



Estimates and Configurations

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User Guide

Cisco Proprietary

Note: This document is no longer being actively updated as of August2019. Please contact crc-training@cisco.com if an update isrequested.

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1 Conventions Used in this Document

- Keyboard sequences you press are shown in bold. Example: "Press Tab to move to the next field."
- Links that display in blue on the Cisco Commerce homepage, whether underlined or not, are underlined in the user guide. Example: "On the Items tab, click <u>Find Products</u>."
- Menu or sub-menu paths are separated by a ">". Example: "Select Intended Use > Managed Service."
- Buttons you click on the screen are shown in bold. Example: "Click Continue."
- The labels on radio buttons, drop-down menus, checkboxes, and fields that correspond have no special formatting. Examples: "Click the Yes radio button." "Click the Service Program drop-down menu."
- When there are multiple ways of accomplishing a specific task, preferred methods are highlighted as follows:



The blue circle around a lower case "i" means *reader take note*. Notes contain helpful suggestions or reference to material not covered in the manual.

For example:



Best Practice: Search for an address before creating a new one. Add a shipping address only if the address is not found.

- Active hyperlinks to other documents or within the same document are shown in blue (RGB: 0, 0, 255) and underlined. Example: "Additional information is available in the <u>Getting Started with Cisco</u> <u>Commerce User Guide</u>." or "See Creating an Estimate for more details."
- In sections describing a process that starts from somewhere other than the Cisco Commerce homepage, a process flow indicates how to get there. For example, you link an estimate to a deal ID on the Estimates page, which means you would have already created an estimate. The following illustration would therefore display at the beginning of the Link the Estimate to a Deal ID section.



2 Cisco Commerce Estimates and Configurations Workflow

To understand how the estimates module fits within Cisco Commerce and the Cisco sales structure, see <u>Getting Started with Cisco Commerce User Guide</u>.

In Cisco terms, an estimate is a pre-configured collection of products and/or services that form a solution. This collection can be validated and saved for reuse, sharing with others, and purchasing.

As part of Cisco Commerce's pre-sales capabilities, you can create an estimate and add products and services to a shopping cart, without having to provide the detailed customer information needed to create a quote or an order in Cisco Commerce. This process enables seamless collaboration between end customers, Cisco Partners, and Cisco Sales using the share functionality of their estimate.

Note: Guest users (often non-registered customers) can configure Cisco solutions to generate estimates for purchase through a registered partner. As a partner, you can claim their estimate by using the estimated ID shared by them. See Claiming an Estimate.



Estimates Workflow

2.1 Using Options on the Estimates Tab

In Cisco Commerce, the Estimates tab allows you to:

- Create and manage your estimates
- Access a shared estimate
- View all or a specific estimate
- Claim estimates created by guest users

Estimates	=	▼ Search All		Q		v 🖾 😁
A Catalog	Estimates	Deals & Quotes	Orders	Services	& Subscriptions	Software
Estimate Name 🔻	Create Estimate					Create New Estimate
Advanced Search	Access Shared Estimate		te Selected Estimates	Edit View	Deal and Opportunity Name	Configuration Status
E All Estimates	View All Estimates Recent	Estima	te_1			UNVERIFIED
Shared Estimates	Shared Saved Searches	7 Estima Estima	te_(VALID
Saved Searches View Tags	Tags Customer Estimates	7 Estima				UWERIFIED
Access Shared Estimat		Estima				IMALID
E Customer Estimates Claim Estimate	_ =	7 Estima	te_F			UNVERIFIED

Options on the Estimates Tab

2.2 Setting Default Preferences

You can set and verify default preference for your estimates for options such as, Price List, Intended Use, Bill to ID (BID), End Customer Information, Export, Sharing, and Service preferences using My Profile and Preferences section. This saves time and effort in setting preferences for each estimate individually that you create. See <u>Getting Started with Cisco Commerce User Guide</u>.

You can also update this information for an individual estimate when required.

2.2.1 Setting Default Estimates Preferences

To set default estimates preferences for all your estimates complete the following steps:

1. Select **My Profile and Preferences** from the drop-down menu that displays when you hover over your name.

Cisco Commerce			= •	▼ Search All Q			(~	\boxtimes	69	
•	Catalog Estimates			Deals & Quotes Orders		Ser		My Profile and Preferences	5	Softv	ware	
								Change Language: English				

My Profile and Preferences

2. Select **Preferences** > **Estimates**. The Estimates page displays.



You can default the discount information for products and services, as well as estimate validity period on this page. Use the validity period for pre-sales activities to provide your estimate with a set life, after which the estimate will expire and can no longer be imported into a quote or an order. Reset the validity period to make the estimate active (see <u>Verifying and Updating the Validity</u> <u>Period</u>).



Note: The discounts and validity information displayed here are not validated or approved. These values are only used for pre-sales price modeling.

want to manage my	Estimates			
L Profile	Modifications to your E	stimate Preferences will be auto	omatically applied to all new Orders.	
Left Company Details	Discounts			
Preferences	Product (%)	Service (%)	Validity Period (days)	
🖅 General	45.99	23.99	0	
Estimates				
E→ Export				Sa

Estimates Preferences Page

Best Practices:

- If you want to create an estimate with your standard cost, set your estimate discounts to be your contractual standard discounts. For End Customer price modeling, you can change the discounts at the estimate or line level. See <u>Price</u> <u>Modeling for End Customers</u>.
- Keep the validity period value blank unless you always want to create an estimate with the same validity period. For End Customer pre-sales activities, you can update the validity period on the estimate. See <u>Verifying and Updating the Validity</u> <u>Period</u>.

2.2.2 Setting Share Preferences

You can set default sharing preferences for your estimates, quotes, and orders.

Setting default sharing preferences for all your estimates can be done through the Estimates tab on the Share Preferences page. See <u>Getting Started with Cisco Commerce User Guide</u>.

You can:

- Set preferences for default sharing of estimates with the team when you check the checkbox for "Automatically add my team to Estimates that I create".
- Allow others to add themselves to the estimate through an advanced search by checking the checkbox for "Allow users to add themselves to Estimate team, searching by Estimate ID in advance search when estimate is shared as".

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Note: The e-mail notification feature enables you to send e-mail notifications for shared estimates to registered and non-registered users in Cisco Commerce.

Marking the estimate preferences as Public Read-Only or Public Read/write will make the estimate visible to everyone. However, until a user searches for that estimate using the advanced search feature in Cisco Commerce, the estimate will not display in their Shared Estimates list. If Read-Write access is granted, any changes made by recipient(s) will be reflected in your view as well. They can also share the access key with others for similar read-write access.

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Note: Providing public access will enable all users who know the estimate ID to access your estimate. It is NOT recommended to set this as your default.

I want to manage my	Share				
Profile	Quote/Order	Estimates			
🗱 Preferences 🔨	Please note - Estima	ates can be shared with use	ers that have a valid Cisco.com ID, reg	gistered em	nail ID, or non-registered
	Automatically add my te	Public Read/write	arching by Estimate ID in advance sear	ch when es	timate is shared as
 ♀ Orders ♣ Shipping 	Name Katie	Cisco.com ID katie	Email Address katie.		Access Type
 Contacts Notifications 	Gina	gina	Gina.Col		Read/Write

Share Preferences Page: Estimates Tab

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Best Practice: Set your defaults to Read-Only. You can grant Read-Write access if needed when sharing an estimate.

To share individual estimates, see <u>Sharing an Estimate</u>.

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3 Creating an Estimate

In Cisco Commerce, you can create estimates in two ways:

- Using the Catalog: See Using the Catalog Tab.
- Using the Estimates tab: See Using the Estimates Tab.

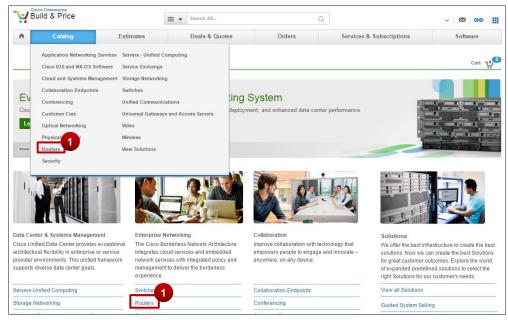
You can also create an estimate by using the common utility **Save as Estimate** from within a quote or an order. See <u>Saving as an Estimate</u>.

3.1 Using the Catalog Tab

Cisco Commerce offers an enriched catalog experience that allows you to browse through all Cisco technologies, and identify the offers that best suit your needs. Guest users or registered guest users can also share their estimates with you to request a quote.

Through the Catalog tab:

- Browse through available Cisco products and services
- Review available product data sheets and literature
- Compare Unified Computing System (UCS) products
- Customize or configure products and services and add to cart to create an estimate



Cisco Commerce Homepage: Catalog

To create an estimate using the Catalog tab, complete the following steps:

1. Hover over the Cisco Commerce Catalog tab to view the available technology in a drop-down menu. You can also select a technology from the Cisco Commerce homepage itself.

Various products display for the technology selected.



2. Select the appropriate product item from the list. A detailed product information page displays.

Note: You can select a particular UCS series and compare products while viewing detailed product descriptions. See <u>Comparing UCS Products</u>.

All Routers Products	
» Branch Routers	» Other Routing Products
» Cloud Connectors	» Service Provider Core Routers
* Cloud Routers	» Service Provider Edge Routers
» Connected Grid Routers	» Service Provider Infrastructure Software
» Data Center Interconnect Platforms	» Small Business Routers
» Industrial Routers	WAN Aggregation and Internet Edge Routers
» Mobile Internet Routers	
Branch Routers	
Cisco 1100 Series Routers	Cisco 4300 Series Integrated Services Routers
Cisco 1800 Series Integrated Services Routers	Cisco 4400 Series Integrated Services Routers
Cisco 1900 Series Integrated Services Routers 2	Cisco 800 Series Routers
Cisco 2800 Series Integrated Services Routers	ITP 3200 Series Routers

Catalog Tab: Series and Model Page

3. Review the product information displayed on this page, such as data sheets and bulletins.

Build & Price	=	Search All	Q		v 🛛 😁 🛄
Catalog	stimates	Deals & Quotes	Orders	Services & Subscriptions	Software
Products > Routers > Cisco 2900 Serie	es Integrated Serv	vices Routers		•	Cart 🛫
	Cisco Rout	o 2900 Series Integ ers	grated Services	ALC: NOT THE REAL PROPERTY OF THE REAL PROPERTY.	Refine By V 1 1 AUTOMATION- Collateral as a link-
Products Bundles Accessories » Cisco 2900 Series Integrated Services Roi » Cisco 2900 Series Secure Voice Bundles » Cisco 2900 Series Services Ready Engine » Cisco 2900-AX Series Integrated Services	ter Application Options	 » Cisco 2900 Series Secure Voi » Cisco 2900 Series Security Bu » Cisco 2900 Series Voice Bund » RPS2300 for the Cisco 2900 S 	ndles les	↓ Views (0) ≧ Sr	all tags None in Target theatre Sales Case Studies- sprint5 Released Date: 12-APR- 2016 nares (0)
SKU & Description		Unit Qty List Price		Downloads (0)	
Cisco 2900 Series Integrated Services Ro	uter		•		
C1-CISCO2901/K9 CP SVIP Cisco ONE - ISR 2901		1,995.00 1	Configure Add To Ca	rt	

Catalog Tab: Product Information Page



 Click Configure (or Customize, as applicable) to configure a product with additional options and accessories. See <u>Choosing Options and Resolving Issues</u>. While configuring, you can also add services to your products. See <u>Adding Services</u>.

Alternatively, click Add to Cart to first create an estimate and then configure your product.

5. An estimate is created for your product(s) and an estimate ID is assigned automatically. You can change the estimate name and build the estimate further, as required (see <u>Building the Estimate</u>).

3.1.1 Using Solution Advisor

You can use Solution Advisor to quickly configure multi technology solutions and to generate an Estimate.

3.1.1.1 Create a Solution

From the homepage:

- 1. Click Catalog.
- 2. Select Solution Advisor.

A list of Technology Groups will appear.

- 3. Click **Create** to proceed further with creating a Solution for a technology.
- 4. To view already saved solutions, click **Saved Solutions**. The count of solution(s) saved earlier will appear next to Saved Solutions.



Solution Advisor		Search All		Q	v 🖾 😋
Catalog	Estimates	Deals & Quotes	Orders	Services & Subscriptions	Software
New solutions have been ad	ded: Email Security , Web	Security .			
	ASR 9000 Quick way to configure AS	R Chassis and Line Cards			Create Saved Solutions
	CPwE Solution Converged Plantwide Eth	ernet Solution			Create Saved Solutions
	management solution for	iter Express (Unified CCX) delivers a h ip to 400 agents. This integrated, comp midmarket, enterprise branch, and cor	orehensive, contact center s	al, and sophisticated customer interaction olution is intended for both formal and	Create Saved Solutions
	Email Security Cisco Email Security offer today.	s high availability email protection agair	nst the constant, dynamic, r.	apidly changing threats affecting email	3 Create Saved Solutions 1
	Enterprise Networks Our enterprise networking Wireless technologies.	solutions help you innovate faster, sim	plify operations, and reduce	risk using Switching, Routing and	Create Saved Solutions (2)
		solution is ideal for large districts and i d complexity of traditional solutions.	ndependent schools alike, p	roviding performance and manageability	Create Saved Solutions
	Web Security Cisco Web Security offerin	ngs keep malware off your network and	more effectively control and	l secure web usage.	Create Saved Solutions

Note: Mote: Note: Note:

- 5. To Edit the Custom Solution Name, Click on the 🖊 icon.
- 6. Select and Enter details for each segment.
- 7. Proceed to Next Step.



8. To save the filled information for a solution, Click **Save**.

•	Catalog	Estimat	es	Deals & Quotes	Orders	Services & Subscrip	ptions	Software
Em	ail Security		5					
	OM SOLUTION NAME I Security-v2		1	ID NUMBER 10890		CREATED BY		
Usag Softv	ner Requirements le Information ware Options ware Options	•	Enter the	User count * 🍞	100			6
	6		Select the	e License term	3 Years			
			Sav	e 8		(<< Previous St	Next Step >>

9. Click **Previous Step** to return to previous segment.

Customer Requirements			
Usage Information		Appliance Email Security Appliance Hardware	_
Software Options Hardware Options	•	Email Security Hardware for Small businesses and branch offices	x Email Security Hardware C190 for Small businesses and branch offices
		Email Security Hardware for Midsize offices	Email Security Hardware C390 for Midsize offices
		Email Security Hardware for Large enterprises and service providers	 Email Security Hardware C690 for Large enterprises and service providers
		Note: Device configuration must be done in	9 << Previous Step >>

- 10. The configuration will be created based on user selection.
- 11. Click **Customer Requirements** to edit the options.
- 12. To export or print details of configuration, Click Export as XLS or Print Friendly PDF.



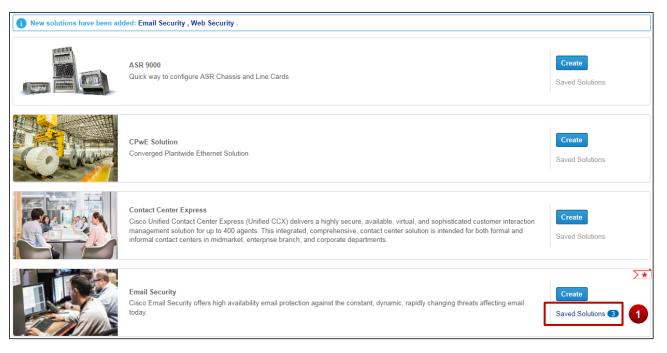
13. To save the Bill Of Materials (BOM) as an estimate, Click Save as Estimate.

Export as XLS Print Friendly PDF	Configur	ation Summary				
	Line	Product ID	Description	Unit List Price	Qty	Extended List Price
	(+) 1.0	ESA-C690-1G-K9	ESA C690 Email Security with 1GE Fiber interfaces	\$30,950.00	1	\$30,950.00
	(+) 2.0	ESA-C390-K9	ESA C390 Email Security Appliance with Software	\$13,950.00	1	\$13,950.00
	3.0	ESA-C190-K9	ESA C190 Email Security Appliance with Software	\$5,950.00	1	\$5,950.00
	(+) 4.0	L-CES-ESI-LIC=	Cloud Email Security Inbound Essentials License	\$45.46	100	\$4,546.00
		L-CES-AMP-LIC=	Cloud Email Security AMP Add-on	\$28.92	100	\$2,892.00
	⊕ 6.0	L-CES-MFE-LIC=	Cloud Email Security McAfee AV Add-on	\$16.80	100	\$1,680.00
			Total Price			\$59,968.0

3.1.1.2 View Saved Solutions

Saved Solutions can be accessed from the Solution Advisor Home Page.

1. Click Saved Solutions.



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2. List & count of saved solutions for each technology group will appear.

•	Catalog	Estimates	Deals & Quotes	Orders	Services & Subscriptions	Software
	Solutions access your Saved Solutions fro	om nere	Enterprise Networks	ou innovate faster, simplify ope	rations, and reduce risk using Switching, Routing and	Wireless Create
	Security prise Networks	3 ·	T Delete D Copy		Search by Custom Name	Q
ASR 9	9000	0	Custom Name -		Last Updated Date	
			Enterprise Networks-v3		03-Aug-2016	
			GSS-ENS-MODEL-9348-04042	016	04-Apr-2016	
			GSS-ENS-MODEL-9345-04042	016	04-Apr-2016	
			View 10 views Per Page		</ Previous</td <td>1 of 1 Next > ></td>	1 of 1 Next > >

3. To delete, Select a solution/s and Click **Delete**.

n	Catalog	Estimates	Deals & Quotes	Orders	Services & Subscriptions	Software
	Solutions access your Saved Solutions f	romnere	Email Security Cisco Email Security offers high availability	email protection against the c	onstant, dynamic, rapidly changing threats affecting e	mail today.
	Security rise Networks	3	🛍 Delete 🕒 Copy		Search by Custom Name	Q
ASR 9		_	Custom Name -		Last Updated Date	
ASKS	000		Email Security-v3		03-Aug-2016	
			Email Security-v2		03-Aug-2016	
			Email Security-v0		01-Aug-2016	
			View 10 🔹 Items Per Page		<pre></pre>	1 of 1 Next > >>

- 4. Search for a Solution with Custom Name.
- 5. Create a new Solution from Saved Solutions Page.

A	Catalog	Estimates	Deals & Quotes	Orders	Services & Subscriptions	Software
	I Solutions access your Saved Solutions fr	omnere	Email Security Cisco Email Security offers high availability	email protection against the c	onstant, dynamic, rapidly changing threats affecting e	5 email today.
	Security prise Networks	3	💼 Delete 🔹 Copy		4 Search by Custom Name	Q
ASR			Custom Name -		Last Updated Date	
ASK	5000	•	Email Security-v3		03-Aug-2016	
			Email Security-v2		03-Aug-2016	
			Email Security-v0		01-Aug-2016	
			View 10 views Per Page		« Previous	1 of 1 Next > >>

Note: You can edit a previously created solution by accessing it from Saved Solutions.



6. To Copy, select a solution, click **Copy** and follow the instructions.

▲ C	atalog	Estimates	Deals & Quotes	Orders	Services & Subscriptions	Software
Saved Solution You can access you		m here	Email Security Cisco Email Security offers high availabili	ty email protection against the c	onstant, dynamic, rapidly changing threats affecting	email today.
Email Security		3	👕 Delete 🚺 Copy		Search by Custom Name	e Q
Enterprise Netwo	rks	3	Custom Name -		Last Updated Date	
			Email Security-v3		03-Aug-2016	
			Email Security-v2 Email Security-v0		03-Aug-2016 01-Aug-2016	
			View 10 vitems Per Page	e	< Previous</td <td>1 of 1 Next > >></td>	1 of 1 Next > >>

7. The default Customer Name is populated. Edit the Custom Name and click Copy.

🛗 Delete 🛛 🚹 Copy	
Custom Name 💌	Last Updated Date
Email Security-v3	
Email Security-v2	
Email Security-v0	01-Aug-2016
View 10 🗸 Items Per Page	<pre>((< Previous 1 of 1 Next >)</pre>
Copy Solution	×
Custom Name	

8. You will see a success message when the solution is copied.

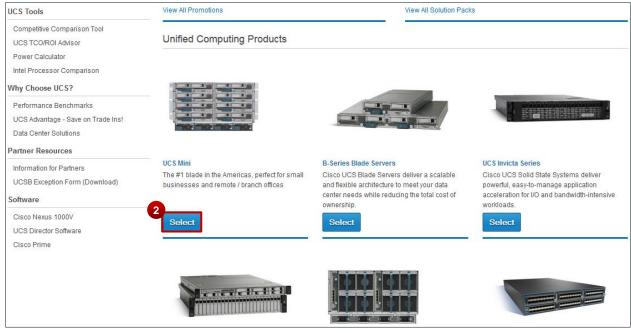
Solution Copy Successfully.					
Saved Solutions You can access your Saved Solutions from here			Email Security Claco Email Security offers high availability email protection against the constant, dynamic, rapid)		Create
Enterprise Networks	4		more information <a <="" href="http://www.cisco.com/c/en/us/products/security/email-security/index.html" th=""><th>ml" target="_blank">click here</th>	ml" target="_blank">click here	cicuto
Email Security	4	<	👕 Delete 🛛 🕒 Copy	Search by Custom Name	Q
ASR 9000	1		Custom Name 🕶	Last Updated Date	
			Copy of Email Security-v3	11-Aug-2016	
			Email Security-v3	09-Aug-2016	
			Email Security-v2	03-Aug-2016	
			Email Security-v0	01-Aug-2016	
			View 10 Views Per Page	<pre></pre>	Next > >>

3.1.2 Comparing UCS Products

In Cisco Commerce, you can find and compare various Unified Computing System (UCS) products.

To compare UCS products, complete the following steps:

- 1. From the Catalog tab on Cisco Commerce homepage, click the Servers Unified Computing technology group. The page refreshes to display a list of UCS products available.
- 2. Click **Select** for the appropriate product from the options displayed.



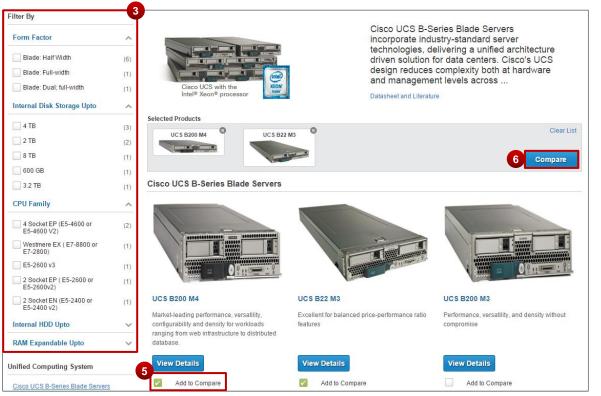
Catalog Tab: UCS Products Page

- 3. Use the Filter By options to streamline the search for the selected products. The selected products display. Click <u>Clear</u> in the Selected Filters section to remove a filter.
- 4. Click View Details corresponding to each product to view detailed description of a specific model.
- 5. Check the checkbox for Add to Compare for models that you want to compare.

Alternatively, click Compare All to compare all the available models.

6. Click **Compare**. The Compare Model page displays the product descriptions for the selected models.

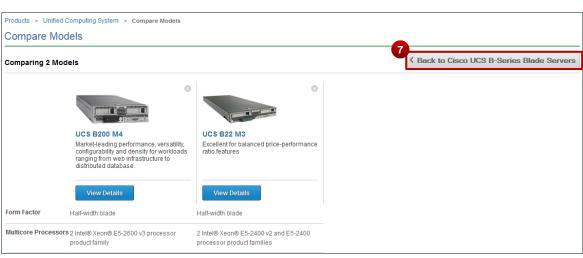
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UCS Products Page

7. Click **Back** to go back to the selected models page.

Note: The Compare Model page displays five products at a time, but you can use left/right arrows to scroll over an unlimited number of products. A "Comparing X Models" indicator will state X as the total number of products being compared.



Compare Models Page

3.2 Using the Estimates Tab

To create an estimate using the Estimates tab, complete the following steps:

1. From the Estimates tab, click **Create Estimate**.

Cisco Commerce Estimates	≡	▼ Search All				Q		~	∞ ∞
A Catalog	Estimates	Deals & Quo	tes	Orders		Services	& Subscriptions		Software
Estimate Name 🔻 🌵	Create Estimate						(Create N	ew Estimate ゝ
	Access Shared Estimate	Add Tag 🛗 Delete Selected Estimates 🥒 Edit View							
Advanced Search	View All Estimates	ID	Estimate	Name	Estima	te Description	Deal and Opportunity Name	Configu	iration Status
Recent Estimates	Recent	718BR	Estimate_	_TB6496871					UNVERIFIED
Shared Estimates	Shared Saved Searches	715BI	Estimate_	_OB6497871					VALID
Saved Searches	Tags	'19CJ	Estimate_	_MI64928719					VALID
💊 View Tags	Customer Estimates	716WM	Estimate_	LO6492871					UNVERIFIED
Access Shared Estimat	Claim Estimate	767DO		_YW6487876					INVALID
Customer Estimates		763WH	Estimate_	_JN6487876					INVALID
Claim Estimate	■ ■ RE648	378761BX	Estimate_	_RE6487876					UNVERIFIED

Estimates & Configurations Tab

2. The Estimates Cart page displays. The system assigns a unique estimate ID automatically.



Note: The system will populate any defaults set within your My Profile and Preferences section, such as price list and service preferences.

If you do not have a price list set as a default, the system will navigate you to the My Profile and Preferences page to select a price list.

	isco Commerce Estimates		≡ ▼ Search All		Q				~ 8	8 co III		
•	Catalog	Estimates	Deals & Quotes	Order	s	Services &	Subscriptions	3	So	ftware		
Lwan	t to			🕩 Export 🛛 🔊	Email < Shar	e 🚯 Clone	🛗 Delete	💊 Add Tag	₩ Co	ntinue Shopping		
wan		2 ESTIMATE	NAME Estimate_PG64978721TB (PC	G64978721TB) 🌶	1			JAPAN Pri	ce List in U	IS Dollars (USD)		
🗎 Vie	ew Estimate Information		ESTIMATE ID CREATED BY PG64978721TB				CREATED ON 28-Apr-2016					
🌪 Lin	nk to Deal	Set prefere	ences for this estimate 🗸									
9 Se	t Install/Service Location	Search h	y Sku , Description and Product Family		1	Add	Find	Droducts &	Solutions	Actions 🗸		
🗂 Se	e Recommended Global Sa		y ora , bescription and rioduct ranny			Add	1110	in routets a	Solutions	Actions •		
_		Remove	Selected Lines Validate App	ly Discount								
ZA S	Security Subscriptions		Hardware, Software and Services	Lead Ti		it List Qt			scount	Extended Net		
<i>⊙</i> ≣ A	AS-Fixed				Price	(050)	Price	e (USD)	(%)	Price (USD)		
<u>ale</u> L	earning Credits				No records for	und						

Estimates Cart Page



3. To change the estimate name, click the edit icon next to the estimate ID. The Edit Estimate dialog box displays.

Edit Estimate	
*	* Required Field
Estimate Name *	
Estimate_MS64316044LE	
Estimate Description	
Estimate Description	

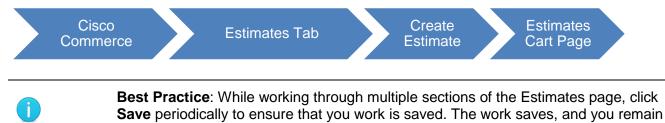
Edit Estimate Dialog Box

- 4. Click the Estimate Name field and enter the new estimate name.
- 5. Click **Save**. The dialog box closes.

3.3 Adding Products and Services to the Estimate

You can add products and services to an estimate on the Estimates Cart page. See the next section.

4 Building the Estimate



From the Estimates Cart page, you can:

- Add items: See <u>Adding Items</u>
- Configure items and resolve issues: See <u>Choosing Options and Resolving Issues</u>
- Add services: See Adding Services
- Use optional functions for individual line items: See <u>Using Optional Functions for Individual Line</u>
 <u>Items</u>

4.1 Adding Items

There are several ways to add items to an estimate:

on the current page.

- Finding items using a search: See Finding Items Using a Search
- Adding items by SKU, SKU Description, or Product Family: See Adding Items by SKU
- Adding different types of SKUs: See <u>Adding Different Types of SKUs</u>
- Importing a saved configuration: See Importing a Configuration

4.1.1 Finding Items Using a Search

Searching for products allows you to add multiple products to the estimate at one time. There are several ways to find items using a search:

- Search and add by product description or SKU using the Find Products & Solutions search (search by product description or SKU if a specific SKU or portion of the product description is available): See <u>Search and Add by Product Description or SKU</u>
- Search and add by product family using the Find Products & Solutions (search by product family to find the product by browsing through a list of Cisco product families): See <u>Search and Add by</u> <u>Product Family</u>



Best Practice: If you know the product family, then use the Search and add by product family option. It makes the search easier.

4.1.1.1 Search and Add by Product Description or SKU

To search for items to add to the estimate, complete the following steps:



1. From the Estimates Cart page, click **Find Products & Solutions**. The Find Products & Solutions page displays.

Estimates		Search All			Q		~ 🖾 😁 🏭				
Catalog	Estimates	Deals & Quotes	0	rders	S	Services & Subscriptions				oftware	
I want to	<		Export	a Email	< Share	🕒 Clone 🍵	🖬 Delete	💊 Add Ta	g 🏆 C	ontinue Shopping	
r want to	ESTIMATI	ESTIMATE NAME Estimate_PG64978721TB (PG64978721TB) 🖌						JAPAN Price List in US Dollars (USD)			
View Estimate Information	ESTIMATI PG64978		CREATER	BY			CREATED 28-Apr-20				
Normal Kine Contract	Set prefere	ences for this estimate 🗸									
9 Set Install/Service Location	Search	y Sku , Description and Product Family			1	Add		nd Products	& Solution	s Actions 🗸	
🗍 See Recommended Global Sale	s Kits		ly Discount		,	Add		in Frontion	o bolaton		
Security Subscriptions		Hardware, Software and Services	Lea	ad Time 🕕	Unit Lis				Discount	Extended Net	
AS-Fixed					Price (USE))	Pri	ce (USD)	(%)	Price (USD)	
Learning Credits				No rec	cords found						

Estimates Cart Page: Find Products & Solutions

2. Select the Product description or SKU radio button.

Find Products & Solutions									
		Sack to [Page Accessed From]							
Search and Add	Lead Time Search								
Search by Search by									
Display VIP eligibl	e product only								
Product Description or	sku								
Enter Product Description	or SKU	Search							
Please provide input in Engl	ish								

Find Products & Solutions Page: Search by - Product description or SKU

3. In the search field, enter a product description, SKU, or partial SKU, and click **Search**. You do not need to enter the entire SKU.

The page refreshes to display the results.

4. Locate the appropriate product(s).

ılıılı cısco

- 5. Click The product is added to the Selected Items cart.
- 6. Click in the textbox of the Qty field and enter the appropriate quantity.
- 7. Repeat steps 3 6 to populate the items in the estimate.
- 8. To remove unwanted items from the Selected Items cart, click **Remove**.
- 9. When you have added all the desired products from the search to the Select Items cart, click **Add**. The Estimates Cart page displays the new line item(s).

Results for "2911" — 53 Results Found				Key
		Filter By 13 selected	•	Selected Items
sku	Lead Time 🚺	Unit List Price (USD)	Qty	Item Qty
Cisco 2900 Series Integrated Services Router				
C1-CISCO2911/K9 C CP SVIP Cisco ONE - ISR 2911	14 days	2,695.00	1 🕂	Cisco 2911 w/3 GE,4 EHWIC,2 SP,1 SM,256MB CF,512MB D AMUPP Remove
C2911-AX/K9 C SVIP C-1 Cisco 2911 AX Bundle w/ App,SEC Lic	14 days	4,300.00	1 +	Cancel Add
C2911-AX/K9-RF C CP REFREST Cisco 2911 AX Bundle w/ App,SEC Lic REMANUFACTURED		2,580.00	1 +	

Find Products & Solutions Page: Search Results

4.1.1.2 Search and Add by Product Family

To search by product family, complete the following steps:

- 1. From the Estimates Cart page, click **Find Products & Solutions**. The Find Products & Solutions page displays.
- 2. Select the Product Family radio button.

Find Products & Solutions	
	Sack to [Page Accessed From]
Search and Add Lead Time Search	
Search by Product Description or SKU Product Family Solution	JAPAN Price List in US Dollars (USD) 🕕
Display VIP eligible product only	
Product Family	3
	Search
3PCOE MATERIAL	
ADVANCED SERVICES FIXED PRICE	
ADVANCED SERVICES SUBSCRIPTION SERVICES	
ADVANCED SERVICES TRANSACTION SERVICES	
APIC	y Trademarks
AS Fixed Virtual Managed Services	
ASF Small Cell Liscensed Svc	
ASSET MGMT PREMIUM NO HW RPL (CON-AMSP-XXX)	•

Find Products & Solutions Page: Search By – Product Family

- 3. Click the Type to filter or click menu button drop-down arrow to see a full list of product families.
- 4. Scroll through the list and click the desired product family.



- 5. Click Search. Results display all applicable product families.
- 6. Locate the appropriate product(s).
- 7. Click 💽 . The product is added to the Selected Items cart.
- 8. Click the Qty field and enter the appropriate quantity.

Note: There are several ways to enter or change the quantity for a product.

- As listed in step 8 above (entering the quantity in the Selected Items cart).
- Locate the appropriate product (step 6). Click the Qty field and enter the quantity. Continue to step 7 (entering the quantity before adding the product to the Selected Items cart).
- On the Estimates Cart page (see <u>Setting Quantities for Items</u>).
- 9. Repeat steps 3–8 to populate the items in the estimate.
- 10. When all desired products from the search have been added to the Select Items cart, click **Add**. The Estimates Cart page displays the new line item(s).

4.1.1.3 Using the Lead Time Functionality

The Lead Time Search functionality allows you to obtain lead time information for both major and minor lines. A lead time of a particular product or minor line option is the amount of time from order placement to product shipment. It is possible to search for lead times by product family, product SKU, product description, or a wild card search. You can then download or e-mail the lead time information in either an Excel or PDF format.

You can access the lead time tool in Quick Links also. Refer to the <u>Getting Started with Cisco</u> <u>Commerce User Guide</u> to perform a lead time search.

4.1.2 Adding Items by SKU



To add items to the estimate by entering an SKU, SKU description, or product family, complete the following steps:



1. On the Estimates Cart page, click the Search field and enter at least three letters or numbers of a SKU, SKU description, or product family. A drop-down menu displays items with matching results.

	Estimates			E V Search All			Q				~ 6	×		
•	Catalog	Estimates		mates Deals & Quotes Orders			Services & Subscriptions			Software				
Iwa	nt to	<				€ Export	a Email	< Share	Clone	🛗 Delete	S Add	lag 🏆 Co	ontinue	e Shopping
_			ESTIMATE NAME Estimate_PG64978721TB (PG64978721TB) 🖌 JAPAN Price List in US Dollars (USD)											
ωv	View Estimate Information PG64978					CREATED BY					CREATED ON 28-Apr-2016			
₹ ⊘ L	ink to Deal		Set preferen	ces for this es	timate 🗸									
<u>9</u> s	et Install/Service Location		Search by :	Sku , Description	and Product Family			1	Add	F	Find Product	ts & Solution	s A	ctions 🗸
🗇 s	ee Recommended Global	Sales Kits												
70	Security Subscriptions			elected Lines		ply Discour								
	Security Subscriptions			Hardware, So	ftware and Service	s I	.ead Time 🕕	Unit Price (U		ity P	Unit Net Price (USD)	Discount (%)		nded Net
Ø	AS-Fixed													
	Learning Credits						No rec	ords four	nd					

Estimates Cart Page: Add Product Item

2. Scroll down the drop-down menu and click an appropriate product.



Note: To locate products that are orderable but not published on the indicated price list, enter the full SKU and press Enter. If the SKU is still not found, then the standard process to address errors applies.

Prior to contacting support, verify that the SKUs cannot be located via the autopopulate, wild card search, or general Cisco Commerce search functionalities and that the SKU in question has been published to the price list selected on the estimate.

- 3. Click the Qty field and enter an appropriate quantity.
- 4. Click Add. Your item will be added to the estimate.
- 5. Click Save.

4.1.3 Importing a Configuration

Another way to add products to an estimate is to import a saved configuration. Access the different tools via the **Import Saved Configuration** option under the Actions drop-down menu on the Estimates Cart page.

stimates	Deals & Quotes	0	Orders		Services & Su		ns	Software	
<		Export	a Email	< Share	Clone	<u>च</u> Delete	💊 Add Ta	g 🕴 🎬 Continue Shopping	
ESTIMATE N	AME Estimate_PG64978721TB (PG		JAPAN Price List in US Dollars (USD)						
		CREATE	D BY						
Set preferen	ces for this estimate 🗸								
Search by	Sku , Description and Product Family			1	Add	Fi	Find Products & Solutions Actions		
			1				Impo	rt Saved Configuration	
Remove Se			a d Trus O	11-241			Edit	Services for Multiple Lines	
	naruware, sonware and services	Le	au ninte 🕕				ioo (I	range Lines	
							Previ	ew BTO Configuration	
	ESTIMATE IL PG6497872 Set preference Search by S Remove Se	ESTIMATE NAME Estimate_PG64978721TB (PI ESTIMATE ID PG64978721TB Set preferences for this estimate Search by Sku, Description and Product Family Remove Selected Lines Validate App	ESTIMATE NAME Estimate_PG64978721TB (PG64978721TE) ESTIMATE IND PG64978721TB Set preferences for this estimate Search by Sku, Description and Product Family Remove Selected Lines Validate Apply Discount	Export		Image: Export Image: Export<	Image: StrimATE NAME Estimate_PG64978721TB (PG64978721TB) Image: StrimATE Decemption ESTIMATE ID PG64978721TB CREATED BY CREATED BY Set preferences for this estimate CREATED BY CREATED BY Search by Sku, Description and Product Family 1 Add Fi Remove Selected Lines Validate Apply Discount Image: Software and Services Lead Time ID Unit List Qty	Image: Second	

Estimates Cart Page: Import Saved Configuration

ΤοοΙ	Document Section						
Estimate	The Cisco Commerce Estimates application enables browsing, configuration, validation, and price estimation of Cisco hardware, software, and services, with importable Bills of Materials (BOM), as well as sharing capabilities. See Importing an Estimate.						
Copy Quote: BOM	Import the Bill of Materials from a quote previously created in Cisco Commerce to help you quickly build a validated solution. See <u>Copying a Quote: BOM</u> .						
BOM Upload	You can upload a BOM file that is in XLS/XLSX, CSV, and TSV format. Use the available template to upload a BOM. See <u>Uploading a BOM</u> .						

4.1.3.1 Importing an Estimate

To import an estimate, complete the following steps:

- 1. From the Estimates Cart page, click to expand the Actions menu, then click **Import Saved Configuration**. The Import Saved Configuration modal window opens.
- 2. Click Select next to the Estimate option.
- 3. Search for the estimate you wish to import by using the Estimate ID, Estimate Name, Created By, Created Date, Last Modified, and Status fields.
- 4. Click **Search**. The search results display.



5. Select the radio button associated with the desired estimate

ESTIM	ESTIMATE NAME Estimate_CV53071274ZR Global Price List in US Availability (USD)											
ESTIM 53071	IATE ID		CREATED BY		CREATED ON Thu Jan 21 09:21:34 EST 2016							
Impo	ort Estimate											
3 Start by	searching for a estimate	e you would like to copy.										
Estimat	te ID		Estimate Name		Created By							
			Created By Me									
Created	d Date		Last Modified		Status							
All Dat	es	24	All Dates	24	3 selected	\$						
521 res	ults				(Cancel Reset Search						
5	Estimate ID	Estimate Name	Price List	Created Date	Last Modified 🔻	Created By						
0	CR53071273WX	Estimate_CR5307127	Global Price List - US	21-Jan-2016	21-Jan-2016							
0		Estimate_CV5307127	Global Price List - US	21-Jan-2016	21-Jan-2016							
0		test	Global Price List - US	21-Jan-2016	21-Jan-2016							

Importing an Estimate

6. Click **Continue with Selected Estimate**. The Estimates page displays the newly imported line items.

4.1.3.2 Copying a Quote: BOM

To copy a quote, complete the following steps:

- 1. From the Estimates Cart page, click to expand the Actions menu, then click **Import Saved Configuration**. The Import Saved Configuration modal window opens.
- 2. Click **Select** next to the Copy Quote: BOM option.
- 3. Select the parameter for search, such as Deal/Quote Name and enter the appropriate text in the search field.
- 4. Click **Search**. The search result displays.
- 5. Select the appropriate option from the search results.



	E+ Export	a Email	< Share	Clone 🚯	🛗 Delete	🍆 Add Tag	↔ Back to Estimate	Continue Shopping
ESTIMATE NAME Estimate_PG64978721TB (PG64978721TB) 🖌							JAPAN Pri	ce List in US Dollars (USD)
ESTIMATE ID PG64978721TB	CREATED BY					REATED ON 8-Apr-2016		
Import the Bill of Materials from any quote that you have created or ha	ave access to in SFD	C or CCW.						
Copy Quote will import Part Number, Quantity and Duration for uploaded through Excel in the source quote.	or items from the Ha	ardware, Soft	ware and Se	rvices section	on of the orig	inal Quote. List	Price will be copied on	ly for included items
Search								
Start by searching for a quote you would like to copy.								
Search by		₩ •	eal ID					
Deal/Quote Name		•						
								4
							Cance	Reset Search

Copying a Quote: BOM Page

- 6. Click **Continue with Selected Configurations**. The Estimates Cart page displays the newly imported BOM from the selected quote.
- 7. To continue adding lines, click **Save**. The page remains unchanged, and additional lines can be added by repeating the above process or by using any of the other processes for adding products.

4.1.3.3 Uploading a BOM

To upload a BOM, complete the following steps:

- 1. From the Estimates Cart page, click to expand the Actions menu, then click **Import Saved Configuration**. The Import Saved Configuration modal window opens.
- 2. Click **Select** next to the BOM Upload option.
- 3. Click Browse.
- 4. Locate the appropriate file from your directory.



Best Practice: Use the available templates in XLS/XLSX, CSV, and TSV format to upload a BOM.

- 5. Check the checkbox for Import lines as assembled configurations. Unchecking this box will import all configurations to your estimate as major lines.
- 6. Optionally, check the checkbox to indicate the solution as a part of the available categories using the drop-down menu.
- 7. Click **Upload File**. A progress bar indicates the percent complete. The Estimates Cart page displays the imported BOM as line items.
- 8. Click **Save**. The work is saved, and you remain on the Estimates Cart page.



		Export	.💌 Email	< Share	Clone	🛗 Dele	e 🕒 Add Tag	Sack to Estimate	Y Continue Shopping
ESTIMATE NAME Estimate_PG64978721	TB (PG64978721TB) 🖌							JAPAN Pric	e List in US Dollars (USD)
ESTIMATE ID PG64978721TB	CR	EATED BY					CREATED ON 28-Apr-2016		
Upload the Bill of Materials from any	y quote that you have created			3					
tart browsing for a BOM you would like t	o upload.		Browse	Τ					
Download Sample Template: You can upl	oad a BOM file that is in XLS/XL	SX, CSV, TSV fo	ormat click on	i file types to	download th	e template			
Download Sample Template: You can upl						1.1			
	ons (Unchecking this will import					1.1			7

Uploading a BOM

4.2 Adding Different Types of SKUs



You can add different type of products, services, and configurations to an estimate on the Estimates Cart page.

4.2.1 Adding Remanufactured Equipment

You can add remanufactured equipment (also known as Refresh), to an estimate with the applicable services.

- 1. Add remanufactured products using any of the methods for adding items. See Adding Items.
- 2. To configure products, see <u>Choosing Options and Resolving Issues</u>.
- 3. Hover over the REFRESH icon to view the new equivalent product SKU and price. The icon will display only for the remanufactured products.

Sea	rch by	Sku , Description and Product Family		1 Ad	d	Find Pr	Find Products & Solutions Actions		
Rem	ove S	elected Lines Validate Apply Disc	count				Import Saved Configuration		
	(⊕	Hardware, Software and Services	Lead Time 🕕	Unit List Price (USD)	Qty	Unit Price (L	Edit Services for Multiple Lines Rearrange Lines		
		1.0 CISCO2/ 3 ECK9-RF	Not Applicable	2,169.00	1	1,51	Preview BTO Configuration		
		More Cisco 2911 Security Bundle w/SEC li cense PAK REMANUFACTURED					Remanufactured Availability		
		Invalid as of 28-Apr-2016 10:08:	03 EDT						
		Select Options Select Service/Subsc	cription Validate	Add Note More /	Actions 🗸		Add Subtota		

Estimates Cart Page



j

Note: Some remanufactured products require a power cord. For those products, you must select the correct power cord for your country prior to submitting the estimate for approval.

4. To view available inventory and shipment lead times, click to expand the Actions drop-down menu and then click **Remanufactured Availability**. The Available Inventory dialog box displays.

Availa	ailable inventory										
		t inventory quantities are su ts are not available in certa				hmission					
Hardv			Qty on Estimate Availability				Lead Time				
						3 Days	7 Days	30+ Days			
1.0	CISCO2911-S	CISC02911-SECK9-RF		1	46	46	0	0			
	Ship To 🚯	UNITED STATES	•								
								Cancel			

Remanufactured Inventory Dialog Box

- 5. From the Ship-To drop-down, select the appropriate country. The drop-down default is based on the ship to or end customer country set as defaults in your profile.
- 6. View the available remanufactured inventory and shipment lead time. Create a quote or order to reserve remanufactured product, see the <u>Cisco Commerce Deals and Quotes User Guide</u> or the <u>Cisco Commerce Order User Guide</u> for more information.



Note: If the Quantity Available is zero, the product is not available. A three-day shipment lead time applies to shipments from in-country warehouses. A seven-day shipment lead time applies to shipments from out-of-country warehouses. The inventory found in the 30+ days shipment lead time represents inventory that can be remanufactured to meet the request.

1

Note: Remanufactured equipment cannot be shipped to LATAM countries, Korea, Sudan, or Iran.

4.2.2 Adding Fixed Scope Consultancy SKUs

You can add Fixed Scope Consultancy services only in Cisco Commerce. There are two types of Fixed Scope Consultancy services:

- Installations
- Network Optimization

These services are fixed price, fixed scope, and fixed duration. Therefore, Fixed Scope Consultancy services will always be purchased at net price. To add technical services, see <u>Adding Services</u>.

Fixed Scope Consultancy SKUs can be added as a separate line, or configured as an option for eligible software offers (see <u>Choosing Options and Resolving Issues</u>).



To add Fixed Scope Consultancy SKUs, complete the following steps:

- 1. From the Estimates Cart page, click **Find Products & Solutions**. The Find Products & Solutions page displays.
- 2. Enter "ASF-" in the field and click **Search**. A list of Fixed Scope Consultancy SKUs display.
- 3. Select the desired SKU.
- 4. Verify the quantity is correct depending on the SKU and click **Add**. The Fixed Scope Consultancy line is added to the line items of the estimate.



Best Practice: Contact information for Fixed Scope Consultancy SKUs must be accurate and should be the contact with whom a project team will work to schedule the installation. In most cases, this is not the Ship To contact.

Providing accurate information results in seamless delivery.

4.2.3 Adding Cisco Integrated Customization Services (CICS) SKUs

CICS (also referred to as Silver-level License SKUs) can be added to an estimate, but the process can only be completed once the estimate is converted to an order (and the Attach Template button becomes active). CICS require files to be attached in the order and this step cannot happen as part of the estimate process. See <u>Getting Started with Cisco Commerce User Guide</u> for more information on completing this process.

4.3 Using Optional Functions for Individual Line Items



You can use additional options for an individual line to reorder lines, preview Bill to Order (BTO), set install site and/or service location, copy, configure, and validate, among other actions.

I want to	<	🕩 Export 🛛 🛲 Email	< Share 🚯 Clone 🧃	🖥 Delete 🛛 🏷 Add Tag	g 🛛 💘 Continue Shopping					
i want to	ESTIMATE NAME Estimate_PG64978721TB (ESTIMATE NAME Estimate_PG64978721TB (PG64978721TB) 🖌 JAPAN Price List in US Dollars (USD)								
View Estimate Information	ESTIMATE ID PG64978721TB	CREATED BY		CREATED ON 28-Apr-2016						
Note all the set of th	Set preferences for this estimate V			207012010						
Set Install/Service Location										
See Recommended Global Sales Kits	Search by Sku, Description and Product Family		1 Add	_	& Solutions Actions V					
	Remove Selected Lines Validate A		Import Saved Configuration Edit Services for Multiple Lines							
Calculate Financing Options >	Hardware, Software and Service	s Lead Time ()	Unit List Qty		Rearrange Lines					
			Price (USD)	Price (USD)	Preview BTO Configuration					
Security Subscriptions	1.0 CISCO2911/K9 CP SVIP C-1	14 days	2,695.00 1	1,886.50	Remanufactured Availability					
AS-Fixed	more O Cisco 2911 w/3 GE,4 EHWIC,2				Cisco ONE Upgrade					
Learning Credits	1 SM,256MB CF,512MB DRAM, Invalid as of 28-Apr-20									
			Add Note More Actions 🔨		Add Subtotal					
	Estimate Total		Copy Remove Line		All Prices Shown in USD					
	Average Product Discount	30.00%	Product rotar		1,886.50					

Estimates Cart Page: Optional Functions for an Item



4.3.1 Rearrange Lines

You can rearrange the lines on your Estimate from the Manage Groups feature. To re-order your lines, click on **Manage Groups/Rearrange Lines**

Remove Selected Lines More ~					Manage Groups / Rearrange Lines 🛛 🧮 🚍		
•	Hardware, Software and Services	Estimated Lead Time 🛈	Unit List Price (USD)	Qty	Unit Net Price (USD)	Discount (%)	Extended Net Price (USD)
	1.0 CISCO AEOS C REFREST more 2 Valid as of 12-Feb-2019 12:04:22 PST	Not Applicable	2,581.00	1	2,581.00	0.00	2,581.00

You can drag and drop the lines by clicking and dragging on the icon under the **List Order** column. Alternatively, you can enter a number on each line. When you are done, click **Reorder List**.

Seck To Estimate								
Items By Group Create/Assign Group 🗸 Reorder							Reorder List	
	List	Order	Hardware, Software and Services	Unit List Price (USD)	Qty	Unit Net Price (USD)	Discount (%)	Extended Net Price (USD)
	Θ	Default						9,900.00
	0 0 0 0 0 0 0 0	1	1.0 PWR-C1-715WAC-RF	600.00	1	600.00	0.00	600.00
	0 0 0 0 0 0 0 0	2	2.0 WS-C3850-48P-S-RF	7,800.00	1	7,800.00	0.00	7,800.00
	0 0 0 0 0 0	3	3.0 C3850-NM-2-10G-RF	1,500.00	1	1,500.00	0.00	1,500.00
								Reorder List

4.3.2 **Previewing BTO Configurations**

You can view the Distributor-equivalent SKUs for the selected UCS products and services in the Estimates Cart page.

To preview a Bill to Order (BTO) configuration, complete the following steps.



1. Click to expand the Actions menu and then click **Preview BTO Configuration**.

	1TB (PG64978721TB) 📝			JAPAN Price List in US Dollars (USD
ESTIMATE ID PG64978721TB	ARK		CREATED 28-Apr-2	
et preferences for this estimate \checkmark				
Search by Sku , Description and Product Fa	amily	1 Add	Fir	d Products & Solutions Actions
Remove Selected Lines Validate	Apply Discount			Import Saved Configuration
🕞 🧠 Hardware, Software and Se	ervices Lead Time 🕕	Unit List	Qty	Edit Services for Multiple Lines
	_	Price (USD)	Pri	ce (L Rearrange Lines
1.0 CISCO2911/K9 CP SVI more 0	C-1 14 days	2,695.00	1	1,88 Preview BTO Configuration

Optional Functions for Line Items: Preview BTO Configuration

The Preview BTO UI page displays. Equivalent distributor configurations are listed next to the selected original configurations.

The preview screen displays the following information as default:

- Hardware, Software, Services, and Subscriptions
- Quantity
- Extended List Price
- Configuration Total
- Maximum Estimated Lead Time

lack to Previous Page Export		
duct with no Disti-Equivalent SKU found		Product with no Disti-Equivalent SKU found
2911W/36E4 EHWIC2DSP15M,256MB CF.512MBDRAM+DC REMANUFACTURED	1 \$1,547.00	CISCO2STINDURSIKE 2911W3GE4 EHWIC2DSP1SM,256MB CF,512MBDRAMHDC REMANUFACTURED
10.1 CON-SSSNT-CISCO29D SOLN SUPP 8X5XNBD Cisco 2911 w/3 GE4 EHWIC2 DSP1 SM256MB Duration: 12 Month(s)	1 \$634.00	1.0.1 CON-SSSNT-CISCO29D SOLN SUPP 8X5XNBD Cisco 2911 w/3 GE4 EHWIC2 DSP1 SM256MB Duration: 12 Month(s)
Subtotal:	\$2,581.00	Subtotal:
	Financial Summary All prices shown in USD	
	,	

Preview BTO UI Page



2. Click on a row to highlight the equivalent SKU. To return to normal, click X.

Error messages indicate if items in the distributor SKUs are not compatible or not correct.

Non-translated products will be shown on both Original configuration set and Disti BTO configuration set sides under the section 'Product with No Disti-Equivalent SKU found' at the bottom of the page.

- 3. Hover over the Export drop-down to export the preview page.
- 4. Select the appropriate format XML or XLS. Save or download the file as required.
- 5. Click **Back to Previous Page** to return to the Estimate Cart page.

4.3.3 Setting Install/Service Locations to a Line Item

You can set install location and service location for more accurate pricing and eligibility validations. These location details are also included when you clone an estimate or import the estimate to a quote or order.

- Install Location applies to Hardware and Services
- Service Location is applicable for on premise subscription offers

I want to	K Export 🔊 Email	< Share 🚯 Clone 🛗 Delete 💊 Add Tag 😽 Back to Estimate 🛛 🎬 Continue Shopping					
	ESTIMATE NAME Estimate_PG64978721TB (PG	64978721TB) 🖌 JAPAN Price List in US Dollars (USD)					
View Estimate Information	ESTIMATE ID PG64978721TB	CREATED BY CREATED ON 28-Apr-2016					
₩⊘ Link to Deal	Set Install/Service Location	Cancel Save					
Set Install/Service Location		*Required Field					
🗍 See Recommended Global Sales Kits	Default Install Site [*] ()						
	This address will be applied to the product you add						
Calculate Financing Options	UNITED STATES	▼ Or ► Add a Full Install Site					
Security Subscriptions	Default Service Location*						
AS-Fixed	This address will be applied to the product you add	· · · · · · · · · · · · · · · · · · ·					
VE AS-I Ked	UNITED STATES	Or Or Add a Full Service Location					
Learning Credits							
	Edit Install Site/Service Location Apply Def						
	Hardware, Software and Services	Install Site/Service Location Country *					
	1.0 CISCO2911/K9 Cisco 2911 w/3 GE,4 EHWIC,2 DSP,1 SM,2 56MB CF,512MB DRAM,IPB	2 UNITED STATES					
	CISCO2911-DC/K9 Cisco 2911 w/3 GE;4 EHWIC,2 DSP,1 SM,2 S6MB CF;512MB DRAM+DC	2 UNITED STATES					
	View 10 🔻 Items Per Page	Results 2 of 2 <<< < Previous 1 Vext > >>					
		Cancel Save					

Set Install/Service Location Page

4.3.3.1 Setting Service Location

Service location is required for SaaS Subscriptions. Click **Add a Full Service Location**. The Search Service Location page displays.

Note: Install Location and Service Location allows for more accurate pricing, eligibility validations, and are included when you clone an estimate or import the estimate to a quote or order.

4.3.3.1.1 Using the Service Location Search

You can use Search Service Location to search using the Site ID or Country and Customer Company name.

Complete the following steps to add a service location:

- 1. You can search by Site ID, if known. Otherwise complete steps 2-4.
- 2. The Country field populates automatically. Change if appropriate.
- 3. Enter Customer Company Name to search for service location from recent addresses used. Suggestions display.
- 4. When you select the desired option, the rest of the address fields will automatically populate.
- 5. Click **Save as Default** for setting this address as a default option for all line items.
- 6. Additionally, to set individual addresses for each line item, check the checkbox for required line items and click **Edit Install Site/Service Location**.
- 7. Alternatively, click **Apply Default** to use default install/service locations to your desired lines.
- 8. Click Save.

Edit Install Site/Service Location Apply Default						
Hardware, Software and Services	Install Site/Service Location Country *					
 I.0 WS-C4948E Catalyst 4948E, opt sw, 48-Port 10/100/10 00+ 4 SFP+, no p/s 	UNITED STATES	🕂 Add a Full Install Site				
2.0 CISCO2911/K9 Cisco 2911 w/3 GE,4 EHWIC,2 DSP,1 SM, 256MB CF,512MB DRAM,IPB	UNITED STATES	🕂 Add a Full Install Site				
		Cancel Save				

Set Install/Service Location Page: Line Address Information Section



4.3.3.1.2 Using Recent Addresses

You can either search for a recent address or click **Recently Used Addresses**. Click the radio button for the desired address and then click **Save as Default**.

					*Required Field
Search in a different language address 中文	한국어	日本語 <u>All Others</u>			Recently Used Addresses
Site Id Search		Generic Search			
Site Id*		Customer Company Name	*	Address 1	
Note: If Site Id is provided, then other fields are not required.	OB	Country* UNITED STATES	v	Address 2	
		State/Province		Address 3	
		Select	•		
		City	Zip/Postal Code	Address 4	

Search Service Location

4.3.3.2 Setting Install Location

Install location is required for hardware and services. To set install location, see <u>Setting Service</u> <u>Location</u>. The steps are the same.

4.3.4 Additional Options for Line Items

•	Hardware, Softw	vare and Services	Lead Time 🕕	Unit List	Qty	Unit Net	Discount	Extended
				Price (USD)		Price (USD)	(%)	Net Price (USD)
•	+ 4 SFP+, no p	- E, opt sw, 48-Port 10/100/100	14 days	13,500.00	1	10,800.00	20.00	10,800.00
			en Melidete Ad	Note Mars Ar	diama .			Add Outstate
		Select Service/Subscripti	on Validate Ad		ctions 🔨			Add Subtota
Estimate	Edit Options		on Validate Ado	I Note More Ad	_		All Prices	Add Subtota Shown in USD
Average S	Edit Options	Select Service/Subscripti	on Validate Adi 20.00% 0.00% 0.00%	Сору	Line		All Prices	

Additional Functions for an Item

To use additional line options, complete the following steps:

- Copying Line Items: To copy a line item click **More Actions**, then **Copy**. A new, identical line item with the same attributes displays on the Estimates Cart page.
- Deleting a Line Item: To delete a line item, click More Actions, then Remove Line. The line item is
 removed from the estimate. Alternatively, you can select the relevant line item checkbox and click
 Remove Selected Lines.
- Validating a Line Item: To validate an item, click **Validate**. The system will validate the configuration status and display the status below as Valid or Invalid. Alternatively, you can select the relevant line item checkbox and click **Validate**.



- Select or Edit Options: See <u>Choosing Options and Resolving Issues</u>.
- Select Service/Subscription or Edit Services/Subscription: See Adding Services.
- Adding Notes: You can add notes to a line item for your personal reference. Follow the steps below to add a user note.
 - 1. Click **Add Note** under the appropriate line item. The Add Note dialog box displays.
 - 2. Click the text field.
 - 3. Click **Save**. The text field closes.
 - 4. To change the user note, start from step 1.

Add Note	×
Test	
Note: Max 300 characters.	
	Cancel Save

Estimates Cart Page: Add Notes

Note: These notes are for your personal use only and are not reviewed by Customer and Partner Experience (CPE) team.

4.4 Choosing Options and Resolving Issues



When a product requires additional configuration, select the appropriate options and resolve any issues so that the product is properly configured. **Customize** or **Configure** on the Catalog tab, or <u>Select</u> <u>Options</u> on the Estimates Cart page is available for products that require additional configuration.



Note: <u>Edit Options</u> displays for products already configured. However, you can select new options.

To configure products, select options, and resolve any warnings or errors in the configuration, complete the following steps:

1. From the Estimates Cart page, click **Select Option** below the line item that needs to be configured so it can become valid. The Option Selection page displays.

The configuration can be completed for multiple options, individual options, when the SKUs are known, and when the SKUs are not known.

- If the SKUs for the required items are known, use the multiple option search function to enter the SKUs in a list and have all results display on the page (see <u>Searching for Multiple Known</u> <u>SKUs</u>).
- To search for a known SKU one at a time, use the Option Search tab or search for a SKU
 manually through the system of links and messages (see <u>Searching for a Single Known SKU</u>).



- If the SKUs are not known or to search by each required component, use the individual search function (see <u>Searching Unknown SKUs Individually</u>).
- 2. Review the product list displaying on the left of the page in the Configuration Summary pane.
- 3. Attend to the warning or error messages displaying at the top of the page indicating corrections within the configuration.
- 4. Some of the options have icons next to them. These icons give additional information about the corresponding option. Hover over the icon to view related information.
- 5. Click the Key drop-down to view icons-related information.

OPTION SELECTION CISCO2911/K9						JAPAN Price List	in US Dollars (USD)
Configuration Summary Country Specification () Select Country (Not Required)	View Fu	III Summary	ľ	Narnings (3): The quantity of Power Cables must be equal to the quantity of Pri quantity. (CE200050) Have you considered using Cisco ONE http://www.cisco.com/go/d the current PID is C1_CISCO2011/K0_(CE201920)			
Category 0	Qty Un	it List Price (USD)	Ð	Option Search 🕦		Multip	le Options Search
SOFTWARE		^	CISCO	2911/K9 > IOS Software Version and Type			5 Key 🗸
IOS Software Version and Type			Image	with Payload Encryption Image with No Payload Encryption			
IOS Technology Package Licenses				SKU	Qty	Lead Time 🕕	Unit List Price (USD)
ADSL Firmware Options VA DSL Firmware Options			0	S29UK9-15501T CP Cisco 2901-2921 IOS UNIVERSAL	1	14 days	0.00
Zero-Touch Deployment EnergyWise Management			0	S29UK9-15303M CF Cisco 2901-2921 IOS UNIVERSAL	1	14 days	0.00
IOS FEATURE LICENSES Unified Communications Feature L	icenses	^	0	S29UK9-15403M CE Cisco 2901-2921-DS UNIVERSAL	1	14 days	0.00
Subtotal Estimated Lead Time		2,695.00 14 days	0	4 S29UK9-15505m Cisco 2901-2921 IOS UNIVERSAL	1	14 days	0.00
Reset Configuration	Cancel	Done	Clear	Selection Show Incompatible SKUs			

Option Selection Page



Key Drop-Down List



Note: Certain products are configured differently; see <u>Configuring the UCS Blade</u><u>Centric Solution</u> and <u>Configuring an Insieme Bundle Solution</u> to configure them.



4.4.1 Using the Power Calculator

Power Calculator option is only applicable to Unified Computing System (UCS) products and identifies the electrical power consumption of products to make better selection.

To view the power consumption information for a UCS product, complete the following steps:

1. Select the appropriate option and click **Power Calculator** drop-down arrow to view the consumption.

Configuration Summary		View Full Summary	· · · ·	Warnings (6): A minimum of 1 Rail Kit Accessories is	required. Please adju	st the quantity. (CE	200056)		
Country Specification 🕕			.	A selection of 1 Cisco ONE Option is re	quired. Please adjust	the selections. (CE	200439)		
Select Country (Not Required)		•		 UCSC-C220-M4S quantity 1 requires a 	minimum quantity of	1 from Processor (CE100012)		
Category 🕕	Qty	Unit List Price (USD)	⊕	Option Search ()			Multip	ole Options	Search
PROCESSOR		^	UCSC	-C220-M4S > Processor			3 Power Calcu	lator 🔺	Key
Processor 🔶		1	Proce	ssor 🔶	UnitDisplay		Metric O Imp	perial	
IEMORY		^		SKU	System Load	Factor %			%50
Memory 🔶 Memory Config			0	UC S-CPU-E52699D 2.30 GHz E5-2699 v3/145W 18C/45MB Car	InputVoltage			70 80 90 100	Ŧ
IARD DRIVE		^	\bigcirc	UC S-CPU-E52698D 2.30 GHz E5-2698 v3/135W 16C/40MB Car	Power Cost p	er W	1.000		
HDD Option			-			mption Estimates		Idle	Max
SSD EP Option			0	UC S-CPU-E52697D 2.60 GHz E5-2697 v3/145W 14C/35MB Cat		NA	AcPower	NA	NA
SSD EV Option			\sim	UC S-CPU-E52695D	Current	NA	Efficiency PowerFactor	NA NA	NA NA

Option Selection Page – Power Calculator

- 2. A legal disclaimer displays. Click Accept to view the power consumption details.
- 3. Select Metric or Imperial to view appropriate units in the power calculator drop-down menu.
- 4. Click again on Power Calculator to close the drop-down menu.

4.4.2 Searching for Multiple Known SKUs



To search for multiple known option SKUs at a time, complete the following steps:

- 1. From the Option Selection page, click **Multiple Options Search**. To show the instructions, click **Show Instructions**.
- 2. Click the text box and enter SKUs and respective quantities. Copy and paste information from another source or enter the information manually if needed.



Note: Enter the SKU and respective quantity; separated by a space, a comma, a tab, or a semi-colon on the same line, one SKU per line.

Enter the product items in a column. Do not enter the product items in a list separated by commas.

OPTION SELECTION CISCO2911/K9		JAPAN Price List in US Dollars	(USD)
Configuration Summary	View Full Summary	Warnings (3): The quantity of Power Cables must be equal to the quantity of Primary Power Supply selected. Please adjust the	 ▼
Country Specification ()		quantity. (CE200050)	
Select Country (Not Required)	•	 Have you considered using Cisco ONE http://www.cisco.com/go/one for this order? The Cisco ONE equivalent for the current PID is C1_CISCO2011/0. (CE201020) 	
Category 🚺	Qty Unit List Price (USD)	2 Multiple Options Search () Option S	Search
SOFTWARE	^	Search by SKU	
IOS Software Version and Type			
IOS Technology Package License	s	Hide Instructions A Clear Sea	arch
ADSL Firmware Options		Instructions	×
VA DSL Firmware Options		Copy and paste option SKUs and quantities from another source into the space provided.	
Zero-Touch Deployment		SKU and quantity may also be entered manually into the box. Valid delimiters are space, comma, tab or semicolon (see example). Then click 'Search' to find options available for product.	
EnergyWise Management		Examples:	
IOS FEATURE LICENSES	^	CAB-AC1 S16RC-12208T,1 NM-1V2	
Unified Communications Feature	Licenses	Search Results for Available Locations can be selected and added to configuration. Results for Potential Locations require	
Subtotal	2,695.00	parent be added to the configuration before they can be added. Potential Location results will be moved to Available Locati if the parent option(s) are added.	ions
	14 days		-
Estimated Lead Time		Multiple Option Search Results Filter By ALL v	Kev 🗸
Estimated Lead Time	Cancel Done		

Option Selection Page: Multiple Options Search

- 3. Click Search.
- 4. The search results display under Result: By Available Location, Result: By Potential Location, and Result: Not available. Search results include estimates lead times, SKU list prices, and locations (available and potential).

Some of the results have icons next to them. These icons give additional information about the corresponding option. Hover over the icon to view the information.

- 5. From the search results under Available Location section, check the checkbox(es) corresponding to the desired items.
- 6. Errors with the indicated quantities display above the Multiple Options Search tab. Click each link to resolve the error. Once the quantity errors are resolved, the items are added to the configuration.

(UCSB-5108-DC) requires a minimum of 2 and allows maximum of 4 from Power. (CE100015)

• [UCSB-5108-DC] quantity 1 requires a minimum quantity of 1 from Fabric Extender (CE100012)

Option Selection Page: Quantity Error Messages

Note: Some *Qty* fields are editable and some are not. If the *Qty* field is populated and greyed out so that you cannot make edits, the quantity is controlled by the system according to the rules of quantity limitations.

- 7. Click **Done**. The Estimates Cart page displays.
- Available Location indicates the path to the SKU(s) under the Configuration Summary pane on the left side of the page. Items can be added to the configuration by leaving the appropriate checkbox (es) checked. To remove a product from the list of items to add, uncheck the checkbox corresponding to that product.
- 9. The Potential Location indicates a possible path to the indicated SKU(s) under the Configuration Summary pane on the left side of the page. Items cannot be added to the configuration from this section. Click the link within the indicated path and select the appropriate product.
- 10. If there are any error messages associated with a SKU, the error message displays at the top of the page and the SKU displays under Results: Not available. These SKUs are not selectable.

Configuration Summary Country Specification () Select Country (Not Required)	View Ful	I Summary	UPG,UCSB-5108-AC2-UPC	C2,UCSB-5108-DC2 cannot be configur 3,UCSB-5108-DC2-UPG instead. (CE20 mum of 2 and allows maximum of 8 from	0137)		se N20-C650	8-
Category 0	Qty Unit	t List Price (USD)	O Multiple Options Search				Opt	ion Search
BLADE OPTIONS		^	Search by SKU					
Blade 🔶								
CHASSIS OPTIONS		^				Show Instructions	Clear	Search
Fabric Extender 🔶			Multiple Option Search Results		Filter By	ALL	•	Key 🗸
Power 🔶			₨			Lead Time 🚺	Unit List F	Price (USD)
Chassis Expansion		8	Result By: Available Location 🕦					
			SKU	SKU Location				Qty
		9						Add
Subtotal		1.00	Result By: Potential Location 🕕					
Estimated Lead Time		10 day	SKU	SKU Hierarchy				Qty
Reset Configuration	Cancel	Done	Result: Not Available					
			SKU	Error				Qty

Multiple Option Search Tab: Search Results

11. For more information on the Available and Potential Location, hover over the information icons next to the location call outs.

4.4.3 Searching for a Single Known SKU

To search for a single known SKU, complete the following steps:

1. From the Option Selection page, expand the Option Search section.



2. Click in the Search by SKU field and enter a full or partial SKU.

OPTION SELECTION N20-C6508					JAPAN Pric	e List in US Dollars (USD)
Configuration Summary Country Specification () Select Country (Not Required)		View Full Summary	UPG,UCSB-5108-AC2-UPG,	2,UCSB-5108-DC2 cannot be configured outsid UCSB-5108-DC2-UPG instead. (CE200137) num of 2 and allows maximum of 8 from Blade. (ne N20-C6508-
Category 🚺	Qty	Unit List Price (USD)	Option Search		l	Multiple Options Search
BLADE OPTIONS		^	UCSB-B420-M4			Search
Blade 🔶			Option Search Results	Filter By	ALL	🔻 Key 🗸
CHASSIS OPTIONS		^	SKU		Lead Time 🕕	Unit List Price (USD)
Fabric Extender 🔶			UCSB-B420-M4 SVIP		21 days	9,187.00
Power 🔶			Result By: Available Location ()			
Chassis Expansion			SKU	SKU Location		Qty
			UC \$B-B420-M4	Blade > Blade Server > UC	SB-B420-M4	2
			Result By: Potential Location 🎧			Add
Subtotal		1.00	SKU	SKU Hierarchy		
Estimated Lead Time		10 days		onto merureny		

Option Selection Page: Option Search Tab

3. Select the SKU from the drop-down menu as you begin typing or click **Search**. The search results display at the bottom of the page under Result: By Available Location, Result: By Potential Location, and Result: Not available. Search results include estimates lead times, SKU list prices, and locations (available and potential).

Some of the results have icons next to them. These icons give additional information about the corresponding option. Hover over the icon to view the information.

- 4. Click the radio button corresponding to the SKU.
- 5. Click Add.

4.4.4 Searching Unknown SKUs Individually

To select options, configure products, and resolve any warnings or errors in the configuration, complete the following steps:

OPTION SELECTION CISCO2911/P	K9					JAPAN Price List	in US Dollars (USD)
Configuration Summary Country Specification Select Country (Not Required)	V	lew Full Summary	ľ	Marnings (3): • The quantity of Power Cables must be equa quantity. (CE200050) • Have you considered using Cisco ONE http: http://www.ceable.com/com/state/ceable/	://www.cisco.com/go/one for this order		
Category	Qty	Unit List Price (USD)	Ð	Option Search ()		Multip	le Options Search
SOFTWARE		^	CISCO	02911/K9 > IOS Software Version and Type			Key 🗸
IOS Software Version and Type			Image	with Payload Encryption Image with No F	Payload Encryption		
IOS Technology Package Licens	ses			SKU	Qty	Lead Time 🕕	Unit List Price (USD)
VA DSL Firmware Options			0	S29UK9-15501T CP Cisco 2901-2921 IOS UNIVERSAL	1	14 days	0.00
Zero-Touch Deployment EnergyWise Management			0	S29UK9-15303M CP Cisco 2901-2921 IOS UNIVERSAL	1	14 days	0.00
IOS FEATURE LICENSES Unified Communications Feature	e Licenses	^	0	S29UK9-15403M CP Cisco 2901-2921 IOS UNIVERSAL	1	14 days	0.00
Subtotal Estimated Lead Time		2,695.00 14 days	0	S29UK9-15503M CP Cisco 2901-2921 IOS UNIVERSAL	1	14 days	0.00
Reset Configuration	С	ancel Done	Clear	Selection Show Incompatible SKUs			

Option Selection Page

1. From the Estimates Cart page, click **Select Options** below the line item. The Option Selection page displays.

Line items that require validation are denoted by a yellow exclamation icon next to them and are labeled as Invalid.

2. Scroll through the Configuration Summary pane. Using the warning messages at the top of the page as a guide, click the appropriate link within the message to resolve each warning or error. Click the appropriate option(s). Continue this process until all issues have been.

Configuration Summary	View Full Summary
Country Specification	
Select Country (Not Required)	•
Select Country (Not Required)	A
ALBANIA	
ANDORRA	
ANGOLA	
ARGENTINA	
ARMENIA	
ARUBA	
AUSTRALIA	
AUSTRIA	
Energywise Management	•

Option Selection Page: Country Specification Feature



- 3. Click the Country Specification drop-down arrow in the Configuration Summary pane and click the appropriate country. The system will then filter the products based on the country selection, making it easier and faster to configure products correctly.
- 4. Click **Done**. If issues remain, an error message displays in the Done Messages dialog box. Upon clicking Done in the Done Messages dialog box, the Items tab displays a confirmation message indicating that the changes have been saved.
- 5. To correct the error(s), click the Return to Configuration button or link.

'our p	roduct configuration has some errors and warnings.
rodu	ct Configuration Issues
eturr	to configuration to correct these errors.
	The quantity of Power Cables must be equal to the quantity of Primary Power Supply selected. Please adjust the quantity. (CE200050)
•	Have you considered using Cisco ONE http://www.cisco.com/go/one for this order? The Cisco ONE equivalent for the current PID is C1-CISCO2911/K9. (CE201839)
•	Are you aware of the Cisco ONE sales incentives http://iwe.cisco.com/web/sales-community/worldwide sales-incentives. (CE201841)
•	

Done Messages Dialog Box

4.4.5 Viewing Full Summary

You have the option of viewing a summary page of the configuration with the selected options.

From the Option Selection page, click **View Full Summary**. The page refreshes to display the Full Configuration Summary.



Option Selection Page: Configuration Summary Pane

ılıılı cısco

FULL CONFIGURATION SUMMARY CISCO2911/K9				JAPAN Price List in US Do	llars (USD)
				😽 Back to C	onfiguration
SKU	Qty	Lead Time 🕕	Unit List Price (USD)	Extended List Price (USD)	Included
Primary Power Supply					
1.1 PWR-2911-AC Cisco 2911 AC Power Supply	1	14 Days	0.00	0.00	Yes
Power Cables					
1.2 CAB-AC AC Power Cord (North America), C13, NEMA 5-15P, 2.1m	1	14 Days	0.00	0.00	No
Redundant Power Supply Adapter					
Cables and Accessories					
Serial Cables					
Smart Serial Cables					
Console and Auxillary Cables					
ССР					
Cisco Configuration Professional Software					
Included Items					
System Expansions					
1.3 SL-29-IPB-K9 IP Base License for Cisco 2901-2951	1	14 Days	0.00	0.00	Yes
			Configuration Summar	y All prices sho	own in USD
			Subtotal Estimated Lead Time		2,695.00 14 days

Option Selection Page: Full Configuration Summary

4.4.6 Using Cisco Feature Navigator



The Cisco Feature Navigator helps you to find the best software solution for the selected hardware. By using this function, you can find the right product based on software or feature needs.

To access Cisco Feature Navigator, complete the following steps:

1. From the Option Selection page, click Cisco Feature Navigator.

The Cisco Feature Navigator page displays in a new window.

	Open a Case Training CCW Support Community Cisco Feature Navigator
OPTION SELECTION CISCO2911/K9	JAPAN Price List in US Dollars (USD)

Option Selection Page: Cisco Feature Navigator

2. To return to Cisco Commerce, close the new window.

There is no navigation back to Cisco Commerce from the Cisco Feature Navigator page.





Cisco Feature Navigator Page

4.4.7 Configuring the UCS Blade-Centric Solution

Add a UCS Blade-Centric SKU (see <u>Adding Items</u>) to an estimate. To configure the solution, click **Select Options** and work through the different tabs.

- Step-numbered tabs direct through each step to complete a blade-centric configuration. Begin with the blade server and work through the other parts of the solution.
- A blade library is available for you to store blades for reuse. From this library, you can send a copy of these blades to other users.

4.4.7.1 Step 1: Blade Server

To configure a blade server, complete the following steps:

- 1. On the Step 1: Blade Server tab, scroll down the menu on the left to identify the appropriate blade server.
- Click to choose a blade server. The blade displays under the Blade Server Configurator section.
 If the status is invalid, the item must be configured in order to be validated (see step 4).



Step 1: Blade Server Step 2	Chassis 9	Step 3: Fabric Inf	terconi	nect	Step	4: Subscription		Step 5: Servi	ce	Step 6: Sur	nmary
to your solution: Configurat Componer	servers into the 'UCS B of from the 'Available ts' panel, 'My Blade Lii bal Blade Library'.		~	blade s	ire, copy, o ervers in th irator' as n	r change the quantitie e 'UCS Blade eeded.	es of			to the next tab once e been configured. <u>Hide Instru</u>	
Available Components		🕂 My B	lade S	erver L	ibrary				V	ïew Global Blade Se	erver Librar
Blade Server		Blade Serve	er Con	figurate	or						Key
UC S-SPL-B200M4-A1T UCS SP Select B200M4 Advanced1	2.00	Product				Unit List Price		timated Lead ne (days)	Qty	Extended Price	Status
w/2xE52690 v3,8x32GB,VIC1340 Estimated Lead Time: 10 days							No Iter	ms(s)			
UC \$B-B200-M4	\$2,995.00	Add Blade	Serve	r from th	e leπ pane	1					
UCS B200 M4 w/o CPU, mem, drive bays, HDD, mezz Estimated Lead Time: 21 days	+							Next 🕽	Total		\$0.0
UCS-SPL-B200M4-A2T	\$27,235.00								Max.	Estimated Lead Tim	
UCS SP Select B200M4 Advanced2 w/2xE52680 v3,8x32GB,VIC1340	+									(All prices sh	iown in US

Blade Server Tab

3. The quantity defaults to 1. To change the quantity, click the Qty field and enter the quantity.

🕀 My Blade Server Library			V	iew Global Blade Se	rver Library
Blade Server Configurator					Key 🗸
Product	Unit List Price	Estimated Lead Time (days)	Qty	Extended Price	Status
⊕ UC SB-B200-M4 SVIP ▲ UCSB-B200-M4(1) ✓	\$3,094.00	21	1	\$2,995.00	INVALID
UCS B200 M4 w/o CPU, mem, drive	e bays, HDD, mezz				
Power consumption per Blade Serv	ver - Idle: NA, Typical	: NA, Maximum: NA			
Configure Remove Copy	Add to Library				
Add Blade Server from the left panel					
	L.	lext >		A 0	005.00
		Tota	1	\$2	,995.00

Blade Server Tab: Line Item

4. If the line item is invalid, click **Configure**. Using the warning messages at the top of the page as a guide, click the appropriate link and select the appropriate option(s) to resolve the issue. Continue this process until all error messages have been resolved.

Step 1: Blade Server	Step 2: Chassis	Step 3: Fabric Interconnect	Step 4: Subscription	Step 5: Service	Step 6: Summary
Show Instructions					Cancel Finish
UCSB-B200-M4 Configuration Summary		6100 Series (6140XP at	1380 are only supported under 6200 nd 6120XP) Fabric Interconnects. (C 1 Cisco ONE option is required per	E201692)	
sku	Quantity Extended List	CE200791) (CE200791) UCSB-B200-M4 quant (\$)	ty 1 requires a minimum quantity o	f 1 from Processor (CE100012)	
Processor Memory			ty 1 requires a minimum quantity o		012)

Blade Server Tab: Warning Messages

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- 5. Click **Finish**. The blade is now configured and the status is Valid.
- 6. Repeat steps 2 through 6 until all the blades have been added and configured.
- 7. Click **Copy** to create a copy of the blade.
- 8. Click Next > to go to the next tab (see Step 2: Chassis)

🕀 My Blade Server Library			V	iew Global Blade Se	rver Library
Blade Server Configurator					Key 🗸
Product	Unit List Price	Estimated Lead Time (days)	Qty	Extended Price	Status
UCS-SPL-B200M4-A1T UCS-SPL-B200M4-A1T(1)	\$62,837.00	21	1	\$28,227.00	VALID
UCS SP Select B200M4 Advanced1 Power consumption per Blade Serv					
Configure Remove Copy	Add to Library				
Add Blade Server from the left panel					
	8				
		Tota	I	\$28	,227.00

Blade Server Tab: Line Item

4.4.7.1.1 Placing a Blade in the Blade Library

You can save blades for future use by placing them into the blade library to save time.

To place a blade in the library, complete the following steps:

- 1. Click **Add to Library**. The Add to Library dialog box displays.
- 2. Enter a description. This is optional.
- 3. Click Add. The blade library displays above the configuration items.

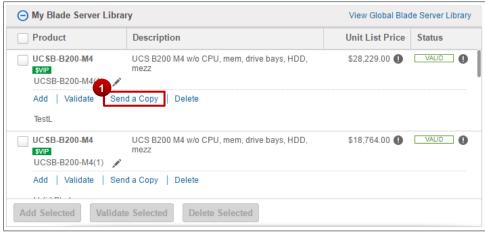
🕣 My Blade Server Library			V	iew Global Blade Se	rver Library
Blade Server Configurator					Key 🗸
Product	Unit List Price	Estimated Lead Time (days)	Qty	Extended Price	Status
UCS-SPL-B200M4-A1T UCS-SPL-B200M4-A1T(1) UCS SP Select B200M4 Advanced1 Power consumption per Blade Sep			1	\$28,227.00	VALID
Configure Remove Copy Add Blade Server from the left panel	Add to Library	lext >			
		Tota	ıl	\$28	,227.00

Blade Server Tab: Line Item

4.4.7.1.2 Sending a Copy of a Blade

To send a copy of a blade, complete the following steps from the blade library:

1. In the My Blade Server Library section, click Send a Copy. The Send a Copy dialog box displays.



Blade Server Tab: My Blade Server Library

- 2. Click the radio button for Email or Cisco.com ID and enter the appropriate information.
- 3. Click Add.
- 4. Click the Message to Recipients field and enter a message. This is optional, but recommended.
- 5. Click Send to Recipients. A success message displays.
- 6. Click **Close** to return to the configuration.



Send a Copy Dialog Box

4.4.7.2 Step 2: Chassis

To configure a chassis, complete the following steps:

1. In the Chassis Preference section, click each drop-down arrow and select appropriate options. The Auto-distribute Blade Servers checkbox is checked by default.

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 Click Apply. The system automatically distributes the pre-configured blades into the chassis. After the first auto-distribute, you can manually distribute blades. This over-rides the auto-distribute completed by the system. See <u>Manual Blade Distribution</u>.

Step 1: Blade Server Step 2:	Chassis Step	3: Fabric Interconnect	Step 4: Subscription	Step 5: Service	Step 6: Summary
	Chassis Preferences' optic ly to all of your chassis. Cl n.	lick the 🛛 🖌 Configura	chassis in the 'Chassis tor' and/or add empty chassis fro Components' as needed.	om 3 You may proceed to t chassis have been co	
vailable Components	1	Chassis Preferences	ŝ		
ASSIS		Select the Chassis T	vpe	Country of Deployment	0
UCS5108-AC2 UCS5108 Blade Server AC2 Chassis, 0	\$5,999.00	AC2 Chassis	÷	North America	\$
PSU/8 fans/0 FEX Estimated Lead Time: 10 days			Power	Preferences	
		Power Supply		Power Cord	
UCSB-5108-DC UCS 5108 Blade DC Chassis/0 PSU/8 fans/0 fabricextender	\$1.00	UCSB-PSU-2500AC	DV \$	C19 - C20 Jumper Cor	rd 2.7m/9ft 🛟
Estimated Lead Time: 10 days		Power Redundancy			
		Grid	\$		
N20-C6508 UCS 5108 Blade Svr AC Chassis/0 PSU/8 fans/0 fabric extender Estimated Lead Time: 10 days	\$1.00	Fabric Extender	Fabric Exter	nder Preferences	
		UCS 2208XP (8 Ext	ernal, 32 Internal 1 💲		
UC SB-5108-DC2 UCS 5108 Blade Server DC2 Chassis/0	\$6,999.00				2
PSU/8 fans/0 FEX		🖌 Auto-distribute blac	de servers among Chassis 🚺		Apply

Chassis Tab

- 3. The chassis displays under the Chassis Configurator section. If the chassis is not verified, click **Configure**. The Configuration Summary pane displays.
- 4. Scroll through the Configuration Summary pane. Using the warning messages at the top of the page as a guide, click the appropriate link to resolve the first item. Click the appropriate option(s). Continue this process until all error messages have been resolved.
- 5. Click Finish. The chassis is now valid and indicates blade distribution per chassis.
- 6. Click **Next >** to go to the next tab.

hassis Configurator			Mar	ually Distribute Blad	es Key -
Product	Unit List Price	Estimated Lead Time (days)	Qty	Extended Price	Status
UCSB-5108-AC2 SVP UCSB-5108-AC2(1)	\$29,743.00	10	1	\$29,743.00	VALID
UCS 5108 Blade Server AC2 Chas	sis, 0 PSU/8 fans/0 Fl	EX			
Power consumption per Chassis - I	dle: NA, Typical: NA,	Maximum: NA	View	1 Blade Servers (per	Chassis)
Configure Remove Copy					
Add Chassis from the left panel					
		6			
	K Back	lext >	ıl	\$57	970.00

Chassis Configurator Section

4.4.7.2.1 Manual Blade Distribution

After the first auto-distribute, you have the option to manually distribute each subsequent time by clicking **Manually Distribute Blades**. Choosing this option over-rides the auto-distribute completed by the system.

Chassis Configurator			[Man	ually Distribute Blad	es Key 🗸
Product	Unit List Price	Estimated Lead Time (days)	Qty		Extended Price	Status
UC SB-5108-AC2 SVP UCSB-5108-AC2(1) ✓	\$29,743.00	10		1	\$29,743.00	VALID
UCS 5108 Blade Server AC2 Chass	sis, 0 PSU/8 fans/0 Fl	EX				
Power consumption per Chassis - I	dle: NA, Typical: NA,	Maximum: NA	V	iew 1	Blade Servers (per	Chassis)
Configure Remove Copy						
Add Chassis from the left panel						
	K Back	lext >			¢57	070.00
		Tota	ıl		\$57,	,970.00

Chassis Configurator Section

To manually distribute the blades, complete the following steps:

- 1. In the Chassis Configurator section, click Manually Distribute Blades. A new page displays.
- 2. Click [▲] corresponding to the chassis to which the blades should be moved. You can choose only two chassis at a time.

	Step 1: Blade Server	Step 2: Chassis	Step 3: Fabric Inte	erconnect	Step 4: Subscription	Step 5: Service	Step 6: Summary
							Cancel
	move Blades tween Chassis	1 Select or drag two Chassis Solution" list to the Chassis the right of this page.		store E	llades between Chassis. Temporarily llades in the "Blade Dock" when you o create room in a Chassis.		Chassis List" button e editing a Chassis. <u>Hide Instructions</u>
	-l-l- C-l-d 4 Ob				dd e New Emply Cheesis		
Chas	ssis in Solution 1 Chas Chassis	sis (Min 1, Max 40) Power Consumption	Blade Server		dd a New Empty Chassis Action		
Chas 1			Blade Server				

Manually Distribute Blades Page

- 3. The chosen chassis move(s) to the chassis staging section on the right of the page. The blades display based on the width of the blade.
- 4. Drag blades from one chassis to another. Blades may be added to the dock temporarily when moving blades from or to completely filled chassis. Doing this will increase or decrease the amount of blades in each chassis.
- 5. The blade dock displays all of the loose blades. Drag blades to the dock or move blades in the dock to the chassis. Blades may be added to the dock temporarily when moving blades from completely filled chassis.

All blades must be removed from the dock into the chassis before the solution can be validated.



6. Click **Finish**. The Step 2: Chassis tab displays.

	Step 1: Blade Server	Step 2: Chassis	Step 3: Fabric I	nterconnect	tep 4: Subscription	Step 5: Service	Step 6: Summary
	move Blades tween Chassis	1 Select or drag two Chassis from Solution" list to the Chassis star the right of this page.		store Blades in	etween Chassis. Temp the "Blade Dock" whe room in a Chassis.		Cancer Finisl
has	sis in Solution 1 Cha	ssis (Min 1, Max 40)		Add a Ne	v Empty Chass		
	Chassis	Power Consumption	Blade Serv	ers	Action	UCSB-5108-AC2(1) Power Consumption,Idle: NA, Typical:	NA, Maximum:NA
1	UC\$B-5108-AC2(1)					UCS-SPL-B200M4-A1T(1)	
	UCSB-5108-AC2	ldle: NA, Typical:NA, Maximum:NA	View 1 Blade	Server	•	(UCS-SPL-B200M4-A1T)	

Manually Distribute Blades Page

- 7. To view the blades in the chassis, mouse over <u>View Blade Servers (per chassis)</u> in the Chassis Configurator section. A list opens, displaying the blade SKUs, quantity, and description. The quantity represents the number of blades in the chassis.
- 8. Click **Next >** to go to the next tab, Step 3: Fabric Interconnect tab.

4.4.7.3 Step 3: Fabric Interconnect

To configure the fabric interconnect, complete the following steps:

- 1. In the Fabric Interconnect Preferences section, click each drop-down arrow and select the appropriate options.
- 2. Scroll down the menu on the left to identify the appropriate fabric interconnect.
- 3. Click to add a fabric interconnect. The fabric interconnect displays under the Fabric Interconnect Configurator section of the page. The status of the added fabric interconnect is unverified, which means you need to configure it in order to be validated.

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Step 1: Blade Server	Step 2: Chassis	Step 3: Fabric Interconnect	Step 4: Subscription	Step 5: Service	Step 6: Summary
Add fabric interconnects to your solution:	Add fabric interconnect(s) from 'Available Components' panel 'Fabric Interconnect Configura	into the 🛛 🖌 your fa	the preferences you want to apply to bric interconnect(s). Click the 'Apply' .		to the next tab once your Is have been configured. <u>Hide Instructions</u>
Vailable Components Fabric Interconnect UCS-FI-6248UP UCS 6248UP IRU Fabric Intu 12p LIC	+	Fabric Interconne Country of Deploy North America	rment ()		
Estimated Lead Time: 10 UC S-FI-6296UP UCS 6296UP 2RU Fabric Int 18p LC Estimated Lead Time: 10	\$48,000.00 No PSU/48 UP/	Power Cord Software Version	Power Pref		
		UCS Manager v2	2.2 \$		Apply

Fabric Interconnect Tab

Product		Unit List Price	Estimated Lead Time (days)	Qty	Extended Price	Status			
		\$34,800.00	10	1	\$34,800.00	INVALID			
UC S-FI-6248UP SVIP UCS-FI-6248UP(1)	, di								
UCS 6248UP 1RU F	abric Int/No P	SU/32 UP/ 12p LIC							
Power consumption per Fabric Interconnect - Idle: NA, Typical: NA, Maximum: NA									
	per Fabric Inte								

Fabric Interconnect Configurator Section

- 4. Click **Configure**. The Configuration Summary pane displays.
- 5. Scroll through the Configuration Summary pane. Using the warning messages at the top of the page as a guide and click the appropriate link to resolve the error message. Continue this process until all error messages have been resolved.
- 6. Click **Finish**. The fabric interconnect is now configured.
- 7. Click **Next >** to go to the next tab, Step 5: Subscription tab.

4.4.7.4 Step 4: Subscription

To add subscriptions to your solution, complete the following:

- 1. In the Available Components section, add any desired licenses.
- 2. Using the warning messages at the top of the page as a guide, adjust the quantity as desired.
- 3. Expand the license sub-section and select the license that corresponds with your desired duration.



4. Click **Next >** to go to Step 5: Service tab.

Step 1: Blade Server Step 2: Chassis		Step 3: Fabric Interconnect	Step 4: Subscription	Step 5: Servi	ice	Step 6: Sur	nmary
w Instructions							
Available Components		Subscription Configurator					Key
ESA-ESP-LIC=	\$0.00	Product	Unit List Price	Estimated Lead Time (days)	Qty	Extended Price	Status
ESA Premium SW Bundle (AS, AV, OF, DLP, ENC) License Estimated Lead Time: 2 days	•	ESA-ESP-LIC= SVIP ESA-ESP-LIC=(1) ESA Premium SW Bundle (\$70.00	2	100	\$7,000.00	VALID
ESA-ESI-LIC= ESA Inbound Essentials SW Bundle (AS, AV, OF) License Estimated Lead Time: 2 days	\$0.00	Power consumption per Su 3 ew Quantity-Based Pricin © ESESP <u>Clear Select</u>		/laximum:			
ESA-ESO-LIC=	\$0.00	Subscription		Duration (Month(s	;))	Unit Lis	t Price
ESA Outbound SW Bundle (DLP, Encryption) License Estimated Lead Time: 2 days	•	ESA-ESP-1Y-S1	C	12			\$32.00
		● ESA-ESP-3Y-S1 🤇	D	36]		\$70.00
		● ESA-ESP-5Y-S1 🤇	D	60			\$111.00
		Add Subscription from the left p	anel				
			4	Next >			

Subscription Tab

4.4.7.5 Step 5: Technical Service

You can choose technical programs to apply to the solution. All mandatory services will automatically be added to the solution.

To add services to the product, complete the following steps:

- 1. Click the Hardware Service Level drop-down arrow and select an appropriate option.
- 2. Click the Software Service Level drop-down arrow and select the appropriate option.
- 3. Click the Duration field and enter any value between 12 months and 60 months as the service duration. You will only be able to enter values within the minimum and maximum range listed below the Duration field. This minimum and maximum range is determined by the service chosen.



- 4. Click **Apply**. The updated Service Total price is reflected in blue.
- 5. Click **Next >** to go to the Step 6: Summary tab. The summary page for the added services.

Step 1: Blade Server	Step 2: Chassis	Step 3: Fabric Interconne	ct Step 4: Subscription	Step 5: Service	Step 6: Summary
To Apply Services:	1 Select Hardware Service Le Software Service Level from		ease enter the Service Duration for ardware and Software Services.		oly to attach your service cross all eligible products. <u>Hide Instructions</u>
Services will be applied to	any products that require mandatory	services.			
Technical Support					
Please select the technica	al support programs you would	like to apply to your solution	n.		
Hardware Service Le	evel	\$	are Service Level	\$	Duration (in months) 0 Range: 0 to 0
Allow Cisco to inclu	ude Additional Services when availal	ble.			
					4 Apply

Service Tab

4.4.7.6 Step 6: Summary

The Summary tab shows each individual component of the configuration.

- The products are displayed, including the main products with sub-products. The Included column lists includes products (yes) and those that were added (no).
- Lead time for each is also given. Services, chosen in the Service tab from the expandable menus, also display. Total cost and lead time for the entire solution displays.
- Power consumption for the solution and for each chassis display in the table. Input and BTUs for the categories Idle, Typical, and Maximum display by chassis and by the total solution.
- A solution must be valid before it can be saved, emailed, or printed. These three functions are initiated from this tab in the form of links.

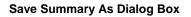
Step 1: Blade Server	Step 2: 0	Chassis Ste	p 3: Fabric Interconnect	Step 4: Subscription	Step 5: S	Service Step 6: S	Summary
A solution must be valid b	efore you may sav	e, email, or print its su	mmary.				
Save Summary As 🛛 🛲 E	mail Summary 🛛 🔒	Print Summary					
ower Consumption (soluti	ion)			Show Chassis			
		Idle	Typical	Maximum			35,281.00
Solution	Input:	NA	NA	NA		Max. Estimated Lead Time	21 days
	BTU:	NA	NA	NA		(All prices	shown in US
	Current	NA	NA	NA			
							Ke
Product	C	Description		Estimated Lead Time	Qty	Extended Price	Included
Product Blade Server	C	Description		Estimated Lead Time	Qty	Extended Price	Included
	1T	•	4 Advanced1 w/2xE52690	Estimated Lead Time	Qty 2	Extended Price \$56,454.00	
Blade Server	1 T T(1)	UCS SP Select B200M v3,8x32GB,VIC1340	4 Advanced1 w/2xE52690 35W 12C/30MB Cache/DDR4				No
Blade Server 1.0 UCS-SPL-B200M4-A UCS-SPL-B200M4-A1	IT I T(1)	UC \$ SP Select B200M v3,8x32GB,VIC1340 2.60 GHz E5-2690 v3/1 2133MHz		10	2	\$56,454.00	No Yes
Blade Server 1.0 UCS-SPL-B200M4-A1 UCS-SPL-B200M4-A1 1.1 UCS-CPU-E52690D	IT T(1)	UC \$ \$P Select B200M v3,8x32GB,VIC1340 2.60 GHz E5-2690 v3/1 2133MHz 32GB DDR4-2133-MHz rank/x4/1.2v	35W 12C/30MB Cache/DDR4	10	2	\$56,454.00 \$0.00	No Yes Yes
Blade Server 10 UCS-SPL-B200M4-A1 UCS-SPL-B200M4-A1 11 UCS-CPU-E52690D 12 UCS-ML-1X324RU-A	IT T(1) SVIP	UC \$ SP Select B200M v3,8x32GB,VIC 1340 2.60 GHz E5-2690 v3/1 2133MHz 32GB DDR4-2133-MHz rank/x4/1.2v Cisco UCS VIC 1340 m	35W 12C/30MB Cache/DDR4 LRDIMM/PC4-17000/quad	10 10	2 4 16	\$56,454.00 \$0.00 \$0.00	No Yes Yes Yes

Summary Tab

To use these additional options, complete the following steps:

- 1. Click Save Summary As. The Save Summary As dialog box displays.
- 2. Click the appropriate radio button for file type and click **Save**. The File Download dialog box displays and saves the summary.

Save Summary As	*
File Format	
PDF (Adobe Acrobat)	
XLS (Microsoft Excel)	
	Cancel Save



- 3. To e-mail the summary, click **Email Summary**. Pricing is not included in email summaries. The Email Summary dialog box displays.
- 4. Click the appropriate radio button.
- 5. Click the To field and enter an appropriate e-mail address. You can add separate multiple email addresses with a comma.
- 6. Click the Message to Recipients field and enter an appropriate message.
- 7. Click **Send Email**. The e-mail is sent to the indicated recipients with the summary included as an attachment to the mail message. A success message displays.



Email Summary
Select format for Summary attachment
(Note: All pricing information will be excluded from the attached summary.)
File Format
PDF (Adobe Acrobat)
XLS (Microsoft Excel)
Compose Email
To:
(Note: multiple email addresses must be comma separated.)
Subject
A solution summary is attached
Message to Recipients
Cancel Send Email

Email Summary Dialog Box

- 8. To print the summary, click **Print Summary**. The Print dialogue box displays.
- 9. Click the appropriate options and click **Print**. The summary prints.
- 10. Click Done.

4.4.8 Configuring an Insieme Bundle Solution

Add an Insieme Bundle or Application Centric Infrastructure (ACI) solution (see <u>Adding Items</u>) to an estimate. To configure the solution, click **Select Options** and work through the different available components.

Complete the following steps to configure a bundle or ACI:

- 1. On the Bundle Configuration page, navigate through the available components on the left side of the page.
- 2. Follow the error messages on top of the page and click 🔹 to add a specific item available for each component. The added components display on the right side of the page.
- 3. Click Add Custom Name to add a custom name to the item.
- 4. Click **Update** when done. The Custom Name displays.
- 5. To edit the custom name, click the pencil icon and make changes.
- 6. For components that display as Invalid (**A**), click **Edit Options** to add/change options and resolve issues. See <u>Choosing Options and Resolving Issues</u>.

Once the items are configured, the status changes to Valid.

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BUNDLE CONFIGURATION NAME	ACI-C9336-BL-96PX 🚺 🗌 M	lax. Estimated Lead Time 14 day	/\$		AUSTR	ALIA Price List in AUDs E	Ex-Tax (AUD)
Set service preferences for this co	nfiguration 🗸					Cance	Done
Warnings (5): OPTICS requires a minimum APIC-M2 requires a minimum The category APIC-M2 is reg	n of 1 component(s). Please						▲ ▼
QSFP-40G-SR-BD= has been	added to the bundle categ	JORY OPTIC S.					
Available Components		OPTIC S > 1 Selected (Min 2,	Max 4)				Key 🗸
Available Components	Unit List Price (AUD)	Product	Unit List Price (AUD)	Adjusted List Price (AUD)	Qty	Extended List Price (AUD)	Status
QSFP-40G-SR-BD= QSFP40G BiDi Short-reach Transceiv	1,665.02 er	QSFP-40G-SR-BD= Add Custom Name	Remove Line	1,665.02	1	1,665.02	VALID
Estimated Lead Time: 14 days			Add a OPTICS	from the left panel			
QSFP-H40G-AOC5M= 40GBASE Active Optical Cable, 5m	1,520.57	FIXED SPINE SWITCHES >	1 Selected (Min 1, Max 1)				
Estimated Lead Time: 14 days		€ Product	Unit List Price (AUD)	Adjusted List Price (AUD)	Qty	Extended List Price (AUD)	Status
QSFP-H40G-AOC7M= 40GBASE Active Optical Cable, 7m Estimated Lead Time: 14 days	1,520.57	N9K-C9336PQ SVIP Add Custom Name	6 Edit Options Remove Line	54,740.45	1	54,740.45	INVALID
QSFP-H40G-AOC10M= 40GBASE Active Optical Cable, 10m	1,520.57	LEAF SWITCH OPTION 1 > () Selected (Min 0, Max 2)				
Estimated Lead Time: 14 days	•	Construct Product	Unit List Price (AUD)	Adjusted List Price (AUD)	Qty	Extended List Price (AUD)	Status
			Add a LEAF SWITCH OF	PTION 1 from the left p	anel		
⊕ LEAF SWITCH OPTION 1		APIC-M2 > 0 Selected (Min 1	, Max 1)				

Bundle Configuration

7. For configured items, you can also add services. Click **Edit Service/Subscriptions**. Follow the steps to add services as in Adding Services.

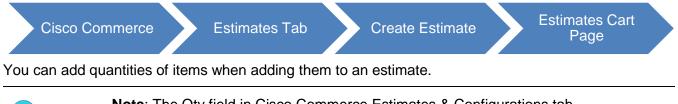
Note: Standard durations for technical services can be between 12 and 60 months and appropriate multi-year discounts will apply.

Available Components			CS > 1 Selected (Min 2, Max 4)					Key
Available Components Unit Li	st Price (AUD)		Product	Unit List Price (AUD)	Adjusted List Price (AUD)	Qty	Extended List Price (AUD)	Status
QSFP-40G-SR-BD= QSFP40G BIDI Short-reach Transceiver Estimated Lead Time: 14 days	1,665.02	÷	QSFP-40G-SR-BD= 〇 Add Custom Name Remove Lin		1,665.02	1	1,665.02	VALID
QSFP-H40G-AOC5M= 40GBASE Active Optical Cable, 5m	1,520.57	FIXED) SPINE SWITCHES > 1 Selected (Mi		from the left panel			
Estimated Lead Time: 14 days		¢.	Product	Unit List Price (AUD)	Adjusted List Price (AUD)	Qty	Extended List Price (AUD)	Status
QSFP-H40G-AOC7M= 40GBASE Active Optical Cable, 7m Estimated Lead Time: 14 days	1,520.57	⊕ ∳	N9K-C9336PQ SVIP Add Custom Name Edit Options	7 Edit Services/Subscrip	55,920.28	1	55,920.28	VALID

Bundle Configuration Page: Change Services/Subscriptions Option



4.5 Setting Quantities for Items



Note: The Qty field in Cisco Commerce Estimates & Configurations tab accommodates up to nine digits, for example, 1234567891.

To change the quantity for each of the items, enter the desired number of items or options in the Qty field for that line and press **Enter**. For multiple items and options, repeat this step for each item. The Extended Net Price is the price per unit multiplied by the quantity.

4.5.1 Splitting Quantity of Items

You can split quantity of items for configuration, adding different services or ordering partial quantity.

To split quantity of an item, complete the following steps:

1. Click Split below the item quantity. The Split Quantity dialog box displays.



Estimates Cart Page: Line Item

- 2. Click Add to split the quantity. The dialog box refreshes.
- 3. Type the quantity in the new line.
- 4. Alternately, click the delete icon to remove a newly added line.
- 5. Click **OK**. The Items sub-tab refreshes to display the new line with split quantity.

Split	Quantity	×
To Spl	it quantity of item, click on add, enter quantity an	d confirm.
	Hardware, Software and Services	Quantity
	WS-C4948E	5
ò	WS-C4948E	
	Cancel	Ok Add

Split Quantity Dialog Box



4.6 Adding Services

There are various types of Cisco service offerings:

Technical services are always attached to hardware or software product. They can either be ordered at the point of sale (in Cisco Commerce) or purchased separately as a service only line (in Cisco Commerce).



Note: Standard durations for technical services can be between 12 and 60 months and appropriate multi-year discounts will apply.

Advanced Services (AS): Each type of Advanced Service has different deliverables, delivery models, as well as ordering rules. Not all are orderable within Cisco Commerce.

- AS Transaction (AS-T): These cannot be ordered within Cisco Commerce, you must fax this order.
- AS Subscription (AS-S): These can be ordered within Cisco Commerce by agents on your behalf, once you submit or fax your order.
- AS-Fixed (AS-F): These services have a fixed scope, fixed price, and fixed cost and are orderable with Cisco Commerce. For more information on ordering AS-F SKUs in Cisco Commerce Deals & Quotes tab, see <u>Adding Fixed Scope Consultancy SKUs</u>.

You can add services to items as part of the product configuring process. Services for previously ordered products can also be ordered separately as a service-only quote, later converted to an order. See <u>Cisco Commerce Deals and Quotes User Guide</u>.

Best Practice: Add services as part of the product configuration within your estimate, quote, or order, rather than as a separate service-only line item.

For more information on Cisco services, see: http://www.cisco.com/web/partners/services/index.html

4.6.1 Setting Default Services Options



Within your Cisco Commerce My Profile and Preference section, you can select your default service choices, as well as determine whether you would like Cisco Commerce to automatically add services to your valid configurations across all quotes, estimates, and orders in Cisco Commerce (refer to the <u>Getting Started with Cisco Commerce User Guide</u>). You can also override these preferences at the quote, estimate, or order level.

If you ask Cisco Commerce to automatically add services to your order, they will be chosen based on the following:

- Services will be attached based on the service preferences set within the order
- If no services are set within the order, then preferences from your My Profile and Preferences will be used



 If selected preferences are not applicable (or not set), the system attaches services based on existing service attach rules, such as, products being ordered, service program availability, certifications, Bill-to and install site and others

To set the service options in the items sub-tab (these will override any preferences that were set under your My Profile and Preferences), complete the following steps:

- 1. In the Service Preferences window, your Default Service Preference appear. You can also Search for the Service Level, select a service level, and your selection will be automatically saved for this quote.
- 2. Click the appropriate radio button to allow Cisco to attach services automatically or to add services manually.
- 3. Start typing in the **Select/Edit Service Level** box and a list of matching Services will appear; select the desired Service Level

t preferences for this quote		_
Service Preferences Select a default Service Preference for this Quote to be applied to each item added. Allow Cisco to attach appropriate services each time a new item is added to a quote. I will add services to items myself. Note: Cisco will still add mandatory service where appropriate. Select/Edit Service Level Switch To Guided Viel		
Allow Cisco to attach appropriate services each time a new item is added to a quote. I will add services to items myself. Note: Cisco will still add mandatory service where appropriate. Select/Edit Service Level Switch To Guided Vieland	×	
SNTC 8X5XNBD (SNT)	ew	
3 Comes with SWSS (ECMU) and 3 other Compatible Service Levels Note: Cisco may apply compatible services along with selected service level (For example: Software Services), if required.	2	

4.6.2 Adding Services to Items in the Configuration

There are two ways to edit services using the Services Option widget. You can attach services at the Header level by clicking on **Edit Service** in the More dropdown on your estimate. The Service Level you select will apply to all selected lines of your configuration. Use this option for basic Service Level changes. You can also click **Edit/Remove Servi**ce on an individual line of your configuration. Use this option for more complex Service Level changes.



¢.) Н	ardware, Soft	Validate Apply Discount	ead Time 🚺	Unit List Price (USD)	Qty	Unit Net Price (USD)	Discount (%)	Extended No Price (USI
•) 1	UCSB-B20 more O UCS B200 N U, mem, HD	Remove Services Edit Services	28 days	9,291.00	1	9,291.00	0.00	9,291.0
			-Nov-2014 09:43:49 PST	Validate Add Note	e More Actions	~			Add Subto
] 🖸) [2	Edit Options	-AC2= ade Server AC2 Chassi	J Validate ∣ Add Note 21 days	e More Actions 29,825.00	1	29,825.00	0.00	Add S 29,3

You can attach Services at the Header level if you wish to apply the service level across all selected lines of the configuration in the cart. However, because preferences in the cart are not filtered by Product lines, the Service level may or may not successfully apply to each line. You should verify that each line of your configuration has the correct Service level applied before proceeding with your order.

1. Place a checkmark next to the desired SKUs before selecting **Edit Services** from the **More** dropdown.

2. Select/Edit Service Level

Edit Services for the Selected Lines	×
Select/Edit Service Level Help search and specify service level	Select/Edit Duration, Date and Co-Term Helps specify contract tenure
4	Apply to Selected Line Items

3. Start typing the name of the Service; the widget will display a list of potentially-matching Service Levels.

Ec	lit Services for the Selected Lines	Not Applicative	66,000.00	59,400.00 10.00 ×
	Select/Edit Service Level		Select/Edit Duration,	, Date and Co-Term
8	SBS4	Q	Helps specify contract to	enure
	Planning, Design and Implementation Prtnr calls Cisco (PDISS)			
	SBS4 24x7x4 3yr Small Business Ptnr Rapid Response (SBS4)		3	
	SP Software Application Sub-ort Plus Upgrades (SPSAU)			
	Enterprise Mobility Services Platform Support (EMSPS)			Apply to Selected Line Items

4. Notice the Compatible Service Lines display after selecting a service.



- 5. Change the duration by entering in number of months, start date, or start and end date.
- 6. Apply the Service to the Selected Lines (see Note below):

lect/Edit Service Level 🖌 💼	Select/Edit Duration, Date and Co-Term							
SBS4 24x7x4 3yr Small Business Rtrift Rapid Response (SBS4)	O Duration) Delay service start by	Co-Term service by					
Comes with SWSS LIPGR 3XR DISTI (35CMU) and other Compatible Service Levels	Start Date	Co-Term End Date						
Note: Cisco may apply compatible services along with selected ser	26-Apr-2016	27-Apr-2017	Duration 12 Months					

Note: applying the Service to the selected lines does not guarantee that the Service will be added to each line; you should manually verify each individual configuration to ensure it has the correct service level.

4.6.2.1 Attach Services on the Edit Services/Subscription Page

The Edit Services/Subscription page summarizes all attached services and subscriptions. You can use this page to compare prices for different service offerings, see what services are available, or add secondary services. You can also attach one or more service levels to one or more lines of your configuration.

1. Click either **Edit Service/Subscription** or **Select Service/Subscription** on any line to open the Edit Services page.

Se	arch by	Sku , Description and Product Family		1 Add	i	Find Products & Solutions Actions				
Ren	iove \$	elected Lines Validate Apply Disco	ount					=		
	¢ ⊕	Hardware, Software and Services	Lead Time 🚺	Unit List Price (USD)	Qty	Unit Net Price (USD)	Discount (%)	Extended Net Price (USD)		
	Ð	1.0 CISCO2911-V/K9 CP SVIP C-1 more O Cisco 2911 Voice Bundle, PVDM3-16, UC License PAK, FL-CUBE10 Valid as of 23-May-2016 03:28:31 PDT Edit Options Edit Service/Subscription	14 days	4,048.00	2 Split	4,048.00	0.00	8,096.00 Add Subtotal		
	æ	2.0 CISCO2911/K9 CP SVIP C-1	Not Applic able	2.695.00	2	2,695.00	0.00	5,390.00		



2. The Service Options widget will appear in Simplified View with the service-eligible lines below.

	SERVICES/SUBSCRIPTIONS WS-C4500X-3	2SFP+				Global Price List US Availability (USD)				
						Products not map	ped to Ser	vices/Subscriptions		
Servic	e Options									
Choo	ose Service Level from All Service Progra	ms 🗸 Switch to Le	P							
Search by Name & Description					Time Duration 🚺	Duration	Duration			
	Note: Cisco may still install another compatible service if required. Compatible services are t services that come with primary service and are based on products.				Duration Delay service start to Co-Term service to	Months: 1 to 60		Reset Apply		
ବ	Service SKU		Product SKU			Unit List Price (USD)	Qty	Total List Price (USD)		
©	Service SKU SMART NET TOTAL CARE (1 ITEM)	SNT (SNTC 8X5XNBD SUMMARY					Qty			
Ŭ	SMART NET TOTAL CARE (1 ITEM)	SNT (SNTC 8X5XNBD) 🧪 Durati				Qty 1			

- 3. Search for specific service levels within a service program.
- 4. Select a service program from the dropdown list to focus your search to a specific program. All included services and compatible services will be displayed after choosing a service.

	Service Options 4			
	Choose Service Level from SMART NET TOTAL CARE V Switch to Legacy Service P			
	Search by Name & Description		Time Duration 🕕	Duration
3	SNTC NO RMA (SW)	and/or	Ouration	Months: 1 to 60
	SNTC 8X5XNBD (SNT)		 Delay service start to 	
	SNTC 8X5XNBDOS (CS)		 Co-Term service to 	
	SNTC 8X7XNCDOS (SNCO)	_		·
	SNTC 8X7XNCD (SNC)			Reset Apply



5. Specify the Time Duration in months. You can also Delay Service start by selecting a start date and duration. You can also Co-term Service by inputting the proper start and end dates.

Choose Service Level from SMART NET TOTAL CARE V Switch to Legacy Service P		Time Duration 🕕	Duration	
SNTC		Ouration	Months: 1 to 60	
SNTC NO RMA (SW)	and/or	O Delay service start to		
SNTC 8X5XNBD (SNT)		Co-Term service to		
SNTC 8X5XNBDOS (CS)				
SNTC 8X7XNCDOS (SNCO)				Reset
SNTC 8X7XNCD (SNC)				

6.	Select	Apply to	add the	service	configuration.
----	--------	----------	---------	---------	----------------

Choose Service Level from All Service Programs Switch to Legacy Service P	and/or			
Search by Name & Description		Time Duration 🕕	Duration	
lote: Cisco may still install another compatible service if required. Compatible services are the ervices that come with primary service and are based on products.		 Duration Delay service start to Co-Term service to 	24	6
				Reset Apply

7. After selecting Apply, you will see the updated Service and Duration.

G	Service SKU	Product S	Product SKU			Qty	Total List Price (USD)
Θ	SMART NET TOTAL CARE (2 Items)	C4S (SNTC 8X5X4OS) /	Duration 24 Months				



- 8. You can always check the rest of your items by selecting Non Serviceable Products.
- 9. Delete all services at any time by selecting **Remove All Services**.

Ser	vice Non Serviceable Products 8								
Servic	e Options								
Choo	ose Service Level from All Service Programs 🗸	Switch to L	egacy Service P		Time Duration	D	Duration		
Sea	rch by Name & Description				Ouration		Months: 1 to 84	4	
	Cisco may still install another compatible service if require es that come with primary service and are based on prode	ervices are the	and/or	 Delay service Co-Term service 					
									Reset Apply
ବ	Service SKU		Product SKU				Unit List Price (USD)	Qty	Total List Price (USD)
Θ	SOLUTION SUPPORT WITH SNTC (1 ITEM)	SSSNT (SOL SUMMARY	N SUPP 8X5XNBD)	Duration 12 Mag					
	CON-SSSNT-C19AIRKC						810.00	1	810.00
	SOLN SUPP 8X5XNBD Cisco ONE - 3504 Wireless C SERVICE SKU	ontroller	C1-AIR-CT3504- Cisco ONE - 3504		roller			1	
	Change Service Remove Service		PRODUCT SKU						
Rem	ove All Services 9 move All Additional Servi	ces				Configuration	n Summary	All	prices shown in USD
						Services			810.00

4.6.2.2 Attach Services to Unassigned Products

Products that don't have services attached are listed under Unassigned.

- 1. To add services, click on Add a Service SKU.
- 2. Select the service you want to want to attach.
- 3. Click Apply.

¢9	Service SKU		Product SKU			Unit List Price (USD)	Qty	Total List Price (USD)
Θ	CISCO SOFTWARE SUPPORT SERVICE - S (1 ITEM SERVICE PROGRAM	_	ECMU (SWSS UPGRADES) 🥖	Start Date 30-Jul-2017	End Date 29-Jul-2018	Duration / 12 Months		
	CON-ECMU-C1F1S19K					192.00	1	192.00
	SWSS UPGRADES SERVICE SKU Change Service Remove Service		C1F1PISR1900SK9 Cisco ONE Foundation Perpetual I PRODUCT SKU	ISR 1900 Std		1		
Θ	Unassigned							
	+ Add a Service SKU		C1-CISCO1921/K9 PRODUCT SKU Cisco ONE - ISR 1921				1	
Add	I Service	×						
	: These are available choices in program and if you like to				Configu	ration Summary	All	prices shown in USD
	w/choose a service level from a different program - then please c ink Service Options and navigate to desired program.	lick			Serv	rices		192.00
0	SNTC NO RMA (SW)	^						Cancel Done
0	CMB SPT SVC 24X7X4OS (NCH4P) (NCH4P)							
t ()	CMB SPT SVC 24X7X2OS (NCH2P) (NCH2P)	≡ t∣	Cookie Policy Trademarks					
	SNTC 8X5XNBD (SNT)							
0	CMB SPT SVC 24X7X2 (NCH2) (NCH2)							
0	CMB SVC 24X7X2OS (NCF2P)	-						
	Cancel App	y 3						

4. The product is moved off the Unassigned tab and is displayed with its attached Service Program, Duration, and Service SKU.

Θ	SMART NET TOTAL CARE (1 ITEM)	SNT (SNTC 8X5XNBD) SUMMARY	1	Start Date 30-Jul-2017	End Date 29-Jul-2018	Duration 12 Months	1				
	CON-SNT-C1C1921								22.33	1	22.33
	SNTC 8X5XNBD SERVICE SKU			C1-CISCO1921/K9 Cisco ONE - ISR 1921					1		
	Change Service Remove Service		PRO	DUCT SKU							



5. If the service selected can't be attached, a message will appear with instructions.



4.6.2.3 Adding Secondary Services in the Edit Services/Subscriptions Page

- 1. When available, click on Additional Services to show available secondary services
- 2. Select the appropriate service and duration.
- 3. Click **Apply**.

ତି	Service SKU			Product	SKU			Unit List Price (US		Qty	Total List Price (USD)
Θ	SMART NET TOTA	AL CARE (2 Items) 🛗	SNT (SNTC 8X5XNBC SUMMARY	· ·	ration Months						
	CON-SNT-AIRDO	CAP7							0.00	1	0.00
	SNTC 8X5XNBD SERVICE SKU				702I-SK910					1	
	Change Service	ge Service Remove Service			802.11n CAP702, 10APs, 2x2:2SS; Int Ant; S RegDomain PRODUCT SKU						
	Additional Servi	ces 🗸 There are 2 A	dditional Services available	. Click here to	o add						
	CON-SNT-AIRKO	CAP7		<u> </u>					6.67	10	66.70
	SNTC 8X5XNBD SERVICE SKU		Add/Edit Addi	Add/Edit Additional Services				×		10	
	Change Service										
	Additional Servi	ces V There are 2 A		Additional Services Duration/Dates may vary based on your Primary Service Duration and Coterm preferences							
Rem	ove All Services	Remove All Additio	nal S Available Additio	onal Service	es	Duration (In-Months)		mai	ry	All	prices shown in USD
		CON-TASI-A MP IMP)	CON-TASI-AIRDCAP7 (Tech App Spt 12 MP IMP)			12				66.70	
			CON-TASS-4 MP SUAC)	AIRDCAP7 ((Tech App Spt	12				[Cancel Done
ts H F	eedback Help Site	Map Terms & Conditions	Pr				Cancel	oply			

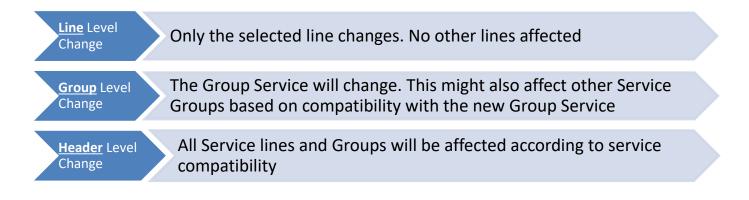
4.6.2.4 Changing Services in the Edit Services/Subscriptions Page

There are three different levels where you can make changes to your Service. It is important to understand how your selections will affect your configuration. The following are three different configuration level changes available and how they affect the entire configuration.

- 1. Header Level Changes
- 2. <u>Group</u> Level Changes
- 3. Line Level changes



Sea	arch by Name & Description			Time Duration 🕕	Duration		
	Cisco may still install another compatible service if re- ces that come with primary service and are based on p		and/or	 Duration Delay service start to Co-Term service to 	Months: 1 to 60		
						[Reset Apply
ල	Service SKU	2 Product SKU			Unit List Price (USD)	Qty	Total List Price
Θ		T (SNTC 8X5XNBD) / Duration MMARY 12 Months					
	CON-SNT-C45X32SF				1,800.00	1	1,800.0
	SNTC 8X5XNBD SERVICE SKU Change Service Remove Service	WS-C4500X-32SF Catalyst 4500-X 32 I PRODUCT SKU		Base, Front-to-Back, No P/S		1	





1. On the Edit Services/Subscriptions Page, the eligible items will display and the option to **Change Service** will be available to make a Line level change.

ତ୍ତ	Service SKU		Produ	ICT SKU	Unit List Price (USD)	Qty	Total List Price (USD)
Θ	SMARTNET SERVICES (1 ITEM)	SU1 (IPS Svc, AR NBD) SUMMARY	-	uration 2 Months			
1	CON-SU1-2951VSEC IPS Svc, AR NBD SERVICE SKU Change Service Remove Service		Cisco 2	I-VSEC/K9 2951 Voice Sec. Bundle, PVDM3-32, UC&SEC Lic JCT SKU	1,464.00	1	1,464.00
Θ	SMARTNET SERVICES (1 ITEM)	SU2 (IPS Svc, AR 8x5x4 a SUMMARY	abc) 🥖	Duration 12 Months			
	CON-SU2-FLCUB100 IPS Svc, AR 8x5x4 abc SERVICE SKU Change Service Remove Service		Unified	JBEE-100-RED I Border Element Ent Lic, 100 Sessions, Redunda JCT SKU	2,807.00	2 2	5,614.00
Remo	Remove All Addi	tional Services			Configuration Summary Services	AI	l prices shown in USD 7,078.00
							Cancel Done

- 2. A dropdown menu will appear with possible options to change the service. Select the appropriate service and click **Apply** to complete the Line level change.
- 3. If the required service is not available in the current program, click on **Service Options** to make a Group level Service change.

	Ô	Service SKU		Produ	uct S	SKU		Unit List Price (USD)	Qty	Total List Price (USD)
	Θ	SMARTNET SERVICES (1 ITEM) SU1 (IPS Svc, AR SERVICE PROGRAM SUMMARY	NBD)	-)ura 2 Mo	tion onths				
		CON-SU1-2951VSEC IPS Svc, AR NBD SERVICE SKU Change Service Remove Service			2951	EC/K9 Voice Sec. Bundle, PVDM3-32, UC&SEC Lic SKU	c,FL	1,464.00	1	1,464.00
	Current Program: SMARTNET SERVICES X		3x5x4 at	ıbc) 🥖		Duration 12 Months				
	Note: These are available choices in SMARTNET SERVICES program and if you like to review/ <u>choose a service level teom</u> a different program -							2,807.00	2	5,614.00
	then please click this line Service Options an 3 igate to desired program.			FL-CUBEE-100-RED Unified Border Element Ent Lic, 100 Sessions, Redundancy PRODUCT SKU				2		
	IPS Svc, AR 8x5x4 abc (SU2)						Configuratio	n Summary	All	prices shown in USD
) IPS Svc, AR 24x7x4 (SU3)					Services			7,078.00
	O IPS Svc, AR 24x7x2 (SU4)								[Cancel Done
		Svc, AR NBD (SU1)								
Cont		S Svc, Onsite NBD (SUO1)	ent C	ookie Po	olicy	Trademarks				
		Cancel	2							



4. The system directs you to the top to search for an appropriate Service Program. Search and select the appropriate Program and click **Apply**.

hoose Service Level from NETWORK SUPPORT COMB Switch to Guid NCDT SMART NET TOTAL CARE S TEAR SUPPORT (3 variations) ote: Cisc SOLUTION SUPPORT WITH SNTC (8 variations) e services are t SP BASE SERVICES (10 variations) NETWORK SUPPORT COMBINED SERVICES (32 variations)	and/or	Time Duration ① Duration Delay service start to Co-Term service to 	Duration Months: 1 to 60	4
--	--------	--	-----------------------------	---

5. The system will automatically adjust all necessary Service programs in other Minor Product Lines as necessary.

Note: This will not affect Unassigned Products eligible for service.

- 6. Once all changes are complete, Click Done.
- 7. For Header level changes, refer to section 2.1. **Note**: Header Level changes will affect Unassigned Product lines eligible for service.



4.6.2.5 Add/Edit a Corresponding Subscription



Note: Only Product SKUs that have Subscriptions associated with them will have the option of adjusting subscription licenses and durations. Otherwise, the Subscriptions Tab will not appear in the Edit Services/Subscriptions Page.

1. Click Edit Subscription to change the details of the subscription.

uba -	rintian Orti-							
ubsc	ription Optic	ons	Vie	w 100-199 Users 🗸				Ke
lice	nse Count	100		100 - 199 l	Jpdate			Term
ē.	Subscripti	on SKU		Product SKU		Qty	Unit List Price USD	Total List Pri ∪
Э	ESA INBO		ESESI (SUBSCRIPTION-	CONTENT)				
	Durati	on 36 Months Licer	nse Band 100-199 Users	Term 3YR				
		-3Y-S1 😒 SVIP ***				100	41.93	4,193
1	Inbound E	PTION SKU Essentials Bundle(AS+A)	V+OF) 3YR Lic, 100-199 Us	ESA-ESI-LIC= PRODUCT SKU		100		
	Edit Subs	scription 🧹 Remove	Subscription	ESA Inbound Essentia	s SW Bundle (AS, AV, OF) License			
lem	ove All Subs	scriptions				Configuration Summ	ary All	prices shown in U
						Subscription		4,193

2. You can edit the Start Date and duration of the subscriptions.

G	Subscription SKU	Product SKU	Qty	Unit List Price USD	Total List Price
Θ	ESA INBOUND BUN LIC (1 Item) ESESI (SUBSCRIPTION-C GROUP DESCRIPTION SUMMARY	CONTENT)			
	Duration 36 Months License Band 100-199 Users	Term 3YR			
	ESA-ESI-3Y-S1 😧 SVIP ***		100	41.93	4,193.00
	SUBSCRIPTION SKU Inbound Essentials Bundle(AS+AV+OF) 3YR Lic, 100-199 Us Edit Subscription	ESA-ESI-LIC= PRODUCT SKU ESA Inbound Essentials SW Bundle (AS, AV, OF) License	100		
2	ESA-ESI-1Y-S1 Inbound Essentials Bundle(AS+AV+OF) 1YR Lic, 100-1		Duration (Months)	19.06	
	ESA-ESI-3Y-S1 Inbound Essentials Bundle(AS+AV+OF) 3YR Lic, 100-1	Edit Start Date	Duration (Months)	41.93	
	ESA-ESI-5Y-S1 Inbound Essentials Bundle(AS+AV+OF) 5YR Lic, 100-1		Duration (Months)	66.69	
				C	ancel Apply

3. Click Apply and then Done to make updates to the subscription.



4. Once these steps are completed and the Services/Subscriptions are configured, proceed normally with the Quote to Order process

4.6.3 Remove Services

There are multiple ways to remove services from a product. The following are the most common.

- 1. Select the Product lines that will have their services removed
- 2. Click on **More** to display the available options, if it has not already displayed.
- 3. Click on Remove Services. This will remove the attached services for all selected Product lines

Q Link to Opportunity	Set pr	eferer	nces for this estimate 🗸					*	Back to Solution
Set Install/Service Location Combined Service Calculator See Recommended Global Sales			S4-HA-K9=		1	Add	Find Produ	cts and Solutio	ons Actions 🗸
Kits		B	Hardware, Soft Validate	Time O	Unit List Price	Qty	Unit Net Price (USD)	Discount (%)	Extended Net Price (USD)
Calculate Payment Options		Θ	1.0 1X100GB- Cisco CRS Interface Mo	3 plicable	66,000.00	1	59,400.00	10.00	59,400.00
AS-Fixed 1			Valid as of 1 Edit Services Select Options Edit/Remove			15 🗸	7540.00		7.540.00
Learning Credits			Service Start Date / 29-Jun-2016	Duration		1	7,549.00	00.00	7,549.00
			2.0 W6-6509EXLFWNK9 Cisco CRS Services 1x100GbE Interface Module REFURBISHED Valid as of Mon Apr 27 02:59:41 F Select Options Select Service	PDT 2015	60,000.00	1 Actions V	59,400.00	50.00	59,400.00

4.6.3.1 Remove services in Edit Service/Subscription page

- 1. On the Edit Service/Subscription page, click on the **delete icon** (^{im}) next to the service program you want to remove. This will remove the service program for all products serviced by it.
- 2. Alternatively, if you only need to remove the service for one Product line, click on **Remove Service**, if applicable
- 3. Lastly, click on **Remove All Services** or **Remove All Additional Services** to remove accordingly.

5 Managing an Estimate

In Cisco Commerce, you can claim an estimate, link your estimate to a deal ID, apply discounts at estimate and line level, calculate financing options for your estimate, and import the estimate into a deal/quote or an order. You can also view, tag (attach a keyword), clone, export, e-mail, print, share, delete, or save as an estimate using the common utilities. The following sections explain how to use these functionalities.

5.1 Claiming an Estimate



Guest users are often non-registered customers who do not have a Cisco ID. They are able to browse through Cisco offerings and create an estimate. They can add items to their cart, configure the products, add services, validate, reorder lines, export, e-mail, add notes, tag, and print estimates. However, they do not have the access to pricing information or other Cisco Commerce capabilities.

Hence, to request a quote, they may share the estimate ID with you. You can then search for and claim the estimate in Cisco Commerce. Refer to the <u>Getting Started with Cisco Commerce User Guide</u> for information on how to perform a search in Cisco Commerce.

Note: View the Customer Estimates option from the Estimates tab or option on the left side of the Estimates Cart page to view any pending acceptances from the guest users.

To claim an estimate, complete the following steps:

1. From the Estimates tab on the Cisco Commerce homepage, click Claim Estimate.

Alternatively, you can select **Claim Estimate** from the options available on the left side of the Estimates page. The Claim Estimate page displays.



Catalog		Estimates	Deals & Quotes	Orders	Services & Subscriptions	Software
stimate Name 🔻	<	Claim Estima	ate			Create New Estimate
	Q	Enter the Estim	nate ID provided by the customer	to Claim Estimate		
Ivanced Search						Search
All Estimates						
Recent Estimates						
Shared Estimates						
Saved Searches						
View Tags						
view rugs						
Access Shared Estin	nate					
E Customer Estimates						
N J	-11					

Claim Estimate Page

- 2. Enter the Estimate ID provided by the customer in the field and click **Search**. The search result displays the estimate.
- 3. Review the estimate details such as Estimate ID, Created On, Modified on, Customer Name (if available) and Total Price. If the guest user did not previously enter the customer details, enter Customer Information for the estimate and click **Claim**.

Estimate Name 🔻	<	Claim Estimate				Create New Estimate
Q		Stimate has been s	uccessfully claimed. Pleas	e use KC50314710UA for f	urther processing. Mew Claimed Estim	5
Advanced Search		-				
∃ All Estimates			ID provided by the cu	stomer to Claim Estim	ate	
Recent Estimates		YK50314708LI				Search
Shared Estimates		C. Harrison and S. Harrison an		1		
Saved Searches		Estimate ID YK50314708LI	Created On 2014-09-30	Modified On 2014-09-30	Customer Name	Total Price
💊 View Tags						
Access Shared Estimate		Customer Information	on			
Customer Estimates		First Name			Company	
Claim Estimate						
	1	Last Name			City	
		Phone Number			State	
		Email			Zip Code	
					Country	
					Select	•
						Cancel

Claim Estimates Page



- 4. Once the estimate has been successfully claimed, a success message displays.
- 5. Click View Claimed Estimate to proceed to the Estimates page within Cisco Commerce.
- 6. Once accepted, the reseller contacts the guest user to finalize transaction details. The reseller can import the estimate into a quote or an order, and proceed with the Quoting and Ordering process. Refer to the <u>Cisco Commerce Deals and Quotes User Guide</u> and <u>Cisco Commerce Order User Guide</u> for the Quoting and Ordering process. The reseller can also share and collaborate the estimate with others in their organization. See <u>Using Common Utilities for Estimates</u>.

5.2 Linking the Estimate to a Deal ID



You can link your estimate to an approved deal and generate an approved pricing proposal to streamline your internal ordering process. However, you first need to get the deal ID and approved discount from your Account Manager.

Best Practice: Verify the products that are on the approved deal. Your Account Manager can also link the estimate to a deal during your collaboration.

To link an estimate to the Reusable Non-standard Discounts (RNSDs), complete the following steps:

1. From the Estimates Cart page, click Link to Deal. The Link to Deal page displays.

Estimates		Search All		Q		~ 🖾 60 🏢
A Catalog	Estimates	Deals & Quotes	Orders	Service	es & Subscriptions	Software
I want to	< ESTIMATE	NAME Estimate_XA66288797AL (XA6	Export 🔉 Email 6288797AL) 🖌	K Share 🕒 Clo		Tag 🏋 Continue Shoppin Price List in AUDs Ex-Tax (AUD)
View Estimate Info	ESTIMATE I XA662887		CREATED BY		CREATED ON 02-May-2016	
Set Install/Service Location See Recommended Global Sales	Search by	Sku , Description and Product Family		1 Add	Find Produc	ts & Solutions Actions 🗸
Security Subscriptions	Remove S	elected Lines Validate Apply Hardware, Software and Services	Discount	Unit List Price (AUD)	Qty Unit Net Price (AUD)	Discount Extended Net
AS-Fixed			No rec	cords found		

Estimates Cart Page



2. Search for deals using different search criteria and click **Search**. The search results display.

I want to	<	Export	a Email	< Share	🚯 Clone	🛗 Delete	🍆 Add Tag	← Back to Estimate	💘 Contin	ue Shopping
i want to	ESTIMATE NA	AME Estimate_XA6628	8797AL (XA6	6288797AL)	1			AUSTRALIA Price	e List in AUDs E	x-Tax (AUD)
View Estimate Information	ESTIMATE ID XA66288797			CREATED	BY			CREATED ON 02-May-2016		
Note to Deal	My Deals									
Set Install/Service Location	Customer Na	ime				Deal Name				
🗂 See Recommended Global Sales Kits	plaza									
	Deal Status					Deal ID				
Security Subscriptions	All				•					
AS-Fixed									Reset	Search
Learning Credits	Deal ID	Deal Name	Cust	omer Name			Sta	itus	Owner	3
	22585007	check Target threshold	PLAZ	A			Ap	proval in Progress		R
	22583718	Test	PLAZ	A			No	Submitted		
	22582515	chekasd	PLAZ	A			No	Submitted		

Link to Deal Page

3. Identify the deal you want to link the estimate to, hover over that line, and then click the Link to Deal icon. The linked deal ID displays.

If the items, discounts or price list on the estimate do not match information on the approved deal, you will receive an error message.

- 4. To remove the linked deal, click the **delete icon**.
- 5. A Remove Deal dialog box displays. Click **Delete**.
- 6. To view the end customer(s), on any deal, click View Customer.
- 7. Verify the end customer information on the estimate and/or the deal. If an end customer was not provided on the estimate, the information from the RNSD is copied. If the end customer is provided on the estimate, and it does not match the information from the RNSD, the information from the RNSD is not copied to the estimate, and you will see both end customers displayed.

want to	<	D*	Export 🙉 Email 🔹	🕻 Share 🛛 🚯 Clone	🛗 Delete 🏾 🍆 Ad	d Tag 🤺 Cor	ntinue Shopping		
want to	ESTIMATE NAME Estimate_VL6	64855851YB (VL64855851YE	3) 🖌		Globa	al Pr 4 in US	S Dollars (USD)		
View Estimate Information	ESTIMATE ID VL 64855851YB					DEAL ID 21885127 💼 View Customer 🗸			
Link to Deal Set Install/Service Location	Set preferences for this estimate 🗸								
See Recommended Global Sales Kits	Search by Sku , Description and Product Family			Add	Find Produc	ts & Solutions	Actions 🗸		
Get Improved Security, Advanced	Remove Selected Lines	Apply Discount							
Service and Training	Hardware, Softwa	ire and Services L		(USD) Qty	Unit Net Price (USD)	Discount (%)	Extended Net Price (USD)		

Link to Deal Page

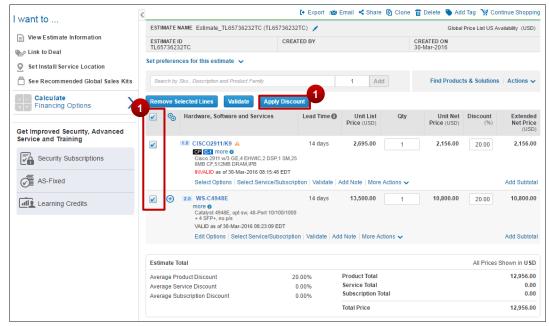
8. Click View Estimate Information to change the end customer, if needed.

i

Best Practice: Verify the customer information when you import a linked estimate.

5.3 Price Modeling for End Customers

You can create a pre-sales estimate for your end customer and adjust the discount to show their estimated cost and provide a validity period beyond which the estimate will expire.



Estimates Cart Page: Estimate Level

You can apply discounts at estimate level and at line level.

To apply discounts at an estimate level, complete the following steps:

- 1. Select the applicable lines, or use the select all lines checkbox to adjust the discount for the entire estimate. Click the **Apply Discount** button. The Apply Discount dialog box displays. The Product and Service discounts are pre-populated based on your estimate preferences.
- 2. Enter or change the discounts, as required.

Product	Service	Subscription
%	%	%
Average Discount 50.00%	Average Discount 0.00%	Average Discount 0.00%

Apply Discount Dialog Box

3. Click Save. The discounts are applied to the applicable lines.

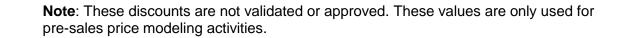
ılıılı cısco

To apply discounts at a line item level, complete the following steps:

- 4. Enter or update the value directly in the Discount (%) field at the line item level.
- 5. Click outside the Discount (%) field. The extended net price is updated.

(⊕	Hardware, Software and Services	Lead Time 🚺	Unit List Price (USD)	Qty	Unit Net Price (USD)	Discount (%)	Extended Net Price (USD)
Ð	1.0 WS-C4948E Catalyst 4948E, opt sw, 48-Port 10/100/1000 + 4 SFP+, no p/s VALID as of 16-Feb-2016 12:03:43 EST	14 days	13,500.00	1	6,750.00	50	6,750.00
	Edit Options Select Service/Subscriptio	n Validate Ad	d Note More A	ctions 🗸			Add Subtotal

Estimates Cart Page: Line Item Level



5.3.1 Verifying and Updating the Validity Period



You can provide a validity period for each estimate that you create in order to present the estimate to an end customer along with a set expiration time period.

To verify the validity period for an estimate, complete the following steps:

1. Click View Estimate Information. The View Estimate Information page displays.

Estimates		Search All		Q	L.		~ 🛛 😁
Catalog	Estimates	Deals & Quotes	Orders		Service	s & Subscriptions	Software
I want to	<	🕩 Export 🛛 🛲 Email	< Share 🛛 🚯	Clone 🚺	🖥 Delete 🛛 💊	Add Tag	💘 Continue Shopp
Hunt to	Basic Int	formation					
View Estimate Information	Name			De	scription		
Normal Key Contract C	Estimat	e_XA66288797AL					
Set Install/Service Location	Deal ID	Expiry Date		2			
-	225837	18 11-Jul-2016					
See Recommended Global	Sales Kits Price Lis	t		Bill	ling Address		
	Global	Price List US Availability	•			SYSTEMS	/ 前
Calculate Financing Option				E	Bill to ID	401	
_	Intended			E	Billing Address		
Security Subscriptions	Interna	I Business Use	•				
AS-Fixed						ENGLEWOOD, CO 80112, US	
				c	Operating Unit	CISCO US OPERATING UNI	т
Learning Credits	End Cu	stomer					

Estimates Cart Page



- Click the calendar () icon corresponding to the Expiry Date field. The date is derived based on the value you entered while setting up your Estimates preferences. See <u>Setting Default Estimates</u> <u>Preferences</u>.
- 3. Click **Back to Estimate** to return to the Estimates Cart page.



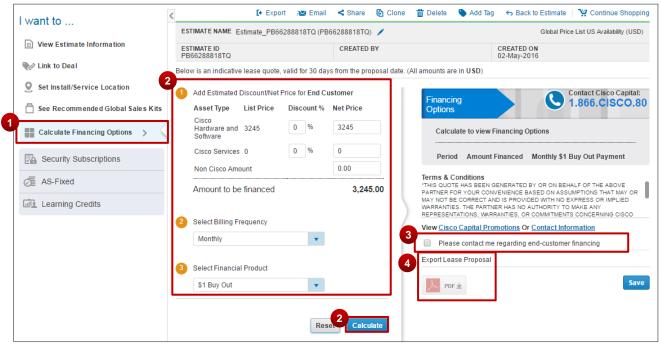
Note: You can change the Price List, Billing Address, and Intended Use information on the View Estimate Information page for better pricing and validation for each of your estimates. See <u>Setting Default Preferences</u>.

5.4 Calculating Financing Options

If you are a partner or a reseller, you can calculate financing options during the estimate creation process in Cisco Commerce.

To calculate financing options, complete the following steps:

- 1. From the Estimates Cart page, click **Calculate Financing Options**. The View Financing Options page displays.
- 2. Enter information, such as estimate discount, billing frequency, and financial product, and then click **Calculate**. The system will present you with various financing options.
- 3. If you want someone from Cisco Capital to contact you regarding end-customer financing, check the Please contact me regarding end-customer financing checkbox.
- 4. Click Export Lease Proposal to export your estimate to a PDF.



View Financing Options Page

5.5 Creating and Managing Configuration Groups

You can group your configurations into different groups within Estimates.

5.5.1 Creating Groups

1. From the Cisco Commerce homepage, select the Estimates tab and click on an Estimate ID

l	Estimates	Deals	& Quotes	Orders	Servi	ces & Subscriptio	ons	Software
<	121193	results						Create New Estimate 🗲
	E+ Export	🖶 Print 🕮 Shai	re 🖲 Tags 🎁	Delete Selected	Estimates 📝 🖌	Edit View		
-		Estimate ID	Estimate Name	Estimate Description	Created Date	Extended Net Price	Deal ID	Configuration Status
		FL51829297CE		WS-C3750X-4	05-Aug-2015	\$7,845.00		INVALID
		ZS52856590PI		WOW	16-Nov-2015	\$4,090.00		VALID
		UP52073253		With CUWL S	03-Sep-2015	\$2,847.00		VALID
-		XF51372952KN		WIC-1DSU-56	04-Jun-2015	\$0.00		UNVERIFIED
-		EC52463549		Weidenhamm	13-Oct-2015 b	\$83,426.00		VALID
		GN53543848		We have a reg	22-Dec-2015	\$2,680,650.00	2259502	8 UNVERIFIED
		RC51127372		VWIC3-2MFT	16-Apr-2015 b	\$0.00		UNVERIFIED
		SR53210679VI		VersaStack co	03-Dec-2015	\$500,811.00		VALID

2. Click to toggle to Group View

Search by Sku , Description and Produ	ict Family	1 Add		Find Produ	cts & Solutions Actions 🗸		
Remove Selected Lines Valid	ate Apply Discount				2 📃		
Hardware, Software an	d Services Lead Time ()	Unit List Price (USD)	Item	is By Group			3 Create/Assign Group 🔨 📃
□	Not Applicable	21,125.00		List Order	Hardware, Software and Services	L Pric	Groups
more o Infinite Video Subscri	ption			😑 Default			🔿 Default 🖈 🛛 🗛
Valid as of 04-Aug-20	16 09:49:00 PDT	Months Billing Mode		:: 1	O 1.0 IV-BNDL-SUB		Create New Group
Edit Options Valid	ate Add Note More Actions 🗸				1.1 IV-SP-RECURR	13	test ×
					1.2 IV-USERS-USAGE	Uncor	Cancel 5 ply
					13 IV-SESSIONS-USAGE	Uncor	mmitted 1 0.00 0

- 3. Click Create/Assign Group
- 4. Click Create New Group and enter a unique group name
- 5. Click on the + button to add new group to your list

Note: SKUs are automatically added to the default group.

You can also edit/delete groups within the Groups modal:

Groups	Delete
🔿 test 2	/ 🛍
⊖ test	

5.5.2 Adding SKUs to Groups

- 1. Select the SKU(s) you want to include in the group
- 2. Click Create/Assign group
- 3. Select the group for your SKU(s)
- 4. Click Apply

Item	s By Group			2 Create/Assign Group 🔊
	List Order	Hardware, Software and Services	Unit List Price (USD)	Groups
1	😑 Default			● test 3
 Image: A start of the start of	** ** **		4,703.00	Create New Group
	*** *** 2		12,399.00	4
	:: :: 3		33,800.00	Cancel Apply

5. Changes are displayed in the Group View

Item	s By Group				Cr	eate/Assign	Group 🗸 🗌 🔳
	List Order	Hardware, Software and Services	Unit List Price (USD)	Qty	Unit Net Price (USD)	Discount (%)	Extended Net Price (USD)
	🖯 test		5				47,030.00
	** ** **		4,703.00	10	4,703.00	0	47,030.00
	\ominus Default						1,250,770.00
	÷÷ ••• ••• 2		12,399.00	30	12,399.00	0	371,970.00
	3		33,800.00	26	33,800.00	0	878,800.00

6. Alternatively, you can drag and drop SKUs into different groups.

7. Click Rearrange to have the line numbers match the list order number

Note: These changes are also displayed in the cart view.

							6	Rearrange	Items By Group			
m	s By G	Group				Cre	ate/Assign (Group 🗸 🔳	Lines are re-arranged successfully.			
	List (Drder	Hardware, Software and Services	Unit List Price (USD)	Qty	Unit Net Price (USD)	Discount (%)	Extended Net Price (USD)	List Order Hardware, Software and Service			
	Θ	test						878,800.00	□ ⊖ test			
	* * * * * *	1	⊕ 3.0 CTS-SX80-IP60-K9	33,800.00	26	33,800.00	0	878,800.00	□ 1			
	Θ	Default						419,000.00	Default			
	**	2		4,703.00	10	4,703.00	0	47,030.00	□ 🔡 2 🛨 2.0 CTS-SX10-K9			
	* * * * * *	3		12,399.00	30	12,399.00	0	371,970.00	□ 3			
							6	Rearrange				

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5.5.3 Exporting Groups

- 1. Click Export
- 2. Check Group Information
- 3. Select Excel or PDF

Note: Export only available into Excel and PDF

4. Click Export

_	Exp	oort 🕬 Email	< Share	Clone 🖸	🛗 Delete	💊 Add Tag	Back To Estim	ate 😭	Continue Sho	pping
	TIRAATE NARAE . Colimanda		00000000					- Deine Link	in us Dyllars (L	JSD)
E	Export Estimate								×	
- T										
F	ile Type		Freight Term							
ſ									earra	nge
	XLS (Microsoft Excel)	•	None		•					
11	PDF	<u> </u>							~	
	PDF (Adobe Acrobat)	=								
	Full Record PDF (Adobe								ended	
	Acrobat)	3							rice (I	50)
			Discount and	d Pricina		10	ogos and Signatures		07.00	0.00
	XLS (Microsoft Excel)		_			_				
			Pricing			×	Digital Signature		07,00	0.00
	XLS (Microsoft Excel)	× _	List Price	e Only		×	Company Logo		51,000	
1	Aujuotor Enroo		Net Price	e Only			Recipient Logo			
Г	TAA Information		Discount	ts			No file selected		earra	nge
l r	Cisco Product Reference	_	Total Price	ce at bottom				Max. Siz	e 2MB	
								Up	load	
	Group Information									
N	lotes									
-								4		
					(monuts)	TIME	Cance		ortt Pric	
	ame: test		_		(monuts)	Time	Cance	4 Exp	ort st Pric	e F
up N	CTS-SX80-IP60-K9	Cisco SX80 Cod			(montars) 	10	24,900.00	26	Subtotal 24,900.0	e F = 878,80 0 647,40
up N	CTS-SX80-IP60-K9 PSU-12VDC-40W	Power Supply 12	2 VDC 40W			10 10	24,900.00 0.00	26 26	Subtotal 24,900.0 0.0	e F = 878,80 0 647,40 0
up N 1 2	CTS-SX80-IP60-K9 PSU-12VDC-40W CTS-SX80CODEC	Power Supply 12 Cisco SX80 Cod	VDC 40W			10 10 10	24,900.00 0.00 0.00	26 26 26	Subtotal 24,900.0 0.0 0.0	e F = 878,80 0 647,40 0
up N 1 2 3	CTS-SX80-IP60-K9 PSU-12VDC-40W CTS-SX80CODEC PSU-12VDC-40W	Power Supply 12 Cisco SX80 Cod Power Supply 12	2 VDC 40W ec 2 VDC 40W	Cam,		10 10 10 10 10	24,900.00 0.00 0.00 0.00	26 26 26 26	Subtotal 24,900.0 0.0 0.0 0.0	e F = 878,80 0 647,40 0 0 0
up N 1 2 3 4	CTS-SX80-IP60-K9 PSU-12VDC-40W CTS-SX80CODEC PSU-12VDC-40W CTS-CAM-P60	Power Supply 12 Cisco SX80 Cod Power Supply 12 Cisco TelePrese	2 VDC 40W ec 2 VDC 40W ence Precision 60	Cam,		10 10 10 10 10 10	24,900.00 0.00 0.00 0.00 8,900.00	26 26 26 26 26 26	Subtotal 24,900.0 0.0 0.0 0.0 0.0 8,900.0	e F = 878,80 0 647,40 0 0 0 0 0 231,40
up N 1 2 3 4 5	CTS-SX80-IP60-K9 PSU-12VDC-40W CTS-SX80CODEC PSU-12VDC-40W CTS-CAM-P60 PWR-CORD-US-A	Power Supply 12 Cisco SX80 Cod Power Supply 12 Cisco TelePrese Pwr Cord US 1.8	2 VDC 40W lec 2 VDC 40W ence Precision 60 am Black YP-12 T	Cam, 0 Fo YC-		10 10 10 10 10	24,900.00 0.00 0.00 0.00	26 26 26 26	Subtotal 24,900.0 0.0 0.0 0.0	e F = 878,80 0 647,40 0 0 0 0 0 231,40 0 0
1 2 3 4 5 6	CTS-SX80-IP60-K9 PSU-12VDC-40W CTS-SX80CODEC PSU-12VDC-40W CTS-CAM-P60	Power Supply 12 Cisco SX80 Cod Power Supply 12 Cisco TelePrese	2 VDC 40W ec 2 VDC 40W ence Precision 60 em Black YP-12 T ctivate sw encrypt	Cam, 0 Fo YC-		10 10 10 10 10 10 10 10	24,900.00 0.00 0.00 8,900.00 0.00	26 26 26 26 26 26 78	Subtotal 24,900.0 0.0 0.0 0.0 8,900.0 0.0	e F = 878,80 0 647,40 0 0 0 0 0 231,40 0 0
1 2 3 4 5 6 7	CTS-SX80-IP60-K9 PSU-12VDC-40W CTS-SX80CODEC PSU-12VDC-40W CTS-CAM-P60 PWR-CORD-US-A LIC-TC-CRYPTO-K9	Power Supply 12 Cisco SX80 Cod Power Supply 12 Cisco TelePrese Pwr Cord US 1.8 License key to ad	2 VDC 40W lec 2 VDC 40W ence Precision 60 Im Black YP-12 T ctivate sw encrypt kpand	Cam, 0 Fo YC- otion		10 10 10 10 10 10 10 10 10	24,900.00 0.00 0.00 8,900.00 0.00 0.00	26 26 26 26 26 26 26 78 26	Subtotal 24,900.0 0.0 0.0 0.0 8,900.0 0.0 0.0 0.0	e F = 878,80 0 647,40 0 0 0 231,40 0 0 0 0
1 2 3 4 5 6 7 8	CTS-SX80-IP60-K9 PSU-12VDC-40W CTS-SX80CODEC PSU-12VDC-40W CTS-CAM-P60 PWR-CORD-US-A LIC-TC-CRYPTO-K9 CTS-CTRL-DVX-10+	Power Supply 12 Cisco SX80 Cod Power Supply 12 Cisco TelePrese Pwr Cord US 1.8 License key to ac Touch 10 auto ex	2 VDC 40W lec 2 VDC 40W ence Precision 60 im Black YP-12 T ctivate sw encrypt kpand im Black YP-12 T	Cam, 0 Fo YC- otion Fo YC-		10 10 10 10 10 10 10 21 10 10 21 10	24,900.00 0.00 0.00 8,900.00 0.00 0.00 0.00	26 26 26 26 26 26 26 26 26 26 26 26 26 2	Application Subtotal 24,900.0 0.0 0.0 0.0 0.0 0.0 0.0 0.0 0.0 0.0 0.0 0.0 0.0 0.0 0.0 0.0 0.0 0.0 0.0 0.0	e F = 878,80 0 647,40 0 0 0 0 231,40 0 0 0 0 0 0 0 0 0 0 0 0 0
up N 1 2 3 4 5 5 6 7 7 8 9 9 1	CTS-5X80.1P66.49 PSU-12VDC-40W CTS-5X80CODEC PSU-12VDC-40W CTS-CAM-P60 PWR-CORD-US-A LIC-TC-CRVPTO-K9 CTS-CTR-DVX-10+ PWR-CORD-US-A CAB-DV10-4M SW-852020-TC7-K9	Power Supply 12 Cisco SX80 Cod Power Supply 12 Cisco TelePrese Pwr Cord US 1.8 License key to ac Touch 10 auto ey Pwr Cord US 1.8 4 meter flat grey i SW Image for SX	2 VDC 40W lec 2 VDC 40W ince Precision 60 im Black YP-12 T ctivate sw encrypt xpand im Black YP-12 T Ethernet cable fo (80, MX700, MX80	Cam, 0 Fo YC- tition Fo YC- or 00		10 10 10 10 10 10 21 10 10 10 10 10	24,900.00 0.00 0.00 8,900.00 0.00 0.00 0.00 0.00 0.00 0.00	26 26 26 26 26 26 26 26 26 26 26 26 26 2	Application Subtotal 24,900.0 0.0	e F = 878,80 0 647,40 0 0 0 0 231,40 0 0 0 0 0 0 0 0 0 0 0 0 0
up N 1 2 3 4 5 6 7 8 9 9 1 1	CTS-SX80-IP66.49 PSU-12VDC-40W CTS-SX80CODEC PSU-12VDC-40W CTS-CAM-P60 PWR-CORD-US-A LIC-TC-CRYPT0-K9 CTS-CTR-DVX-10+ PWR-CORD-US-A CAB-DV10-4M SW-552020-TC7-K9 CAB-DV1/GA-PHOEN	Power Supply 12 Cisco SX80 Cod Power Supply 12 Cisco TelePrese Pwr Cord US 1.8 License key to ad Touch 10 auto ey Pwr Cord US 1.8 4 meter flat grey SWI Image for SX Presentation cab	2 VDC 40W lec 2 VDC 40W ence Precision 60 im Black YP-12 T ctivate sw encrypl xpand im Black YP-12 T Ethernet cable for 80, MX700, MX86 ole w/audio, VGA/	Cam, 0 Fo YC- tition Fo YC- or 00 JJack		10 10 10 10 10 10 10 21 10 10 10 10 10	24,900.00 0.00 0.00 8,900.00 0.00 0.00 0.00 0.00 0.00 0.00 0.	26 26 26 26 26 26 26 26 26 26 26 26 26 2	At Price Subtotal 24,900.0 0.0	e F = 878,80 0 647,40 0 0 0 231,40 0 0 0 0 0 0 0 0 0 0 0 0 0
1 2 3 4 5 6 6 7 8 9 1 1 1 1 1 2	CTS-SX80-IP60-K9 PSU-12VDC-40W CTS-SX80CODEC PSU-12VDC-40W CTS-CAM-P60 PWR-CORP_US-A LIC-TC-CRYPT0-K9 CTS-CTRL-DVX-10+ PWR-CORP_US-A CAB-DV10-4M SW-552020-TC7-K9 CAB-DV1-VCA-PHOEN CAB-DV1-12.5M	Power Supply 12 Cisco SX80 Cod Power Supply 12 Cisco TelePrese Pwr Cord US 1.8 License key to at Touch 10 auto ex Pwr Cord US 1.8 4 meter flat grey SW Image for SX Presentation cab 12.5 meter flat gr	2 VDC 40W ec 2 VDC 40W ence Precision 60 m Black YP-12 T ctivate sw encrypl xpand m Black YP-12 T Ethernet cable 80, MX700, MX80 ole w/audio, VGA/ rey Ethernet cable	Cam, 0 Fo YC- otion Fo YC- or 00 JJack le for		10 10 10 10 10 10 10 10 10 10 10 10 10 10 110 10 10 10 10 10 10 10	24,900.00 0.00 0.00 0.00 0.00 0.00 0.00 0.	26 26 26 26 26 26 26 26 26 26 26 26 26 2	Et Pric Subtotal 24,900.0 0.0	e p = 878,80 0 647,40 0 0 0 231,40 0 0 0 0 0 0 0 0 0 0 0 0 0 0
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1 2 3 4 5 6 7 7 8 9 1 1 11 12 13 14 15	CTS-SX80.1P66.k9 PSU-12VDC-40W CTS-SX80CODEC PSU-12VDC-40W CTS-CAMP60 PWR-CORD-US-A LIC-TC-CRYPTO-K9 CTS-CTS-CAMPTO-K9 CTS-CTNV-10+ PWR-CORD-US-A CAB-DV10-4M SW-S52020-TC7-K9 CAB-DV10-12.5M CTS-CAMPRON-ACKEARS- CTS-SX80-RACKEARS- CTS-SAMP-ABR_JNU5+	Power Supply 12 Cisco SX80 Cod Power Supply 12 Cisco TelePrese Pwr Cord US 1.8 License key to at Touch 10 auto e Pwr Cord US 1.8 4 meter flat grey SW0 Image for SX Presentation cab 12.5 meter flat grey SX80 rack ears – Cisco TelePrese	2 VDC 40W ec 2 VDC 40W ence Precision 60 mm Black YP-12 T divate sw encrypt kpand mm Black YP-12 T Ethernet cable fo (80, MX700, MX80 Je w/audio, VGA/ rey Ethernet cable for auto expand ence Precision 60 (002.3af)	Cam, 0 To YC- otion Fo YC- or 00 JJack le for only		10 10	24,900.00 0.00 0.00 0.00 0.00 0.00 0.00 0.	26 26 26 26 26 26 26 26 26 26 26 26 26 2	H Price Subtotal 24,900.0 0.0	B F - 878,80 0 647,40 0 0 0 231,40 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0
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5.6 Importing an Estimate

Cisco Account Managers use a similar tool that creates estimates. You may receive an e-mail from your Cisco AM with the estimate ID information. Alternatively, they can export the estimate to you via e-mail.

If applicable, this e-mail will also include the reusable deal ID to which the estimate is linked.

Dear Partner,
Your Cisco Estimate ID : LY60000974DU
Your Cisco Deal ID : NA
For ordering through Cisco Commerce Workspace, please work with your Cisco Account manager to get the deal collaborated with you and follow the instructions as below : Click the URL <u>http://www.cisco.com/go/ccw</u> . Click on the Order link in the CCW Home page. Specify the Deal ID. Provide required information in the Order initiation page and click on Select items to order. Select the items from the Product list. The selected Product items and discounts will be imported to your order. Provide other required information and submit the order.
Thank you, Account Manager Cisco Systems
This Estimate is active through 09-MAR-13

Share Estimates: Export via Email

cisco	Pric	e Quota	ation		1234 Main Street City, State Zip code US Ph no: +1 55 555 5555 accountmanager@cisco.com			
Date: 08 Oct 2012 To: ABC					Estimate ID.: Deal ID :		50000312 7704015	
New York,Ne US	w York-				Product Total : Service Total : Total Price:		35,880.00 1,032.00 36,912.00	
	Description	Service Duration	Unit List Price	Qty	Extended List Price	Disc(%)	Extended Net Price	
Part Number						80.00	35,880.00	
	CISCO1801 Security Router with Annex M		1,495.00	120	179,400.00	80.00		
	CISCO1801 Security Router with Annex M SMARTNET 8X5XNBD CISCO1801 Security Router with Annex M	12.00	1,495.00 86.00	120	179,400.00			
CISCO1801-M/K9 CON-SNT-	SMARTNET 8X5XNBD CISCO1801 Security Router with					90.00		
CISCO1801-M/K9 CON-SNT- 1801MK9 S180AISK9-	SMARTNET 8X5XNBD CISCO1801 Security Router with Annex M	12.00	86.00	120	10,320.00	90.00	1,032.00	
CISCO1801-M/K9 CON-SNT- 1801MK9 S180AISK9- 15001M CAB-ADSL-800-	SMARTNET 8X5XNBD CISCO1801 Security Router with Annex M Cisco 180x Series IOS ADVANCED IP SERVICES	12.00	86.00 0.00	120 120	10,320.00	90.00 80.00	1,032.00	
CISCO1801-M/K9 CON-SNT- 1801MK9 S180AISK9- 15001M CAB-ADSL-800- RJ11	SMARTNET 8X5XNBD CISCO1801 Security Router with Annex M Cisco 180x Series IOS ADVANCED IP SERVICES ADSL RJ11-to-RJ11 Straight Cable	12.00 	86.00 0.00 0.00	120 120 120	10,320.00 0.00 0.00	90.00 80.00 80.00 80.00	1,032.00 0.00 0.00	
CISCO1801-M/K9 CON-SNT- 1801MK9 S180AISK9- 15001M CAB-ADSL-800- RJ11 CAB-AC MEM180X-	SMARTNET 8X5XNBD CISCO1801 Security Router with Annex M Cisco 180x Series IOS ADVANCED IP SERVICES ADSL RJ11-to-RJ11 Straight Cable AC Power Cord (North America), C13, NEMA 5-15P, 128 to 256MB SODIMM DRAM factory upgrade for the	12.00 	86.00 0.00 0.00 0.00	120 120 120 120	10,320.00 0.00 0.00 0.00	90.00 80.00 80.00 80.00	1,032.00 0.00 0.00 0.00	

Share Estimates: Estimate Information

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Note: The e-mail and other information displayed here represent an example. E-mails sent from your Account Manager may vary.

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5.6.1 Importing an Estimate into an Order



To import an estimate into an order, complete the following steps:

- 1. From the Orders tab, click **Create Order**. The Create an Order page displays.
- 2. If there are no approved additional discounts for the estimate, click the Order without Deal ID radio button.
- 3. If your estimate is linked to a deal ID, click the Order with a Deal ID radio button and provide the deal ID information.
- 4. Click **Continue**. The new order is created matching the order details. The Order page: Items tab displays. Edit the order as applicable. You can add or remove items, if required.

	Search All	c	λ	~ 🖾 GO 🏢
Estimates		Orders	Services & Subscriptions	Software
Create an Order	r		* Required Field	
	/ith a Deal ID or	2 Without a l		
	eal ID			
Access Key				
Enter Shared Deal A	Access Key			
↔ Clone an Orde	r (optional) 🚺			
		Canc	el Continue >	
	Estimates Create an Order 3 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0	Estimates Deals & Quotes Create an Order	Estimates Deals & Quotes Orders Create an Order Create an Order With a Deal ID Deal ID Access Key Enter an existing Deal ID Access Key Cone an Order (optional)	Estimates Deals & Quotes Orders Services & Subscriptions Create an Order * Required Field Image: Create an Order Image: Create an Order Image: Create an Order Image: Create an Order

Order Tab: Create an Order Page

Note: If you do not enter the deal ID at this point in the order creation process, approved discounts in the deal will not be captured on the order.

5. To import an estimate into an order, click **Import a Saved Configuration**, found in the More Actions drop-down menu. Follow steps as in <u>Importing an Estimate</u>.

Refer to <u>Cisco Commerce Order User Guide</u> for information on how to add items to the order and review and submit the order in Cisco Commerce.



	E testordermwl	1					Global Price Li	ist in US Dollar	s (USD)
URCHASE		WEB ORDER ID 67641787	STATUS UNSUBMITTED	SMART ACCOUNT Assign Smart Account			Giobai Price Ei	St III 03 Dollar	5 (03D)
ltems	Discounts	Shipping and Insta	ll Billing	Review and Submit					
t preferenc	es for this order	~			Check Local	Validations	Save	Save and Co	ntinue 🕽
Search by S	ku , Description an	d Product Family		Qty Add	F	ind Products	and Solution	IS More Ac	tions 🗸
		d Product Family alidate Assign Smart Ad	count	Qty Add	F	5 Import a S	and Solution Saved Config rvice Options	juration	

Order Page: Items Tab - Import a Saved Configuration

5.6.2 Importing an Estimate into a Deal/Quote



The process for importing an estimate to a deal/quote is almost identical to importing to an order.

To import an estimate into a deal/quote, from the Quote Tab: Items sub-tab, click **Import a Saved Configuration**, found under the Actions drop-down menu. The Import Saved Configuration dialog box displays.

Follow steps as in Importing an Estimate.

Deal	Quote	Review	and Submit	Order							
Items	Discounts &	Credits	Install Site	Billing					Save	Save and	I Continue >
Set preferenc	es for this quote	• •									
Search by Pr	rogramID/SKU, De:	scription and	Product Family			Qty	Add		Find Products and §	Solutions	Actions 🔨
Buy Method			▼ More >						Import a Saved Con	figuration	
	Hardware, Softv	ware and Se	ervices		Lead Ti	me 🚯		Unit List Pric	View Imported Conf	igurations	
								(USE	Add Trade In Items		
					No records				Edit Services for Mu	Itiple Lines	

Quote Tab: Items Sub-Tab – Import a Saved Configuration

Refer to <u>Cisco Commerce Deals and Quotes User Guide</u> for information on how to add items to a deal/quote and review and submit the deal/quote in Cisco Commerce.



6 Using Common Utilities for Estimates

You can view, tag, clone, export, e-mail, print, share, delete, or save an estimate using the common utilities. Access the common utilities from:

- The Estimates tab
- The Estimates Cart Page

Cisco Commerce Estimates		E V Search A	<i>I</i>		Q		~ 🛛 🖾	e9
Catalog	Estimates	Deals & O	Quotes	Orders	Services & Su	bscriptions	Soft	tware
Estimate Name 🔻	< 1172 result	ts					Create New E	stimate 🔉
Advanced Secret	Q	🖻 Print 🛱 Share	🍆 Tags 🛛 🛗 D	elete Selected Estimates	🖊 Edit View) I
Advanced Search		Estimate ID	Estimate Desc	cription	Extended Net Price	Deal ID	Configuration Status	Deal and Opportunity Name
Recent Estimates	 Image: Image: Ima	YS51713749JA			\$13,580.00		VALID	
< Shared Estimates		NI51610650SD	5YR Clone STI	KS 14965545	\$11,145,135.24		VALID	
Saved Searches		VL51459597FF			\$19,750.00		VALID	
View Tags		ZF51302920PY			\$1,210.00		VALID	
Access Shared Estima	ate 📃 🔳	SQ51254477JG			\$54,750.00		VALID	
Customer Estimates		IE51346736BX			\$4,780.00		VALID	
Claim Estimate		HJ60558755VO			\$1,004,488.00		VALID	

Cisco Commerce: Estimates Tab

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	ESTIMATE NAME Estimate_TC64885849TM (TC)	64885849TM) 🖌	Global Price List in US Dollars (USD)				
View Estimate Information	ESTIMATE ID TC64885849TM	CREATED BY	CREATED ON 16-Feb-2016				
Link to Deal	Set preferences for this estimate 🗸						
Set Install/Service Location See Recommended Global Sales Kits	Search by Sku , Description and Product Family	1 Add	Find Products & Solutions Actions V				
	coaron by one, beschpton and Product raining	1 Auu					
Get Improved Security, Advanced Service and Training	Remove Selected Lines Validate App	ly Discount					
_	Hardware, Software and Services	Lead Time 1 Unit List Que Price (USD)	ty Unit Net Discount Extended Price (USD) (%) Net Price (USD)				
Security Subscriptions			(/				
AS-Fixed	No records						
Learning Credits							

Estimates Page: Common Utilities



Best Practice: To export, print, share, or tag multiple estimates, see <u>Getting Started</u> with Cisco Commerce User Guide.

6.1 Viewing and Searching for Estimates

You can view all your estimates, recent, shared, saved, and tagged, using the following steps:

- 1. Hover over the Cisco Commerce Estimates tab to directly select options to view all, recent, shared or tagged estimates.
- 2. Click the tab to view all estimates and select options on the left to view recent or shared estimates.
 - All Estimates: It shows all estimates you have created in the system.
 - Recent Estimates: It shows 50 estimates that have been recently modified.
 - Shared Estimates: It shows estimates that others have shared with you.
- 3. Use the basic and advanced search functionalities from within Cisco Commerce. See <u>Getting</u> <u>Started with Cisco Commerce User Guide</u>.

Catalog	Estimates	Deals & Qu	otes	Orders	Service	s & Subscriptions	Software
stimate Name 🔻	Create Estimate						Create New Estimate
	Access Shared Estimate	Add Tag	📋 Delete Sele	ected Estimates	Edit View		•
dvanced Search		-1	Estimate Na	me E	stimate Description	Deal and Opportunity Name	Configuration Status
■ All Estimates	View All Estimates	718BR	Estimate_TB	6496871			UNVERIFIED
Recent Estimates	Recent		_				
Shared Estimates	Saved Searches	715BI	Estimate_OB	6497871			VALID
Saved Searches	Tags	'19CJ	Estimate_MI	64928719			VALID
View Tags	Customer Estimates	716WM	Estimate_LO	6492871			UNVERIFIED
Access Shared Estimat Claim Estimate		767DO	Estimate_YW	V6487876			INVALID
		763WH	Estimate_JN	6487876			INVALID

Options on the Estimates Tab

Estimates		≡ ▼ Search	a All		Q		~ 🖾	60 I
Catalog	Estimates	Deals	& Quotes	Orders	Services & Su	ubscriptions	Sof	tware
Estimate Name 🔻	< 1172 res	ults					Create New E	stimate 🗲
	Q [+ Export	🖶 Print 🏾 🍆 Add	Tag 🛗 Delete :	Selected Estimates	🖊 Edit View			H
Advanced Search	-2	Estimate ID	Estimate Desc	ription	Extended Net Price		Configuration Status	Deal and Opportuni Name
Recent Estimates	_	YS51713749JA			\$13,580.00		VALID	
< Shared Estimates		NI51610650SD	5YR Clone STM	(S 14965545	\$11,145,135.24		VALID	
Saved Searches		VL51459597FF			\$19,750.00		VALID	
View Tags		ZF51302920PY			\$1,210.00		VALID	
Access Shared Estimation	ie 📃 🔳	SQ51254477JG			\$54,750.00		VALID	
Customer Estimates		IE51346736BX			\$4,780.00		VALID	
🕞 Claim Estimate		HJ60558755VO			\$1,004,488.00		VALID	

Estimates Tab: View Estimates

6.2 Group View

You can view your BOM in either the default Cart view or the Group Info View, where you will see your SKUs sorted by group.

move Selected Lines More 🗸			м	anage Groups / R	earrange Line	s t
Hardware, Software and Services	Estimated Lead Time 🕕	Unit List Price (USD)	Qty	Unit Net Price (USD)	Discount (%)	Cart View et
1.0 A-WX-EMP-COUNT	Not Applicable	0.00	1	0.00	0.00	0.00 Total of MRC

6.3 Tagging an Estimate

You can tag an estimate to easily group your records together, allowing you to quickly search and access a set of records. See <u>Getting Started with Cisco Commerce User Guide</u> for information on how to add, view, and delete a tag.

6.4 Cloning an Estimate

To clone the open estimate, complete the following steps:

1. Click Clone Estimate. The Clone Estimate dialog box displays.

want to	<		🕩 Export 🛛 🛪 E	imail < Share 🕻	Clone	📅 Delete 👋 Ado	l Tag 🦹 Cor	ntinue Shopping
want to	ESTIMATE NAME Estimate_TO	ESTIMATE NAME Estimate_TC64885849TM (TC64885849TM) 🖌						
View Estimate Information	ESTIMATE ID	CR	EATED BY			REATED ON		
🌪 Link to Deal	TC64885849TM 16-Feb-2016							
Set Install/Service Location	Set preferences for this estimation	ate 🗸						
🗍 See Recommended Global Sales Kits	Search by Sku , Description and Product Family 1 Add Find Products & Solutions Action							Actions 🗸
Get Improved Security, Advanced	Remove Selected Lines	Validate Apply Dis	count					
Service and Training	Hardware, Softw	are and Services	Lead Time 🛈	Unit List Price (USD)	Qty	Unit Net Price (USD)	Discount	Extended Net Price
Security Subscriptions				Price (USD)		Price (03D)	(70)	(USD)
AS-Fixed	No records							
Learning Credits								

Estimates Cart Page: Clone Estimate

- 2. The default estimate name displays. Make any necessary edits and add a description, if desired.
- 3. Check the Tags, Shared Users, Notes, and Default Share Team checkbox(es) if you want to copy those values to the new estimate. Checking the Default Share Team checkbox will add the default share team from your Profile and Preferences to the cloned estimate. You can also change the price list.



Clone Estimate	
Clone Estimate will import part number, quantity, duration and disc	* Required Fie count for items from the Hardware, software and services section of the original estimate.
Estimate Name *	Price List
Copy Of Estimate_DO50984613DI	Global Price List US Availability
Estimate Description	Global Price List in US Dollars Global Price List US Availability Global Price List Latin America Availability Wholesale US Price List in US Dollars, 2-tier only
	Cancel

 Click Clone. The part number(s), quantity, duration, and discount for items and services will be copied to the new estimate. Edit the estimate as applicable. You can add or remove items, if required. See <u>Adding Items</u>.

Clone Estimate	×
Clone Estimate will import part number, quantity, duration and discount for items fro	* Required Field m the Hardware, software and services section of the original estimate.
2 Estimate Name * Copy Of Estimate_TC64885849TM Estimate Description Test	Price List Global Price List in US Dollars Include Tags Notes Shared Users ✓ Default Share Team
	Cancel Clone

Clone Estimate Page



Note: When you clone a record, make sure to review all the cloned information such as Install/Service Location before editing the record for further use.

6.5 Exporting, Printing, and E-mailing Estimate

Exporting, printing, and e-mailing an estimate is similar to the export, print, and e-mail functionality within other Cisco Commerce tabs. You can use various formats available, such as PDF, Excel or Comma Separated Value (CSV) formats. You can export an estimate created by you or shared with you. You will also be able to export your estimate's group information in additional file formats.

These options are available for individual records as well. See <u>Getting Started with Cisco Commerce</u> <u>User Guide</u> for more information.

6.6 Sharing an Estimate

Default sharing preferences set within My Profile and Preferences apply when you create or share estimates. See <u>Setting Share Preferences</u>.

You (registered users) can access shared estimates in two ways:

- 1. Using Estimates tab
- 2. From the Estimates Record page: Access Shared Estimate

See <u>Getting Started with Cisco Commerce User Guide</u> for information on how to share and access shared records.

Catalog		Estimates	Deals	& Quotes	Orders	Services & Su	bscriptions	Soft	tware
Estimate Name 🔻		< 1172 resu	lts					Create New E	Estimate 🗲
Advanced Search	Q	[+ Export	🖶 Print 🛛 🍆 Add	Tag 🛗 Delete	Selected Estimates	Edit View			H
E All Estimates			Estimate ID	Estimate Desc	cription	Extended Net Price	Deal ID	Configuration Status	Deal and Opportun Name
Recent Estimate	•	Image: 1	YS51713749JA			\$13,580.00		VALID	
Shared Estimate	6		NI51610650SD	5YR Clone ST	KS 14965545	\$11,145,135.24		VALID	
Saved Searches			VL51459597FF			\$19,750.00		VALID	
View Tags			ZF51302920PY			\$1,210.00		VALID	
Access Shared E	stimate		SQ51254477JG			\$54,750.00		VALID	
🗐 Customer Estim	ites		IE51346736BX			\$4,780.00		VALID	
Claim Estimate			HJ60558755VO			\$1,004,488.00		VALID	



6.7 Deleting an Estimate

Only unsubmitted estimates can be deleted. Deleting an estimate permanently removes the record and all related data.



Note: Once an estimate is deleted, it cannot be retrieved.

To delete an estimate, complete the following steps:

- 1. From the Estimates Record page, select the estimates that you want to delete.
- 2. Click Deleted Selected Estimates.

1	Cisco Commerce Estimates	Search All					Q 🛛 🗸 🖾 🖓 🚱						
•	Catalog	Est	imates & Co	onfigurations	Deals &	Quotes	Orders	Service	es & Subscripti	ons	Software		
Estim	ate Name 🔻	•	< 3365 res	sults	2					Create Net	w Estimate 🔉		
		Q	[+ Export	🖶 Print 🛛 💊 T	ags 🛗 Delete	e Selected Estima	ates 🧪 Edit V	iew					
Advan	ced Search			Estimate ID	Estimate Description	Estimate Name	Last Modified	Created Date	Deal and Opportunity Name	Extended Net Price	Request ID		
:= A	II Estimates			700400504		Tollorda T	10 5-1 001	40.5-1-004					
(-) F	Recent Estimates		1	TC6488584		Estimate_T	16-Feb-201	16-Feb-201		\$0.00			
< 9	ihared Estimates			OK6489585		Estimate_O	16-Feb-201	16-Feb-201		\$0.00			
Pb 9	aved Searches			XG6489584		Estimate_X	16-Feb-201	16-Feb-201		\$0.00			

Estimates Record Page

- 3. Alternatively, open the estimate and click **Delete**.
- 4. The Delete Estimate dialog box displays. The system displays a message confirming that the estimate will be deleted.



- 5. To permanently delete the estimate, click **Delete**.
- 6. To cancel and return to the Estimates page, click **Cancel**.

I want to	<	🕩 Export 🔊 Email < Share 🛐 Clone	💼 Delete 🏷 Add Tag 🛛 🦞 Continue Shopping
_	ESTIMATE NAME Estimate_TC64885849TM (TC6	4885849TM) 🧪	Global Price List in US Dollars (USD)
View Estimate Information	ESTIMATE ID TC64885849TM	CREATED BY	CREATED ON 16-Feb-2016
Catherine Leastin	Set preferences for this estimate 🗸		
Set Install/Service Location	Search by Sku, Description and Product Family	1 Add	Find Products & Solutions Actions
	Gearch by Sku, Description and Product Family	I Auu	
Get Improved Security, Advanced Service and Training	Remove Selected Lines Validate Apply	/ Discount	
	Hardware, Software and Services	Lead Time Unit List Qty Price (USD)	Unit Net Discount Extended Price (USD) (%) Net Price
Security Subscriptions			(USD)
AS-Fixed		No records	
Learning Credits		No records	

Estimates Cart Page

6.8 Saving as an Estimate

You can save an order or a quote as an estimate to reuse any configuration information for import into a new order or quote, and eliminating re-entry of data.

Notes:

- The Save as Estimate icon does not display on RNSD deals and quotes.
- The saved estimate is not related to an order/quote. Any changes made to the configuration details within that estimate will not be reflected on the order or quote, nor will any changes made within the order or quote be reflected in the estimate.

To save the configuration as an estimate, complete the following steps:

1. From a Quote or Order, click **Save as Estimate** from the More drop-down menu in the common utilities bar. The Save as Estimate dialog box displays.

\ :/	Cisco Commerce Order	=	Search All		Q				~ 🖾 🤇	∞
A.	Catalog	Estimates	Deals & Quotes	Orders	Se	rvices & S	Subscriptio	ns	Softwa	ire
				🛱 Favorites 🛛 🖡	 Export 	🖶 Print	🔊 Email	< Shar	e 🛗 Delete	More 🖍
ORDE	R NAME mwl 🧪							Global Pr	🖥 Save as Est	imate
PURCI	HASE ORDER # * 📝	WEB ORDER ID 67959778	STATUS UNSUBMITTED	SMART ACCOUNT Assign Smart Account	t				🔄 Clone Orde	r
Iter	ns Discounts	Shipping and Install	Billing Review	and Submit						

Order: Save as Estimate

2. Click the Estimate Name field and enter the appropriate information.



3. Click the Description field and enter the appropriate information.

Save as Estimate	×
Estimate Name	
Description	
	Cancel Save

Save as Estimate Dialog Box

- 4. Click **Save as Estimate**. A Save as Estimate dialog box refreshes with a success message that indicates the estimate ID.
- 5. Click OK.



Best Practice: Make note of the estimate ID from the refreshed Save as Estimate dialog box.

To reuse the estimate, see Importing an Estimate.

6.9 Estimate Version History

1. You can maintain version history of an estimate. To save a version, select the "Create New Version of this Estimate" option when you share, export, or email it:

іе Туре	Freight Term	Create new version of this estimate 0
PDF (Adobe Acrobat)	None	Create Version
anguage	Orientation	
English		
clude		
roduct Service and Subscripton	Discount and Pricing	Logos and Signatures
System Selected Items	Pricing	V Digital Signature
Separate Service	🖌 List Price Only	Company Logo
Separate Service and Subscription	Rollup for Eligible Items	Recipient Logo
Line Numbers		No file selected Max Size 2ME
Adjuster Lines		Upload
TAA Information		
Group Information		
otes		

You will then be able to compare versions using the "View/Compare Versions" option in the **Actions** dropdown of the Cart page:



Seerch by	/ Sku , Description and Product Family		1 Add		Fillu FIU	ducts & Solutions Actions
temove S	elected Lines More 🗸					Import Saved Configuration
•	Hardware, Software and Services	Lead Time 🚺	Unit List Price (USD)	Qty	Unit Price (L	Preview BTO Configuration Remanufactured Availability
•	10 USC8050-LS-X-K9 CP more O Small Cell Management Software Lic	56 days	408,000.00	1	408,00	FPS Estimator View/Compare Versions

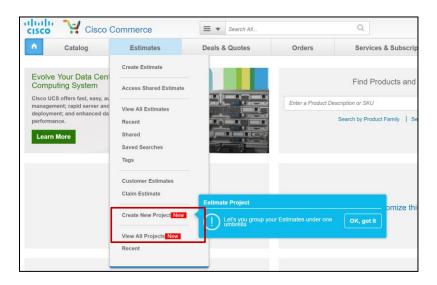
Select the versions of the estimate you wish to compare. You can compare two version at once, and CCW will highlight the differences in the BOM details.

Estimate Versions			0	Created By Created On Ingram Micro Distributor 20-Feb-2018 06:50 AM		Event			
Estimate_XY79001439GF VERSION-2.0		1	20-Feb-2018 06:50 AM			Emailed	Emailed		
 Image: A start of the start of	Estimate_XY79001439GF VERSION-1.0		1	ngram Micro Distribu	tor	20-Feb-2018 06:49 AM	Emailed		
omp	parison								Compare
rsior	1.0				Version 2.0		REMO	OVED UPD	ATED ADD
rsior T	n 1.0 Hardware, Software and Services	Qty	Discount (%)	Extended Net Price (USD)	•	Iware, Software and Services	REMO	DVED UPD Discount (%)	ATED ADD Extended N Price (USI
		Qty 1			🔁 Hard	ware, Software and Services	_	Discount	Extended N
€	Hardware, Software and Services		(%)	Price (USD)	 ⊕ Hard ⊕ 1.0 		_	Discount (%)	Extended N Price (US
Đ.	Hardware, Software and Services		(%)	Price (USD)	 ⊕ Hard ⊕ 1.0 	UCSC-C220-M4S	_	Discount (%) 0.00	Extended N Price (US 3,696.

6.10 Group your Estimates into Projects

To make it easier for you to track multiple estimates for shipping, tracking, or ordering, you can now group your estimates into Projects in CCW. You can create a Project by clicking on **Create New Project** in the **Estimates** menu. You can also view your existing Projects by clicking **View All Projects**.





Once you click **Create New Project**, enter a name for your project and provide the install and end customer countries. You can optionally a description for your project. Click **Create Project** to start adding estimates to your project.

ululu cisco	Cisco Com BUILDA	NDPRICE	≡ ▼ Search All		Q	John Prugh 🐱 😡
•	Catalog	Estimates	Deals & Quotes	Orders	Services & Subscrip	otions Software
Create No	ew Project					
						* Required Field
			Г			
				Project Name *		
			A DECEMBER OF THE OWNER.	Project Name		
				Project Description		
		E		Description		
					Characters left: (0)989	
				Install Country *		
				UNITED STATES		
				End Customer Country		
				UNITED STATES		
			L			
						(*************************************
						Create Project

You can import an existing estimate to your Project, or create a new estimate. Note that you will only be able to import estimates that you have created. You can add an estimate to as many projects as you wish.



Estimate Description	Search All Price List	Q
•	Price List	
There are no Estimates in this Proj	-	
	There are no Estimates in this Pro Start Importing or Create New Estima	There are no Estimates In this Project. Start Importing or Create New Estimate

When you click **Import Estimate**, you can search for an estimate to import. Select the estimate(s) you would like to import and then click **Import Selected Estimate**.

timate ID	would like to copy.	Estimate Name		Created By	
				Created By Me	· •
eated Date		Last Modified		Status	
Vithin 30 Days		Within 30 Days	3 Selected		
Estimate ID	Estimate Nam	e	Price List	Created Date	Last Modified
	The second se		Global Price List	09-Aug-2018	09-Aug-2018
OK83823534II	Estimate_OK83				
OK83823534II				Page 1 of 1 巜 < Previous	1 Next >

You can export the details of your projects by selecting the project(s) to export and clicking **Export**.



		Project Id 🔺	Project Name	Project Description	No of Estimates	Created By	Last Modified
 Image: A start of the start of	:	5296	Project Name	Description	0	jprugh on 09-Aug	jprugh on 09-Aug
	:	5297	Project Name		1	jprugh on 09-Aug	jprugh on 09-Aug
	:	5298	Name		0	jprugh on 09-Aug	jprugh on 09-Aug
View	10	 Items Per Pag 	e		Results 1	1 of 1 巜 < Previous	1 Next > >>

You can select what columns to include in your export. Click **Export** to generate the export file.

You are about to export 1 Projects	
File Type	
PDF	*
Columns Select and Order Columns to Export	
All Columns	Included Columns
*	Project Id* Project Name* Project Description* No of Estimates Created By Last Modified
	*Columns must be displayed
Send Report by	
🔵 Email 💿 Download	

The export file will contain the selected details of your project(s):

PROJECTS Exported By To						
Project Id	Project Name	Project Description	No of Estimates	Created By	Last Modified	
5302	Project		2	techdata on Thu Aug 09 12:49:00 PDT 2018	techdata on Thu Aug 09 12:49:00 PDT 2018	