



# Partner Lead Traceability – Cisco Commerce

**Note:** This document is currently archived as of March 2019 and will not be updated. If you feel that updates are needed, please reach out to our team via [crc-training@cisco.com](mailto:crc-training@cisco.com).

## Overview

Cisco improved the traceability of partner lead conversion to bookings by making updates to CCW's integration with the Leads and Prospects system. These updates include providing P360 partner access to leads information from CCW, automatically updating statuses when leads are converted to deals in CCW, and sharing Deal ID and other deal details in the Leads and Prospects system when generated in CCW.

### [Glossary of Terms](#)

#### [Create Deal by Searching Open Leads](#)

#### [Create Deal within Deals & Quotes by Connecting to a Lead](#)

#### [Create Quote within Deals & Quotes by Connecting to a Lead](#)

## Glossary of Terms

- Partner Admin: PA role in Leads & Prospects, gatekeeper of leads passed to the organization
- Partner Sales Rep: PSR role in Leads & Prospects, responsible for updating lead status and following up with customer
- Partner Deals Desk User: individual from the partner organization who utilizes CCW for deal registration and quote creation but does NOT have access to Leads & Prospects

## Create Deal by Searching Open Leads

Partner Admins, Partner Sales Reps, and Partner Deals Desk Users can view leads information and initiate deals in CCW. Partner Admins and Partner Sales Reps have the additional capability to navigate to the Leads and Prospects system from CCW.

Note: Your organization must be a P360 Partner before the individual users can have access to leads information. Partner Deals Desk Users will not be able to navigate to Leads and Prospects from CCW.

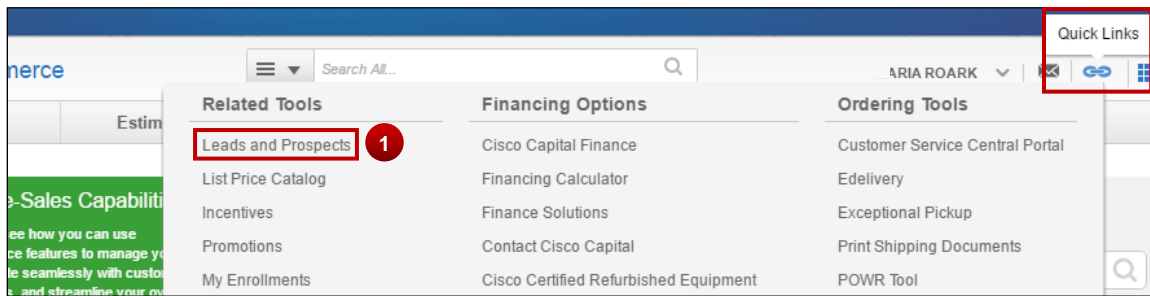
To create a deal using the Leads menus in CCW:

1. Click **Leads** from the Deals & Quotes menu, OR click **Leads and Prospects** or **Leads** from the Quick Links menu

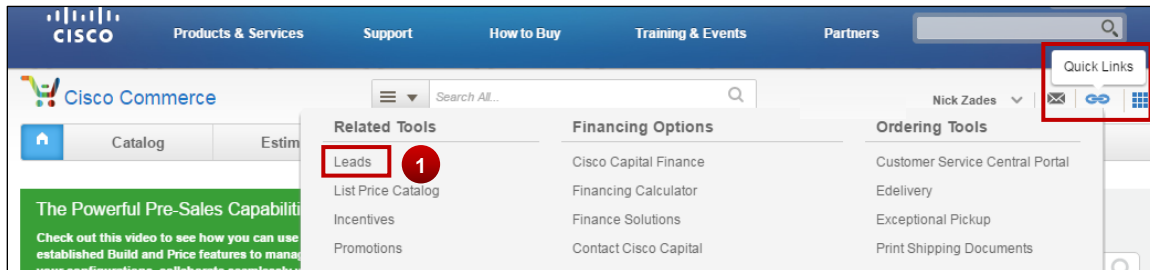
The screenshot shows the Cisco Commerce web application interface. The top navigation bar includes 'Catalog', 'Estimates', 'Deals & Quotes', 'Orders', 'Services & Subscriptions', and 'Software'. The 'Deals & Quotes' menu is expanded, showing options: 'Create Deal', 'Create Quote', 'Access Shared Deal', 'View All', 'Recent', 'Shared', 'Saved Searches', 'Tags', 'Leads', 'Deviations', and 'Reports'. The 'Leads' option is highlighted with a red box and a red circle containing the number '1'. Below the menu, there is a search bar for 'Find Products and Solutions' and a table titled 'Deals & Quotes: Deals To Modify Subscriptions' with columns for Deal ID, Deal Name, and Referral Deal Status. The table contains several rows of deal information.



Or,



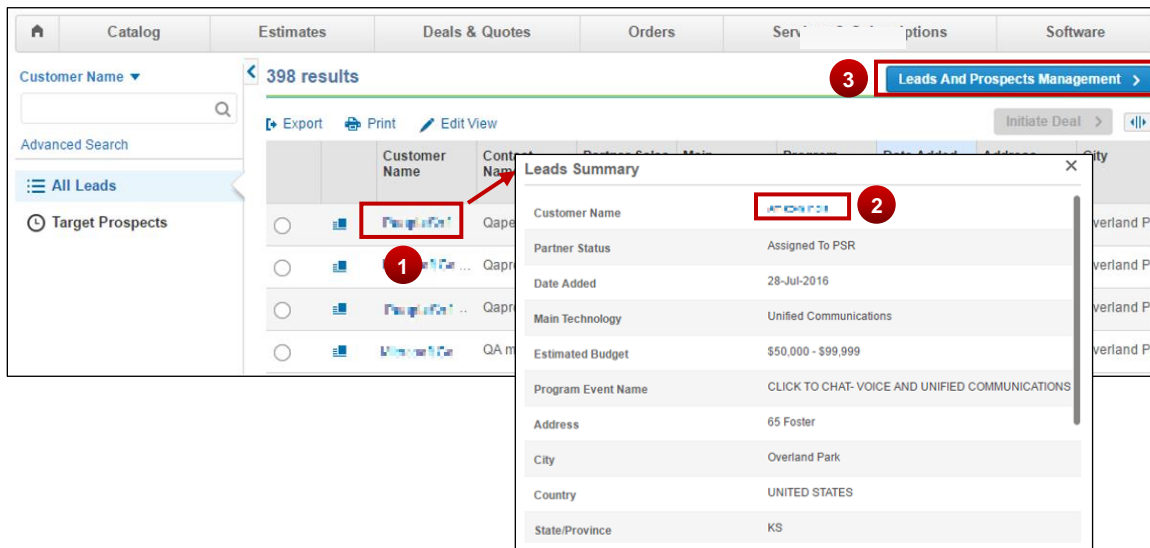
Or,



The Leads and Prospects view displays the Lead records in descending order of Date Added and you can change the view using the Edit View link.

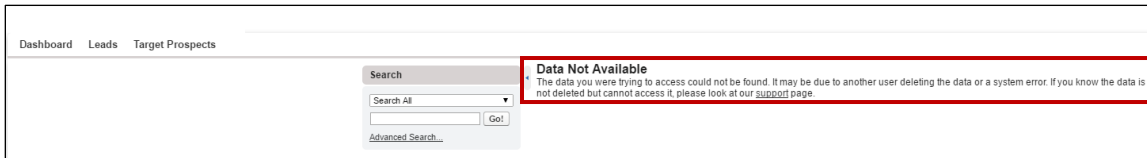
To view lead information on Leads assigned to your company:

1. Click **Customer Name** link;
2. Click the **Leads Summary icon** to view Leads information, then click the **Customer Name** link available under Leads Summary dialogue box; or
3. Click **Leads and Prospects Management**



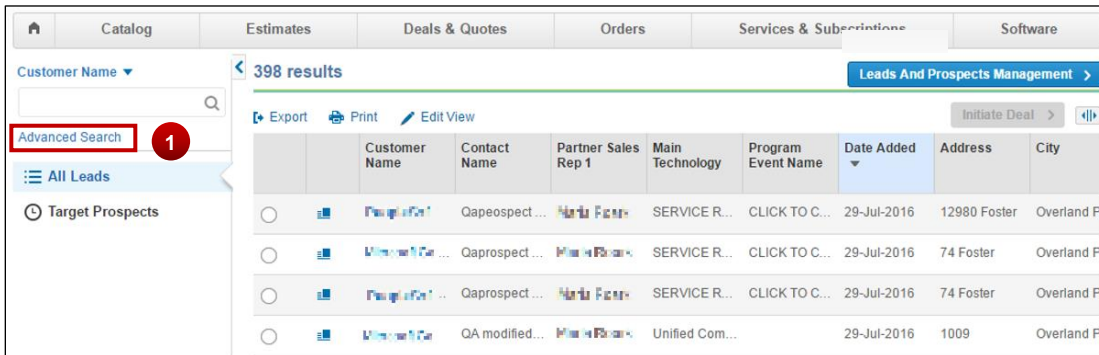


As a PSR, you can view the summary view for all leads assigned to your company. However, you can click and navigate into Leads & Prospects to see the full lead record for the leads directly assigned to you only. If you attempt to view the leads information of a lead that is not assigned to you, the following error message in Leads & Prospects will display.



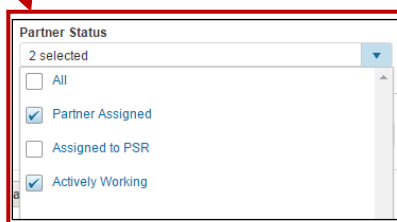
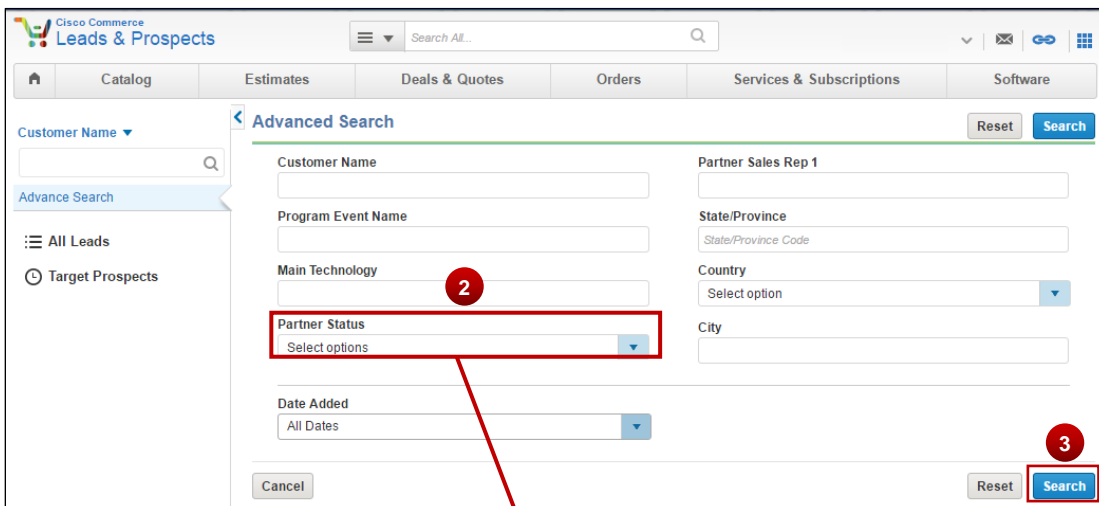
You can use Advanced Search to filter the Leads based on different criteria.

1. Click **Advanced Search**.



2. Enter search criteria.

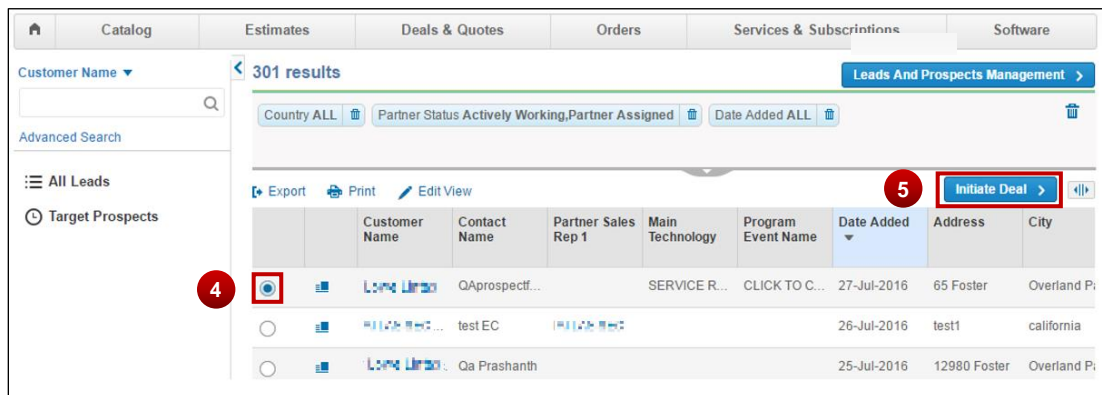
3. Click **Search**.



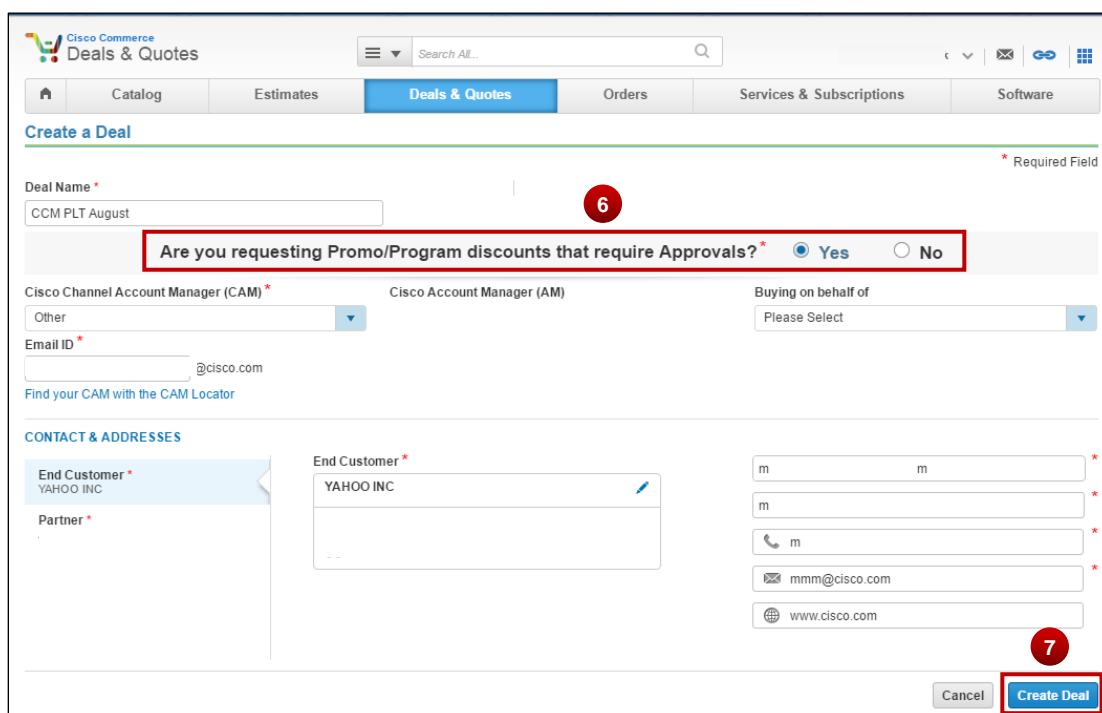
**Note:** You can search by Partner Status – Partner Assigned, Assigned to PSR, Actively Working.



4. Select **radio button** of the lead record you want to select.
5. Click **Initiate Deal**.



6. Complete the required deal information (information from the lead will pre-populate when available).
7. Click **Create Deal**.



**Note:** To create a quote, select the 'No' radio button and proceed with the quote.

**Note:** A Deal ID is assigned to the deal and the Expected List Amount and Lead Information is copied to the deal once the deal is created. You can edit all information, except Lead Information.



8. Click **Lead Information** to view information about the Lead.

QUOTE NAME CCM PLT August Global Price List in US Dollars (USD)

DEAL ID 22962860	QUOTE NUMBER 4713129721	QUOTE STATUS NOT SUBMITTED <span style="color: blue;">Incentive(s) Status</span>	EXPIRY DATE N/A	SMART ACCOUNT ASSIGNMENT <a href="#">Assign Smart Account</a>
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Deal | Quote | **Review and Submit** | Order

[Who's Involved](#) | [About the Deal](#) | [Incentives](#) | [Questionnaire](#) [Save](#) [Save and Continue >](#)

Deal Description Incentives are linked to this field \* Required Field

Intended Use \* Resale | Deal Category \* Not Known

Deal Source LEAD | Deal Type Purchase

**Lead Information** 8

Probability of Closing 25% - Low

Price List \* Global Price List US Availability

Expected Closing Date \* 25-Aug-2016

Expected Cisco Hardware and Software List Amount \* \$ 18000.00

Expected Cisco Service List Amount \$ 0.00

Total Expected Amount \* \$ 18000.00

Note: User currency dictated by promotion rules and country policy  
[Currency Converter](#)

9. Enter any remaining required information and continue with deal registration (as-is).

**Note:** Once the Lead is converted to a deal, the Lead ID will no longer be retrieved in the Leads page. The Lead information in Leads and Prospects is updated with the Deal ID and a status of "Deal Created."

10. You can view Lead Information by clicking the Lead Information link on the Review and Submit tab.

Deal | Quote | **Review and Submit** | Order

[Submit Quote for Approval](#)

i The promotions on the deal are expiring soon. [Click here for details](#)

[Who's Involved](#) | [About the Deal](#) | [Incentives](#) | [Quote](#) | [Trade in Items](#) | [Install Site](#) | [Billing](#)

## Create a Deal in Deals & Quotes by Connecting to a Lead

To create a deal by connecting to a lead:

1. Click **Create Deal**.

Cisco Commerce MARIA ROARK

Catalog | Estimates | **Deals & Quotes** | Orders | Services & Subscriptions | Software

**Create Deal** 1

Create Quote

Access Shared Deal

View All

Recent

Shared

Saved Searches

Tags

Find Products and Solutions

Search by Product Family | Search for Solutions | Guided System Selling

Deals & Quotes: Deals To Modify Subscriptions



2. Click **Create this Deal with Lead**.

**Create Quote** \* Required Field

**◆** If your deal involves an End Customer buying in multiple countries, or being fulfilled by multiple Partner types (Self, Subsidiary, Agent or Disti as Agent) in a country, check the applicable box below and refer to this [Global Deal Training Guide](#)  
If you are not creating a Global Deal, simply click the "Create Deal" button to continue. (Note: Not applicable for Outsourcing deals).

Quote Name \*

Check this box to create and register a Global Deal  
 Create a Local Component of your Global Deal

Note: Global Deal needs to be created and Qualified/Approved prior to creating Local Deals.

Cisco Channel Account Manager (CAM) \*  Cisco Account Manager (AM) (To be assigned by Cisco.) Buying on behalf of

Find your CAM with the CAM Locator

**Create this Deal with Lead** 2

3. Enter search criteria, if applicable.
4. Click **Search**.

**Import Leads**

Start by searching for Leads you would like to copy. 3

Customer Name  Partner Sales Rep 1  Main Technology  City

State/Province  Country  Date Added

State/Province Code Select option Enter Date

Cancel  4

5. Select a lead by checking its **radio button**.
6. Click **Continue with Selected Lead**.

395 results

	Customer Name	Contact Name	Partner Sales Rep 1	Main Technology	Program Event Name	Date Added	Address	City	St
<input type="radio"/>		Qapeospect Qatest		SERVICE RENEWAL	CLICK TO CHAT-VOICE AND UNIFIED COMMUNICATIONS	29-Jul-2016	12980 Foster	Overland Park	KS
<input type="radio"/>		Qapropect Saladanha		SERVICE RENEWAL	CLICK TO CHAT-VOICE AND UNIFIED COMMUNICATIONS	29-Jul-2016	74 Foster	Overland Park	KS
<input type="radio"/>		QA modified date check		Unified Communication		29-Jul-2016	1009	Overland Park	KS
<input checked="" type="radio"/>		Qapropect Nitish		Unified Communications	CLICK TO CHAT-VOICE AND UNIFIED COMMUNICATIONS	28-Jul-2016	65 Foster	Overland Park	KS
<input type="radio"/>		QATESTING Partha		INTELLIGENT NETWORK	CLICK TO CHAT SECURITY	26-Jul-2016	77 Foster	Overland Park	KS
<input type="radio"/>		QABAT Julia		UNIFIED COMMUNICATIONS	CLICK TO CHAT-VOICE AND UNIFIED COMMUNICATIONS	26-Jul-2016	44 Foster	Overland Park	KS
<input type="radio"/>		Qa Prashanth				25-Jul-2016	12980 Foster	Overland Park	KS
<input type="radio"/>		Manjeet Chillar				25-Jul-2016	12980 Foster	Overland City	KS
<input type="radio"/>		QA PRash Vishnu				22-Jul-2016	1008	ray street	
<input type="radio"/>		Bryan Ponder		SWITCHING	1-800-553-NETS OPT2	11-Apr-2016	403 N Service Rd.	Calera	OK

View  Items Per Page Page 1 Of 40 << < Previous  Next >>

**Continue with Selected Lead** 6



- Click **pencil icon** to select a different Lead or click **trash icon** to delete Lead Information. If you delete the Lead, you will be returned to the initial Create a Deal page.
- Fill all the required deal information (information from the lead will pre-populate when available)
- Click **Create Deal**.

**Note:** A Deal ID is assigned to the deal and the Expected List Amount and Lead Information is copied to the deal once the deal is created. All information, except Lead Information, is editable.

- Click **Lead Information** link to view information about the Lead

Enter any remaining required information and continue with deal registration as-is.

**Note:** Once the Lead is converted to a deal, the Lead ID will no longer be retrieved in the Leads page. The Lead information in Leads and Prospects is updated with the Deal ID and a status of "Deal Created."





11. Click **Lead Info** the Lead Info link on the **Review and Submit** tab.

QUOTE NAME CCM PLT September Global Price List US Availability (USD)

DEAL ID 22963045	QUOTE NUMBER 4713130041	QUOTE STATUS MORE INFORMATION REQUIRED Incentive(s) Status	EXPIRY DATE 30-Jan-2017	SMART ACCOUNT ASSIGNMENT Assign Smart Account
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Deal Quote **Review and Submit** Order

Submit Quote for Approval  
Mark Deal as Lost...

Who's Involved About the Deal Incentives **Quote** Trade in Items Install Site Billing

Quote Summary		All prices shown in USD	
Configured Hardware and Software List Total	29,400.00	Deal Summary	<b>Lead Info</b>
Configured Service List Total	0.00	Expected Cisco Hardware and Software List Amount	18,000.00
Special Items List Total:	0.00	Expected Cisco Service List Amount	.00
Discounts (42.00%)	12,348.00	Deal Total	18,000.00

## Create a Quote in Deals & Quotes by Connecting to a Lead

Note: B2B Partners cannot connect a lead to a quote using this option. B2B Partners must either select a lead from the 'Leads' summary or **Create a Deal in Deals & Quotes Connecting to a Lead**.

To create a quote by connecting to a lead:

1. Click **Create Quote**.

Catalog Estimates **Deals & Quotes** Orders Ser ptions Software

Find Products and Solutions

Search by Product Family | Search for Solutions | Guided System Selling

Deals & Quotes: Deals To Modify Subscriptions

Deal Name Referral Deal Status

2. Click **Create this Quote with Lead**.

**Create a Quote**

Quote Name \*

**Create this Quote with Lead**

Cisco Channel Account Manager (CAM) \*  Cisco Account Manager (AM) TO BE ASSIGNED BY CISCO Buying on behalf of

CONTACT & ADDRESSES

End Customer \*

Partner \*

End Customer \*

English Chinese Japanese Korean

NEW Faster Search (English Only)

First Name Last Name

Title

Phone Number

Email Address





- Enter search criteria, if applicable.
- Click **Search**.

- Select a lead by checking its radio button.
- Click **Continue with Selected Lead**.

Customer Name	Contact Name	Partner Sales Rep 1	Main Technology	Program Event Name	Date Added	Address
<input type="radio"/>			SECURITY	RCL_IMP_PilotAMERCollateral_OwnedChat_SCC_LUH	08-Apr-2016	1640 McCracken Blvd # 200
<input checked="" type="radio"/>			WAN	USA_PMC_FSA_Deal Data Pilot_OwnedAQL_Customer Intelligence/Analytics	22-Mar-2016	Mutual Of Omaha Plaza South 3
<input type="radio"/>	Companies		WAN	USA_PMC_FSA_Deal Data Pilot_OwnedAQL_Customer Intelligence/Analytics	22-Mar-2016	Mutual Of Omaha Plaza South 3
<input type="radio"/>			WAN	USA_PMC_FSA_Deal Data Pilot_OwnedAQL_Customer Intelligence/Analytics	22-Mar-2016	514 Earth City Expressway Suite 100
<input type="radio"/>	Company		LAN Switching	USA_PMC_FSA_Deal Data Pilot_OwnedAQL_Customer Intelligence/Analytics	22-Mar-2016	2000 North Classen Boulevard
<input type="radio"/>			LAN Switching	USA_PMC_FSA_Deal Data Pilot_OwnedAQL_Customer Intelligence/Analytics	22-Mar-2016	2000 North Classen Boulevard

View 10 Items Per Page Page 1 of 39 << Previous 1 Next >>

**6** [Continue with Selected Lead](#)

- Click **pencil icon** to select a different Lead. Click **trash icon** to delete Lead Information. The Lead will be deleted and you will be returned to the initial Create a Quote page
- Complete the required quote information (information from the lead will pre-populate when available)
- Click **Create Quote**.



**Note:** A Deal ID is assigned to the quote and the Expected List Amount and Lead Information is copied to the quote once the quote is created. All information, except Lead Information, is editable.

10. Click **Lead Information** link to view information about the Lead

The screenshot shows a quote interface with the following details:

- QUOTE NAME: CCM PLT Quote
- DEAL ID: 22963609
- QUOTE NUMBER: 4713130865
- QUOTE STATUS: NOT SUBMITTED
- EXPIRY DATE: N/A
- SMART ACCOUNT ASSIGNMENT: Assign Smart Account

The 'Deal' tab is active. The 'Deal Source' dropdown is set to 'LEAD', and the 'Lead Information' link is highlighted with a red box and a red circle containing the number '10'. A red arrow points from this link to a modal window titled 'Lead Information' which displays the following data:

Program Event Name:	USA_PMC_FSA_Deal Data Pilot_OwnedAQL_Customer Intelligence/Analytics
Campaign Description:	IMP - MULTIPLE PROGRAMS
Lead Source:	Partner Demand Center
Main Technology:	WAN
Total Value:	35000
Time Frame:	Now - 4 Months

At the bottom of the modal, the total value is shown as \$ 35000.00 with a note: "Note: User currency dictated by promotion rules and country policy Currency Converter".

11. Click **Lead Info** link to view lead information under **Review and Submit** tab

The screenshot shows the 'Review and Submit' tab of the quote interface. The 'Deal Summary' section contains the following data:

Expected Cisco Hardware and Software List Amount	35,000.00
Expected Cisco Service List Amount	.00
<b>Deal Total</b>	<b>35,000.00</b>

The 'Lead Info' link in the 'Deal Summary' section is highlighted with a red box.