Figure AA).</p> <p style="color: blue; text-decoration: underline;">The <i>All Order Details</i> page (Figure BB) is displayed.</p>

Figure BB



BB.1 Main Order Form tab

BB.2 Header Details tab

BB.3 ShipSets tab

Order ID: MP3692706
Type: STANDARD
Creation Date: 08/04/2003

Sections: [Billing](#) | [Order Notes](#) | [Order Contacts](#) | [Payment & Taxes](#) | [Shipping Information](#) | [Delivery Options](#) | [ShipSets](#) | [Order Totals](#)

Billing Information

<p>Billing Address</p> <p>UNISYS UNISYS NEDERLAND N.V. FAO ACCOUNTS PAYABLE PO BOX 22532 AMSTERDAM ZUID-OOST 1100 DA Netherlands</p> <p>Contact: Phone: Fax: Email: Department:</p>	<p>End User</p> <p>Customer Name: UNISYS Address: 1220 WIEN OESTERREICH PO BOX 581 29 City,State/Province: AMSTERDAM Postal Code: 1040 Country: Netherlands End User Market: Education</p> <p>Contact: Phone: Fax:</p>
--	--

[Check for Errors](#) | [Submit Order](#) | [Back to Order Form](#)



Modifying Order Information

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

Step	To Do This	What You Do
1	Change billing, shipping, contact, end user, payment and tax, or order acknowledgment information for all items on the order	Click the Header Details tab (Figure BB.2). See Chapter Six for more details on this section.
2	Assign a different shipping address and method to some, but not all items in the order	Click the ShipSets tab (Figure BB.3). See Chapter Seven for more details on this section.
3	To modify end user information for some, but not all items on the order.	Click the Main Order Form tab (Figure BB.1), choose a line, and then click the Service/Line Details button. <i>This takes you to the Line Item Details page. See Chapter Thirteen for more details on the Line Item Details section.</i>

Chapter Nine –

Address Book

There are two ways to access the Address Book from within the Ordering Tool. An **Address Book** button is located on the top navigation bar throughout the Ordering Tool. In addition, you can click any of the Change Address buttons within the Ordering Tool to access the Address book.

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

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

Chapter Objectives

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

Definitions

- **Add to My Addresses** – This adds a frequently used address to My Addresses list.
- **Existing Customer** – Choose the customer for whom you want to add a new address.
- **New Customer Name** – If you want to enter a new customer enter their name in this field.
- **Postal/Zip** – Enter the postal or zip code.
- **Search Again** – Returns you to the Search Addresses page for another search.
- **State/Province** – Choose the U.S. state or Canadian, Chinese, Indian or Korean province if appropriate.

How to Use the Address Book

Figure CC



CC.1
Click to
display the
address
book

Maintaining Addresses

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

Step	What You Do
1	From the <i>Ordering Tool Home</i> page click the Address Book link on the top Navigation Bar. (Figure CC.1) <i>The Address Book launches the Manage My Addresses page (Figure DD).</i>
2	Click Add Address . (Figure DD.1) <i>The Search Addresses page is displayed. (Figure EE)</i>
3	Provide search criteria then click Continue . (Figure EE.1) The number of addresses that matched your search is displayed in the upper left corner. A scroll bar is provided on the right to view all the matching addresses. <i>The Address Search Results page (Figure FF) is populated.</i>



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4	<p>Select an address to add to <i>My Addresses</i> by clicking the check box on the far right of the address line in the Select column (Figure FF.1).</p> <p>The <i>Add to My Addresses</i> button (Figure FF.2) turns blue.</p>
5	<p>Click Add to My Addresses.</p> <p>The <i>Manage My Addresses</i> page (Figure GG) is displayed with the new record added to the list.</p>
6	<p>On the <i>Sort By</i> line, click the blue underlined City label.</p> <p>The addresses are sorted alphabetically by city.</p>
7	<p>Select an address by clicking the addresses check box at the far right end of the line.</p> <p>The <i>Assign Contact</i> tab is enabled.</p>
8	<p>Click the Assign Contact tab (Figure GG.1).</p> <p>The <i>Assign Contact</i> page is displayed. (Figure HH)</p>
9	<p>Select a contact and click the Apply button (Figure HH.1).</p> <p>The <i>Manage My Addresses</i> page is displayed. Click the <i>Close</i> button to return to the <i>Ordering Tool Home</i> page.</p>

Figure DD

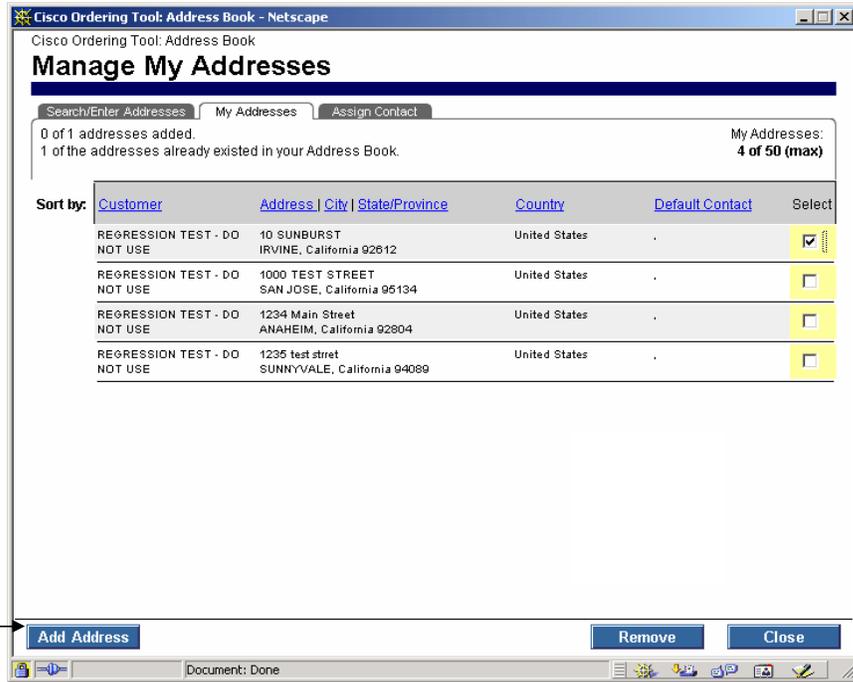


Figure EE

EE.1
Make
selections
then click
Continue

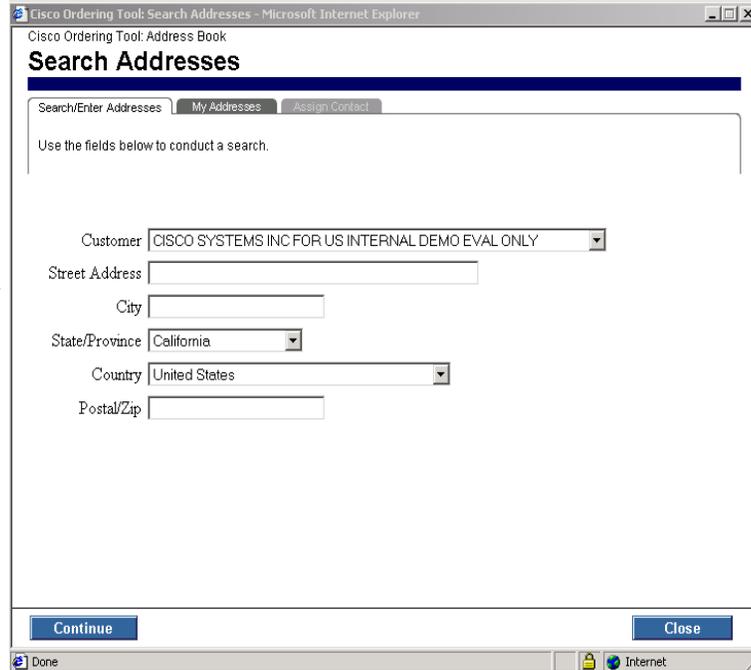


Figure FF

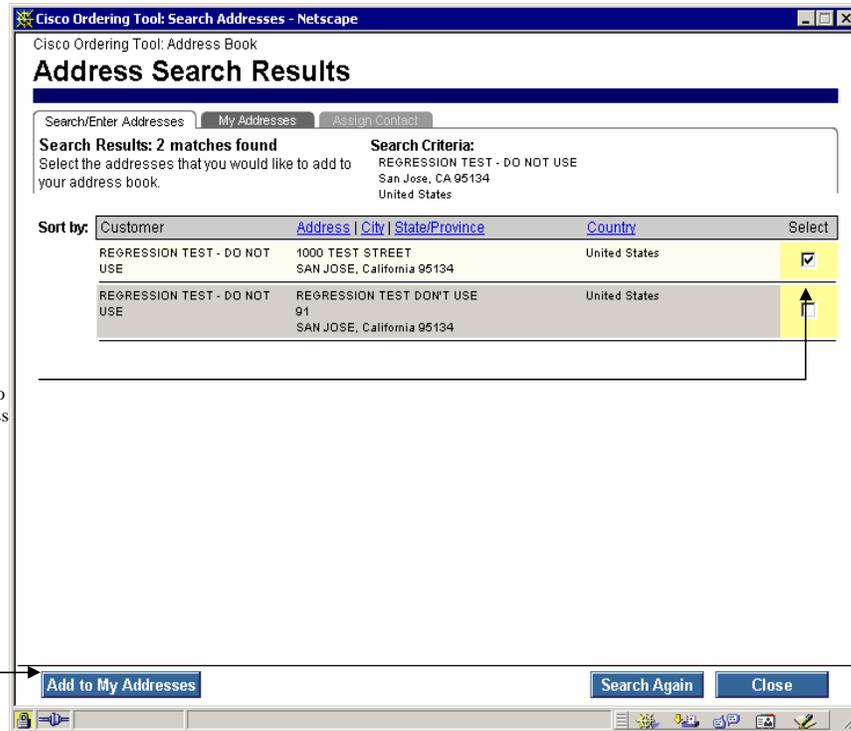


Figure GG

GG.1
Click the
Assign
Contact tab
to assign a
contact to an
address

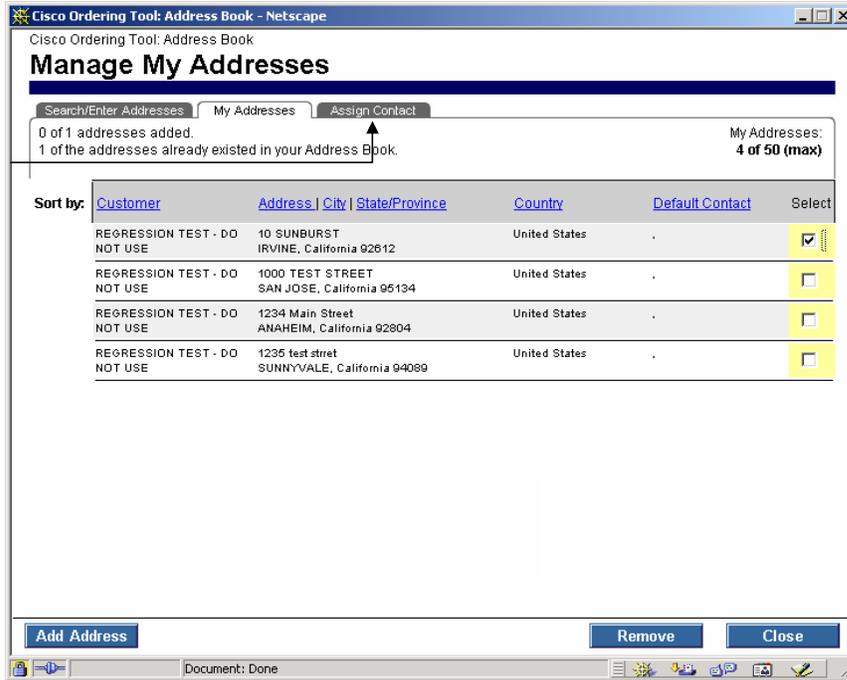
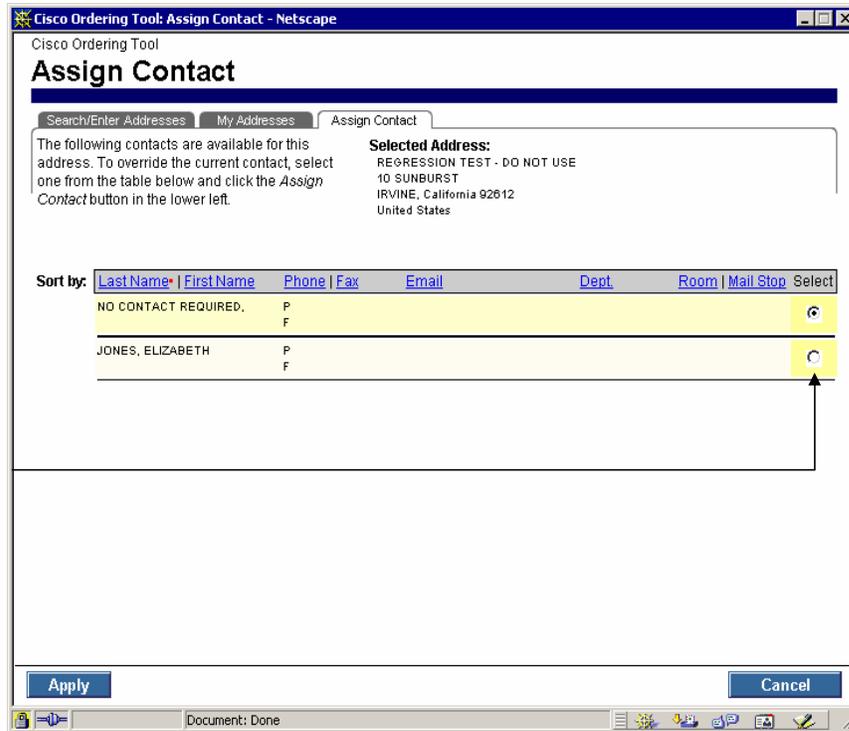


Figure HH



HH.1
 Assign a contact by clicking the radio button to the right of the name to be added, then click apply



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Figure II

Header Details

Apply changes to your entire order

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

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

Billing Information

SPRINT CORPORATION
PO BOX 7977
MAILSTOP KSOPHW0318
OVERLAND PARK Kansas
66207
United States

[Change Address](#)

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

Contact
Phone
Fax
Email
Department
Mail Stop

[Change Contact](#)

Shipping Address & Method

[Help me select Freight Options](#)

Requested Ship Date: 10/25/2003 (MM/DD/YYYY)

Shipping Preference: Cisco Routed

Shipping Service Level: Cisco Routed Standard

Merge In Transit: None

Warning: Selecting Merge Order overrides shipment group settings (shipsets) for individual lines.

Early Shipment Accepted? Yes No

Ship All Items Separately? Yes No

Warning: Items on your order may be fulfilled from different distribution centers which would prohibit a single shipment. Consolidated shipment is possible only for items fulfilled from the same distribution center.

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

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

Carton Notes
(Notes to appear on the carton labels)

II.1 Change Contact → [Change Contact](#)

II.2 Change Address → [Change Address](#)



Searching for a Shipping Address

The following steps show you how to search for a shipping address for your order.

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

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

Figure JJ

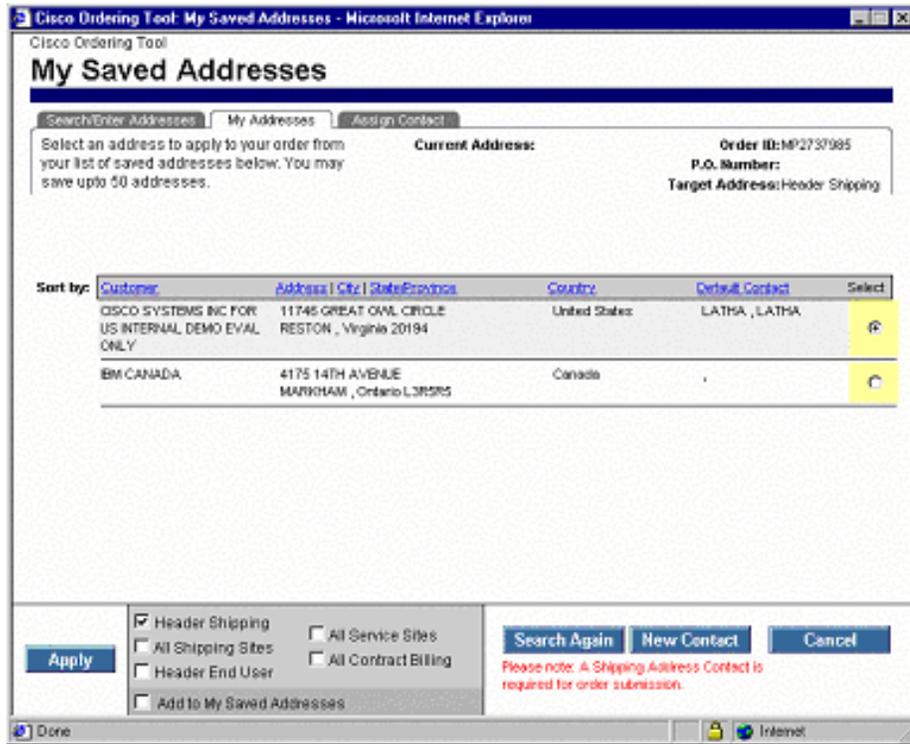
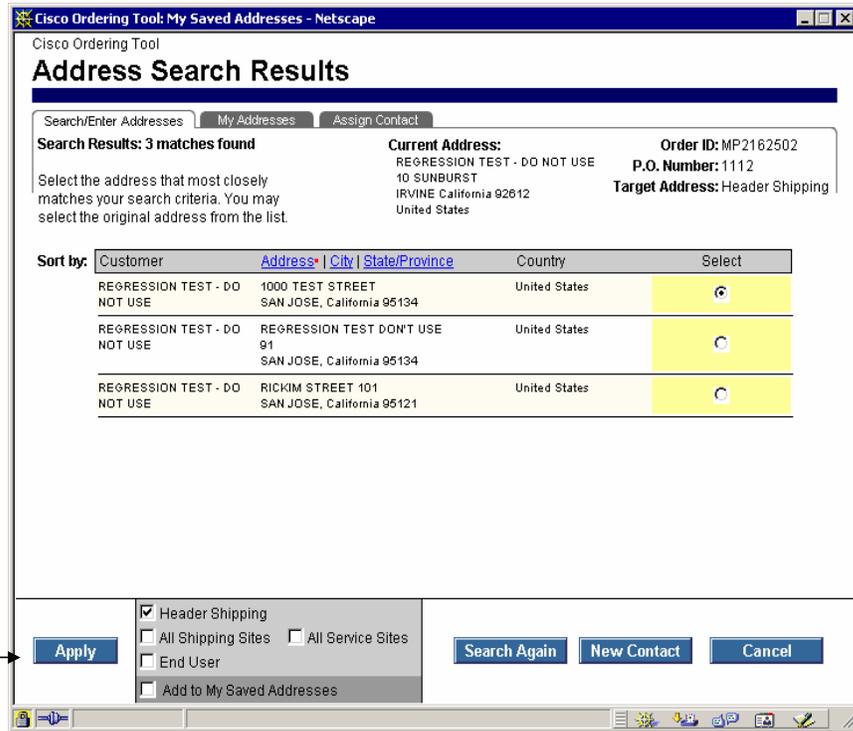


Figure KK

KK.1
 Fill in the
 information on
 the page then
 click Continue

Figure LL



LL.1
Make your
selection
then click
Apply

Applying an Address to Multiple Locations at Once

The following steps will show you how to apply an address to multiple locations at once.

Step	What You Do
1	From the <i>Header Details</i> page, click Change Address under the <i>Shipping Address & Method</i> section. The <i>My Saved Addresses</i> page (Figure JJ) is displayed with the <i>My Addresses</i> tab as the active page.
2	From the <i>My Addresses</i> page, select an address for the order and service sites.
3	From the <i>Apply To</i> checkboxes (Figure JJ.4), check the All Service Sites check box. (Figure JJ.5)
4	Click Apply . A dialogue box appears asking you to confirm your selection.



5	Click OK . The <i>Header Details</i> page is displayed with the new address.
---	--

Creating a New Contact

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

Step	What You Do
1	From the <i>Header Details</i> page, click Change Contact button under either <i>Billing Information or Shipping Address & Method</i> . (Figure II.1) The <i>Select a Contact</i> page (Figure MM) is displayed with the <i>Assign Contact</i> tab (Figure MM.1) foremost and the selected address for the order shown.
2	Click New Contact . (Figure MM.2) The <i>Add New Contact</i> page (Figure NN) is displayed.
3	Enter the new contact information and click the Apply button. (Figure NN.1) The <i>Header Details</i> page is displayed with the new contact assigned to the address.

Figure MM

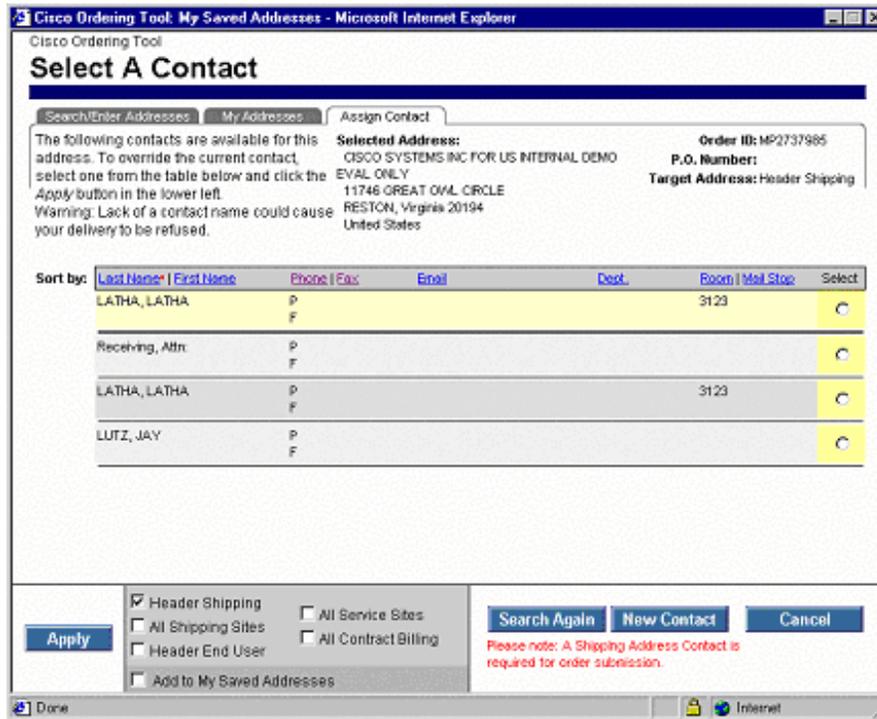
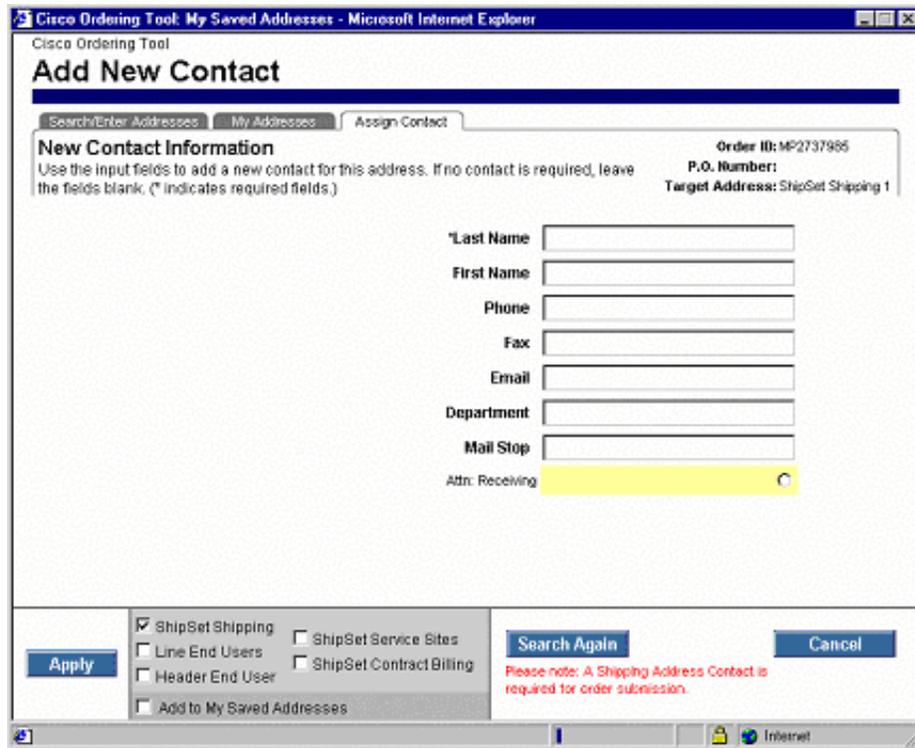


Figure NN



Cisco Ordering Tool: My Saved Addresses - Microsoft Internet Explorer

Cisco Ordering Tool

Add New Contact

Search/Enter Addresses | My Addresses | Assign Contact

New Contact Information
 Use the input fields to add a new contact for this address. If no contact is required, leave the fields blank. (* indicates required fields.)

Order ID: MP2737985
 P.O. Number:
 Target Address: ShipSet Shipping 1

Last Name
 First Name
 Phone
 Fax
 Email
 Department
 Mail Stop
 Attn: Receiving

ShipSet Shipping ShipSet Service Sites
 Line End Users ShipSet Contract Billing
 Header End User
 Add to My Saved Addresses

Apply **Search Again** **Cancel**

Please note: A Shipping Address Contact is required for order submission.



Chapter Ten –

Configure

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

Chapter Objective

- Learn how to access the Configurator.

Definition

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

How to Use the Configurator to Configure Products for Your Order

Configuring a Line Item

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

Step	What You Do
1	On the <i>Main Order Form</i> locate a line item that currently says <i>Unverified</i> in the <i>Status</i> column (Figure OO.1).
2	You must first select what is to be configured. To make your selection, either click the Unverified hyperlink (Figure OO.4), or choose the line in the Line # pull down menu (Figure OO.3). Click the Configure button. (Figure OO.2) You are taken to the <i>Configurator</i> to configure the product. (Figure PP)



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Figure OO

The screenshot shows the 'Main Order Form' in the Cisco Ordering Tool. At the top, there are navigation tabs: 'Main Order Form', 'Header Details', 'ShipSets', and 'All Order Details'. Below these are fields for 'Sample Company' and 'CISCO SYSTEMS INC FOR US ...'. A 'Hardware Service Level' dropdown is set to '2Hr Onsite Premium'. A table lists order items with columns for Line #, Product, Qty, List Price, Discount, Unit Price, Extended Price, Status, and Delete. The status column contains 'Unverified Complete', 'Not Configurable Complete', and 'Not Saved'. At the bottom, there are buttons for 'Save Order', 'Save as Template', 'Route Order', 'Check for Errors', and 'Submit Order', along with a 'Last saved' timestamp and a 'Subtotal' of 3146.00.

OO.1 Status column

OO.2 Configure button

OO.3 Line # pull-down menu

OO.4 Unverified hyperlink

Line	Product	Qty	List Price	Discount	Unit Price	Extended Price	Status	Delete
1	CISCO2621	1	3095.00	0.0%	3095.00	3095.00	Unverified Complete	<input type="checkbox"/>
SET 1	Dual 19/100 Ethernet Router with 2 WIC Slots, 7 MM Slot							
2	CAB-AC=	1	50.00	0.0%	50.00	50.00	Not Configurable Complete	<input type="checkbox"/>
SET 1	AC Power Cord, US							
3	CISCO76M=	1	10.00				Not Saved	<input type="checkbox"/>
SET 1	Initial Product							
4							New Line	<input type="checkbox"/>

Figure PP

Cisco Configuration Tool Cisco Home | NPM | Login | Profile
 You are logged in as: ANTOLIVE

Configure Exit Configuration **HELP**

Configuration Details **Select Options** Enter Options

Dual 10/100 Ethernet Router with 2 WIC Slots, 1 NM Slot
 Open item categories on the left, then pick and assign quantities to the resulting options on the right.
[Product Info](#) [Product Diagram](#)
[Configuration Guidance](#) OFF

STEP 1: Select Item Category **STEP 2: Choose Options and Select Desired Quantity Below**

POWER CABLES

- 2600 SOFTWARE OPTION CLASS
- 2600 DRAM OPTION CLASS
- 2620 Series FLASH OPTION CLASS
- 2600 NET MODS OPTION CLASS
- WIC OPTION CLASS FOR 2600 SERIES
- AIM CARD OPTION CLASS FOR 2600
- 2600 CABLE OPTION CLASS
- SS CABLE OPTION FOR WIC-2T and WIC-2A/
- Option Class for Analog Technology License
- Embedded Device Management Software
- SMALL Feature License for IP Telephony
- CISCO2600 Software Configuration Option

Quantity	Option Name	Price
(1)	CAB-AC Power Cord,110V	USD 0.00
(1)	CAB-ACA Plug,Power Cord,Australian,10A	USD 0.00
(1)	CAB-ACE Power Cord Europe	USD 0.00
(1)	CAB-ACI Power Cord-Italian	USD 0.00
(1)	CAB-ACR POWER CORD ARGENTINA	USD 0.00
(1)	CAB-ACS Power Cord for Switzerland	USD 0.00

Buttons: Delete All, Exit Configuration, Save, Check Configuration

PP.1 Enable help options → [Product Info](#) [Product Diagram](#)

PP.2 Select an item category → POWER CABLES

PP.3 Select from the listed options → 2600 CABLE OPTION CLASS

PP.4 Check Configuration button → Check Configuration

PP.5 Save configuration information → Save

PP.6 Exit Configuration screen → Exit Configuration



The Configurator Screen

The Configurator's functionality is described below.

Figure	Functionality
PP.1	Enable the Help functionality: <ul style="list-style-type: none">• Product Info: Displays the product's Cisco Web page, with detailed information.• Product Diagram: Displays a drawing of the product.• Configuration Help: Guides you through the configuration process.
PP.2	Item Category: Contains the categories from which you may select options.
PP.3	Options Menu: Displays items belonging to selected category.
PP.4	Final Check button. Performs final check for configuration errors.
PP.5	Save Configuration Information. Allows you to name the configuration, if desired.
PP.6	Exit Configuration button. Returns you to the Main Order Form.

Figure QQ

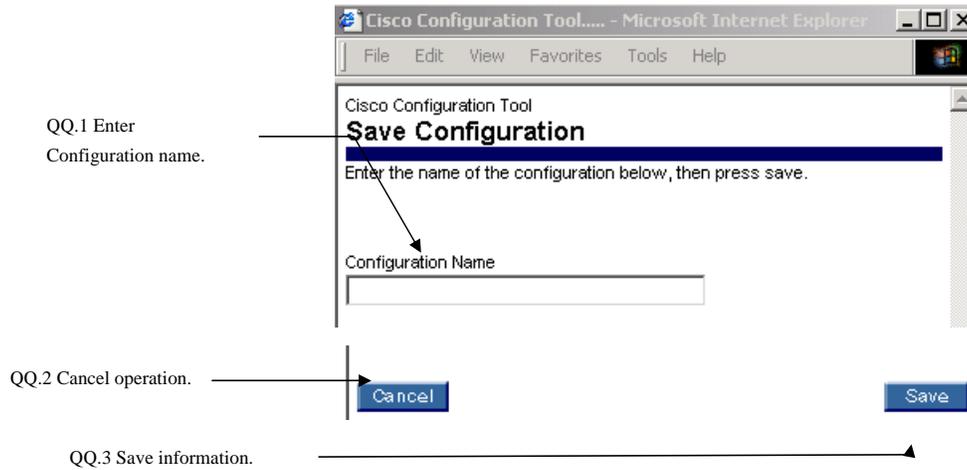


Figure	Functionality
QQ.1	Enter Configuration name.
QQ.2	Cancel and return to Configurator screen.
QQ.3	Saves product configuration information.

Chapter Eleven –

Item Search

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

Chapter Objective

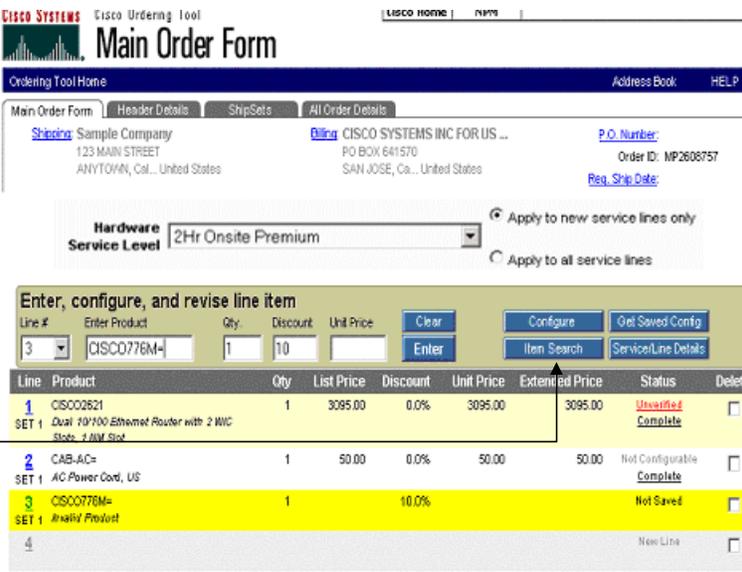
- Learn how to search the Cisco product database.

Definitions

- Configuration Name** – The title of your saved configuration.
- Product Description** – The brief description associated with the product number.
- Product Number** – The part number of the product by, example: CISCO2501.
- Product Family** – This is a group of related products and product numbers.

How to Search for Products for Your Order

Figure RR



The screenshot shows the 'Main Order Form' interface. At the top, there are navigation links for 'Cisco home' and 'myM'. Below that, the 'Main Order Form' title is displayed. The form includes sections for 'Shipping' (Sample Company, 123 MAIN STREET, ANYTOWN, Ca., United States) and 'Billing' (CISCO SYSTEMS INC FOR US, PO BOX 641570, SAN JOSE, Ca., United States). There are also fields for 'P.O. Number' (MP2608757) and 'Req. Ship Date'. A 'Hardware Service Level' dropdown is set to '2Hr Onsite Premium'. Below this, there are radio buttons for 'Apply to new service lines only' (selected) and 'Apply to all service lines'. The main section is titled 'Enter, configure, and revise line item' and contains a table with columns: Line #, Product, Qty, List Price, Discount, Unit Price, Extended Price, Status, and Delete. The table has four rows: Line 1 (CISCO2621, Qty 1, List Price 3095.00, Status Unsaved/Complete), Line 2 (CAB-AC=, Qty 1, List Price 50.00, Status Not Configurable/Complete), Line 3 (CISCO776M=, Qty 1, List Price 10.00, Status Not Saved), and Line 4 (New Line). The 'Item Search' button is highlighted with a yellow background. At the bottom, there are buttons for 'Save Order', 'Save as Template', 'Route Order', 'Check for Errors', and 'Submit Order'. A status bar shows 'Last saved: March 26, 2002 7:31:51 AM PST' and 'Line total: 0.00, Subtotal: 3145.00 (Includes Minor Lines)'.

RR.1
Item
Search
button

© 2003 Revision

Searching for a Product

The following steps show you how to search for a product.

Step	What You Do
1	<p>On the <i>Main Order Form</i> (Figure RR) click Item Search. (Figure RR.1)</p> <p style="text-align: center;"><i>This takes you to the Search for Items and Saved Configs page. (Figure SS)</i></p>
2	<p>On this page you can search by the following:</p> <p>Product Number (Figure SS.3) – Enter as much of the product number as you know, for example: CISCO2501, or CISCO025.</p> <p>Configuration Name (Figure SS.4) – Enter as much of the saved configuration name as you know.</p> <p>Product Description (Figure SS.5) – Enter as much of the product description as you know, for example: router.</p> <p>Search by Product Family (Figure SS.6) – Choose a product family by which to search. If you enter a product family, it takes precedence over other criteria you may have already entered.</p> <p style="text-align: center;"><i>You are not required to enter a value in each field.</i></p>
3	<p>After you have entered your search criteria click on Search. (Figure SS.7)</p> <p style="text-align: center;"><i>The Search for Items and Saved Configs: Results page is displayed (Figure TT)</i></p>
4	<p>On this page choose the products you want to order by entering the appropriate quantity in the Qty (Quantity) column (Figure TT.1).</p>
5	<p>Click Apply when you have entered all pertinent information. (Figure TT.3)</p> <p>If you did not find the product you were looking for, click the Search Again button to return to the <i>Search for Items and Saved Configs</i> page to change your search criteria. (Figure TT.2)</p> <p style="text-align: center;"><i>The Main Order Form is displayed and the product(s) are added as additional line(s) in your order.</i></p>

Figure SS

SS.2 Spares Search Tab

SS.1 - My Saved Configs Tab

SS.3 Product Number

SS.4 Configuration Name

SS.5 - Product Description

SS.6 Search by Product Family

SS.7 Search

Figure TT

Product / Description	List Price	Created Updated	Status	Qty.
CISCO2501 Cisco 2501 EthernetDual Serial Router	2679.00	--	--	2
CISCO2501-DC Cisco 2501 EthernetDual Serial Router-DC	4025.00	--	--	
CISCO2501-CH EthernetDual serial router	5910.00	--	--	
CISCO2501 Cisco 2501 EthernetDual Serial Router	2679.00	--	--	
CISCO2501-CH EthernetDual serial router	5910.00	--	--	
CISCO2501-DC Cisco 2501 EthernetDual Serial Router-DC	4025.00	--	--	
CISCO2501-EDU Cisco 2501 EthernetDual Serial Router-EDU	6718.00	--	--	

TT.1 Qty. column

TT.2 Search Again button

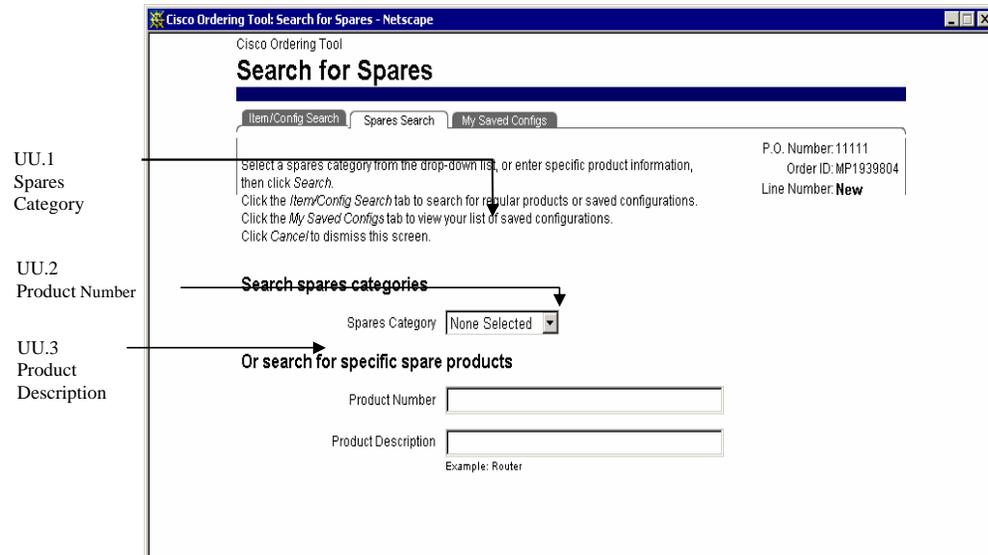
TT.3 Apply button

Searching for a Spare

The following steps show you how to search for a spare product.

Step	What You Do
1	<p>On the <i>Main Order Form</i> click the Item Search button.</p> <p style="color: #004a60;"><i>This takes you to the Search for Items and Saved Configs page.</i></p>
2	<p>Click the Spares Search tab (Figure SS.2).</p> <p style="color: #004a60;"><i>You are taken to the Search for Spares page (Figure UU).</i></p>
3	<p>On this page you can search by the following:</p> <p>Spares Category (Figure UU.1) – Choose a spares category from the list.</p> <p>Product Number (Figure UU.2) – Enter as much of the spare number as you know, for example: CAB-AC=.</p> <p>Product Description (Figure UU.3) – Enter as much of the product description for the spare as you know, for example: cable.</p> <p style="color: #004a60;"><i>After you have entered your search criteria you are taken to the Search for Spares: Results page. (Figure VV)</i></p>
4	<p>On this page you will choose the spares you want to order by entering the appropriate quantity in the field of the Qty. (Quantity) column (Figure VV.1).</p>
5	<p>Once you have finished click Apply. (Figure VV.3)</p> <p style="color: #004a60;"><i>The Main Order Form is displayed and the product(s) are added as additional line(s) in your order.</i></p>
6	<p>If you did not find the product you were looking for, click the Search Again button to return to the Search for Spares page so that you can change your search criteria. (Figure VV.2)</p>

Figure UU

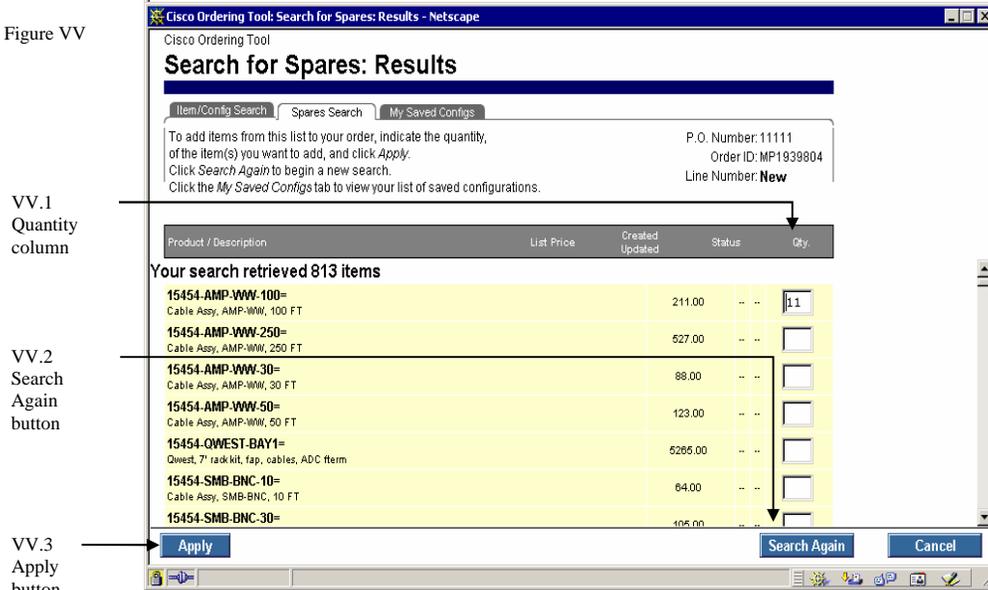


UU.1
Spares
Category

UU.2
Product Number

UU.3
Product
Description

Figure VV



VV.1
Quantity
column

VV.2
Search
Again
button

VV.3
Apply
button



Searching My Saved Configs

The following steps show you how to search for your saved configurations.

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



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Figure WW

WW.1
Item/Config
Search tab

WW.2
Spares
Search tab

WW.3
Qty.
column

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

P.O. Number:
Order ID: Q42818095
Line Number: **New**

Product / Description	List Price	Created/Updated	Status	Qty.	Select
You have 8 saved configuration(s).					
Cisco 2501 Ethernet Dual Serial Router	1495.00	--	--	<input type="text" value="1"/>	<input type="checkbox"/>
Config Name: Jsg_001 Owner: PTEST12	--	09/06/2002 09/06/2002	Unverified	<input type="text"/>	<input type="checkbox"/>
Config Name: Fight Owner: PTEST12	--	09/06/2002 09/06/2002	Unverified	<input type="text"/>	<input type="checkbox"/>
Config Name: Select Owner: PTEST12	--	09/06/2002 09/06/2002	Unverified	<input type="text"/>	<input type="checkbox"/>
Config Name: S_22 Owner: PTEST12	--	09/06/2002 09/06/2002	Unverified	<input type="text"/>	<input type="checkbox"/>
Config Name: sssssss's 2501 Owner: PTEST12	--	12/15/2001 12/15/2001	Unverified	<input type="text"/>	<input type="checkbox"/>

Buttons: Apply, Share Config, Delete, Cancel

Chapter Twelve –

My Saved Configs

Using saved configurations can save you time. You can access all of the configurations you have saved. In addition, you can also access saved configurations that others within your organization have saved provided they give you access and you have the same billing information as the other user.

Chapter Objective

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

Definition

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

Shared Config – A configuration that was shared with you by another user.

How to Use Saved and Shared Configurations

Using Your Saved and Shared Configurations

The following steps show you how to use your saved and shared configurations.

Step	What You Do
1	<p>On the <i>Main Order Form</i> click Get Saved Configs. (Figure XX.1)</p> <p>The <i>My Saved Configs</i> page is displayed. (Figure YY)</p> <p>A list of all the saved and shared configurations that you can access is displayed. Review the list until you find the configuration you need. If you cannot find the configuration use the <i>Item/Config Search</i> (Figure WW.1) or the <i>Spare</i>s tab (Figure WW.2) to search for it. (See Chapter Eleven)</p>
2	<p>For each configuration, enter the quantity in the Qty. (Quantity) column. (Figure WW.3)</p>
3	<p>When you finish entering the quantities for the configuration(s), click the Apply button (Figure WW.4).</p>
4	<p>The <i>Main Order Form</i> is displayed, and the product(s) are shown as additional line(s) on your order.</p>

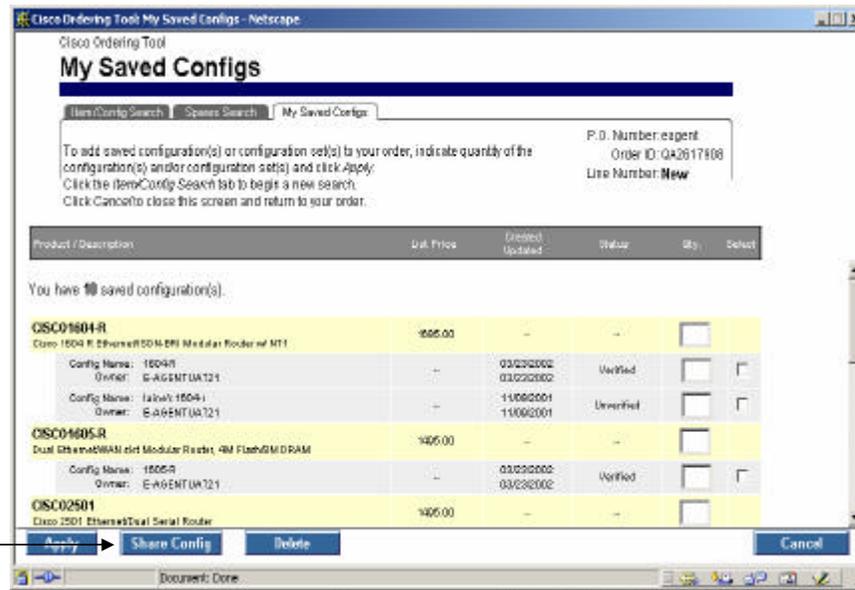
Figure XX

XX.1
Get Saved Config button



Figure YY

YY.1
Share Config
Button





Example of How to Configure a CISCO776M and Save the Configuration

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

Step	What You Do
1	Under <i>CISCO700 SOFTWARE OPTIONS</i> (Figure PP.1) choose 700 US SW 700 US SOFTWARE OPTIONS .
2	Under <i>700 US DEFAULT SOFTWARE</i> (Figure PP.2) choose SF760-IR-US-4.3 IR 760-770 – 30 users, IP Routing .
3	Under <i>POWER CABLES</i> (Figure PP.3) choose CAB-AC Power Cord, 110V .
4	Under <i>Cisco700 Software Configuration Option</i> (Figure PP.4) choose SW-CONFIG-700-0001 .
5	Click Check Configuration button. (Figure PP.5) <i>The Configuration Complete page (Figure QQ) is displayed when the configuration is validated.</i>
6	On the <i>Configuration Complete</i> page enter a name in the Configuration Name field (Figure QQ.1) then click Add to Order . (Figure QQ.2) <i>The Main Order Form is displayed.</i>



Chapter Thirteen –

Service/Line Details

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

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

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

Chapter Objective

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

Definitions

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

How to Use the Line Item Details Section

Figure ZZ

The screenshot displays the 'Main Order Form' interface. At the top, it shows the Cisco logo and 'Cisco Ordering Tool'. Below this, there are navigation tabs: 'Main Order Form', 'Header Details', 'ShipSets', and 'All Order Details'. The 'Main Order Form' tab is active, showing shipping and billing information for 'Sample Company' and 'CISCO SYSTEMS INC FOR US...'. A 'Hardware Service Level' dropdown is set to '2Hr Onsite Premium'. Below this is a section titled 'Enter, configure, and revise line item' with a table of line items. Line 3 is highlighted in yellow. To the left of the screenshot, two callouts point to specific elements: 'ZZ.1 Line # pull-down menu' points to the dropdown menu for line 3, and 'ZZ.2 Service/Line Details button' points to the 'Service/Line Details' button in the line item configuration area. At the bottom of the screenshot, there are buttons for 'Save Order', 'Save as Template', 'Route Order', 'Check for Errors', and 'Submit Order', along with order summary information like 'Last saved: March 26, 2002 7:31:51 AM PST' and 'Subtotal: 3146.00'.

ZZ.1
Line #
pull-down
menu

ZZ.2
Service/Line
Details
button

Line	Product	Qty	List Price	Discount	Unit Price	Extended Price	Status	Delete
1	CISCO2621	1	3095.00	0.0%	3095.00	3095.00	Unsaved Complete	<input type="checkbox"/>
SET 1	Dual 10/100 Ethernet Router with 2 WIC Slots, 7 MM Slot							
2	CAB-JAL=	1	50.00	0.0%	50.00	50.00	Not Configurable Complete	<input type="checkbox"/>
SET 1	AC Power Cord, US							
3	CISCO776M=	1		10.0%			Not Saved	<input type="checkbox"/>
SET 1	Annual Product							
4							New Line	<input type="checkbox"/>

Save Order Last saved: March 26, 2002 7:31:51 AM PST Save as Template Route Order Linetotal: 0.00 Subtotal: 3146.00 (Includes Minor Lines) Check for Errors Submit Order

Figure AAA

Cisco Ordering Tool
Cisco Home | NPM

Ordering Tool Home HELP

Line Item Details
Line 1

Line Item Details Configuration Details

Modify details of a line item

You can select another line to edit via the Line # pull-down below, and you can modify your configurations via the configuration status link. When you are finished, click the **Save** button to save changes you make to any section of this page.

Note: Changes made here are **line-specific**.

You are working on this line:

Line # / Product / Status	Qty	List	Discount	Unit Price	Status
1 CISCO2501 (Complete)	1	1017.0	0.0	1017.0	Not Verified Complete
Cisco 2501 Ethernet/Dual Serial Router					

Sections: [Service Options](#) | [End User](#) | [Ship Set](#) | [Add Note to this Line](#)

AAA.2
Service Options
Section

Service Options

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

Service Level:

Length:

Service Discount:

AAA.3
End User
Section

End User

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

REGRESSION TEST - DO NOT USE
1234 MAIN STREET
ANAHEIM, California 92084
United States

[Change Address](#)

End User Market:

AAA.4
Ship Set
Section

Ship Set

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

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

Note: All line items are initially included in your **entire order's** shipping address, as specified via Header Details. This original group is assigned to Ship Set 1.

Ship Set 1		
Address	Date	Carrier
REGRESSION TEST - DO NOT USE 1234 MAIN STREET ANAHEIM, California 92084 United States		
Account #/Shipping Instructions	Freight Term/FOB	

[Modify Ship Set](#)

AAA.5
Line Note
Section

Line Note

Instructions: Attach a note to this line item.

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Viewing Line Item Details for a Hardware Line Item

The following steps show you how to view details on hardware line items on the *Line Item Details* page.

If the line you choose is not configurable you will not see the Service Options section on the Line Item Details page.

Step	What You Do
1	Choose a configurable line item in the <i>Line #</i> pull down menu (Figure YY.1). Click Service/Line Details (Figure XX.2) on the <i>Main Order Form</i> . <i>The Line Item Details page is displayed.</i> (Figure AAA)
2	On the <i>Line Item Details</i> page you can make changes to any of the following sections:
2a	Service Options (Figure AAA.2) Service Level – Choose the service level that applies to the product. Length – Choose one, two, or three years for the length of the service agreement. Service Discount – Enter the service discount for the line item.
2b	End User (Figure AAA.3) Change Address – Allows you to add an end user to the line item or modify the current end user information. End User Market – Choose the end user’s vertical market.
2c	Ship Set (Figure AAA.4) The ShipSets information for the line item appears here. To change it, click the Modify ShipSet button to take you too the ShipSets page to make modifications. (See Chapter Seven)
2d	Line Note (Figure AAA.5) You can enter a note specific to the line item. The notes box accepts up to 2,000 characters.



Viewing Line Item Details for a Service Line Item

The following steps show you how to view service line items on the *Line Item Details* page.

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



Figure BBB

The screenshot shows the 'Line Item Details' page in the Cisco Ordering Tool. The page title is 'Line Item Details' and it includes a 'Line 4' indicator. The main heading is 'Modify details of a line item'. Below this, there is a note: 'You can select another line to edit via the Line # pull-down below, and you can modify your configuration via the configuration status link. When you are finished, click the Save button to save changes you make to any section of this page.' A second note states: 'Note: Changes made here are line-specific.' Below the notes, a section titled 'You are working on this line:' contains a table with the following data:

Line #	Product/Description	Qty	List	Discount	Unit Price	Status
4	CON-SMTP-2501 Cisco 2501 SMARTnet Premium Maintenance	11	937.0	25.0	702.75	Complete

At the bottom of the table, there are links for 'Service Site' and 'Add Note to this Line'.

BBB.1
Service Site
section

→ **Service Site** TOP

Service Site Address

REGRESSION TEST - DO NOT USE
10 SUNBURST

IRVINE, California, 92612,
United States

[Change Address](#): Click here to use the order shipping address "REGRESSION TEST - DO NOT USE, 10 SUNBURST" as the service site address.

[Change Address](#): Click here to use the ShipSet address as the service site address.

[Change Address](#): Click here to select a new address as the service site address.

Maintenance Type

Equipment Information

Serial #

Serial # is required if Maintenance Type is "Equipment On Site" or "Renewal"

SOP **MP#**

Note: Sales Order=SOP, Cisco MarketPlace=MP

Existing Contract #

BBB.2
Line Note
section

→ **Line Note** TOP

Instructions: Attach a note to this line item.

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Viewing Configuration Details

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

Step	What You Do
1	<p>Choose a configurable hardware line item on your order and click the Service/Line Details button on the <i>Main Order Form</i>.</p> <p style="color: #004a60; font-style: italic;">The <i>Line Item Details</i> page is displayed.</p>
2	<p>On the <i>Line Item Details</i> page (Figure AAA), click the Configuration Details tab (Figure AAA.1) at the top of the page.</p> <p style="color: #004a60; font-style: italic;">The <i>Configuration Details</i> page is displayed. (Figure CCC). This page lets you review configuration details for the line item and gives you access to the Configurator.</p>
3	<p>Under the Status column (Figure CCC.1) you will see one of the following statuses:</p> <p>Verified – The line item is configured. Clicking this takes you to the Configurator.</p> <p>Unverified – The line item is not configured, or its configuration needs to be checked. Clicking this link takes you to the Configurator.</p> <p>Complete – Details such as site or shipping information are complete.</p> <p>Incomplete – Information is missing or incomplete. Clicking this link saves your order and then takes you to <i>Line Item Details</i>.</p>
4	<p>From the <i>Configuration Details</i> page you can also choose another Line # (Figure BBB.2) of the item whose configuration details you want to view, or get a saved configuration by clicking the Get Saved Config button (Figure CCC.3). (See Chapter 12)</p>
5	<p>You can also modify the following pricing fields on the <i>Configuration Details</i> page:</p> <p>Discount (Figure CCC.4) – The discount percentage that your company and Cisco Systems have agreed upon. Though you cannot change your price list once you have begun an order, you can modify your discounts once inside an order. This is validated with your agreement with Cisco if you change the discount percentage.</p> <p>Unit Price (Figure CCC.5) – The unit price for the line item.</p>



Figure CCC

Cisco Systems Cisco Ordering Tool Cisco Home | NPM

Configuration Details

Ordering Tool Home HELP

Line Item Details | Configuration Details

Line **3**

Review line configuration and minor line item details

You can select another line to edit via the Line # pull-down below, and you can modify your configuration via the configuration status link. When you are finished, click the **Save** button to save changes you make to any section of this page.

Note: Changes made here are **line-specific**.

You are working on this line:

Line #	Product/Description	Qty	Discount	Unit Price	List	Status
3	CISCO2501 Cisco 2501 Ethernet/Dual Serial Router	11	0.00	2679.0	2679.00	Verified

[Get Saved Config](#)

Sub-Line	Product/Component and Description	Qty	List Price	Discount	Unit Price	Extended Price
3.1	CAB-AC Power Cord,110V	11	0.00	0.00 %	0.00	0.00
3.2	S25AL-12105T Cisco 2500 Series IOS ENTERPRISE PLUS IPSEC 56	11	7270.00	0.00 %	7270.00	79970.00
3.3	MEM-1X8F Optional 8 MB Flash SIMM	11	1885.00	0.00 %	1885.00	20735.00
3.4	MEM-1X16D (Included) Optional 16 MB of DRAM Memory	11	0.00	0.00 %	0.00	0.00

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[Save Order](#)

Last saved:
July 19, 2001 3:34:52 PM PDT PST

[Check for Errors](#)
[Back to Order Form](#)

CCC.1
Status column

CCC.2
Line # pull-down menu

CCC.3
Get Saved Config button

CCC.4
Discount column

CCC.5
Unit Price column

Chapter Fourteen –

Order Routing

A routed order is an order that is created by one person and sent to someone else to complete, approve or submit. If an order has been routed to you, you will receive an email message from the person who routed the order. The email provides the Order ID and the Key needed to access the order in the Ordering Tool.

Chapter Objectives

- How to route an order.
- How to acquire a routed order.
- How to use the routing history.

Definitions

- **Acquire Order** – Displays the Main Order Form for the order identified by the Order ID and Key fields.
- **Key** – A combination of letters and numbers used to access a routed order.
- **Order ID** – The MarketPlace (MP) number assigned to each order.

How to Use Order Routing

Routing an Order

The following steps show you how to route an order.

Step	What You Do
1	<p>On the <i>Main Order Form</i> for an open order, click the Route Order button (Figure DDD.1).</p> <p style="color: #004a60; font-style: italic;">The <i>Order Routing</i> page (Figure EEE) appears.</p>
2	Enter the email address/es (Figure EEE.2) of the user(s) who should receive the routed order.
3	Enter any notes to be routed with the order in the Routing notes section. (Figure EEE.3)
4	<p>Click the Route Order button (Figure EEE.4).</p> <p>An email message containing the order number, routing key, notes, and order details is sent to the specified email addresses.</p> <p style="color: #004a60; font-style: italic;">The <i>Ordering Tool Home</i> page is displayed.</p>



Ordering Tool User Guide

Internet Commerce

Figure DDD

Shipping: Sample Company
123 MAIN STREET
ANYTOWN, Cal... United States

Billing: CISCO SYSTEMS INC FOR US ...
PO BOX 641570
SAN JOSE, Ca... United States

P.O. Number: Order ID: MP2608757
[Req. Ship Date:](#)

Hardware Service Level: 2Hr Onsite Premium
 Apply to new service lines only
 Apply to all service lines

Enter, configure, and revise line item

Line #	Enter Product	Qty	Discount	Unit Price	Clear	Configure	Get Saved Config
3	CISCO776M-	1	10		Enter	Item Search	Service/Line Details

Line	Product	Qty	List Price	Discount	Unit Price	Extended Price	Status	Delete
1	CISCO2621	1	3095.00	0.0%	3095.00	3095.00	Unsaved Complete	<input type="checkbox"/>
SET 1	Dual 10/100 Ethernet Router with 2 WIC Slots, 1 MM Slot							
2	CAB-AC-	1	50.00	0.0%	50.00	50.00	Not Configurable Complete	<input type="checkbox"/>
SET 1	AC Power Cord, US							
3	CISCO776M-	1		10.0%			Not Saved	<input type="checkbox"/>
SET 1	Invalid Product							
4							New Line	<input type="checkbox"/>

DDD.1
Route
Order
button

Save Order **Last saved:** March 26, 2002 7:31:51 AM PST **Save as Template** **Route Order** Linetotal: 0.00 Subtotal: 3146.00 (Includes Minor Lines) **Check for Errors** **Submit Order**

Figure EEE

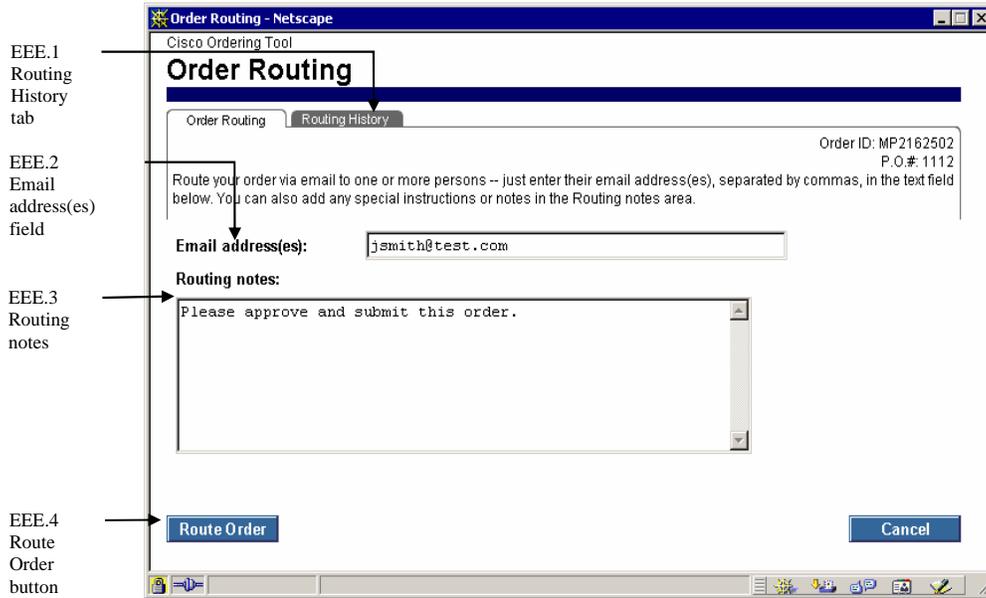


Figure FFF



Acquiring a Routed Order

The following steps show you how to acquire a routed order.

Step	What You Do
1	<p>On the <i>Ordering Tool Home</i> page, click on the Get Routed Order button (Figure FFF.1) under the What would you like to do? toolbar at the top of the page.</p> <p style="color: #004a60; text-align: center;">The page scrolls to the <i>Acquire a Routed Order</i> section. (Figure GGG)</p>
2	Go to the routed order email you received to get the MP Number. Enter the MP number into the Order ID field (Figure GGG.1) under the <i>Acquire a Routed Order</i> section.
3	Go to the routed order email you received to get the key. Enter the key into the Key field (Figure GGG.2) under the <i>Acquire a Routed Order</i> section.
4	<p>Click on the Acquire Order button. (Figure GGG.3)</p> <p style="color: #004a60; text-align: center;">The <i>Main Order Form</i> for the routed order is displayed. From here, you can review the order and either submit, change, or route it to another person.</p>

Figure GGG

Acquire a Routed Order ▲ TOP

Instructions: 1. Provide the order's MarketPlace ID number 2. Provide your secret Key number from your routed order email
3. Click "Acquire Order"

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

GGG.1 - Order ID Field → **Order ID**

GGG.2 - Key Field → **Key**

GGG.3 - Acquire Order Button →

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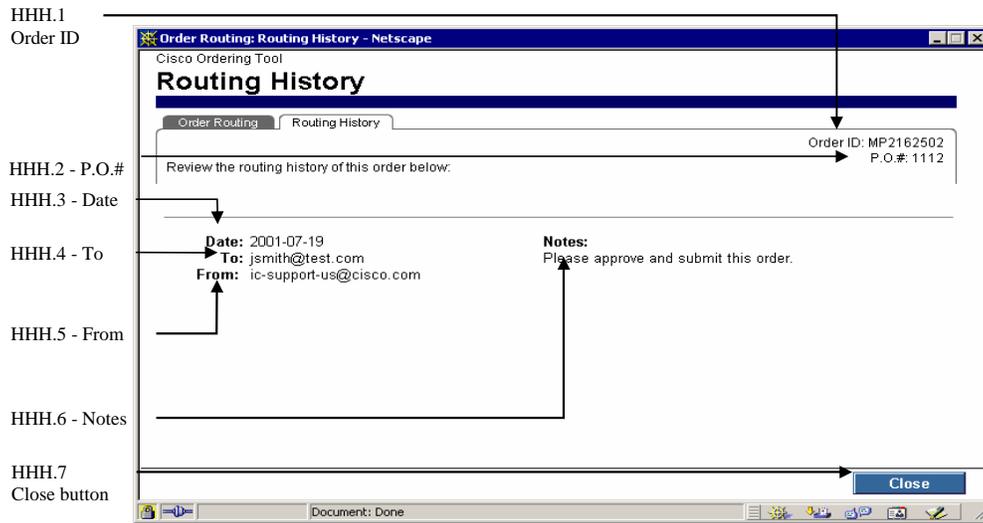


Viewing Routing History for an Order

The following steps show you how to view the routing history for an order.

Step	What You Do
1	<p>On the <i>Main Order Form</i> for an open order, click the Route Order button.</p> <p>The <i>Order Routing</i> page appears. (Figure EEE)</p>
2	<p>Click on the Routing History tab (Figure EEE.1) at the top of the page. When you are done reviewing the information click the Close button (Figure HHH.7).</p> <p>The <i>Routing History</i> page is displayed (Figure HHH).</p> <p>The <i>Order ID#</i> (Figure HHH.1) and <i>P.O.#</i> (Figure HHH.2) appear in the upper right hand corner, and the <i>Routing History</i> appears in the scrolling portion of the page. <i>Date</i> (Figure HHH.3), <i>To</i> (Figure HHH.4), <i>From</i> (Figure HHH.5), and <i>Notes</i> (Figure HHH.6) associated with the routing history for each order that is routed is shown on the page. The <i>Routing History</i> is sorted chronologically with the most recent date at the top of the list.</p>

Figure HHH



Chapter Fifteen –

Error Checking

When you click Error Checking on the Main Order Form, you can view any errors or alerts that the tool has detected in the order. Only orders without errors can be submitted.

Alert user messages are displayed, but do not stop the order from being submitted.

Chapter Objective

- Understand how the Error Checking functionality is used.

Definitions

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

How to Use Error Checking

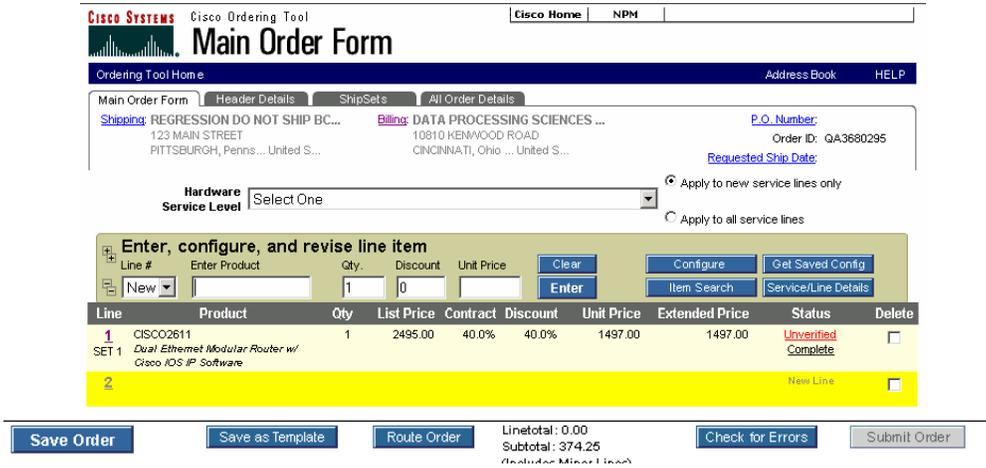
Checking Your Order for Errors

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

Step	What You Do
1	At the bottom of the <i>Main Order Form</i> click Check for Errors . (Figure III.1) The <i>Error Checking</i> page is displayed. (Figure JJJ). Any errors are shown on the left hand side of the window. The error name is displayed as a hyperlink.
2	Click the hyperlink for an error to go to the appropriate page within the Ordering Tool to correct the error. Otherwise you can navigate to the appropriate section of your order.
3	Once you have corrected the error, click Save Order , and return to the <i>Error Checking</i> window to correct remaining errors.
4	There are two ways to return to the <i>Error Checking</i> window: 1. Click the Check for Errors button within your order. 2. Click the Check Again button (Figure JJJ.1) to reload the Error Checking page. Continue this process until you have resolved all errors for your order.

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

Figure III



JJJ.1 Check for Errors button

Figure KKK

Cisco Ordering Tool

Error Checking

Order ID: MP2162502

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

3 Errors Found

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

Location	Error Description	Visited
One or more items not configured.	One or more of your items has not yet been configured.	
Invalid Shipping Customer	The shipping Customer is missing or incomplete.	
Incomplete ShipSet Validation	The shipping address is missing or incomplete. Please ensure a street address, city and country are specified.	

0 Alerts Found

Instructions: Review the issues below before submitting your order.

Alerts

KKK.1
 Check
 Again
 button



Check Again

Close

Trade Agreements Act

Certain customers will now be allowed to flag orders as requiring TAA handling. Work with your Account Manager(s) or Customer Service Specialist if you believe you should be placing orders with TAA compliance.

- Only for Fed or 2-Tier orders
- Fed or 2-Tier orders will see the DPAS field in the OT
- Federal DPAS Rating field will now also display TAA, TAA-DO, and TAA-DX



Ordering Tool User Guide

Internet Commerce

Federal DPAS Rating -

Taxable? Yes

Order Processing

These notes are reviewed by Cisco. Entries in this field may delay the processing and/or shipment of your order.

None
DX
DO
TAA
TAA-DO
TAA-DX

id applies to selected Federal orders only.



Chapter Sixteen –

Creating Shared Support Orders

The process of creating Shared Support orders is similar to regular orders except that the customer's agreement with Cisco requires that service be purchased for all products ordered from EMEA, APAC, and Japan. For orders placed in the US or Canada, if service is not purchased, a service referral is required.

If you are a Cisco Partner and would like more information on the Shared Support program, please visit the following website:

http://www.cisco.com/en/US/partner/products/svcs/ps3844/ps3849/ps3850/serv_home.html

Chapter Objective

- Learn how to create orders with Shared Support service
- Learn how to create orders with service referrals (US and Canada Only)

Creating an Order with Shared Support Service

Creating a Shared Support Order

The following steps show you how to create a Shared Support order.

Step	What You Do
1	On the Ordering Tool home page, click the Create an Order button.
2	Choose "Standard Order" in the Order Type field.
3	Enter a Product Discount and a Service Discount .
4	Choose a Purchase Type of "Resale" or "Internal Business Use/Infrastructure". Shared Support orders require that the Purchase Type be "Resale" or "Internal Business Use/Infrastructure" in EMEA, APAC and Japan. Shared Support orders are restricted to a Purchase Type of "Resale" in the US and Canada.
5	Enter a Requested Ship Date that is within the next 90 days.
6	Choose a hardware service level for the order in the Hardware Service Level field. Shared Support orders require that service be purchased for every product. An order will not be created until a service level is selected for orders originating in EMEA, APAC and Japan. For orders originating in the US and Canada, if service is not purchased, a service referral is required..



7	<p>Choose a software service level for the order in the Software Service Level field.</p> <p>Shared Support orders require that service be purchased for every product. An order will not be created until a service level is selected for orders originating in EMEA, APAC and Japan. For orders originating in the US and Canada, if service is not purchased, a service referral is required.</p>
8	<p>Enter End User information:</p> <p>Select End User – Choose the end user from the list.</p> <p>Country – Choose the end user’s country.</p> <p>End User Market – Choose the end user’s vertical market.</p>
9	<p>Click the Continue button.</p> <p>The <i>Main Order Form</i> is displayed.</p>

Entering Header Detail Information

For information on entering Header Detail information, refer to Chapter Six.

Figure LLL

The screenshot shows the 'Main Order Form' interface. At the top, there are navigation links for 'Cisco Home' and 'NPM'. Below the title, there are tabs for 'Main Order Form', 'Header Details', 'ShipSets', and 'All Order Details'. The 'Header Details' tab is active, showing shipping information for 'SPRINT CORPORATION' and a 'P.O. Number: Test Defect 42337'. There are also fields for 'Order ID: MP4181790' and 'Requested Ship Date: 10/30/2003'. A 'Hardware Service Level' dropdown is set to 'SMARTnet24x7x4 Service'. Below this is a section for 'Enter, configure, and revise line item' with a table of line items.

Line	Product	Qty	List Price	Contract	Discount	Unit Price	Extended Price	Status	Delete
1	CISCO1721	1	1195.00	42.0%	42.0%	693.10	693.10	Unverified Complete	<input type="checkbox"/>
SET 1	10/100Base T Modular Router w/2 WAN slots, 32M Flash/64M DRAM								
4	CON-SNTP-1721	1	243.00	0.0%	0.0%	243.00	243.00	Not Configurable Site Info Incomplete	<input type="checkbox"/>
SET 1	24x7x4 Svc, 10/100Base T Modular Router w/2 WAN slots								
5	15454-O48E-1-48.1=	1	19700.00	42.0%	42.0%	11426.00	11426.00	Not Configurable Complete	<input type="checkbox"/>
SET 2	OC48/STM16, ELR, 1546.12, 100 GHz, 1G4, SC								
6	CON-SNTP-454048E	1	1635.00	0.0%	0.0%	1635.00	1635.00	Not Configurable Site Info Incomplete	<input type="checkbox"/>
SET 2	24x7x4 AR Svc, 15454 OC48/STM16,ELR,150c								
7	New Line <input type="checkbox"/>								

At the bottom of the form, there are buttons for 'Save Order', 'Save as Template', 'Route Order', 'Verify All Configs', 'Check for Errors', and 'Submit Order'. Summary statistics show 'Lin total: 0.00' and 'Subtotal: 19997.10 (Includes Minor Lines)'.

Entering Service Site Information

The following steps show you how to enter service site information.

Step	What You Do
1	<p>Add and configure products on the order.</p> <ul style="list-style-type: none"> • Enter the product number in the editing console – Chapter Five • Item Search – Chapter Eleven • Get Saved Configs – Chapter Twelve
2	<p>Click the “Site Info. Incomplete” link on one of the service lines</p> <p style="text-align: center;">The Line Item Details page is displayed.</p>
3	<p>Choose a service site by clicking the Change Address button (Figure MMM.1)</p> <p style="text-align: center;">See Chapter Nine for more information on using the Address Book.</p>
4	<p>In the <i>Equipment Information</i> section, enter the service contract number the product will be covered under in the Existing Contract # field.</p>
5	<p>Enter resale information in the Resale Information section:</p> <ul style="list-style-type: none"> • Service Contact (Figure MMM.2)– Enter the contact’s name • Service Contract Billing Address (Figure MMM.3) – Enter a free form address in the box, use the billing address or the service site address <p style="text-align: center;">If there is a contact associated with the billing address or the service site address, it will automatically be entered in the Service Contact field when the respective button is clicked.</p>
6	<p>Click the Save Order button to save the changes made on the page.</p>
7	<p>Click the Back to Order Form button to return to the <i>Main Order Form</i>.</p> <p style="text-align: center;">The <i>Main Order Form</i> is displayed.</p>

Figure MMM

There are errors in the page. Please scroll down to see them.

PO Line Numbers

Line#	PO Line#	Item / Part#/Description	List Price	Qty.	Discount (s)	Unit Price	Extended Price	Contract
4.0		CON-SNTP-1721 24x7x4 Svc, 10/100BaseT Modular Router w/2 WAN slots	243.00	1	0%	243.00	243.00	0%

Service Site

Service Site Address [Change Address](#) Click here to select a new address as the service site address.

Maintenance Type

Equipment Information

Serial #

Serial # is required if Maintenance Type is "Equipment On Site" or "Renewal"

SO# MP#

Note: Sales Order=SO, Cisco MarketPlace=MP

Existing Contract #

[Get Next Service Site](#)

Figure MMM.1
Change Address

Resale Information

Instructions: Edit your Service Contract Billing address by entering a different address directly in the text area, below. Click Save to record your changes.
ERROR: Address required for resale type orders.
ERROR: Contact required for resale type orders.

Service Contract

Service Contract Billing Address

Contract Type

Partner Managed

Pass Through

Partner Email

Provide Partner Email address only if you selected Pass Through, above.

Replace with another address
 To use your Billing or Service Site address for your Service Contract address, click either of the buttons below. The address you select will replace the address displayed.

[Use Billing Address](#) [Use Service Site Address](#)

Figure MMM.2
Service Contact

Figure MMM.3
Service Contract
Billing Address



Creating an Order When Service is Referred

Creating an Order with Service Referrals

The following steps show you how to create an order with service referrals. This function is limited to the US and Canada.

Step	What You Do
1	On the Ordering Tool home page, click the Create an Order button.
2	Choose “Standard Order” in the Order Type field.
3	Enter a Product Discount and a Service Discount .
4	Choose a Purchase Type of “Resale”. Shared Support orders require that the Purchase Type be “Resale” in the US and Canada.
5	Enter a Requested Ship Date that is within the next 90 days.
6	Choose “Referral” in the Hardware Service Level field. When “Referral” is chosen in the Hardware Service Level field, the Software Service Level field becomes read-only.
7	Choose the reason service is being referred in the Referral Reason field. A referral reason is required when “Referral” is chosen in the Hardware Service Level field. The order will not be created until one is chosen.
8	Enter End User information: Select End User – Choose the end user from the list. Country – Choose the end user’s country. End User Market – Choose the end user’s vertical market.
9	Click the Continue button. The <i>Main Order Form</i> is displayed.

NOTE: A service line with a product number of “CON-REF-xxxx” will be added for each product on the order. You are still required to enter site and end user information on those service lines before the order can be submitted. Please refer to the “Entering Service Site Information” section in this chapter for more details on entering service site information.

Glossary

- **Acquire Order** – Displays the Main Order Form for the order identified by the Order ID and Key fields.
- **Add to My Addresses** – Use this feature to add frequently used addresses to your My Addresses list.
- **Address Book** – Tool used for managing your addresses.
- **Alert** – A warning message that something on your order may cause it to be put on hold once it is submitted. However, it will not prevent you from submitting the order.
- **All Order Details Page** – This section summarizes the entire order. Information on this page is static and for review purposes only.
- **Apply to New Service Lines Only** - If you would like to add Hardware Service to every NEW **Hardware** product line that is being entered, select your preferred Hardware Service Level from the Hardware Service Dropdown and then select the radio button titled “Apply to new service line only.
- **Apply to all service Lines** - If you would like to add Hardware Service to all hardware products that are visible on the Main Order Form including any new products that are added, select your preferred Hardware Service Level from the Hardware Service Dropdown and then select the radio button titled “Apply to all service lines.
- **Back to Order Form** – Displays the Main Order Form.
- **Billing** – The address where the invoice will be sent.
- **Carton Notes** – Enter any notes you want to appear on carton labels, packing slip, and invoices (commercial and remittance) for all future orders.
- **Change Address** – Displays the My Billing Addresses or My Saved Addresses page, where you can change the addresses.
- **Change Contact** – Displays the Select a Contact page within the Address Book, where you can change default contact information. The contact is the person with whom Cisco should communicate regarding billing and/or shipping questions. Click Change Contact in the Billing Information section for a Billing Contact, and Change Contact in the Shipping Address & Method section for a shipping contact.
- **Check Again** – Checks your line item details and configurations to see if they are valid and complete, and displays a message if you need to make a correction.
- **Check for Errors** – Checks your line item details and configurations for correctness and completeness, and displays a message if you need to make a correction.
- **Cisco Prod. Number/Competitor Prod. Description** – If you are returning a Cisco product, enter the Cisco Part Number or use Search Products button to find valid Cisco Part Numbers. If you are returning a Competitive product, enter the Competitive product description
- **Clear** – Clears all information from the editing console without applying it to the order.

- **Collapse** (Figure N.7) – Click on this button to collapse only that major line
- **Collapse All** (Figure N.5) – Click on this button to collapse all major lines that contain minor line options
- **Complete** – Line item details, such as site or shipping information, are complete.
- **Configurator** – The tool used to select software, cables, memory, and other options associated with a product.
- **Configuration** – The process of choosing different options (cables, memory, cards) that will be included in the product you are purchasing.
- **Configuration Details Page** – Displays the minor lines of configured products and allows the user to edit the discounts of the minor lines in a product.
- **Configuration Name** – The title of your saved configuration.
- **Configure** – To select software, cables, memory, and other options associated with a product.
- **Defaults** – Preferred settings that you can pre-determine. The settings will automatically populate in every order created. This saves you time from entering information that remains the same on all orders.
- **Delete** – Removing an item from the order upon saving the order.
- **Merge in transit** – Lets you choose whether or not to merge all items into one shipment. If you choose Merge Order, you override multiple ShipSets.
- **Discount** – The percentage of discount off the list price of products or services, as agreed upon by your organization and Cisco.
- **Early Shipment Accepted?** – Click Yes if you will allow Cisco to ship a partial or all of your order prior to the requested ship date.
- **Email Acknowledgement** – The email you receive that summarizes the placed order.
- **End User** – The ultimate recipient of the equipment on an order.
- **Enter Product** – The field where you enter the unique part number identifying a product.
- **Equipment Manufacturer** – Cisco Systems or another company who makes the product.
- **Error Checking** – Scans entire order for any errors that need to be adjusted and also advises user of any holds that will be placed on the order.
- **Existing Customer** – Choose the customer for whom you want to add a new address.
- **Expand** (Figure N.6) – Click on this button to expand only that major line
- **Expand All** (Figure N.4) – Click this button to expand all major lines that contain minor line options
- **Extended Price** – The total price for a line item.
- **Shipping Preference/Shipping Service Level** – Indicates the seller's and buyer's responsibilities during transportation of purchased product from the manufacturing location, to Title Transfer, to the customer.



- **Get Saved Config** – To search for a customer’s saved configurations.
- **Hardware Service Level** - This dropdown menu will allow you to select your preferred hardware service level. You can set this dropdown in the Set Defaults section of the Ordering Tool or on the Create an Order Page.
- **Header Detail Page** – This section is used to manage the details that apply to every line of an order.
- **IC Agreement** – A contract between the customer’s company and Cisco Systems, Inc. that gives the customer access to the Ordering Tool. The ICA agreement link is green if it has not been filled out. The link is grayed out if it has been filled out but you do not have permission to submit an order.
- **Incomplete** – Line items details are missing or incomplete. Clicking this link displays Line Item Details.
- **Item Search** – This is useful when you are unsure of a product’s name but would like to place an order. Search by product number, product description, or product family.
- **Key** – A combination of letters and numbers used to access a routed order.
- **Line Items Details Page** – This page allows you to modify additional details for a major line including service site addresses, maintenance type, contract number, or equipment serial numbers.
- **Line #** – The line number of the product on your order. A value of New for the line will remain until you complete the line and click Enter or press Enter on your keyboard.
- **List Price** – The price of a product as it appears on the base price list, in US dollars, prior to the application of any local currency exchange rates, country uplifts or wholesale discounts.
- **Main Order Form** – This section is the central location of the Ordering Tool where products, quantities, and discounts are entered.
- **Major Line Item** – This is usually the main product that you are ordering, for instance – a chassis.
- **MarketPlace Number** (also known as MP Number or Order ID) – The identifying number for an order.
- **Merge In Transit** – A delivery program for customers who wish to receive all items on a purchase order at the same time, with a single remittance invoice. This optional program is offered at an additional cost and is designed to simplify the receiving and remittance processes by eliminating multiple shipments and invoices, making it even easier to do business with Cisco.
- **Minor Line Item** – This is usually an option associated with the main product that you are ordering, for instance - a cable, memory, or an interface card.
- **New Customer Name** – Enter a new customer name in this field as needed.
- **Open Order** – An order created but not yet submitted.



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- **Order ID** – The MarketPlace (MP) number assigned to each order.
- **Order Templates** – An unsubmitted order that has been named and saved for future use. If a customer regularly submits an order with the same product selections, the customer can create the order and save it as a template before submitting it. The next time the order needs to be placed, the template can be accessed, modified slightly if necessary, and then submitted. The template remains for future use.
- **Order Type** – The type of order to be placed: internal, evaluation, standard, service-only, multinational, or trade in.
- **Ordering Tool Home Page** – This page is where you begin to create a new order, view an open order, access a routed order, or access the Set Defaults page.
- **PO (Purchase Order) Number** – The purchase order reference number used to identify the order within your organization.
- **Postal/Zip** – Enter the postal or zip code.
- **Price List** – The list from which you may order products.
- **Product Description** – The brief description associated with the product number.
- **Product Family** – This is a group of related products and product numbers.
- **Product Number** – The part number that is used to order the product. For example: CISCO2501.
- **Purchase Type** – Indicates the purpose of the order.
- **Quantity (Qty.)** – The number of chassis you are ordering.
- **Routed Order** – An order created by one user and sent to another user, to be retrieved by that user with the Order ID and a key.
- **Save as Template** – Saves your order as a template that can then be used for future orders.
- **Save Order** – Saves all new or revised information on the order form.
- **Search Again** – Returns you to the Search Addresses page for another search.
- **Service Only Order** – An order that contains only service/maintenance items.
- **Service Options** – You can choose the service level, service length, and service discount.
- **Service Site** – The location where the product resides.
- **Service/Line Details** – Enables you to choose service, provide end user, and ShipSet details at the line item level. Also enables you to edit configuration details for already configured items.
- **Set Defaults** – This section is used to set pre-determined fields that automatically populate each time the ordering tool is used.
- **Shared Config** – A configuration that was shared with you by another user.



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

As Cisco manufactures worldwide, multiple line orders will typically still arrive in separate deliveries, though selecting Ship All Items Separately *No* will reduce the number of deliveries.
- **Ship Early** – This selection informs Cisco if it is permissible to ship product prior to the Requested Ship Date. No should be selected if you want Cisco to ship as close as possible to the Requested Ship Date.
- **Shipping** – The address where the order will be shipped.
- **Shipping & Packaging Notes** – Enter any default shipping and packaging notes that you want to appear on packing slips and invoices for all future orders. You can change this information if necessary on the Header Details page when you are creating an order.
- **ShipSets** – A grouping of items within an order that have the same shipping information.
- **Software Service Level** – This dropdown menu will allow you to select your preferred Software Service Level. You can set this dropdown in the Set Defaults section of the Ordering Tool or on the Create an Order Page.
- **Standard Order** – A traditional order placed for Cisco products or a combination of Cisco products and services.
- **State/Province** – Choose the U.S. state or Canadian province if appropriate.
- **Submit Order** – Runs a check on the order for errors and submits complete orders to Cisco.
- **Trade-In Order** – The order type used to place Cisco Technology Migration Plan (CTMP), Custom Trade-In (Non-CTMP programs), or other Promotional Programs orders.
- **Unit Price** – The price of the product calculated by taking the list price and applying any customer discounts.
- **Unverified** – The configuration status of a product indicating that its configuration has *not* been completed and verified as correct.
- **Verified** – The configuration status of a product indicating that its configuration has been completed and verified as correct.
- **Verify All Configs** – Selecting this button is equivalent to selecting each previously configured product line by line and running the configuration check. This button will verify any configurations currently loaded in the order that are still valid and set their status to *verified*; any invalid configurations will remain in the *Unverified* status.

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

<http://www.cisco.com/go/ordering-tool>



Appendix Product Bundles

Bundle Display in the Main Order Form

Once a bundle is entered into the Main Order Form, it is displayed as follows:

Figure LLL

Cisco Systems Cisco Ordering Tool Cisco Home | NPM

Main Order Form

Ordering Tool Home Address Book HELP

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

Shipping: CS CAPITAL CORPORATION
1045 WHITLEY AVENUE
CORCORAN, Ca... United States

Billing: CS CAPITAL CORPORATION
170 WEST TASMAN DRIVE
SAN JOSE, Ca... United States

P.O. Number: CALHERNA 101A
Order ID: DV2407875
Reg. Ship Date: 12/09/2001

Enter, configure, and revise line item

Line # Enter Product Qty. Discount Unit Price

Line	Product	Qty	List Price	Discount	Unit Price	Extended Price	Status	Delete
1	TEST1 TEST BUNDLE FOR CRPB	1	0.00	0.0%	0.00	0.00	Verified Complete	<input type="checkbox"/>
4	CISCO2610 Ethernet Modular Router w/ Cisco IOS IP Software	1	1995.00	0.0%	1995.00	1995.00	Verified Complete	<input type="checkbox"/>
5	TEST1 TEST BUNDLE FOR CRPB	1	0.00	0.0%	0.00	0.00	Verified Complete	<input type="checkbox"/>
8	CISCO1605-R Cisco 1605-R Dual Ethernet/WAN Interface Card slot Router	1	1495.00	0.0%	1495.00	1495.00	Verified Complete	<input type="checkbox"/>
9							New Line	<input type="checkbox"/>

Last saved: December 10, ... **Linetotal:** 0.00
Subtotal: 18297.00 (Includes Minor Lines)



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Viewing Service Options for Bundle Products

Service added at order level will cascade down to the bundles and their lines. However, service cannot be added at the bundle level, it must be added at the major line level.

Figure MMM

Cisco Systems Cisco Ordering Tool Cisco Home | NPM

Main Order Form

Ordering Tool Home Address Book | HELP

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

Shipping: CS CAPITAL CORPORATION
10-45 WHITLEY AVENUE
CORCORAN, Ca... United States

Billing: CS CAPITAL CORPORATION
170 WEST TASMAN DRIVE
SAN JOSE, Ca... United States

P.O. Number: CALHERNA 101A
Order ID: DV2407875
Reg. Ship Date: 12/09/2001

Enter, configure, and revise line item

Line # Enter Product Qty. Discount Unit Price

Line	Product	Qty	List Price	Discount	Unit Price	Extended Price	Status	Delete
1	TEST1	1	0.00	0.0%	0.00	0.00	Unverified Complete	<input type="checkbox"/>
SET 1	TEST BUNDLE FOR CRPB							
11	CON-09E-26XX	4	706.00	15.0%	600.10	2400.40	Not Configurable Complete	<input type="checkbox"/>
SET 1	Cisco 26XX SMARTnet Onsite Enhanced Maintenance							
12	CON-09E-WS-C352X	2	643.00	15.0%	546.55	1093.10	Not Configurable Site Info. Incomplete	<input type="checkbox"/>
SET 1	8x8x4 Onsite Svc, WS-C3524-FWR-XL-EN							
4	CISCO2610	1	1995.00	0.0%	1995.00	1995.00	Verified Complete	<input type="checkbox"/>
SET 1	Ethernet Modular Router w/ Cisco IOS IP Software							
5	TEST1	1	0.00	0.0%	0.00	0.00	Unverified Complete	<input type="checkbox"/>
SET 1	TEST BUNDLE FOR CRPB							
8	CISCO1605-R	1	1495.00	0.0%	1495.00	1495.00	Verified Complete	<input type="checkbox"/>
SET 1	Cisco 1605-R Dual Ethernet/WAN Interface Card slot Router							
13							New Line	<input type="checkbox"/>

Last saved: December 11 2001

Linetotal: 0.00
Subtotal: 21791.40
(Includes Minor Lines)

Viewing Bundle Line Item Details

The line item details functionality behaves differently for the product bundles, as detailed below.

Figure NNN

Line Item Details

Modify details of a line item Line 1

You can select another line to edit via the Line # pull-down below, and you can modify your configuration via the configuration status link. When you are finished, click the **Save** button to save changes you make to any section of this page.

Note: Changes made here are **line-specific**.

You are working on this line:

Line # / Product / Status	Qty	List	Discount	Unit Price	Status
1 TEST1 (Complete)	1	0.0	0.0	0.0	Verified Complete

[End User](#) | [Ship Set](#) | [Add Note to this Line](#)

WARNING: Changes in this page will affect all the bundle components.

Service Options TOP

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

[Save Order](#) **Last saved:** December 10, 2001 11:26:00 AM PST [Check for Errors](#) [Back to Order Form](#)

Figure Reference	Display
NNN.1	Bundle line - Changes made to the major bundle line cascade to other lines.
NNN.2	Major line - Changes made to major lines do not impact other lines.

Viewing Bundle Configuration Details

The bundle configuration details form displays the discount structure.

Figure 000

Configuration Details

Review line configuration and minor line item details Line 1

You can select another line to edit via the Line # pull-down below, and you can modify your configuration via the configuration status link. When you are finished, click the **Save** button to save changes you make to any section of this page.

Note: Changes made here are line-specific.

You are working on this line:

Line # / Product / Status	Qty	List	Discount	Unit Price	Status
1 TEST1 (Verified)	1	0.00	0.00	0.00	Verified

TEST BUNDLE FOR CRPB [Get Saved Config](#)

Sub-Line	Product and Description	Qty	List Price	Promotional Discount	Discount	Unit Price	Extended Price
1.1	CISCO2610 Ethernet Modular Router w/ Cisco IOS IP Software	2	1995.00	22.00%	22.00 %	1556.10	3112.20
1.1.1	WIC-1DSU-56K4 1-port 4-WIRE 56/64 KBPS WAN INTERFACE CARD	2	700.00	22.00%	22.00 %	546.00	1092.00
1.1.2	CAB-AC Power Cord,110V	2	0.00	22.00%	22.00 %	0.00	0.00
1.1.3	S28C-12.0.10 (Included) Cisco 2800 Series IOS IP	2	0.00	22.00%	22.00 %	0.00	0.00
1.2	WS-C3524-PWR-XL-EN Catalyst 3524-PWR-XL Enterprise Edition	1	3995.00	15.00%	15.00 %	3395.75	3395.75
1.2.1	CAB-AC (Included)	1	0.00	15.00%	15.00 %	0.00	0.00

[Save Order](#) **Last saved:** December 10, 2001 11:50:52 AM PST PST [Check for Errors](#) [Back to Order Form](#)

Figure Reference	Display
000.1	Total discount. (Total discount is defined as customer discount plus promotional discount) Please note, changes to the total discount field will override all other discounts on the order.
000.2	Promotional discount, as given to a bundle

Viewing Bundle Information in Order Details Section

The bundle information is displayed in the order details section in accordance to the bundle numbering sequence.

Figure PPP

Item ID	Description	Unit Price	Quantity	Discount %	Discount	Total Price
6.0	CISCO 1005-F, Cisco 1005-F Dual Ethernet/POE Interface Card for Router F	1,495.00	1	48.00%	867.00	628.00
6.1	CAB-AC7 Power Cord (10V)	0.00	1	48.00%	0.00	0.00
6.2	SBC-12.0-17 Cisco 1600P Series IOS #	0.00	1	48.00%	0.00	0.00
6.3	HW-1600P-4FC 4 MB Flash Card for Cisco 1600 P	0.00	1	48.00%	0.00	0.00
7.0	NETACAD-2500-2014-NETACAD BUNDLE F	0.00	1	48.00%	0.00	0.00
7.1.0	CISCO 2901 Cisco 2901 Ethernet Serial Router F	1,495.00	4	48.00%	867.00	3,508.00
7.1.1	CAB-AC7 Power Cord (10V)	0.00	4	48.00%	0.00	0.00
7.1.2	HW-12.0-17 Cisco 2900 Series IOS #	1,308.00	4	48.00%	730.08	2,808.00
7.2.0	CISCO 2514 Cisco 2514 Dual Ethernet Serial Router F	1,995.00	1	48.00%	1,197.00	1,152.00
7.2.1	CAB-AC7 Power Cord (10V)	0.00	1	48.00%	0.00	0.00
7.2.2	SBC-12.0-17 Cisco 2500 Series IOS #	1,208.00	1	48.00%	730.08	720.00
7.3.0	WS-C1324-A 24 Port 13M Switch (AC, 100BaseTX Ports, 8th Ed Upgradeable)	1,281.00	1	48.00%	777.00	777.00
7.3.1	CAB-AC7 Power Cord (10V)	0.00	1	48.00%	0.00	0.00
7.4.0	WS-C1912-BK 12 Port 19M Switch (2 100BaseTX Ports, 8L, 20W PWR IN)	1,295.00	1	48.00%	777.00	777.00
7.4.1	CAB-AC7 Power Cord (10V)	0.00	1	48.00%	0.00	0.00

(*Items indicated with an asterisk will be fulfilled by our European Operations. This may result in Partial Shipments for your order.)

Order Totals

Product Total: 22579.00

Last saved: January 15, 2002 11:54:35 AM PST

[Check for Errors](#)
[Submit Order](#)
[Back to Order Form](#)

Figure Reference	Display
PPP.1	Bundle Line (7.0)
PPP.2	Major Lines (7.1.0)
PPP.3	Minor Lines (7.1.1)



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