

# **Cisco Commerce Express** Customer User Guide

February 2024

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Commerce

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## About Cisco Commerce Express (CCE)



### Cisco Commerce Express (CCE)



In order to meet customer needs and to provide an improved and faster experience for customers, Cisco designed and developed a Cisco Commerce Express (CCE) platform that allows for Cisco and customers to collaborate while reviewing and purchasing some offers from Cisco Collaboration portfolio.

The platform offers customers easy access to Cisco created Webex and Webex Teams quotes, gives possibility to review the quotes and submit orders directly to Cisco Systems, Inc.

It also allows customers to manage quotes and orders, review and print invoices, as well as view and manage subscriptions.

This document is to guide Cisco customers through the Cisco Commerce Express platform, and show its benefits on how to use it.



## **CCE Basics**

#### **CCE Basics**



Overview:

Customers can now use the Cisco Commerce Express platform to manage quotes and place orders.

1. To Login to the Cisco Commerce Express homepage, click here

Note: To log to the tool you need to use your Cisco.com Account (CCO ID) and password.

If you do not have Cisco user CCO ID yet, along with "Shared Quote" email, you received a "register for a new account" email. Please follow the steps described in that email to register your CCO ID account. The Primary billing contact can also add secondary and support contacts. Once added, follow the Activate email to set up the CCO ID.







In the Cisco Commerce Express homepage, configure your profile by clicking the arrow to the right of your name then click **My Account and Preferences**.

- On your profile on the right side of the screen select my account preferences
- 2. Select change language to see a list **of16 supported languages** to view subscriptions, quotes, orders, and invoices.
- 3. You can add **Bill To** or **Service To** addresses. *The Bill To address will save the preferred currency. This is set by Sales.*
- 4. Select toggle to set quote and order notification
- Add (ach/check/wire transfer or credit card) payment methods, preferred payments, or change methods.

• K > III		= conversion is all	1100	6	נים איז
ISCO EXPRESS		Salasergeisers Gardon	Crows Presser		COS Liver
	My Profile				despending report
					Sec.
	OCL User	Construction and an experimental sector of the sector o	<ul> <li>angle sting where</li> </ul>	5, converse	<ul> <li>148-000</li> </ul>
	Languago				
	Trable Telefonger				
	Access				



#### **CCE Basics**

Commerce

- There are four tabs in the header: Subscriptions, Quotes, Orders, & Invoices. Click on a tab to connect to the associated dashboard.
- 2. Click on the **links** in the toolbar to view contacts, site map, terms & conditions, privacy statement, cookie policy, and trademarks of Cisco, view contacts, submit feedback and receive help.
- 3. Click the explored tools or to contact Cisco.



		3
CISCO COMMERCE CISCO EXPRESS	Subscriptions Quotes Orders Invoices	CCE User - Ge
Orders		Contact Cisco

#### **CCE Basics**



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#### inimize button to minimize the



Soud a roomage to Natio - Democrat Assistant	

After 10 minutes of inactivity, your session will expire and CCE will automatically log you out. Click the bunered to re-login to CCE.

Session Expired

Your session has been timed out due to inactivity. Please click here to re-login to the systems.

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### **Reviewing Quote in CCE Dashboard**

Sales will share with customers a quote in CCE.

Diagram A If a user is a <u>New user on CCE</u>, <u>they must register for a</u> <u>Cisco.com Account</u>.

Return to Quote email and click to <u>View Quote</u>. Enter your Cisco.com Account information.

\*\*Please Save this information as it will be used on

**Diagram B** For **returning users**, please click to <u>View Quote</u>. Now enter your Cisco.com Account information.





## Tax Exemption (US)

#### **Tax Exemption**

Commerce

Overview:

- The products & services purchased are subject to applicable sales taxes in the ship-to and serviceto location(s).
- Effective September 13, 2020, if a bill-to customer company does not have tax exemption certificates on file for the **Cisco Systems Inc. and/or Broadsoft Adaption LLC** in the taxable location(s), Cisco will apply all required taxes to their invoices.
- If you are eligible for tax exemption and you do not want Cisco to apply taxes to your invoices, please send us your resale certificate/s or other tax exemption certificate/s before you place your first order through Cisco Commerce Express platform.
- This is one-off requirement. Tax exemptions certificates are valid for the specified state(s) until expired or revoked.
  - States where Broadsoft Adaption LLC is registered to collect taxes: Arizona, Arkansas, Connecticut, Georgia, Indiana, Kansas, Kentucky, Louisiana, Maine, Maryland, Massachusetts, Michigan, Minnesota, Mississippi, Missouri, Nebraska, Nevada, New Jersey, New Mexico, North Carolina, Ohio, Pennsylvania, South Carolina, Utah, Washington, West Virginia, Wisconsin
- On the exemption certificate, please enter "computer or networking equipment and related services" in the field for the description of items that qualify for exemption.

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#### **Tax Exemption**



Effective September 13, 2020, in order to receive accurate tax exemption status, you will need to provide Cisco with two packets of certificates, one each for:

- Cisco Systems, Inc. (CSI),
- Broadsoft Adaption LLC

Your Tax exemption certificates must be sent to your Cisco Sales Representative or the Cisco Collections Team with the same Customer ID (CID) number included on each submission. The certificates will be forwarded internally to Cisco's Sales Tax Team for validation.

If you do not know you Customer ID number, please contact your Cisco Sales Team and they will be happy to find your Customer ID number for you.

More information can be found on Cisco's Sales Tax Customer Support page (<u>https://www.cisco.com/c/en/us/buy/customer-support-information/united-states-sales-tax.html</u>), including references to State-by-State Tax Exemption forms.



## **Manage Quotes from Dashboard**

### Manage Quotes from Dashboard

#### **Overview:**

Customers may now manage **quotes** created by Cisco directly in Cisco Commerce Express platform. After a quote has been shared with you it is visible in Cisco Commerce Express Quotes Dashboard. You can now sort, filter, search, and view all your quotes. You have access only to quotes that have been shared with you.

3

4

1. In the Cisco Commerce Express homepage, click **Quotes** to view all quotes with high-level details.

2. To **filter by status**, click the drop down and all applicable quote statuses in the Status section.

3. Use the drop to review **Shared Quotes** within the last 30, 60, or 90 days

4. You may sort by date including when a quote is *Shared on, Valid Until or Billing Amount.* 









#### Overview:

Customers can now manage quotes and place orders from their Dashboard in Cisco Commerce Express (CCE).

1. From the Cisco Commerce Express homepage, click Quotes to view the **Quote** dashboard.

2. For new quotes pending acceptance, you will see "*Pending Acceptance*" in the Status field.

3. To decline the quote, click **Decline**.

4. To checkout, click **Checkout**.

5. To view the quote details, click **View Details**.





6. Once clicking **View Details** from the Dashboard, the Items page will show the details on the quote.

7. If a promotion has been applied on the quote, a message will show at the top with the name and duration of the promotion.

8. In addition, the **Promotional Credit Subtotal** will show at the bottom of the quote to inform users of the discounts they are receiving.

9. To see more details on the priced items of the quote, click **Financial Summary**.

NG (	CUSTOMER ACCEPTANC	E Shared On 10-Jun-2020		Valid U 10-Jul	I-2020	Cisco Sales Rep		C-1
ø	Covid-19 Promo 4 m	nonth(s) promo applied suc	cessfully, valid for a	period of 4 mor	nth(s)			
				9		FINANCIAL SUMMARY		
6	ITEMS			Qty	Unit List Price (USD)	Discount (%)	Unit Net Price (USD)	BILLING AMOUNT (USD)
Θ	1.0 Collaborat A-FLEX	ion Flex Plan				0.00		
	INITIAL TERM 12Months	Auto Renewal Term 12Months	Billing Model Annual Billing	Provisionin		quested Start Date 🖍 -Jun-2020		
	Included Delivera	ble Items						
	1.1 Basic Support SVS-SPK-SU	ort for Cisco Spark JPT-BAS		1	0.00	0.00	0.00	0.00 Annual
	1.2 Included Vo A-SPK-VOIP			1 Each	0.00 Per Each /Mont		0.00 Per Each /Month	0.00 Annual
	1.3 Cloud Meet A-FLEX-MEE			1200 User	0.00 Per User /Montl		0.00 Per User /Month	0.00 Annual
	1.4 File Storage A-FLEX-FILE			24000 User	0.00 Per User /Month		0.00 Per User /Month	0.00 Annual
	1.5 Cloud Devic A-FLEX-DEV	ce Registration Entitleme REG-ENT	ent	1200 User	0.00 Per User /Montl		0.00 Per User /Month	0.00 Annual
	1.6 Messaging A-FLEX-MS			1200 User	0.00 Per User /Mont		0.00 Per User /Month	0.00 Annual
	Priced Items							
	1.7 EntW Cloud A-FLEX-EAC	Meetings Tier 1 (1) PR	OMO APPLIED	1000 Each	15.50 Per Each /Month		15.50 Per Each /Month	186,000.00 Annual
						8 0	ffer Subtotal (Annual Billing)	186,000.00
							Credit During Promotion (A	nnual Billing) 62,000.00



10. The **Financial Summary** pop up will show providing the detail breakdown of the promotion for each item. Users will be able to see the name of the promotion applied and the duration of the promotion. Each item with the applied promotion will show in the Financial Summary table. Users can see the discount and billing amount during the promotion period as well as the discount, unit net price, and billing amount after the promotion has expired. Note: all priced items in the quote regardless if a promotion is applied to the item will show in the Financial Summary table.

• Note: For Annual Billing, it will display the annual billing total.

#### 11. Click **Checkout** to proceed with ordering the quote.

romo Applied: Covi	d-19 Promo 4 month(s)	Promo Du	ration: 4 month(	s)				All prices in U
Offer Name	Priced Item Name	Qty	Unit List Price	During Pro	mo Period		After Promo Expiry	
Oner Name	Priced item Name	Qty	Unit List Price	Discount (%)	Billing Amount	Discount (%)	Unit Net Price	Billing Amou
A-FLEX	EntW Cloud Meetings Tier 1 (1) A-FLEX-EACM1	1000 Each	15.50 Per User/Month	100.00	0.00 Monthly	50.00	7.75 Per User/Month	7,750. Mor
			Monthly Total		0.00 Monthly			<b>7,750</b> . Mon
						Sub Tota	I for 12 Months	93,000.0
						Total Pro	motion for 4 month(s)	31,000.0

Test Demo - Jun 10 Quote ID:						Billing Amount (Monthly) USD 7,750.00
Status PENDING CUSTOMER ACCEPTANCE	Sharad On 10-Jun-2020	Valid Chill 10-34-2020		Cruch Sales Res	-	Co
Covid-19 Premo 1 month promo applied succ	eschuly, valid for a period of 1 month(s)					
				,		FINANCIAL SUMMARY
S ITEMS		Qty	Unit List Price (USD)	Discount (%)	Unit Net Price (USD)	BILLING AMOUNT (USD)

cisco commerce



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12. In the checkout page, click Add Service Address, if applicable.

#### 13. Click Add New Address.

SCO EXPRESS	SUBSCRIPTIONS QUOTES	ORDERS INVOICES		
leckout			QUOTE ID: 1	
ADDRESSES *				
			ORDER SUMMARY	
			BILLING AMOUNT USD 0.00	
ADD BILLING ADDRESS Same as Bill To Address	12	ADD SERVICE ADDRESS	TOTAL BILLING USD 0.00 AMOUNT (MONTHLY)	
	-		By placing your order you agree to Cisco's privacy notice and conditions of use	
Contacts * Primary Business Delete	Primary Billing	Des	Place Your Order	
	TERM COMMON	63 b		
PAYMENT METHOD		Show Additional Con	facts	
ENTER PURCHASE (HEXER NAMERI (SPETOWA)		$\backslash$		
<ul> <li>✓ Bill Me Later (Check ACH)</li> <li>✓ Payments Terms: Net</li> </ul>				
TAX INFORMATION *				9
			¥	
	Add Service Address			





14. Complete all fields in the Add Service Address box. In the Checkout page, click Add Service Address, if applicable.

15. Click Assign This Address As Billing to Address, if applicable.

16. Click Add Address.

17. Click Recommended Match.

18. Click Add Address.

Add Service Address	14	×
New Address		
Country * UNITED STATES	* ·	
Company Name *	CALIFORNIA	
Address Line 1 * 4	SAN JOSE	
Address Line 2	Zip Code * 91 m m	
ASSIGN THIS ADDRESS AS BILLING TO ADDRESS.		
15	Cancel Add A	ddress
	1	6
d Service Address		×
w Address		
Entered Address	Recommended Match	
al		
42 SA UR	42 Shi Uf	
ASSIGN THIS ADDRESS AS BILLING TO ADDRESS		8
	Cancel	Address



19. Click Add Billing Address.

20. Click Add New Address.

21. Complete all fields in the Add Billing Address box.

22. Click Assign This Address As Service to Address, if applicable.

23. Click Add Address.

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24. Click Recommended Match.25. Click Add Address.



26. To delete an existing Primary Business or Primary Billing contact,

click Delete.





27. To add a Primary Business Contact or Primary Billing Contact, click Add Primary Business Contact or Add Primary Billing Contact. Note: Both primary business and primary billing contacts are mandatory.



28. Select your Contact from the Search by **CCO or Email ID** field. Note: To add a new business contact, proceed to step 24.





29. Select all applicable contact types

#### 30. Click Add Contact.

Note: You cannot edit contacts once added. To make changes, delete the contact and add again. Add again

31. To create a new business contact, enter "Create New Business Contact" in the Search By Cisco.com Account (CCO ID) or Email ID field

#### 32. Click Create New Business Contact

If your billing admin contact is no longer with the company, and the contact must be updated, please submit a ticket here:

Link: https://www.cisco.com/go/cs Portal Path: Quote > New Quote> Cisco Commerce Express

EARCH BY CCO OR EMAIL ID		
PRIMARY BILLING CONTACT		
	<ul> <li>1 ini mini minjeppene</li> </ul>	
NTACT TYPE *	Iditional 29	30



### Cisco.com Account (CCO ID)

Activate Email & View Invoice

Note: If the contact is new, the new user will receive one email which includes an "Activate" CCO ID Account message in the email, along with the current invoice.

Click here to activate new CCO ID account

Click View Details to View invoice



#### CISCO COMMERCE

#### Hi Subscriber,

T

Thanks for Submitting the order for DEMO CAFE. Please use the Web Order ID 1300058041 for future reference.

Please find the order details shown below.

You need to activate your Cisco Account here and then click below button to view the order

ITEMS			BILLING AMOUNT (USD)
Webex Name			890.0 Monthly
Initial Term 12.0 Months	Automatically Renews For 12 Months	Provisioning Contact Email demo111@yopmail.com	Requested Start Date Mar 15, 2019

View Details

If you have a cisco.com account, login with user id and password when prompted. If you do not have a cisco.com account, register here with your email id.

Order can also be accessed by going to the Cisco workspace.

For further assistance, please contact below listed Cisco Sales Person

 $\mathbf{X}$ 

@cisco.com



### Create a Cisco.com Account (CCO ID)

How do I set up a Cisco ID (CCO ID)?

1. Go to the <u>Register page</u>

2. Fill out all required fields.

3. Click Register.

#### PLEASE NOTE:

To be mapped to your companies account, order, or invoice, here are a few ways to be added:

- Sales should 'share order' or invoice with you and add you as a contact to the account.
- Your internal business contact can add you as a billing, secondary, or support contact to the account directly in <u>CCE</u>.
- You can create a ticket to request to be added www.cisco.com/go/cs





33. Complete "Add New Contact" details34. Select all applicable contact types35. Click Add Contact

ADD NEW CONTACT Business Email \* CCO ID \* a Last Name \* First Name Ja S Company Name Country \* UNITED STATES A -Phone Number \* (1) Contact Type 34 V Primary Business V Primary Billing Additional 35 CANCEL

33

Search and add Contacts

36. To see additional contacts, click Show Additional Contacts



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37. To add additional contacts, click *Click To Additional Contacts.* 

Additional Contacts		Hide Additional Contacts
TEPONO	■ 1 Q US	Delete
Q	37	
	Click To Additional Contacts	

38. Click the applicable taxability selection in the Tax Information box.

Contacts *						ORDER SUMMARY	
Primary Business		Delete	Primary Billing		Delete	CROCK COMMON	
TERTONIA			TEST OBIO			BILLING AMOUNT USD 0.00 (MONTHLY)	
Q-12	2 b		Q-1	2 t			
						TOTAL BILLING USD 0.00 AMOUNT (MONTHLY)	
2 PAYMENT METHOD					Show Additional Contacts		
						By placing your order you agree to Cisco's privacy notice and conditions of use	
ENTER PURCHASE ORDER NUMBER (OPTIONAL)							
						Place Your Order	
<ul> <li>Bill Me Later (Check ACH)</li> </ul>							
<ul> <li>Payments Terms: Net</li> </ul>							
3 TAX INFORMATION *							
You have either not selected the taxability	ty value or have selected an invalid value						
-							
Taxability							
8 Internal Use 🕤	State/Fed	eral/Direct Pay	or Export Exemptions 🕕				
Tax Status							

### Add a Secondary Billing contact

Commerce

- 1. To add a secondary contact Select Quote
- 2. Go to Check Out
- 3. Show Additional Contacts
- 4. Click to add Additional Contacts
- Search to assign user or click to Create New User Contact. Select secondary billing or support role
- 6. Review Secondary contact has been added

EXPRESS OCE User 4 Subscriptions Cuctes Intelices Search and add Conta TOTAL MALENCE AUD 2.225 CCE AUS Ltd Sector CODE TRUD demosPyopmeil.com 25 DOMAIN STREET SOLITH REPORT, GUD, 4101 Assists Ouctes Show-Guster By Statu Pending Acceptance Stand Sort By Search Dy Quote Kame JD to the and manufactures Status Fending Acceptance incluties Cecline Zach Mueller REPLACE QUOTE FOR SUB231423 27-FEB-2019 Priced hems manaplane Spreaking Ouste ID: 1203067894 Instant Vessacing CANCEL AND COMM AUD 2 215 51 WebEx Support Option and deal Definencials have WebEr Audo Add Co. Conferenciera Other Payment Metho WebEr Storage Add On POR Reg Stated 01 Vold End Vew Details -27-Feb-2019 29-War-2019 5 2 EXPRESS Owleys Involves Search and add Contacts TOTAL BLUNS CCE AUS Ltd baives the \* domoig/yop mail.com Addrosses Godresse OROFR SUNWARD You Dave Tell Science UNIED STATES CCE AUS LM Your between the Bull State In Line and TO LAST BE COMPANY 2,225.5 CCE AUS Ltd CCE AUS Ltd Primary Busine 2009022155 25 DOMENIS RABIT SOUTH ERCENSE GRO, 2001 Autorita 25 DOMON STITULT SOUTH STOREMEN 0 D 4101 Autorits Bestow And Amore Guards Zach Mueller 🖌 Procedury Billion 🖌 Proper Please Your Order Centerts \* Primary Business Primary Billing Zach Mueller Zach Mueller 1,-612032546262 5,461200224050 moore internet Payment Metho Payment Method FO\_Ren Payment Mathon Wire Tennior | Payment Tenni 30 NET Perment Method: Wire Transfer, J. Payment Term: 32 NF V Vin Transfe 🖌 victor Transfer 3 ORDER SUNTYAR 6 reur involges Will De Sent To This Adams Your Onlar Will be Serviced for This Aphroa The Aller Million Strategy TO THE MELTING 2,226.64 TOTAL NULLAS 2,223,50 AUD AUD CCE ALIS LM CCE ALIS LM CCE AUS Ltd CCE AUS Ltd STREET, BALLER 24-10 PHON REPAIRS SCIENCE CONTRACTOR (10-1) 4-10-1 Australia 25 COMEN STREET SOUTH SREEK-12. GLF. 24 DOMEN STREET SUCT 1 BRIDSARD, 0.0 410 Break and And American Desiries Redom Anti-Annari Garo's condi que, anos Autoria Aurora humb Dertherte \* Doutonty 7 Primacy Business P ferance Billing Primary Duribert Primery Dilling Zach Muelle Zach Muelle Zach Mueller Zach Muello C 612032546565 1,1612032549888 manager designation Biological Antipation in An Additional Conta DEMO CODDESSS in carroltycoral.com \$2.73 E Parcmarit Matheur PO\_Rep Deersent Method, Wite Transfer - Payment Terms 30 NET V Max Transfer

Payment Method

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39. To change the provisioning contact email, click the pencil icon.

40. To change the requested start date, click the pencil icon

41. If a promotion was applied on the quote, a message will show stating the name and duration of the promotion.

42. To view the Financial Summary of the priced

items on the quote, click Financial Sun ary.

43. To place your order, check the box to agree to Cisco's privacy notice and conditions of use.

44. Click Place Your Order

Tax	Information *						ORDER SUMMARY		
T	axability						TOTAL BILLING AMOUNT	USD	7,750
0	Internal Use 🕜	O State/	Federal/Direct Pay or Expo	ort Exemptions 🕕			43 Review And Ad	ccept Cisco's co	nditions of
И	ax Status : NON-EXEMPT bu designated this order for internal use. Taxe Please note: Tax Status is only an estimate."	es may be applied to th	e involce.				Contraction of the second	l your order pleas	
Pro	duct Information		_				44	ce Your Order	
0	Covid-19 Promo 1 month promo applied successfully, vi	alid for a period of 1 month(s)	;		4	2	-		
						FINANCIAL SUMMARY			
0	ITEMS	Qty	Unit List Price (USD)	Discount (%)	Unit Net Price (USD)	BILLING AMOUNT (USD)	-		
@ ©	ITEMS 1.0 Collaboration Flex Plan A-FLEX		Unit List Price (USD)	Discount (%)	Unit Net Price (USD)		-		
	1.0 Collaboration Flex Plan A-FLEX INITIAL TERM Auto Renewal Term 800	ling Model Provisio	39	0.00			-		
	1.0 Collaboration Flex Plan A-FLEX INITIAL TERM Auto Renewal Term 800	ling Model Provisio	39	30 <sup>0.00</sup>					
	1.0 Collaboration Flex Plan A-FLEX INITAL TERM Auto Reneval Term Bill 12Months 12Months Mo	ling Model Provisio	39	0.00 and Start Date 3-Jun-2020					
	1.0 Collaboration Flex Plan A-FLEX INITIAL TERM Auto Barwal Term IIII 12Months 12Months Mo Included Deliverable Items 1.1 Basic Support for Cisco Spark	ling Model Provisio	39 ning Contact Enual / I @cisco.com	0.00 tequested Start Date 3-Jun-2020	×	BILLING AMOUNT (USD)			
	1.9 Collaboration Flex Plan A-FLEX MatTAL TIRM Auto Renewal Term 108 Tokotela Deliverable Items 1.1 Basic Support for Cisco Spark 295-697-697-697-1	Ing Model pothly Billing 1	39 ang Contact Email Resisco.com	0.00 lequered Start Data 13-Jun-2020 0.00 0.00 0.00	0.00	BILLING AMOUNT (USD)			

#### Manage Purchase Order# (PO #)



Adding a PO Number to a new order:

- 1. From the **CCE Dashboard > Review Quote**.
  - 1. For new users, please see steps registering in your email here.
- 2. Scroll Down 2) Payment Method and Enter PO Number > Update PO Field.

1

3. Please Note: PO Numbers for new orders must be entered prior to accepting the quote from your Sales rep.

EXPRESS		Subsc	riptions Quotes	Orders Invoices		CCE Help jenn Mendezoa + ee	NAGAVARA	ARK (MERP) OUTER RING ROAD, RACE	IENA HALLI,	NAGAWARA	ARK (MERP) DUTHERING ROAD, RACHENA HALLI,	ORDER SUMMARY	
Checkout						QUOTE ID: 1200148061 🕒	BENGALURU, KA, 560065 India			BENGALURU, KA, 560065 Indie		TOTAL BILLING INR AMOUNT (FOR THEY)	2,434.64
							GSTIN 29AADCM2448J128	Address Classification India: SEZ (Special Econom	tic Zone)	GSTIN 29AADGM2448J128	Address Classification India: SEZ (Special Economic Zone)	Review And Accept Cisco's c	anditions of
						ORDER SUMMARY	Contacts *					Place Your Order	
						TOTAL BILLING INR 2,434.64 AMOUNT_MCPTIFLIZ	Primary Business JENN MENDEZOA		Delete	JENN MENDEZOA	Deloto		_
Addresses *						Review And Accept Clisco's conditions of	L +01 0103465401	sjens123Øyopmel.com		<b>C</b> +91 9193453401	■jarn123@yopmel.com Show Additional Contacts		
	0			0		Place Your Order	Payment Method      FIRDUSE CADE     3477109TDC						
	ADD BILLING ADDRESS Same as Service To Address			Add Service Address Same As Bill To Address			Payment Method: Wire Tra	nsfer   Payment Term: 30 NET					
Contacts *		Delete	Primary Billing		Delete		Tax Information *						
Jenn Mendezoa	ajern123@yopmall.com	Leiste	Jenn Mendezoa	com 23/byopmell.com	Caroo		Tax will be calculated/ applies on invol	kc(s) (Fapploible)					
Payment Method				Show Ac	iditional Contacts		Product Information     G ITEMS	Qty	Unit List P	rice (INR) Discount (%) Unit	Net Price (INR) BILLING AMOUNT (INR)		
PURCHASE ORDER							<ul> <li>1.0 Webex Named Use A-SPK-NAMED-US</li> </ul>			0.00			(

### Manage Purchase Order # (PO)



Active subscriptions can be modified by customers (billing contacts) only.

1. Select the **<u>Subscription UI</u>** > Manage Payment Details > Update PO Field.

	/X-NAMED-USER)						
Subscription ID Sub174258		Effective 12.00 M	For onths from 13-Se	ep-2018 to 12-	Sep-2019	Automatically Renews 12.00 Months On 13-	
Status ACTIVE		Billing Free Monthly				Monthly Cost USD 846.25	
	Summary	History	Invoices	Usage	Manage Contacts	Quotes In Progress	Manage Payment Details
Purchase Order Number 6076015D	*						
Payment Method PO Payment Term 30 NET		Purchase 607601	e Order Number 5D				

### VAT ID Registration & Certificate Upload



- 1. Click to view Quotes shared by sales.
- 2. Click Check out
- 3. Customer or VSS can now upload VAT registration certificate
- For countries that do not have a manual/automated VAT ID lookup link.

CISCO EXPR			Subscrip	Quotes Orders	Invoices		CCE User -   👁
Orders							Contact Cisco
CCE16T	rding Acceptance Z 2200035667		Includes Included Items Other Spark Support O Spark M1-M3	)ptions			Dave Checkout Billing Amount (MONTHLY) AUD 737.50
Shared On 08-Feb-2019	Valid Until → 10-Mar-2019						View Details →
3 VAT/G Applied	armation *		Enter VAT/GST ID/ Ta	ıx ID *			
Tax will b	na calculated/applied on invoice/c) (if appl	icable)	VAT/GST/Tax ID validated	d automatically			
🗸 Wire Tran	sfer					TOTAL B AMOUNT	illing aud 737.50 T(MonTHLY)
4 ax Informat	tion *					Rev use	view And Accept Cisco's conditions of
Applied To Co TANZANIA, U	ax ID Information puntry * INITED REPUBLIC OF listed/applicable)	VAT/GST ID/ Tax ID *		Tax Certificate * Sample_Cisco.png(0.01 MB	) <u>*</u>	_	Place Your Order
Product Info	ormation						

#### **Tax Options**



- Taxability options will be displayed for customers. Customers may select from Internal Use (Non-Exempt) or State/Federal/ Direct Pay or Export Exemptions
- 2. Tax definition will be displayed in taxability section

Payment Method Payment Term	VAT/GST/Tax ID Information
rayment metros Payment lem Nire Transfer 30 Net	
	Applied To Country/Region VAT/GST ID/ Tax ID MX
	What is the intended use of your product?
	1  internal Use  internal Use internal Use internal Use internal Use internal Use internal Use internal Use internal Use internal Use internal Use internal Use internal Use internal Use internal Use internal Use internal Use internal Use internal Use internal Use internal Use internal Use internal Use internal Use internal Use internal Use internal Use internal Use internal Use internal Use internal Use internal Use internal Use internal Use internal Use internal Use internal Use internal Use internal Use internal Use internal Use internal Use internal Use internal Use internal Use internal Use internal Use internal Use internal Use internal Use internal Use internal Use internal Use internal Use internal Use internal Use internal Use internal Use internal Use internal Use internal Use internal Use internal Use internal Use internal Use internal Use internal Use internal Use internal Use internal Use internal Use internal Use internal Use internal Use internal Use internal Use internal Use internal Use internal Use internal Use internal Use internal Use internal Use internal Use internal Use internal Use internal Use internal Use internal Use internal Use internal Use internal Use internal Use internal Use internal Use internal Use internal Use internal Use internal Use internal Use internal Use internal Use internal Use internal Use internal Use internal Use internal Use internal Use internal Use internal Use internal Use internal Use internal Use internal Use internal Use internal Use internal Use internal Use internal Use internal Use internal Use internal Use internal Use internal Use internal Use internal Use internal Use internal Use internal Use internal Use internal Use internal Use internal Use internal Use internal Use internal Use internal Use internal Use internal Use internal Use internal Use internal Use internal Use internal Use internal Use internal Use internal Use internal Use internal Use internal Use internal Use internal Use internal Use internal Use internal Use internal Use internal Use i
	Tax Status: NON-EXEMPT

Payment Method	Test Test	Expiry Date:	Payment Term	What is the Intended use of your product?
Credit Card	xxxxxxxxx1000	8/2022	Immediate	



- Link is included to allow customers to redirect to Customer Service Hub to upload their tax certificate
- 2. Link to Cisco Tax website for general sales tax information


# Tax Display & Agreement



- 1. Estimated tax will be displayed for customers
- 2. Customer must acknowledge the estimated sales tax agreement

CISC	Co Express		G Subscription	s Quotes	Orders	Invesces			of heights	0	
Otb							Quine ID	Order Scheriffed By	0	Submitted On Status	r Processing
ine o	oder ID Sales Order Touriber	Ciaco Salan Representativ	*			Silling Arrian	at (Property)				
Ord	ler Details										Internal View
Item	ns									-	inancial Summary
6	Items				Qty	Unit List Price (CAD)	Discount (%)	Unit Net Price (CAD)	Extended Net Price (CAD)	Estimated Shipping (CAD)	Estimated Taxes (CAI
0	Case Duo subscription						-1,100.00		114,048.00 Prepaid	NA	14.020.2
	Criter Precessing	RMA = SERIES Vew Det	ett.								
	Circles Processing	RMA # 889968. View Det	alta							Rem	Subitati 128,874.2
	Conter Processing		oning Contact Enall	Requerred Start Can 25-Am-2021 🐯	Cytomate 25-Jun	ed Start Carls 1-2021 Sud02				Rett	Subestal: 128,874.3
	Conter Processing O	Ding Model Proces	oning Contact Enall		25-Jun	of Start Cala 1-2021 Sub02				Rett	Subliticital: 128,874,3
	Sitems returned on 17-Aut-2021 with 1 Sitems returned on 17-Aut-2021 with 1 [-] Hole Service Address Details betail Term Acto Researd Term 12 Months 12 Months	Ding Model Proces	oning Contact Enall	25-Jun-2021	25-Jun	-2921 Sub82			_	Sub Total	114,048.0
	Sitems returned on 17-Aut-2021 with 1 Sitems returned on 17-Aut-2021 with 1 [-] Hole Service Address Details betail Term Acto Researd Term 12 Months 12 Months	Ding Model Proces	oning Contact Enall	25-Jun-2021	25-Jun	-2921 Sub82		1			Submetai 128,874.3 114,048.0 124,049.0 124,049.0

Text Take Representation			Criter Summary	Thanca summary
🖬 abatam@chaia.com 🔩 8 666 2874			Categories	Torial Datab
O These are one or more errors on this quarte. Pix scrall down and fix them before placing your order	E		Hardware (1 Barn)	4,995.0
A Your credit Last analog in accounteredDDD will super within 25 days. Please update your credit	and information to avoid apricin interruptions		Estimated Drapping     Estimated Tax	+ 100 T + 327 A
Billing Information *		^	Seath (1 Service) + Estimated Tax	904.0 + 37.0
Address			-	USD 5,844.70
1 M 1	Cor Bit To Number			
Contacts *	Additional Contacts		and Deep Tax	and Use Terms , Privacy Polic
	· (*******	2	Payment of Same Tax Servic of shall in according to with apple with consume and charge come	able sizes takes and use has been
OVFED STATES     Asinghree/pupped com     4, -1 5102/50002     Overeintering     Overeintering     Overeintering     Overeintering	🕚 (Atti) STATES 🖀 utodoknowdysprawi com 🕈	. 19	No parchases of the group or pay all order basic charged pr- sides his through to the basic record of the mouse. Further forward to adopt unlike Chart agent.	the Check Involution, These as well the network Magnetable agrees or must agrees before meaning
		Continue	Place II	w Drive



# Place Order Highlight

alia) cisco	EXPRESS	Subsci	riptions Quotes Orders	Invoices		CCE Help Lime Cafe cafe	• 00
Che	ckout					QUOTE ID: 1200090065	Þ
1	Addresses *						
	Bill To	Change	Service To		Change	ORDER SUMMARY	
	Your Involces Will Be Sent To This Address LIME CAFE 101 Collins St MELBOURNE, VICTORIA, 3000 AUSTRALIA		Your Order Will Be Serviced To Thi LIME CAFE 101 Collins St MELBOURNE, VICTORIA, 3000 AUSTRALIA	s Address		TOTAL BILLING AMOUNT MONTHLY)     AUD     52.92       Image: Construction of the second seco	
c	ontacts *					"Place your order" Button Place Your Order	
	Primary Business	Delete	Primary Billing		Delete		
	LIME CAFE CAFE \$+613 9659 4200		LIME CAFE CAFE	Imecafe@yopmail.com			
2	Payment Method			Show	Additional Contacts		
	PURCHASE ORDER 123456789						
	Payment Method: Wire Transfer ( Change )   Payment Term: 30 N ✔ Wire Transfer	IET					
3	Tax Information *						$\mathbf{e}$

The Place Order button is now highlighted for customers when confirming and placing orders.

# **Download Your Signed Contract**

- 1. From the Orders Screen
- 2. To the left click Signed Contract
- 3. The file will download and include:
  - a) copy of signed T&C
  - b) copy of your invoice.

cisco				Subscriptions	1. Orders Ir	rvoices		S CCE Help Jenn Me - 1 ce
ORDER	<b>IS</b> (							2. ± Signed Contract
	CE DEMO ler ID: 1300093127						Order Summary	
Submitt	eci .	Quete ID 1200148450		Order Submitted By Jennme211258256	Cridi 04-	er Submittad On Oct-2019	Billing Amount (Monthly	INR 1,941.1
orsoo s Preeti S	NLES REP hinde	ι.						
9	ITEMS			Qty	Unit List Price (INR)	Discount (%)	Unit Net Price (INR)	BILLING AMOUNT (INR)
Θ	1.0 Webex Named User Meetin A-SPK-NAMED-USER \$1		malag 🛩			0.00		
	PRTIAL TERM Auto Reveval Term 12Months 0	Billing Model Monthly Billing	Provisioning Contact Email Jean1234@yopmail.com	Requested Start Date 07-Oct-2019	ESTMATED START DATE 07-Oct-2015	SUBSCRIPTION ID	Contract Number	
	Spark Devices Registration							
	1.1 Cloud device registration A-SPK-ND-SR			1	1,941,13 Per Gast Allecte	0.00	1,941,13 Par Usar Alcoriti	1,941,13 Linearry
	Spark Support Options							
	1.2 Basic Support for Cisco Spark SVS-SPK-SUPT-BAS			1	0.00	0.00	0.00	0.00
							Offer Subtotal(Monthly Billing)	1,941.13
Paym	nent Method							
	Wire Transfer		Disymptot Term 30 NET					
Tax Ir	nformation							e
	with the calculated/ applied on immice(s) (if applie	(atta						-

	Name:	Jenn Me				
	Email: Quote ID:	jenn1234@yopma 1200148450	il.com			
	By placing this of the Cisco Hoste can be found	d Cloud offer you a	ne Cisco Universal are ordering and yo	Cloud Terms and a u agree to be boun	pplicable Offer Descrip d by them. Both docum	tion for tents
	Billing legal co		IBM INDIA LTD			
	Billing legal co	mpany address:	ROAD, RACHEN BENGALURU,KA INDIA GSTIN : 29AAAC	A HALLI, NAGAVA ,560045 14403LSEZ	ARK (MEBP) OUTER I	
	incorpo	ration.		ame and address a mpany name or Bill to a	is registered in the state	e of
	Signature:	Jun Mc Josef Selder ADE DCS88F Selder ADE				
Desider Deserve 0 + 42 Test OCE DE UIDTE D: 1284						SILING AND UNT CONTINUE
Test CCE DE	MD Billio	redOs	Validad	Occo Sales P		BILING AND UNT (MONTHLY)

State Descine	Curtamar	Acceptance	810 M	101		Aald Unck 32-N 59-2019		Occo Sales Rep Pronti Shinda	mathing Science are	
	Inres					av	Unit List Price (NP)	Discount?		Stilling Amount (INR)
3	1.0 Weberl A-SPIC-NAS	Named User Me AED-USER	etings			1				
	12 Vorihe	Automatically Plan O'Months	www.Par	Dilling Vockil Nanthly	Provisioning Contact Dre Jack 1001 By types Loans	il Taganied Sta 17-Os-6219	et Extended Start Outs 07-Oct-2019	Subscription M. Contract?	wor.	
	Spark Devic	es Registration								
	LI Gaucia A SPEND ST	n teorogialente n				1 Der	LOVIID peribushuris	0.00	1.540.03 per Den manifi	1.548.83 Hardky
	Spark Supp	ord Cpliana								
	1.5 Basic Sa octubre con	post to Disco Spark					1.00	0.00	0.00	0.00 Marity
		1.140							Other Sublease (Northly Billing)	1,841.53
Addres									Offer Subleasi (Northly Billing)	046.0
Addres	5505	- 455					SERVICE TO		Offer Subleasi (Morriy Billing)	Get.G
IBM BM	IN THE REAL PROPERTY INTERNAL	L. BE BENTTO THE LTD GUENESE THREE			ocht ne nellt ne chwada		IBM INDI	ST-DUSINESS FARE (USDP)		
BLL T TOUTH IBM BRAN BRAN BRAN	IN THE REAL PROPERTY INTERNAL	L. BE BENTTO THE LTD GUENESE THREE		Address 1	acht na halli, na chranta Iordinatio (Sancia Constrait Zong		YOUP CROSS W IBM INDI. UNIVATE FEDA RECOLUCI, KO	A LTD 197-000 metic page petidy, wear	H:SK	u, waanna
BLL T TOUTH IBM BRAN BRAN BRAN	SSES TO TAVALEES HIL TINDIA TINDIA TAVALEE TAVALEES TAVALEES TAVALEES TAVALEES TAVALEES TAVALEES TAVALEES TAVALEES	L. BE BENTTO THE LTD GUENESE THREE		Address 1	instantes .		YOUR OPCER IN IBM INDI. UNIVATE DEBA RECOLUCION ROM	A LTD 197-000 metic page petidy, wear	oreas curtoninina nose, nociativa va éstano filosoficiation	u, waanna
DEL T TOPTI IBM BOATS BOATS BOATS BOATS BOATS Contac	SSES TO TAVALEES HIL TINDIA TINDIA TAVALEE TAVALEES TAVALEES TAVALEES TAVALEES TAVALEES TAVALEES TAVALEES TAVALEES	LL BE BENT TO THE LTD FOUSIESE THINK &		Address 1	instantes .		YOUR OPCER IN IBM INDI. UNIVATE DEBA RECOLUCION ROM	A LTD 19-040 MESS PARC (MEDP) (MED) 12	oreas curtoninina nose, nociativa va éstano filosoficiation	u, waanna

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Overview:

Customers can now view, download, and print invoices, in addition to view taxability, in Cisco Commerce Express (CCE).

1. In the Cisco Commerce Express homepage, click Invoices to view all invoices with high-level details.

CISCO EXPRESS	Subscriptions Quotes Orders Invoic	es CCE User +
Quotes		
Show Quotes By Status Pending Acceptance Shared	▼ Sort By	Search By Quote Name,ID C
Status: Pending Acceptance REPLACE QUOTE FOR_SUB231423_27-FEB-2019 Quote ID: 1200067894	Includes Priced Items Instant Messaging WebE: Support Options Included Delilverable Items WebE: Audio Add On Conferencing Other WebE: Storage Add On	Dacline Checkout Billing Amount (MONTHLY) AUD 2,225.50
Shared On         Valid Until           27-Feb-2019         29-Mar-2019		View Details →



2. Sort them by clicking the up/down arrow icon next to eachColumn header.

3. Use the Items Per Page dropdown menu to view more or less invoices per page.

Note: CCE Invoices defaults to 20 invoices per page.

4. Use the single arrows to advance or return a page and the double arrows to advance or return to the last page and first page, respectively.

IS	•			2	Search By Invoice Numb	er, Subscription Id		۹
Invoice 🔻	TYPE 🔻	CREATED ON 🔻	DUE ON 🔻	PO NUMBER 🔻	INVOICE TOTAL 🔻	BALANCE 🔻	STATUS 🔻	1
5	Invoice	09-May-2018	08-Jun-2018	PO_1	USD 0.00	USD 0.00	CLOSED	-
5	Invoice	09-May-2018	08-Jun-2018	PO_1 == ==	USD 41,855.31	USD 41,855.31	OPEN	
5	Credit Memo	09-May-2018	09-May-2018	PO_1	USD (11,530.98)	USD 0.00	CLOSED	
5	Invoice	09-May-2018	08-Jun-2018	PO_1	USD 21,573.35	USD 0.00	CLOSED	
5	Credit Memo	09-May-2018	09-May-2018	PO_1	USD (32,360.02)	USD (10,786.67)	OPEN	
5	Invoice	08-May-2018	07-Jun-2018	PO_1	USD 14,552.10	USD 3,021.12	OPEN	
5	Invoice	08-May-2018	07-Jun-2018	PO_1 =	USD 32,447.25	USD 32,447.25	OPEN	
5	Invoice	08-May-2018	07-Jun-2018	PO_1	USD 136,999.50	USD 0.00	CLOSED	
5	Credit Memo	08-May-2018	08-May-2018	PO_1	USD (171,249.38)	USD (34,249.88)	OPEN	
5	Invoice	08-May-2018	07-Jun-2018	PO_1	USD 0.00	USD 0.00	CLOSED	
10 🔻 Items Per Pa	ge				4	Results 1 of 8 《	< Previous 1	Next )



5. From the Dashboard Click Invoices then Search by Invoice# or Subscription#.

ATUS	•				5 Search By Invoice Numb	er, Subscription Id		
Invoice *	туре *	CREATED ON *	DUE ON ¥	PO NUMBER *	INVOICE TOTAL *	BALANCE *	STATUS *	_
5	Invoice	09-May-2018	08-Jun-2018	PO_1	USD 0.00	USD 0.00	CLOSED	1
5	Invoice	09-May-2018	08-Jun-2018	PO_1 == =	USD 41,855.31	USD 41,855.31	OPEN	1
5	Credit Memo	09-May-2018	09-May-2018	PO_1	USD (11,530.98)	USD 0.00	CLOSED	1
5	Invoice	09-May-2018	08-Jun-2018	PO_1	USD 21,573.35	USD 0.00	CLOSED	1
5	Credit Memo	09-May-2018	09-May-2018	PO_1	USD (32,360.02)	USD (10,786.67)	OPEN	8
5	Invoice	08-May-2018	07-Jun-2018	PO_1	USD 14,552.10	USD 3,021.12	OPEN	1
5	Invoice	08-May-2018	07-Jun-2018	PO_1	USD 32,447.25	USD 32,447.25	OPEN	1
5	Invoice	08-May-2018	07-Jun-2018	PO_1	USD 136,999.50	USD 0.00	CLOSED	1
5	Credit Memo	08-May-2018	08-May-2018	PO_1	USD (171,249.38)	USD (34,249.88)	OPEN	8
5	Invoice	08-May-2018	07-Jun-2018	PO_1	USD 0.00	USD 0.00	CLOSED	1
iew 10 👻 items Per P	age					Results 1 of 8 🛛 🐇	< Previous 1	Next > >

My Invoices							
STATUS	•		Search By Invoice Number, S 5 1	ubscription Id	٩		
Invoice *	ТҮРЕ 👻	CREATED ON ¥	DUE ON *	PO NUMBER V	INVOICE TOTAL *	BALANCE * STATUS *	
5	Invoice	09-May-2018	08-Jun-2018	PO_1	USD 41,855.31	USD 41,855.31 OPEN	÷
View 10 View Por Pa	ge					Results 1 of 1 🔣 🤇 Previous 1	Next > >>>

6. To view more details of the invoice, click the Invoice Number.

7. To **download the invoice**, click the

3 ertical dots icon.



ululu cisco Commerce

**E**XPRESS



10. To **print** the invoice, click the

🔒 hter icon.

11. To view **Invoice FAQs**, click Invoice FAQs Note: Invoice FAQs are also available at the bottom of the .pdf version of the Invoice.

12. To download the invoice, click **Download Invoice** 

13. On the CCE Invoice tab, the column **Program Discount** has been added as of August 2020 and reflects the discount amount if any promotions were applied on the line items.

14. To return to the main list of invoices, click **Back to Invoices**.

Invoice No: 51	Du	ue Date:Aug 16, 2020							Download Invoice
Invoice Date Jul 17, 2020		Invoice Type Invoice	Status Open	Payme 30 NE	int Term T	c	Customer Contact	GST	Number
lo Number vull		Web Order ID 130	Bill To Number 103	Custo 103:	mer Number				
Recurring Charge	<b>es</b>					1	3		
PO LINE #	ITEM #	SERVICE DESCRIPTION		DURATION (Month)	QTY	RATE PRICE	PROGRAM DISCOUNT	TAX AMOUNT	EXTENTED AMOUNT (USD
		A-FLEX Collaboration Flex Plan Subscription ID: Subscription ID: Subscription ID: Subscription ID: Subscription	16-2020						
•	1	A-FLEX-DEVREG-ENT-Cloud I	Device Registration Entitlement	1	600	Per User / mth			
•	2	A-FLEX-EA-BCCB-EntW Meet (1)	ings Bridge Country Call Back Audio	1	500	Per Each / mth	660		1,340.0
•	3	A-FLEX-EACM1-EntW Cloud I	Aeetings Tier 1 (1)	1	500	Per Each / mth	2560	-	5,190.0
•	4	A-FLEX-EDGAUD-USER-A-FL	EX Webex Edge Audio	1	500	Per User / mth			
	5	A-FLEX-FILESTG-ENT-File Sto	rage Entitlement	1	12000	Per User / mth			
•	6	A-FLEX-MEET-ENT-Cloud Me	atings Entitlement	1	600	Per User / mth		-	
•	7	A-FLEX-MSG-ENT-Messaging	Entitlement	1	600	Per User / mth			
•	8	A-SPK-CS-MNTH-Monthly Co	mmitted Audio Spend (1)	1	400	Per USD / mth			400.0
•	9	A-SPK-VOIP-Included VoIP (1)		1	1	Per Each / mth		-	
		A-FLEX Collaboration Flex Plan Subscription ID: Sub Billing Period: 17-AUG-2020 To16-5							

Back to Invoices					Invoice FAQ				
Invoice No: 5	Invoice No: 5 Due Date: Jul 04, 2018								
Invoice Date Jun 04, 2018	Invoice Type Invoice	Status Open	Payment Term 30 NET	Customer Contact	GST Number -				
Po Number PO_1	Web Order ID	Billing Contact +1 408	Billing Inquiries	Bill To Number	Customer Number 1				



14. To view Taxability, note the Web Order ID on the invoice.

15. Click Back to Invoices.

16. Click Orders.

Date , 2018	Invoice Type Invoice		Status Open	Payment To 30 NET	rm Customer Contact -	GST N	lumber	
nber	Web Order ID		Billing Contact L+1 408	Billing Inqu ■ U	irles Bill To Number		mer Number	
CISCO COMMER CO EXPRESS	CE		Subscri	ptions Quotes C	rders Invoices		TITLO	- 100
My Invoices					16			
TATUS	•				Search By Invoice Num	ber, Subscription Id		c
Invoice 👻	TYPE 🔻	CREATED ON *	DUE ON 👻	PO NUMBER *	INVOICE TOTAL *	BALANCE -	STATUS *	
5	Invoice	16-May-2018	15-Jun-2018	PO_1 = =	USD 3,867,450.00	USD 3,867,450.00	OPEN	÷
5	Invoice	16-May-2018	15-Jun-2018	PO_1	USD 0.00	USD 0.00	CLOSED	÷
5	Invoice	09-May-2018	08-Jun-2018	PO_1	USD 0.00	USD 0.00	CLOSED	
5	Invoice	09-May-2018	08-Jun-2018	PO_1	USD 41,855.31	USD 41,855.31	OPEN	÷
5	Credit Memo	09-May-2018	09-May-2018	PO_1	USD (11,530.98)	USD 0.00	CLOSED	÷
5	Invoice	09-May-2018	08-Jun-2018	PO_1 == =	USD 21,573.35	USD 0.00	CLOSED	÷
5	Credit Memo	09-May-2018	09-May-2018	PO_1	USD (32,360.02)	USD (10,786.67)	OPEN	÷
5	Invoice	08-May-2018	07-Jun-2018	PO_1	USD 32,447.25	USD 32,447.25	OPEN	÷
5	Invoice	08-May-2018	07-Jun-2018	PO_1	USD 136,999.50	USD 0.00	CLOSED	8
5	Credit Memo	08-May-2018	08-May-2018	PO_1	USD (171,249.38)	USD (34,249.88)	OPEN	÷
View 10 👻 Items Per Pa	ige					Results 1 of 8 巜	< Previous 1	Next > >>>



17. In the Orders tab, enter the Web Order ID into the Search By Order Name, ID field.

18. Click View Details.





19. On the Order Details page, you will see the Taxability section below the Items section.

	SALES REP	Quote ID 1	Order Submitted ji	By C	rder Submitted On 5-May-2018	Billing Amount (A	nnual) USD 708,0
<b>®</b>	Items	<b>%</b> +1 408	Qty	Unit List Price (USD)	Discount (%)	Unit Net Price (USD)	BILLING AMOUNT (USD)
<b>(</b>	1.0 Spark Shared Resources A-SPK-SH STATUS: Closed	~	1		80.00		708,000.00 Annual
Tax l	INITIAL TERM Auto Renewal Term 12 Months 12 Months	Billing Model Provisioning Cor Annual Billing or		uested Start Date SUBSCRIPTIO May-2018 Sub2	N ID   Contract Number		
Тах	(ablility 19		State/Federal/Direc	t Pay or Export Exemptions 🕦			

# Invoice export

CCE provides an option to customers to download list of invoices displayed on invoice dashboard.

E List of all Inv	voices Search	By Web Order ID	•	Search: 1300245830	Q				
									Download Invoice Lis
invoice		Туре	Created On	Due On	Subscription Id	Po Number	Invoice Total	Balance	Status
96	1	Invoice	03-Jun-2021	03-Jun-2021			USD 4,866.56	USD 0.00	Closed
e.	:	Invoice	03-Jun-2021	03-Jun-2021			USD 1,045.03	USD 0.00	Closed
e	1	Invoice	03-Jun-2021	03-Jun-2021			USD 250,650.70	USD 0.00	Closed
	:	Invoice	03-Jun-2021	03-Jun-2021			USD 2,215.37	USD 0.00	Closed
	1	Invoice	02-Jun-2021	02-Jun-2021		Credit Card	USD 0.00	USD 0.00	Closed
1	1	Invoice	02-Jun-2021	02-Jun-2021		Credit Card	USD 87,600.00	USD 0.00	Closed
	1	Invoice	02-Jun-2021	02-Jun-2021		Credit Card	USD 81,000.00	USD 0.00	Closed
	1	Invoice	02-Jun-2021	02-Jun-2021		Credit Card	USD 51,960.00	USD 0.00	Closed
	1	Invoice	02-Jun-2021	02-Jun-2021		Credit Card	USD 162,000.00	USD 0.00	Closed
	1	Invoice	02-Jun-2021	02-Jun-2021		Credit Card	USD 0.00	USD 0.00	Closed
	:	Invoice	02-Jun-2021	02-Jun-2021		Credit Card	USD 2,480.41	USD 0.00	Closed
	1	Invoice	02-Jun-2021	02-Jun-2021		Credit Card	USD 4,574.71	USD 0.00	Closed
	:	Invoice	02-Jun-2021	02-Jun-2021	300017179	Credit Card	USD 4,480.64	USD 0.00	Closed

Customers can:

- do an empty search and export all invoices from a dashboard.
- filter for subscription, invoices that belong to that subscription will get exported
- filter by status of invoices, excel will only contain filtered invoices

Invoice	Туре	Status	Created On	Due On	Subscription Id	Web Order ID	PO Number	Currency C In	voice Total	Balance
51	Invoice	CLOSED	21-Jun-2021	21-Jun-2021	Sub	1		USD	57.24	0
51	Invoice	CLOSED	21-May-2021	21-May-2021	Sub	1		USD	57.24	0
51	Invoice	CLOSED	21-Apr-2021	21-Apr-2021	Sub	1		USD	90.47	0
51	Invoice	PAST DUE	21-Mar-2021	20-Apr-2021	Sub	1		USD	19.08	19.08
51	Invoice	CLOSED	21-Feb-2021	23-Mar-2021	Sub	1		USD	18	0
51	Invoice	CLOSED	21-Jan-2021	20-Feb-2021	Sub	1		USD	18	0
51	Invoice	CLOSED	22-Dec-2020	21-Jan-2021	Sub	1		USD	18	0
51	Invoice	CLOSED	21-Nov-2020	21-Dec-2020	Sub	1		USD	18	0





Overview:

Customers can now manage subscriptions in the Cisco Commerce Express (CCE) platform.

#### 1. From the Cisco Commerce Express homepage, click Subscriptions

FILTERS Reset Filters X	SEARCH Q	UOTES		a						Create Quote
QUOTES CREATED										
🔵 Within 30 days	QUOTE *	QUOTE *	CUSTOMER *	CREATION * DATE	SHARED *	STATUS *	DEAL ID *	SHARED WITH * CUSTOMER	CISCO SALES * REPRESENTATIVE	VALID *
Within 60 days	10		The second se	brite				overenza	net neoentritte	Juli L
🔵 Within 90 days	1	T IN THE OWNER	An	26-FEB-2018	07-MAR-2018	REOPENED		1	\$	15-MAR-2018
Date Range	11	Time (ma)		13-FEB-2018		NEW			State and	
<u> </u>		Time cont								
STATUS	1	S		13-FEB-2018		NEW			Simo	
Cancelled	View 20 🔻	Items Per Page							Results 1 of 1 🛛 🌾 🕻 Previous	1 Next >
Declined										
Expired	Contacts   H Food	back   Help   Site M	ap   Terms & Conditions	Privacy Statement   Co	okle Policy   Trademarks	of Cisco Systems Inc				
New										
Ordered										
Pending Customer Acceptance										



- 2. In the Subscription tab, select a search option from the Search Bay dropdown menu.
- 3. Enter the associated search variable in the Search Subscriptions field.
- 4. Alternatively, you can click Advanced Search.

Υ.	Subscription ID	SEARCH SUBSCRIPTIONS	Q Advanced Search	k		Advanced Search	×	Þ
_	- End Customer Bill To Customer	3	4			End Customer END-CUSTOMER SAME	END-CUNDIMER SMART ACCOUNT	
	Subscription ID PO Number		4	R		Order NUS ORDERID	SALES ORDER NUMBER	
	SO Number					PURCHANE ORDER NUMBER:		
L	Web Order ID					Bill To BEL TO CUNCHER MANE	HOLDING ACCOUNT	
	2				)	NLL TO ID		
					<b>`</b>	Subscription Offers oreax 1798	DOMAN NAME	
				Start with a Start Please search to view softw		NTE URL		
						Sales CUMPOMER SUCCESS MANAGER	SALES OWNER	
						PARTNER SUCCESS SANSAGER		
Contacts	H Feedback   Help   Site Map   1	Terms & Conditions   Privacy Statement   Cook	ie Policy   Trademarks			Rest	Canal Seed	

5. Use the scroll bar to view high-level details of the subscription.

6. To view more details of the subscription, click on the Subscription ID





- 7. View subscription details in the Subscription header.
- 8. To return to the subscription menu, click My Subscriptions.
- 9. To view history, click View History.
- 10. To view and manage addresses and contacts, click View/Manage Addresses and Contacts.





10. To view and manage addresses and contacts, click View/Manage Addresses and Contacts.

- a) To update a billing address, customers must reach out to their Inside Sales Representative for them to complete change modify. CCE Customers can find their Cisco Inside Sales Rep under the Cisco Contacts in Manage Contacts.
- b) Only the Primary Billing or Business Contact or Cisco internal user can update the Primary Billing or Business Contact on the Subscription. To update the Primary Billing contact click **Manage Contacts** and the click **Change** under Primary Billing Contact under Bill to Customer contacts and enter the desired contact info in the pop-up.

	Summary	History	Invoices	Usage	Manage Contacts	Manage Payment Details			
Address & Manage Contacts	6							Change Co	ntact : Primary Business ×
Addresses								Edit Existing	Search And Add Contact Same As Primary Billing Contact
Bill To					Service To			Name* None Sele	cted
Your Invoices will be sent to this address CISCO 355 E TASMAN DR SAN JOSE CA, US					Your Order will be Servic CISCO 355 E TASMAN DR SAN JOSE CA, US	ced to this address		Email*	Phone Number*
Contacts									
Primary Business				Change	Primary Billing		b	Change	In the pop-up, there are 3 options:
None Selected ∿ ■					None Selecte 、 ■	ed			Edit Existing
Additional Contacts									Search and Add Contact
© 2017 CISCO and/or ItS and		C FREETVAR		Click to Add	Additional Contacts				Same as Primary Billing Contact



11. To view all invoices, click **View All Invoices.** 

12. To view payment information, click **Manage Payment** Information.

• My Subscriptions							
Spark Named User (1)						Modif	y Subscription
Subscription ID Sub1	Term Dates 17-Oct-2017 - 16-Nov-2017	Subscription Term 1 Month		Ily Renews On 017 For 1 Months			
Status ACTIVE	Billing Frequency Monthly Billing	Monthly Cost USD 159.20					
Bill Day 3rd of the Month, billed Monthly	S Payment Method	Current Open B			Things	You Can Do	
3rd of the Month, billed Monthly	Purchase Order Purchase Order Number	USD 1,37	1.65		View History	view Usa	ge
		e Payment Information	11 New All Invol	ces → View/Man	age Addresses and Contacts	In-Progress (	Quote
Items		Qty Unit List	Price (USD) Dis	icount(%)	Credits Unit Net F	Price (USD) Billing Amo	unt (USD)
A-SPK-NAMED-USER Spark Named User (1)		1					
Provisioning Information Provision Info							
A-SPK-ND-BRD Spark Board 55/70 Subscription A	Activation	1	199 Per Month	20.00	0.00	159.20 Per Month	159.20
		View All Items $\rightarrow$					
Terms & Conditions   Privacy Statement   Cookie Po	kçy   Trademarks						

**Please Note:** Remaining balances should be paid through Cisco Commerce Express upon Contract Expiration.



# Credit Card Payment

### **Credit Card Payment**

- 1. Customers can now include a Credit Card Default Payment.
- 2. You may update or Add New Credit Card by entering required credit card information.





3. Use the **O** the bottom left of the credit card screen to set a **default credit card** to automatically pay the subscription.

#### Credit Card Availability is Available to Rest of World

Albania	Islands	Ecuador	Iceland	Malta	Papua New Guinea	Slovakia	United Kingdom
Argentina	Bulgaria	El Salvador	India	Mauritius	Paraguay	Slovenia	Unites States
Aruba	Canada	Estonia	Indonesia	Mexico	Peru	South Africa	Uruguay
Australia (Amex)	Cayman Islands	Ethiopia	Ireland	Moldova	Philippines	Spain	US virgin Islands
Austria	Chile	Finland	Israel	Morocco	Poland	Sri Lanka	Venezuela
Bangladesh	Columbia	France	Jamaica	Netherlands	Portugal	Sweden	Vietnam
Barbados	Congo	Germany	Kazakhstan	Netherlands	Puerto Rico	Switzerland	Zimbabwe
Belarus	Costa Rica	Ghana	Kenya	Antilles	Puerto Rico	Tanzania	Japan CC is in
Belgium	Croatia	Greece	Latvia	New Zealand	Qatar		Progress
Benin	Cyprus	Guatemala		Nicaragua	Romania	Thailand	
Bermuda		Guinea	Lithuania	Nigeria	Saudi Arabia	Tunisia	
Bolivia	Czech Republic	Honduras	Luxembourg	Norway	Senegal	Uganda	
Bosnia &	Denmark	Hong Kong	Macedonia	Pakistan	Serbia	Ukraine	
Herzegovina	Dominican Republic	0 0	Malaysia			United Arab	
British Virgin		Hungary		Panama	Singapore	Emirates	





### **Credit Card Payment Methods**

3. Customers can select **Payment Method.** Click **change** to select Credit Card method of payment.

4. If the payment method is Credit Card please select (change) to activate credit card the payment option.

5. Setting payment method as **default** will automatically autopay the subscription.

6.Credit cards have new **Auto Reflect** Feature. Credit cards expire, when you update your account

#### **Please Note:**

Reminder to pay all **remaining balance(s)** should be handled at the time of setting up Auto Payments to ensure timely payments.



# **One-Time Payment**

**One-Time** payments can be made if a default credit card option is not selected. In this case the customer may complete a one-time payment by selecting a **Saved Card** to Authorize Payment.

Note: If a credit card fails, the customer will automatically receive an email notification.

5. To select a one-time payment go to **Invoices**. Click **Make Payment.** 

6. Click the Invoice

7. Select the **saved card** you wish to make payment with.

8. Confirm Payment on the selected credit card.

Note: You can slide the toggle to Update Current Subscription with this Credit card.

9. Click Authorize Payment



Subscriptions Quotes Orders

Subscription Id

Po Number

Invoice '

CAD (376.29

LISD 15,857.6

EXPRESS

5

Invoice Numbe

30-Oct-2018

30-0rt-2018

Due On

30-Oct-2018

29-Nov-2018

My Invoices

6

ahaha

cisco

Status

Balance \*

CAD (376.29) OPEN

Commerce

RESS



# Auto Pay Enhancements

- 1. Credit Card **Auto Pay enhancement** now includes setting any existing or new credit card for Auto Pay.
- All subscription can be updated on the profile page including any outstanding payment customers might have using the same credit card.
- By selecting Auto Pay, the card will be used to pay all current subscriptions associated with the account going forward.
- 4. Any current account balances will need to be paid separately.
- 5. You may also select the box to **Pay current account balances** with the card.

Enter your card details		Enter your billing ac	Juless
First Name *	Last Name * Goddesss	Country * UNITED STATES	_
Card Nickname		State/Province *	
Visa for Cisco Webex		CALIFORNIA	
mail Address * demogoddesss@yopma	ail.com	city * MILPITAS	Zip Code * 95035
Card Number * 5000111111111111111		Address Line 1 * 771 Alder Dr	
Exp. Month * 02	Exp. Year * 2021	Address Line 2	
CVV *		Address Line 3	
Use this card for Auto Pay		will be used to pay all current subsc ing forward. Any current account bal be paid separately.	Cancel Add
		ing forward. Any current account bal	
Add New Card	G with this account goi	ing forward. Any current account bat be paid separately.	Cancel Add
Add New Card	C with this account goi	ing forward. Any current account bal be paid separately.	Cancel Add
Add New Card Enter your card details First Name *	G with this account goi	ing forward. Any current account bal be paid separately. Enter your billing ac County *	Cancel Add
Add New Card Enter your card details First Name * Demo Card Nickname	G with this account goi	Ing forward. Any current account ball be paid separately.	Cancel Add
Add New Card Enter your card details First Name * Demo Card Nickname Visa for Cisco Webex Email Address *	Last Name * Goddesss	Enter your billing ac Country * UNITED STATES State/Province * CALIFORNIA City *	Cancel Add ddress
Add New Card Enter your card details First Name * Demo Card Nickname Visa for Cisco Webex Email Adress * demogoddesss@yopm Card Nurbær * 5000111111111111 Exp. Month * 02	G with this account gol	Enter your billing ac Country * UNITED STATES State/Province * CALIFORNIA City * MILPITAS Address Line 1 * 2713 Addre Dr	Cancel Add ddress
Add New Card Enter your card details First Name * Derno Card Nickname Visa for Cisco Webex Email Address * demogoddesss@yopm Card Number * 5000111111111111	Last Name * Goddesss Hail.com	Ing forward. Any current account ball be paid separately.	Cancel Add ddress

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# **Auto Reflect**

When credit cards expire, or the credit card billing address has changed, the new **Auto Reflect** feature will allow you to update credit card information on your profile.

Once the cc data is updated, it will be automatically applied to all subscriptions and orders where the card is **set as default** for payment.

10. Go to your User Profile

11. Click on Payment Method

12. Make updates on the **credit** card and **Save** changes

13. <u>Tip!</u> Review your Orders & Subscriptions to ensure the modified information is displayed and reflected correctly everywhere that card is used.





# **Credit Card Decline Email Notification**

10. An email will be sent to notify the customer listed on the Invoice when there is a credit card decline.



Sometimes Credit Cards Expire, or Billing Address change. We make it seamless with the ability to Auto pay multiple subscriptions with just one credit card. This ensures payment automation for each instance with accurate credit card details! Simply save your credit card details and ensure your CCV code is included.

սիսիս	EVEREAS
CISCO	EXPRESS
Dear	
This email is to inform the	you that the credit card we currently have on file for your company has d. Please update your credit card information.
	rd information will not pay the open Invoices. To pay open invoices,
CARD DETA	ILS
Card on file ends i	n: .
	This is a system generated notification. Please do not respond to this emi
Thank you,	This is a system generated notification. Please do not respond to this eme
CISCO COLLECTIONS	
CISCO COLLECTIONS	
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CISCO COLLECTIONS .11.11.1 CISCO CISCO.COM CisCO.COM CisCO.COM CisCO.COM CisCO.COM CisCO.COM CisCO.COM CisCO.COM CisCO.COM CisCO.COM CisCO.COM CisCO.COM CisCO.COM CisCO.COM CisCO.COM CisCO.COM CisCO.COM CisCO.COM CisCO.COM CisCO.COM CisCO.COM CisCO.COM CisCO.COM CisCO.COM CisCO.COM CisCO.COM CisCO.COM CisCO.COM CisCO.COM CisCO.COM CisCO.COM CisCO.COM CisCO.COM CisCO.COM CisCO.COM CisCO.COM CisCO.COM CisCO.COM CisCO.COM CisCO.COM CisCO.COM CisCO.COM CisCO.COM CisCO.COM CisCO.COM CisCO.COM CisCO.COM CisCO.COM CisCO.COM CisCO.COM CisCO.COM CisCO.COM CisCO.COM CisCO.COM CisCO.COM CisCO.COM CisCO.COM CisCO.COM CisCO.COM CisCO.COM CisCO.COM CisCO.COM CisCO.COM CisCO.COM CisCO.COM CisCO.COM CisCO.COM CisCO.COM CisCO.COM CisCO.COM CisCO.COM CisCO.COM CisCO.COM CisCO.COM CisCO.COM CisCO.COM CisCO.COM CisCO.COM CisCO.COM CisCO.COM CisCO.COM CisCO.COM CisCO.COM CisCO.COM CisCO.COM CisCO.COM CisCO.COM CisCO.COM CisCO.COM CisCO.COM CisCO.COM CisCO.COM CisCO.COM CisCO.COM CisCO.COM CisCO.COM CisCO.COM CisCO.COM CisCO.COM CisCO.COM CisCO.COM CisCO.COM CisCO.COM CisCO.COM CisCO.COM CisCO.COM CisCO.COM CisCO.COM CisCO.COM CisCO.COM CisCO.COM CisCO.COM CisCO.COM CisCO.COM CisCO.COM CisCO.COM CisCO.COM CisCO.COM CisCO.COM CisCO.COM CisCO.COM CisCO.COM CisCO.COM CisCO.COM CisCO.COM CisCO.COM CisCO.COM CisCO.COM CisCO.COM CisCO.COM CisCO.COM CisCO.COM CisCO.COM CisCO.COM CisCO.COM CisCO.COM CisCO.COM CisCO.COM CisCO.COM CisCO.COM CisCO.COM CisCO.COM CisCO.COM CisCO.COM CisCO.COM CisCO.COM CisCO.COM CisCO.COM CisCO.COM CisCO.COM CisCO.COM CisCO.COM CisCO.COM CisCO.COM CisCO.COM CisCO.COM CisCO.COM CisCO.COM CisCO.COM CisCO.COM CisCO.COM CisCO.COM CisCO.COM CisCO.COM CisCO.COM CisCO.COM CisCO.COM CisCO.COM CisCO.COM CisCO.COM CisCO.COM CisCO.COM CisCO.COM CisCO.COM CisCO.COM CisCO.COM CisCO.COM CisCO.COM CisCO.COM CisCO.COM CisCO.COM CisCO.COM CisCO.CO	3 TEAM

# **Email Notification Payment**

Customers will now receive an email notification after a successful payment and one-time credit card payment is made.





# **Direct Debit Payment**

# **Direct Debit Payment Method**

### Considerations when using Direct Debit as payment method

- The selected bank account will be used for a subscription's payment at the next billing cycle.
- The selected bank account will be charged on the Invoice Date.
- Please ensure bank account details are accurate to avoid any potential errors.
  - For how to correct errors when entering bank account details, see slide 79.
- If payment does not process properly due to insufficient funds, please select a new bank account or payment method.



1 Log into CCE and select My Account and Preferences

Cisco Commerce Expres	s × +				✓ - □ ×	
$\leftrightarrow$ $\rightarrow$ $\mathbf{C}$ $\triangleq$ http:	s:// <b>ccwdir-cstg.cloud</b>	apps.cisco.com/app/#/dashboard/profile		e	२. 🖈 🔲 🌧 Incognito 🗄	
🌖 Configure Price Qu 🗯	Tracker and Timelin	. 🦚 ACH - Business De 🔤 Log In to Cisco	🚟 Cisco Commerce Ex 🚾 Emp	ployee Connecti 🤹 Agency 2.0 – Busi	in » 🛛 📙 Other bookmarks	5
Cisco Commerce Cisco Express			s Invoices	(	2 CCE Help	Select Payment Methods
Profile Preferences	My Profile					
Address Book	CCE Customer	Ccecustomer76754	🔄 ccecustomer@yo	opmail.com 📞 +1 2	2055986618	
Notification Preferences	Language English Select Language					
javascriptsvoid(0); Privacy State	ment   Cookie Policy   Tr	ademarks of Cisco Systems Inc	Speaking:	Eric Rauch (Cisco) (Host)		

🛗 Cisco Commerce	Express × +			~	- 0 X		
← → C	https://ccwdir-cstg.cloudapps.c	isco.com/app/#/dashboard/profile		Q ☆ [	😸 Incognito 🚦		
🤹 Configure Price Q	u 🤹 Tracker and Timelin 豿	ACH - Business De 🔠 Log In to Cisco 🔛 Cisco Com	nerce Ex 🚾 Employee Connecti 🗖	Agency 2.0 – Busin »	Other bookmarks		
Cisco Commerce CISCO Express		G Subscriptions Quotes Orders Invoices		200	Help   🕘 CCE Customer 👻   🖩	3	Selects Direct Debit
Profile Preferences	My Profile			3			Sciects Direct Desit
Address Book >	CCE Customer	Coecustomer76754	<ul> <li>ccecustomer@yopmail.com</li> </ul>	+1 2055986618			
Payment Methods	Default payment method: Credit Card	O Check/Wire transfer	C	Direct Debit		4	Select from existing accounts or add a new
	My Bank Details						
	Manoj Account Number : *****6956 Routing Number : 121000358	Select Account for Auto Pay	Agency Demo Account Number : ****0014 Routing Number : 313187636		Select Account for Auto Pay		account (see step 5)
	Negetive3 Account Number : ******2444 Routing Number : 072000096	Select Account for Axis Ray	Negative2 Account Number : ******9994 Routing Number : 072000096		Select Account for Auto Pay		
	NegetiveTest Account Number : ******0271 Routing Number : 121000358	Select Account for Ante	4 sghupathi Appannagari count Number : ***3220 outing Number : 321180515		Select Account for Auto Pay		
	MS Testing Account Number : ******2222 Routing Number : 121000358	Salest Account for Anto Pay	DP Testing Account Number : *****8161 Routing Number : 072000096		Select Account for Auto Pay		
	Raghupathi Appannagari Account Number : ****3220 Routing Number : 321180515	Select Account for Acts Pay	CCE-BAT-I2C-COMPANY Account Number: #####\$171 Routing Number: 121000358		Select Account for Auto Pay		
Terms & Conditions   Privacy Stateme	Taet Choca ent   Cookie Policy   Trademarks of Cisco Systems Inc.	n	> Expand panel to show video		n		

Cisco Commerce Ex	press × +							- 0	>
$\rightarrow$ C $h$	nttps://ccwdir-cstg.cloudap	ps.cisco.com/app/#/das				ର 🕁		😸 Incognite	
Configure Price Qu	Tracker and Timelin Routing Number : 072000096	🤹 ACH - Business De	Cisco Commerce	Ex CC Employee Connecti Routing Number : 072000096	🐌 Agency 2.0 – Busin.	-	»	Other boo	
	Manoj Kumar Account Number : *****6956 Routing Number : 072000096		Select Account for Auto Pay	Cisco Payment Term Account Number : ****6789 Routing Number : 122105155				Select Account fo	or Auto Pay
	Mathan SUB UI Account Number : ******9090 Routing Number : 011401533		Select Account for Auto Pay	Manoj Kumar Account Number : ****1200 Routing Number : 011401533				Select Account fo	or Auto Pay
	Ramya Gopal Account Number : ******9078 Routing Number : 091000019		Select Account for Auto Pay	Ratna Kumari Account Number : ******9076 Routing Number : 121000358				Select Account fo	or Auto Pay
	asdfsf Account Number : *2345 Routing Number : 011401533		Select Account for Auto Pay	Vijay Pawar Account Number : *********3456 Routing Number : 072000096				Select Account fo	r Auto Pa
	ACH Account Account Number : ******4321 Routing Number : 091000019		Select Account for Auto Pay	CCE Account Account Number : ****1111 Routing Number : 021000021				Select Account fo	t or Auto Per
	Sai Saran Account Number : ******7614 Routing Number : 072000096	5	Select Account for Auto Pay						
		+ Add New Bank							







For error messages while attempting to add a new bank account, see slide 79.

## Quote Search and Checkout Order Checkout Page

COPY OF < <dnt>&gt;CCE_ACH_BAT_I2C_SW Ordered Quote ID: 1200600368, Shared on Mar-24-2022 by Cce-I2c-bat-bid- Direct Debit-testing and Valid Until Apr-23-2022 Promotion Applied None</dnt>	Decline Checkout Billing Amount (Monthly) USD 3,412.50	Log into CCE to view quote
COPY OF ACH TEST1 SAAS Ordered Quote ID: 1200600359, Shared on Mar-24-2022 by New Sai Company and Valid Until Apr-23-2022 Promotion Applied None	Decline Checkout Billing Amount (Mont USD 3,887.50 2	2 Search for approved quotes and select Checkout
DD Pending Customer Acceptance Quote ID: 1200600356, Shared on Mar-24-2022 by New Sai Company and Valid Until Apr-23-2022 Promotion Applied None	Decline Checkout Billing Amount (Monthly) USD 3,887.50	
ACH TEST3 SAAS Ordered Quote ID: 1200600355, Shared on Mar-24-2022 by New Sal Company and Valid Until Apr-23-2022 Promotion Applied	Decline Checkout Billing Amount (Prepay)	

## Verify Billing Information / Update Tax Information Order Checkout Page

Cisco Commerce	oscriptions Quotes Orders Invoices	CCE Help	]
	Quote ID	Shared On Valid Until Status	
	1200600210	22-Mar-2022 21-Apr-2022 Pending Customer Acceptance	3 Billing Information will
Cisco Sales Representative Abhinav Satya Kumar Bellam 📓 abellam@cisco.com 📞 8 066 2874			
Billing Information *		Order Summary Financial Summary	be displayed on the
Address 3		Categories Total (USD)	quote. Please verify the
Mdqa	Cid Bill To Number	SaaS (1 Service) 8,580.00	billing information.
PPP ② 23333 Ridge Route Drive Lake Forest, Ca, 92630 States	United 1044778330 1046249089	+ Estimated Tax + 0.00	
Contacts *	Additional Contacts	USD 8,580.00 Billing amount for today	
		For more details please see "Financial Summary".	
<ul> <li>         ⊕ United          ⊆ cccustomer@yop          ↓ +1 20559.         </li> </ul>		I agree to Cisco's Purchase and Use Terms , Privacy Policy and Sales Tax.	
Manoj Kumar Selvam FRIMARY BILLING		Place Your Order	
United St Market mkumars2@cisc & +1123456.	🕒 🌐 United St 📓 ddera@cisco 📞 +1123456		
	Сог	ntinue	
			]
2 Tax Information *		^	Review and select
What is the intended use of your product?			
What is the intended use of your product?			<sup>4</sup> appropriate tax
Internal Use	State/Federal/Direct Pay or Export Exemptions		information, then click
Tax Status: NON-EXEMPT			Continue
	and to the investor		Continue
You designated this order for internal use. Taxes may be	applied to the involce.		
"Please note: Tax Status is only an estimate."			
		Continue	
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### Choose Payment Method for SAAS Orders Order Checkout Page





Select from existing accounts or click + to add a new bank account (see step 8)

Click *Done* when complete

6

7

### **Total Order Value – Payment Method Auto-Enablement:**

For new S/W order greater than \$50K, all 3 options(Direct Debit , Credit Card, Wire Transfer/Check)

For new S/W order less than \$50K, all 3 options(Direct Debit , Credit Card, Wire Transfer/Check)

For new S/W order greater than \$0, all 3 options(Direct Debit , Credit Card, Wire Transfer/Check)

### Adding New Bank Details Order Checkout Page – Enter New Bank Account Details





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### Adding New Bank Details Error Messages



System will display an error message in the following scenarios:

- When routing number is invalid (Please provide a valid ABA routing number)
- 2 When Account number is invalid (*Please* provide a valid funding account number)
- 3

When Provided Account name is Invalid. (Please provide a valid account holder name)

## Choose Payment Method for Hardware Order Order Checkout Page

→ C	pp/≢/open/quote/809878				¢ Order Summary Fi	nancial Summary
Product & Shipping Information				~	Categories	, Total (USD)
Payment Method Purchase Order				^	Hardware (1 Item) + Estimated Shipping + Estimated Tax	<b>59,094.00</b> + 2,363.76 + <b>4</b> ,949.12
Payment Method:						SD 66,406.88 ing amount for today
Credit Card Check/Wire trans	sfer 💿 Direct Debit	1			For more details please Summary*.	see "Financial
Payment Te 2 IMMEDIATE Choose your bank					I agree to Cisco's Pu Terms , Privacy Polic	
	CCE-BAT-I2C- COMPANY	•	Test Chase	ō		
+ Add New Bank	Account Number ******5171 Routing Number 121000358	Account ***** Routing 32227	1510 Number			
				Done		

### **Total Order Value – Payment Method Auto-Enablement:**

For new H/W order greater than \$50K, only Direct Debit option.

For new H/W order less than \$50K, only Credit Card option

For HW SKUs with value greater than \$50K, Direct Debit method will be enabled and selected by default.

2 Credit Card & Check/Wire Transfer options will be disabled (greyed out).

### Choose Payment Method for **Hybrid** (Hardware + Software) Orders Order Checkout Page

For Hybrid SKUs with value greater than \$50K, Direct Debit

method will be enabled and selected by default.

Check/Wire Transfer options will be disabled

Credit Card &

(greyed out).

2

← →	C C ccwdir-cstg.cloudapps.cisco.com/a	pp/#/open/quote/809897			0	Speaking: Ramya Gopal (Cisco)	(Host) Inito :
3	Product & Shipping Information				~ r		ancial Summary
0	Payment Method Purchase Order				^	Categories Hardware (1 Item) + Estimated Shipping + Estimated Tax	Total (USD) 25,114.95 + 1,004.59 + 2,103.38
	Payment Method: Credit Card Check/Wire trans	fer 💿 Direct Debit					31,563.60 + 0.00 D 59,786.52
	Payment Te IMMEDIATE Choose your bank				l	For more details please a Summary".	
		Raghupathi Appannagari	0	CCE-BAT-I2C- COMPANY	ō	I agree to Cisco's Pure Terms , Privacy Policy	and Sales Tax.
	+ Add New Bank	Account Number ****3220 Routing Number 321180515		Account Number *****5171 Routing Number 121000358			
		521100515		121000000	Done		
Terr	ns & Conditions   Privacy Statement   Co	ookie Policy   Trademarks of C	isco Systems Ir	ic .			

### **Total Order Value – Payment Method Auto-Enablement:**

For new Hybrid order greater than \$50K, only Direct Debit option

For new Hybrid order less than \$50K, only Credit Card option

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## **Changing Payment Methods in Subscription UI**



## **Changing Payment Methods in Subscription UI**

CISCO COMMERCE CISCO EXPRESS	Subscriptions	Quotes Orders Invoices	CCE Custon
Subscription Details			
Webex Named User Meetings (A-SPK-NAMED	-USER)		
Sub967339 1	fective For 2.00 Months from 24-Mar-2022 to 23- /ar-2023	Automatically Renews For 12.00 Months On 24-Mar-2023	
	Nonthly Cost () ISD 4,665.00	Billing Amount (Prepaid Term) () USD 55,980.00	Billing Frequency Prepaid
Summary History	Invoices Usage M	anage Subscription Manage Contacts	Manage Payment Details
Manage Payment Information			
Purchase Order Number PO_1200600355		4	
Payment Method: Check/Wire Transfel (Chang	e) Payment Term: 30 NET		
S Payment Method Check/Wire Transfer			



4 Click on Manage Payment Details tab and click on Change Payment Method

5 Select Direct Debit and click on Change.

## **Changing Payment Methods in Subscription UI**

Summary	History Invo	lices Usage	Manage Subscription	Manage Contacts	Manage Payment Details	
						<b>C</b> 1
Janage Payment Informat	lion					Seleo
						Save
Purchase Order Number PO_1200600398						or clie
						botto
Newly selected Bank Account would be u	sed for this subscription	payment from next billing cyo	cle. Bank Account will be charge	ed on Invoice Date.		new a
Payment Method: Direct Debit (Char	nge)   Payment Tern	n: Immediate				
My Saved Accounts			Name On Account			
Account No. *****7614 Account S	Selected		Sai Saran			
Account No. **3456			test@cisco.com			
Account No. *****4321		6	ACH Account			
Account No. *****1510			Test Chase			
		ick to Add New Account		See More~		

Cisco Exp		nmerce SS	1	Subscripti	ions Quotes	Orders In	voices	1	CCE H	lelp 🛛 😑 Sa	i Saran Test 🔻 🛛 🎚
Invoices	Mak	e Payme	nt Search B	y		-	Search:			Q	
We are unable	to pre	ocess your pa	yment, Please upda	ite or enter another	payment method to	avoid service susp	insion.				
nvoice		Туре	Created On	Due On	Subscription Id	Web Order ID	Status	Invoice Total	Balance	Pay All	Amount To Pay
96117090	÷	INVOICE	04-Apr-2022	04-Apr-2022		1300277753	PAST DUE	USD 66,944	USD 2,344.64		Payment is in p
5100456812	:	INVOICE	06-Apr-2022	06-Apr-2022	Sub968261	1300277793	PAST DUE	USD 30,260	USD 30,260		
961 3 61:	19	INVOICE	04-Apr-2022	04-May-2022		1300277671	OPEN	USD 20,238	USD 20,238		
96117368	:	INVOICE	07-Apr-2022	07-Apr-2022		1300277806	PAST DUE	USD 33,757	USD 33,757		
2118376521	:	DEBIT	07-Apr-2022	07-May-2022		1300277671	OPEN	USD 585.00	USD 585.00		2
5100456851	:	INVOICE	06-Apr-2022	06-Apr-2022	Sub967921	1300277734	PAST DUE	USD 8,641,4	USD 8,641,4		10p)
5100456611	:	INVOICE	03-Apr-2022	04-Apr-2022	Sub968261	1300277755	PAST DUE	USD 16,534	USD 16,534		
100456852	:	INVOICE	06-Apr-2022	06-Apr-2022	Sub968261	1300277793	PAST DUE	USD 12,000	USD 12,000		
00117200		BRIOLOF	00 4 0000	00 4 2022		10000770000		1100 00 001	100 00 00 1	_	

Orders with open or past due invoices resulting from a transactional error require a onetime payment to correct.

To make a one-time direct debit payment, follow these steps:

Click on the *Invoice* tab and search by either Customer Name, Invoice Number, PO Number, Subscription ID, or Web Order ID.

Enter the payment amount in *Amount to Pay* field.



2

To view the invoice details, click on the *Invoice* hyperlink (see steps 4-8).

isco E	co Comr (pres:	s	ent, Please update o	Subscriptions	Quotes Orde			(± c	CE Help	Sai Saran Test 👻 📔
ivoice		Туре	Created On	Due On	Subscription Id	Web Order ID	Invoice Total	Balance	Status	Amount To Pay
6117090	1	INVOICE	04-Apr-2022	04-Apr-2022		1300277753	USD 66,944.64	USD 2,344.64	PAST DUE	USD 100.00
yment Meth Credit Card	۲	Direct Debit	]							
loose your b			- Future	re Invoice BAT		I2C QA Tes	ting D	Ragha	vendra 🗖	BAT

4 Check the invoice status (status will show as PAST DUE)

5 Select *Direct Debit* option

6 Select existing account or click + to add new account

Invoice	Туре	Created On	Due On	Subscription Id	Web Order ID	Invoice Total	Balance	Status	Amount To Pay
96117090 :	INVOICE	04-Apr-2022	04-Apr-2022		1300277753	USD 66,944.64	USD 2,344.64	PAST DUE	USD 100.00
					7		You will be	charged	USD 100.00 Including Tax
Payment Method:	Direct Debit	Confir	rm Payment				×		
Choose your bank		Are you	u sure you want to m	ake the payment us	ing this Direct Debit	Account?			
			re Invoice BAT Te *7479	sting			I AMOUNT 0 100.00	vendra t	BAT
+ Add New	Paak					Cancel	Proceed		Account Number *****401 Routing Number
Add New	Dalik	121000	358		21000358		121000358		121000358
		Order	— Mozilla Firefox	internal Server	r Error — Mozilla 🔞	Library			
		100			1			Cancel	Authorize Payment

7 Confirm payment by clicking *Proceed* 

Invoice	Туре	Created On	Due On	Subscription Id	Web Order ID	Invoice Total	Balance	Status	Amount To Pay
96117090	INVOICE	04-Apr-2022	04-Apr-2022		1300277753	USD 66,944.64	USD 2,344.64	PAST DUE	USD 100.00
					8	D3	You will be o	harged	USD 100.00 Including Tax
ayment Method: Credit Card	Direct Debit								
/ Orean Gara	Uneer Debit	Confi	m Payment				×		
hoose your bank									
		O Pa	yment has been sent	for processing, it may	take few hours to refl	act this in your account.	ghay	vendra	BAT
-	-					Cancel	Ok 3		Account Number
Add Ne	w Bank		1473						Routing Number
		Routing N 121000		12	1000358		121000358		121000358
								Cancel	Authorize Payment
								Lancel	Authorize Payment

8 System will display a message to confirm payment:

"Payment has been sent for processing. It may take a few hours to reflect this in your account."



# **Global Banking Remit**



## **New Banking Remittance**

Customers newly onboarded to CCE should take the following actions

- 1. Update Cisco Webex, LLC banking remit to Cisco Systems, Inc.
- 2. To see the new remit to information, you may download your most recent invoice on CCE.
- 3. Please ensure you submit your payments to now Cisco Systems, Inc. The excel file below includes payment remittance information by region/location.
- 4. Please update as soon as you onboard to prevent late payments. The spreadsheet below list Bank Remittance details:





CISCO COMMERCE EXPRESS				Subscriptions	Quotes Orde	rs Invoices				CCE User +
Invoices										
rus	▼ Sear	rch By		<ul> <li>Search</li> </ul>	Invoices	Q		Г		Make Payment
nvoice 🔻	Type ▼ Grea	ted On ▼	Due Or	r Subsc	ription Id 🔻	Po Number 🔻		Invoice * Total	Balance	⊤ Status ⊤
	CISCO COMMERCI CISCO EXPRESS	τé		s	iubscriptions Quote	o Ordera Invoic	00			CCE User +   an
	*Back to Invoices									Invoice FAO
	Invoice No: 55000003	26 Due Date:Mar 2	6, 2019						e	Jownload Invoice
	Involce Date Feb 24, 2019	Invoice Type	Frint	Status Open	Pi S	yment Term I NET	Customer	Contact	GST Number	
	Po Number	Web Order ID	sco	Dilling Contact			Bill Ta Nur taona ao	nber Kra	Customer Number	1 of 3
		BILL-TO	:		SERVICE-TO	<u>e</u>		SUMMARY OF CHA RECURRING CHAR USAGE/OVERAGE OTHER CHARGES SUBTOTAL (EXCL. TAXES TOTAL AMOUNT (I	GES CHARGES TAX)	22,716.00 0.00 <b>22,716.00</b> 0.00 <b>22,716.00</b> <b>22,716.00</b>
		please c	ontact at RRING C	ance with your service or sub +31 20 485 4900. HARGES	oscription,		_		ТАХ	EXTENDED
		PO LINE#	LINE NO	SERVICE DESC	RIPTION	DURATION MONTH(S)	QTY	RATE PRICE	RATE (%)	AMOUNT (Excl. Tax)
				A-SPK-NAMED-USER Webe Meetings Subscription ID: Sub23026 Billing Period: 10-Feb-19 to	5					
			1	A-SPK-NU-M3-Business M Advanced Meetings (1)	Aessaging and		300	26.34 Per User	0	7,902.00
			2	A-SPK-NU-M1-Business N	Messaging (1)		300	6.70 Per User	0	2,010.00

## View and Manage All Notifications



### **Overview**

Notification emails will be issued for the following notifications:

A quote being ready for review - which is sent to the Primary Business Contact and Primary Billing Contact and carbon copied to the Quote Creator, Quote Submitter and Additional Receipts.

Quote acceptance reminders to the customer, which is sent to the Primary Business Contact and Primary Billing Contact and carbon copied to the Quote Creator. These reminders are automatically triggered at 14 days, 7 days, and 2 days prior to expiration.

A quote that is expiring now, which is sent to the Primary Business Contact and Primary Billing Contact and carbon copied to the Quote Creator. This is automatically triggered when the quote expires.

When a customer accepts a quote and places the order, which is sent to the Primary Business Contact and the Primary Billing Contact and carbon copied to the Quote Creator, Quote Submitter, and Additional Recipients.

When a customer declines a quote, which will be sent to the Quote Creator and Quote Submitter



## Create a Dispute

5. The required details are needed to

Create a Dispute.

6. Please complete the \* to include the Invoice#, SubID, User info, Dispute Amount, and select the line item you are disputing.

7. Click Submit.

cisco	EXPRESS	Subscriptions Quotes Orders Invoices	USER USA +
5	Create a Dispute		Back to Invoices
6	Included Invoice Subscription ID 5100000434 Sub2152356	Include Line Items Add	
	Select A Reason For Dispute* Cancellation	Dispute Amount (USD) * 30	
	First Name* USER	Last Narros* USA	
	<sub>Email*</sub> user.usa1@yopmail.com	<sup>рьове</sup> * +1 646464564	
	Comments		
	UPLOAD ATTACHMENT (Limit each	2000 Max Characters file size to less than 5 MB and total of all the files should not increase more than 25 MB)	
			Cancel Submit
erms & Condition	is   Privacy Statement   Cookle Policy   Trademarks of Clico Systems Inc		



## Suspended, Restored and Terminated Notifications

In the unlikely event that an account has overdue invoices, your account will receive Suspend, Terminate and Restore notifications based on the current activity and status of your account.

To avoid suspension and ultimately termination, please use the link in the email notification you receive to complete payment.



### Suspended, Restored and Terminated Notifications



#### Notifications will be sent:

- Late Notification 10 Day Past Due Notification
- Late Notification <u>25 Day Past Due</u> Notification
- Pre-suspension <u>45 Day Past Due</u> Notification
- Suspension Notification
  - <u>60 days</u>
- Termination Notification
  - <u>75 days</u>
- If **payment received** prior to termination, an automated **resumption** notification will be sent to customer

SUBSCRIPTION SUSPENDED Dear ABhiwe wuebfo,	CISCO COMMERCE EXPRESS
Your Cisco service has been suspended. Yo and have the service restored. If no paymer will serve as written notification that this sub	SUBSCRIPTION TERMINATED
👆 You can pay your bill online tod:	Your account has been terminate It is very important to resolve all b outstanding balance will be set to the terminate of termin
ACCOUNT INFORMATION Bill to Number Account Name	SERVICE RESTORED
1012729838 At Cisco Systems, Inc. we value your busine	Dear ABhiwe wuebfo, ACCOUNT INFORMATIO Bill to Number Account Account
asting relationship with your company For more information you can er	820212830     AGIO LLC       To avoid payment delay, enable auto pay by updating payment       method to credit card
This is an automatically ge	For more information y Bill to Number Account Name Subscription ID
Thank You, CISCO COLLECTIONS TEAM CISCO CISCO.com Cisco.com Cisco.com Cisco.com Cisco.com Cisco.com Cisco.com Cisco.com Cisco.com Cisco.com Cisco.com Cisco.com Cisco.com Cisco.com Cisco.com Cisco.com Cisco.com Cisco.com Cisco.com Cisco.com Cisco.com Cisco.com Cisco.com Cisco.com Cisco.com Cisco.com Cisco.com Cisco.com Cisco.com Cisco.com Cisco.com Cisco.com Cisco.com Cisco.com Cisco.com Cisco.com Cisco.com Cisco.com Cisco.com Cisco.com Cisco.com Cisco.com Cisco.com Cisco.com Cisco.com Cisco.com Cisco.com Cisco.com Cisco.com Cisco.com Cisco.com Cisco.com Cisco.com Cisco.com Cisco.com Cisco.com Cisco.com Cisco.com Cisco.com Cisco.com Cisco.com Cisco.com Cisco.com Cisco.com Cisco.com Cisco.com Cisco.com Cisco.com Cisco.com Cisco.com Cisco.com Cisco.com Cisco.com Cisco.com Cisco.com Cisco.com Cisco.com Cisco.com Cisco.com Cisco.com Cisco.com Cisco.com Cisco.com Cisco.com Cisco.com Cisco.com Cisco.com Cisco.com Cisco.com Cisco.com Cisco.com Cisco.com Cisco.com Cisco.com Cisco.com Cisco.com Cisco.com Cisco.com Cisco.com Cisco.com Cisco.com Cisco.com Cisco.com Cisco.com Cisco.com Cisco.com Cisco.com Cisco.com Cisco.com Cisco.com Cisco.com Cisco.com Cisco.com Cisco.com Cisco.com Cisco.com Cisco.com Cisco.com Cisco.com Cisco.com Cisco.com Cisco.com Cisco.com Cisco.com Cisco.com Cisco.com Cisco.com Cisco.com Cisco.com Cisco.com Cisco.com Cisco.com Cisco.com Cisco.com Cisco.com Cisco.com Cisco.com Cisco.com Cisco.com Cisco.com Cisco.com Cisco.com Cisco.com Cisco.com Cisco.com Cisco.com Cisco.com Cisco.com Cisco.com Cisco.com Cisco.com Cisco.com Cisco.com Cisco.com Cisco.com Cisco.com Cisco.com Cisco.com Cisco.com Cisco.com Cisco.com Cisco.com Cisco.com Cisco.com Cisco.com Cisco.com Cisco.com Cisco.com Cisco.com Cisco.com Cisco.com Cisco.com Cisco.com Cisco.com Cisco.com Cisco.com Cisco.com Cisco.com Cisco.com Cisco.com Cisco.com Cisco.com C	This is an autor Thank You, CISCO COLLECTIONS TEAM CLISCO GSOD com
	CISCO CONTINUE of a registered in California, U Tasman Drive, San Jose, CA 98134 Thank You, CISCO COLLECTIONS TEAM ,  ,  ,  ,  ,  , CISCO Cisco Com Cisco Co

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### SRT Policy: Communication Process



	Attributes	Automated Communication Process
$\times$	Email Communication	<ul> <li>Email notification regarding delinquent payment status:</li> <li>At 10 days past due, customer will be alerted that payment is past due</li> <li>At 25 days past due customer will be alerted of payment is still past due</li> <li>At 45 days past due customer will be sent Pre-suspension notification</li> </ul>
II	Suspension Notification	Email notification will be sent to the customer when suspension occurs.
	Termination Notification	Email will be sent to the customer when service is terminated
\$	Payment Received	When Payment is received: Services are resumed and notification to customer sent



# **Modify Subscription**

## **Modify Subscription**



### **Overview**

Customers have been enabled to modify their auto-renew settings within Subscription UI no less than 30 days from the subscription end of term. To learn more, review the <u>Managing Auto-Renewal for</u> <u>Subscriptions</u> section of this guide. Note: For CCE subscriptions that have a monthly cost of \$0, the customer will not be able to turn auto-renew ON via the Subscription UI. Instead, they will have to work with iSales to have auto-renew turned ON.

In case you would like to modify your subscription in already placed order please contact your Cisco Sales Representative and s/he will be able to assist.

Customers do not have the capability to modify an order, after order submission.



# Managing Auto Renewal for Subscriptions

### Turn OFF Auto-Renew via Subscription UI

### Considerations when turning auto-renew OFF via Subscription UI:

- When turning auto-renew OFF via the Subscription UI, it must be completed no less than 30 days from the end of term.
- Turning Auto-Renew OFF cannot be completed less than 30 days from the end of term. If it's
  less than 30 days from the end of term, Customers should open a case in <u>Customer Service Hub</u>
  and an end of term cancellation will be completed and require Sales and Commercial Finance
  approval.
- When turning auto-renew OFF via Subscription UI, the user must select a reason code for turning auto-renew OFF.
- Turning auto-renew OFF will not require approval from Sales or Commercial Finance when done no less than 30 days from the end of term.

### Turn OFF Auto-Renew via Subscription UI

- From Subscriptions tab, scroll and search for subscription, or do search by value to select
  - subscription.
- 2 Under the new tab,

### Manage Subscription, the Manage Auto-Renewal button will be shown.

when applicable.

When clicking on **Manage Auto-Renew** the system will either disable or enable auto-renew based on the current setting.



TIP

The subscription must be in active status for the **Manage Auto Renewal** button to be enabled.

CISCO EXPRESS		1	Subscriptions Quotes	Orders Invoices				
Files	Subscription ID	Search Subscriptions	Q Athenced Search			I. Optime	Subscription 🗸 👩 Charge Vers	r 🗸 🛛 Generate Report N
Consumption Hawith A	Found 159100 Results							
Stata ACTIVE (136370)	Subscription ID *	Bill To Customer *	Roseller +	End Customer *	Offer Name *	Status +	Start Date 👻	Renewal Da
CANCILLED (15719)	Semante	TEST NOT REAL		TEST NOT REAL	CIS-PLATFORM	CANCELLED	27-Oct-2015	28-Nov-201
EXPRED (3737) SUSPENDED (2050)	Distants	TEST NOT BEAL		TEST NOT REAL	CIS-PLATFORM	ACTIVE	28-Oct-2015	29-Nov-201
OVERDUE (322)	Subert	TEST NOT REAL		TEST NOT REAL	CIS-PLATFORM	ACTIVE	29-Oct-2015	30-Nov-20
A-WX-NAMED-USER (27423)	Dublerts	TEST NOT REAL		TEST NOT REAL	CIS-PLATFORM	ACTIVE	01-Nov-2015	02-Dec-20
DNAC1-WAN-RENEW (18727)	Destarts	TEST NOT REAL		TEST NOT REAL	CIS-PLATFORM	ACTIVE	01-Nov-2015	02-Dec-201



### Turn OFF Auto-Renew via Subscription UI

When turning auto-renew off, the user must select the required Primary Reason Code and if applicable, required Secondary Reason Code and Additional Comments. Then click Submit.

CISCO COMMERCE CISCO EXPRESS		Subscriptions Quotes Orders	Invoices	
Hy Subscriptions				
Webex Named User Meetings (A-SPK-NA	AMED-USER)			
Subscription ID Sub	Effective For 36.00 Months from 31-Aug-2020 to 30-Aug-2023	Automatically Renews For 12.00 Months On 31-Aug-2023	Billing Frequency Monthly Billing	
Status ACTIVE	Monthly Cost USD 255,250.00	Billing Amount (Monthly Billing) USD 255,250.00		
	Summary History Invoic	es Usage Manage Subscription	Manage Contacts Manage Payment Details	
Disable Auto Renewal				
Auto Renewal Off	Automatically Renews For No Auto Renewal			
Primary Reason * External Business Factors	Secondary R     Out of Busi		Additional Information AdA	3
				Cancel Submit

If the auto-renew turn off request can't be processed an appropriate error message will show and inform the user as to why.

TIP

# Turn ON Auto-Renew via Subscription UI

### Considerations when turning auto-renew ON via Subscription UI:

- When turning auto-renew ON via the Subscription UI, it must be completed **no less than 30 days from the end of term.**
- Turning Auto-Renew ON cannot be completed less than 30 days from the end of term. If it's less than 30 days from the end of term, Customers should complete a manual renewal prior to the end date.
- When turning auto-renew ON via Subscription UI, the user will have to select the renewal term from the available terms in the drop list provided. The available terms provided for the user to select will include all the standard renewal terms as set up for that offer as well as the last approved renewal term for the subscription.
- Turning auto-renew ON will not require approval from Sales or Commercial Finance when done no less than 30 days from the end of term.
- For CCE subscriptions that have a monthly cost of \$0, the customer will not be able to turn auto-renew ON via the Subscription UI. Instead, they will have to work with iSales to have auto-renew turned ON.
- Renewing a Subscription after Auto-renew is turned OFF requires support from a Cisco Sales representative.
- Upon expiration, the manual renewal of a subscription will require support from a Cisco Sales representative.

### Turn ON Auto-Renew via Subscription UI

From Subscriptions tab, scroll and search for subscription, or do search by value to select subscription.

### 2 Under the new tab, Manage Subscription, the Manage Auto-Renewal button will be shown, when applicable.

When clicking on **Manage Auto-Renew** the system will either disable or enable auto-renew based on the current setting.

6	Г	F		Ì
	-	ľ	10	

TIP

The subscription must be in active status for the **Manage Auto Renewal** button to be enabled.

cisco EXPRESS			1	Subscriptions Quotes	Orders Invoices				. v
Filters [	Search By Subscription ID		Search Subscriptions	Advanced Search			E- Optime	Subscription 🗸 👩 Charge Ver	e w Gewan Root w
Consumption Health									
Over Consumed (2016)	Found 159100 Results								
Within Extitlements (1094)									
Status A	Subscription ID *		Bill To Customer *	Reseller +	End Customer *	Offer Name *	Status *	Start Date *	Renewal Date
ACTIVE (136370)									
CANCELLED (15719)	Sustains		TEST NOT REAL		TEST NOT REAL	CIS-PLATFORM	CANCELLED	27-Oct-2015	28-Nov-2015
EXPORED (3737)									
SUSPENDED (2050)	Duckerst.	1	TEST NOT REAL		TEST NOT REAL	CIS-PLATFORM	ACTIVE	28-Oct-2015	29-Nov-2015
OVERDUE (322)	Sustaint	8	TEST NOT REAL		TEST NOT REAL	CIS-PLATFORM	ACTIVE	29-Oct-2015	30-Nov-2015
Offic Name 🔨	Dublierts		TEST NOT REAL		TEST NOT REAL	CIS-PLATFORM	ACTIVE	01-Nov-2015	02-Dec-2015
A-WX-NAMED-USER (27423)									
DNAC1-WAN-RENEW (18727)	Dublief10	1	TEST NOT REAL		TEST NOT REAL	CIS-PLATFORM	ACTIVE	01-hov-2015	02-Dec-2015



### Turn ON Auto-Renew via Subscription UI

- 3 When turning auto-renew on, the user must select the **renewal term** from the available terms in the drop list provided and then click **Submit**.
  - The av

(TIP)

- The available terms provided for the user to select will include all the standard renewal terms as set up for that offer as well as the last approved renewal term for the subscription.
- If the auto-renew turn on request can't be processed an appropriate error message will show and inform the user as to why.

dialia	EXPRESS				Subscript	ioni Quotes Or	ders Invoices				Ľ
+ My Subscrip	ptoris				_						
Collaboration	n Flex Plan (A-FLEX)									Modify/Renew Subscrip	ption
Subscription Subi		Effective For 12.00 Months from 03-f	iov-2019 to 02-	Nov-2020		Automatically Renews For No Auto Renewal		End Customer	0	Billing Frequency Annual Billing	
Status ACTIVE		Monthly Cost USD 64.50				Billing Amount (Annual Billic USD 774.00	nal				
		Summary	History	Invoices	Usage	Manage Subscription	Manage Contacts	Manage Payment Details	Manage SillT		
Enable A	uto Renewal										
Auto Renewal	(	Automatically Reterms For Monitor Oc	03-Nov-2029								
		1								Carcel	

## Viewing Auto Renewal Changes from the History Tab

Turning Auto Renew On and Off will show as a transaction in the **History** tab from **Subscription UI** under the **Subscription** tab

When Auto-Renew change is done from Sub UI it will have a Transaction ID and the Transaction Type will either be Auto Renew Disabled or Auto Renewal Enabled. When Auto-Renew change is done by Cisco internal user through Change Subscription flow it will have Web Order ID and a Transaction Type of Subscription Modified.

TIP

2

Users can click on the expand icon to see more details like the current Auto-Renewal Term setting and information like reason codes.

Sub	Effective For 12.00 Months from 03-Ju Jun-2021	un-2020 to 03-	Automatically Renews For 12.00 Months On 04-Jun-2021	End Custome	Billing Frequency Monthly Billing
Status ACTIVE	Monthly Cost USD 0.00		Billing Amount (Monthly Billing) USD 0.00		
Summary	History	usage	Manage Subscription	Manage Contacts	Manage Payment Details
story					
Subscription Paymer	it Info Contacts A	uddresses			
	it Info Contacts A Transaction	uddresses Created By	Web Order ID	Transaction ID	
Subscription Paymer			Web Order ID	Transaction ID	



Auto Renew disabled from Subscription UI will show as **Auto Renew Disabled** Transaction type, have a **Transaction ID**, and show the entered **Reason Codes** when expanded to show more details.

Subscription Pa	ayment Info Contacts	Addresses			
Created Date	Transaction	Created By	Web Order ID	Transaction ID	Total Discount (%)
16-Oct-2020	Auto Renewal Disabled	bvamshik		2010	``
15-Oct-2020	Auto Renewal Enabled			2910	2

Transaction ID, and show the renewal term and date.



## Viewing Auto Renewal Changes from the History Tab

TP

(TIP)

If a Cisco internal user has turned Auto Renew ON via **Subscription Modify** on behalf of the customer, it will show as a **Subscription Modified** transaction with a **Web Order ID** and capture the **Renewal term** as well as the **renewal date**.





If a Cisco internal user has turned Auto Renew OFF via **Subscription Modify** on behalf of the customer, it will show as a **Subscription Modified** transaction with a **Web Order ID** and capture the Auto Renewal term as **No Auto Renewal.** To view the reason codes for turning Auto Renew Off, hover over the information icon next to No Auto Renewal.

## **Auto Renewal Change Report**

The Auto Renewal Change Report is a downloadable report to view the current auto renewal status on the subscription(s) based on a selected date range entered by the user. The report will include the current Auto Renewal status based on changes initiated from SUB UI as well as Auto Renewal changes initiated from Change Modify & Manual Renewal orders from change subscription flow for CCE.

Note: The Auto Renewal Change Report is accessible to Direct Customer with Billing contact and Business contact of the CCE Subscriptions.

### The report columns include:

- Account Type
- Offer Name •
- Sub ID •
- Status •
- Subscription Start Date •
- Subscription End Date
- Initial Terms •
- Auto Renewal Flag •
- Due for Renewal •
- **Billing Model**

- Monthly Cost/MRR •
- PO Number •
- CSM •
- Customer Success Manager Email •
- Sales Owner •
- Sales Owner Email
- Partner Success Manager
   Reason Code Tier 1
- Partner Success Manager Email Reason Code Tier 2 •
- Bill To ID

#### 

- Reseller Name
- Deal Id
- Web Order ID
- Order Type
- Auto Renewal Flag
- Automatically Renews for •

- Additional Comment
- Initiated By •

### Auto Renewal Change Report Breakdown of the Report Columns

Column Name	Column Description
Account Type	Annuity/ Cisco Commerce Express
Offer Name	Offer Name
Sub ID	Sub ID
Status	Status of subscription (Active, Cancelled, etc)
Subscription Start Date	Subscription Start Date
Subscription End Date	Subscription End Date
Initial Terms	Initial Terms
Auto Renewal Flag	Auto Renewal Flag
Due for Renewal	Due for Renewal
Billing Model	Billing Model
Monthly Cost/MRR	Monthly Cost/MRR
PO Number	PO Number
CSM	Customer Success Manager
Customer Success Manager Email	Customer Success Manager Email
Sales Owner	Sales Owner
Sales Owner Email	Sales Owner Email

Column Name	Column Description
Partner Success Manager	Partner Success Manager
Partner Success Manager Email	Partner Success Manager Email
Bill To ID	Bill To ID
Bill To Customer Name	Bill To Customer Name
End Customer Name	End Customer Name
Reseller Name	Reseller Name
Deal Id	Deal Id
Web Order ID	Web Order ID
Order Type	Type of order (Modify, Replace, Renew, etc)
Auto Renewal Flag	Auto Renewal Flag of SUB at the time of export (will always reflect AR change completed)
Automatically Renews for	Automatically Renews for
Reason Code Tier 1	Reason Code Tier 1
Reason Code Tier 2	Reason Code Tier 2
Additional Comment	Additional Comment
Initiated By	User Id of person who initiated the AR change

## Auto Renewal Change Report

From the Subscriptions tab, apply any available search and filter criteria to narrow down the subscriptions of interest before generating report.

> The AR Change Report will only generate when there is less than 10,000 SUBID from Landing page. Therefore, use the filters to narrow the results.

Select Auto Renewal Change Report from the Generate Report menu option.

(TIP)

2

In the pop up, enter the **Date Range,** select the **File Type** format, and click **Export**.







## Why Turn OFF Auto Renewal:

• The following slides call out AR scenarios where direct customers <u>may choose</u> to turn off auto renew

- End of Sale/End of Life PIDs
- List Price Change 90
   Days Before
   Renewal

### Why Turn OFF Auto-Renew: End of Sale/End of Life PIDs at Auto Renewal Notifications

Scenario: AR End Date beyond LDOS/EOL date and no replacement PID is setup

Auto Renewal will be turned off for the entire subscription automatically and this notification will be sent to the customer 90/60/35 days before the end of term. Scenario: AR End Date beyond LDOS/EOL date & replacement PID is set up in CCW

EOS PID will be removed and replaced with the replacement PID. The list price will use the price of the new replacement PID (in most cases Cisco maintains the same list price for the replacement PIDs). A notification will be sent to the customer informing them and **asking if they want to opt out of auto-renew** or proceed with the replaced PID and new price.

Scenario: During the auto renewal if there are no replacement PIDS for EOL/EOS skus.

#### CCW/CCE: AR auto turn off notification:

Hi <Customer name>,

We appreciate having you as a Cisco Partner/Direct Customer and are always looking for ways to streamline your subscription management. This notification is to inform you that <company name>'s subscription <<u>SubD</u> has EOS/EOL PID(s). We have identified that there are no alternative PIDs available.

Due to the potential Auto Renewed term extending beyond the End of Life Date with no alternative/replacement PID available, the Auto Renew has been turned off.

PID	EOL Date	
<pid name1=""></pid>	<day, date=""></day,>	
<pid name2=""></pid>	<day, date=""></day,>	

Hi <Customer name>,

We appreciate having you as a Cisco Partner/Direct Customer and are always looking for ways to streamline your subscription management. This notification is to inform you that <company name's subscription has EOS/EOL PID(s). We have identified that there are alternative PIDS available as described below.

Your subscription will be renewed automatically on <Day and Date> with these replacement PIDS. No action is required to autorenew with these replacement PIDs.

- If you wish to add more licenses/services, please contact a Cisco Renewal Sales Representative before your scheduled Renewal Sales Representative:
- If you do not wish to accept the replacement PIDs you may opt-out of auto renewal and discuss options with your Sales Representative. If do not opt-out, it will be deemed that you have accepted the replacement PID.

Current EOS/EOL PID	Replacement PID		
Ххх	Yar		
Xxx	Yap		

Scenario: AR End Date beyond LDOS/EOL date & replacement PID is set up in CCE

EOS PID will be removed and replaced with the replacement PID. The list price will use the price of the new replacement PID (in most cases Cisco maintains the same list price for the replacement PIDs). A notification will be sent to the customer informing them and **asking if they want to opt out of auto-renew** or proceed with the replaced PID and new price.

CCE template changes. 35, 60- and 90-day AR notification if the subscription has EOS/EOL PID and replacement available.

#### Dear <Customer>

This notification is to inform you that <company name>'s subscription includes PIDs which have reached End of Sale or End of Life. However, we have identified that there are alternative PIDs available as described below. We wanted to let you know that your subscription will be renewed automatically in <> days on <Day, date> and no action is required from Cisco in order to autorenew.

 If you wish to add more licenses/services, please contact Cisco Renewal Sales Representative before Renewal Date.

Cisco Renewal Sales Representative:

We are grateful to have you as a Cisco customer and are always looking for ways to help you streamline your account, but if you want to turn off your auto-renewal, you must take action by <Day, date>

Current EOS/EOL PID	Replacement PID
XXX	XXX
XXX	XXX

**View Subscription** 

View Subscription

View Subscription

### Why Turn OFF Auto-Renew: List Price Changes at Auto Renewal Notification

Scenario: List Price changed **90 days** before Auto Renewal

If the List price has changed **90 days** before auto renewal, we would apply the changed List Price during the Auto renewal. Notifications are sent to the customer to inform them of this change and ask if they want to opt out of Auto Renew or accept the new price. The notification is the standard auto renewal notification with additional messaging on the price change.

#### Hi <Customer name>,

<customer name> 's subscription will be renewed automatically in 90 days with new List price on <Day, Date>. No action is required in order to auto-renew.

- To purchase additional licenses or services, head over to CCW to modify your subscription
- We are grateful to have you as a Cisco Partners/Direct Customer and are always looking for ways to help you streamline your account.
- There has been a list price change on the below products. You may opt-out of auto renewal. If do not opt-out, it will be deemed that you have accepted the list price change during the auto renewal.

Product ID	Old List Price	New List Price
Product#1	XXX	X x x
Product#2	XXX	Yyy

End Customer	POWEI	
Subscription ID	Sub168	
Purchase Order Number	600202	
Renewal Date	Friday,	
Billing Method	Monthly	
Subscription Details	A-SPK-	
Subscription SKU	Cloud (	
Latest Web Order ID	835676	
Renewal Term (in Months)	12	
Renewal Amount *	USD 0.	

Resources for You:

- Link to SubUI (<u>https://ccrc.cisco.com/subscriptions/landing</u>)
- Link to Partners/Direct Customer Community Help for managing subs (https://salesconnect.cisco.com/#/content-detail/379d6ded-fd21-4508-95d6-2fa992dae5a7)

Thank you,

CISCO SYSTEMS. INC.


# **Cancel a Subscription**

- Effective September 13, 2020 If a Customer wants to turn auto-renew off, they have been enabled to turn auto-renew off themselves through Subscription UI in CCE. Turning auto-renew off must be done no less than 30 days from the end of term. Review the Managing Auto Renewal for Subscriptions section of this guide to learn how to turn auto-renew off. If it's less than 30 days from the end of term, Customers can request an exception handling of their renewal via Customer Service Hub cancellation case to prevent the subscription from auto-renewing.
- Effective September 13, 2020 For mid-term and/or end of term cancellations for all CCE subscriptions, Customers should create a case through <u>Customer Service Hub (CSH)</u>. When less than 30 days from the end of term date, Customers can request an exception handling of their renewal via Customer Service Hub cancellation case to prevent the subscription from auto-renewing. To learn how to submit a cancellation request case via CSH, follow the steps in the next few slides.
- Effective September 13, 2020 If a Customer has already created a case within the last 30 days from the end of term to stop auto renewal and then changes their mind, the customer can either (1) reopen the initial case if it exists and is not closed or (2) they can open a new CSH cancellation case, and select Withdraw cancellation request unable to turn ON Auto renewal as the Request Type.
  - \*Note: withdrawing a cancellation must be done prior to the cancellation transaction date

Note: Cisco will complete their action on the case by 15 business days for mid-term cancels and 7 business days for end of term cancel that were raised less than 30 days from end date for auto-renewal exception handling cases.

1

To request a mid term or end of term subscription cancellation request for any CCE subscriptions, go to <u>Customer Service Hub</u> to initiate a cancellation request case.

Note: If you are wanting to turn auto-renew off, this can be done no less than 30days from the end of term. Customers have been enabled to turn auto-renew offthemselves in CCE Subscription UI. Review theSubscriptions section of this guide to learn how.

If you are less than 30 days from the end of term, then open a case following these instructions to request an exception handling for their renewal via Customer Service Hub to prevent the subscription from auto-renewing.



Enter the word **Cancel Webex Subscription** in the search bar and click the search magnifying glass icon.

Click on **Open a Case** under **Cancel** Webex Subscription.



ncel Webex Subscription

Select this option for assistance with cancelling a Webex subscription.

Answer if you are creating the case on behalf of someone else. Then click **Next**.

TIP

**Note**: If you are creating the case on behalf of someone else, you will be prompted to provide the CCO ID of the person.



Open a Case

- 5 Under **Case Title**, submit a title for your case (e.g. Cancel SubXXXXX)
- 6 From the **Transaction Type** dropdown, select CCE
- 7 Select a **Reason Code** from the dropdown list
- Select a **Request Type** from the dropdown list
  - Choose Terminate service last day of contract term – unable to turn OFF auto renewal if it's within 30 days of the end of term and you can no longer turn auto-renew off yourself via the Subscription UI
  - Choose Terminate service on effective date if you are requesting a mid-term cancel and want it to occur on the selected Requested Effective Date
  - Choose Withdraw cancellation request unable to turn ON Auto renewal if you have already opened a cancellation case within 30 days of the end of term date and have changed your mind and wish for the subscription to renew and not cancel.





Complete all required fields, including Subscription ID, Transaction Type, Reason for Cancellation, Start Date, Request Type, Federal/Non-Federal, and any Comments.

> Please Note: <u>All mid-term and end-of-term</u> <u>cancellations are exceptions and approval is</u> <u>NOT guaranteed.</u> Please provide a reason for your cancellation, specify if you are requesting an end-of-term or mid-term cancellation, and allow sufficient time for approvals to be completed. If approval is delayed beyond Requested Cancellation Date, subscription will continue to be active, and customer may incur charges beyond Requested Cancellation Date.

Case Title \star	
Transaction Type *	Select V
Reason For Cancellation *	Select V
Request Type 🗙	Select
Subscription ID *	
Start Date *	
Federal /Non-	Federal
5 1 10	
Federal? *	Non-Federal
Federal? *	Non-Federal
Federal?* Comments*	Cancellations may require approval. Please provide a
	Cancellations may require approval. Please provide a reason for your cancellation and allow sufficient time for approvals to be completed. If approval is delayed beyond Requested Cancellation Date, subscription will continue to
	Cancellations may require approval. Please provide a reason for your cancellation and allow sufficient time for approvals to be completed. If approval is delayed beyond
Comments *	Cancellations may require approval. Please provide a reason for your cancellation and allow sufficient time for approvals to be completed. If approval is delayed beyond Requested Cancellation Date, subscription will continue to be active, customer may incur charges beyond Requested
Comments *	Cancellations may require approval. Please provide a reason for your cancellation and allow sufficient time for approvals to be completed. If approval is delayed beyond Requested Cancellation Date, subscription will continue to be active, customer may incur charges beyond Requested

#### TIP

Note: If a Customer has already created a case within the last 30 days from the end of term to stop auto renewal and then changes their mind, the customer can either (1) reopen the initial case if it exists and is not closed or (2) they can open a new CSH cancellation case, and select Withdraw cancellation request – unable to turn ON Auto renewal as the Request Type.

Under Optional Information, you can add a Subject, attach any Attachment files to the cancellation request, and/or add Email addresses to receive a copy of request.

Once done completing all required and optional fields, click **Next**.

**m** 

Attachments 0	0
	Drag and drop files here Or
	Select file(s)
	Enter a valid email address (e.g. Name@company.com). Use a comma/semicolon
Email Copy To:	to separate multiple email addresses.

Review the information you entered. Click **Edit Info** if there are any changes you need to make to the request. Once all information is accurate and correct, click **Create Case.** 

12

Cancel We	ebex Subscription
Case Title	Sub123456
Transaction Type	Cisco Commerce Express (CCE Direct Customer)
Reason For Cancellation	Financial - Budget
Request Type	Terminate Service on Effective Date
Subscription ID	Sub123456
Start Date	03/27/2023
Federal /Non- Federal?	Non-Federal
Comments This is a test	
Preferred Contact M Email	Method
Language English	
	12 Create Case Edit Info Discard

# Hardware Shipment & Returns

#### **Hardware Shipment**

Shipping Speed	Order to Ship	Shipment Transit Time	From Order to Arrival
Standard Shipping	<b>4</b>	<b>6</b>	<b>10</b>
	Business days	Business days	Business days

#### **Returns must be initiated in Customer Service Hub**

- 1. Open a case at <u>Customer Service Hub</u>
- Search 'CCE' > Click "Open a case" under Cisco Commerce Express (CCE) Quoting Tool Support.
- 3. Select "Agency Shipment Support"

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# **Create a Dispute**



# Create a Dispute

- 1. Go to Invoices Tab under My Invoice
- 2. You can search by for Invoice
- 3. Click the 3 vertical dots,
- and select Create a Dispute. Note: You can search by disputes or click the SAF Numbers which provide details/notes of dispute.

My Invoices	2	Search By		Search Invoices	Q			
Invoice *	Type *	Created On *	Due On ▼	Subscription Id *	Po Number *	Invoice * Total	Balance *	Status *
520000046	Credit Memo	30-Oct-2018	30-Oct-2018	Sub2155988	PO_1200051868	CAD (376.29)	CAD (376.29)	OPEN
5100000710	🔏 Create a Disput		29-Nov-2018	Sub2157605	PO_1200051680	USD 15,857.60	USD 0.00	CLOSED
5100000717		ce	29-Nov-2018	Sub2157605	PO_1200051680	USD 63,430.40	USD 0.00	CLOSED
52000000	E Invoice	24-Oct-2018	25-Oct-2018	Sub2155988	PO_1200051868	CAD 993.27	CAD 993.27	PAST DUE
5100000434	Invoice	14-Oct-2018	14-Oct-2018	Sub2152356	PO_1300024627	USD 2,500.06	USD 0.00	CLOSED
5100000411	Credit Memo	11-Oct-2018	11-Oct-2018	Sub2151799	PO	USD (335,640.00)	USD 0.00	CLOSED
5100000408	Invoice	10-Oct-2018	10-Oct-2018	Sub2152356	PO_1300024627	USD 10,925.24	USD 0.00	CLOSED
5100000402	Invoice	10-Oct-2018	10-Oct-2018	Sub2152356	PO_1300024627	USD 2,500.06	USD 0.00	CLOSED
5100000378	Invoice	08-Oct-2018	07-Nov-2018	Sub2151799	PO	USD 335,640.00	USD 0.00	CLOSED
5100000375	Invoice	08-Oct-2018	07-Nov-2018	Sub2151799	PO	USD 0.00	USD 0.00	CLOSED



# Manage Invoices

# **Review Invoice Disputes**



#### 8. Review **Dispute Details**

Please Note: This is a self service view. Customers can review status of dispute and Dispute amount.

CISCO EXPRESS			Subscriptions	Quotes	Orders	Invoices			USER
Dispute Detail									Back To Disput
(Dispute) Number									
		Submitted By		Status Closed					
(Dispute) Amount (CAD) 333 Comments		Saf (Dispute) Reeson							
Test									
Line Items									
🎭 Line Number	SKU					Qty	Tax (CAD)	Rate Price (CAD)	Extended Amount (CAD)
<ul> <li>Invoice:</li> </ul>	Credit Memo:	Re-Bill Invoice:	Debit Memo:						
						100			

# **Review Your Invoices**

#### 9. Click Invoices

- 10. Click Invoice Number link on left
- 11. Click **Download as PDF** to review the Invoice

12. Message notification(s) will be highlighted at the header and footer of the page for accounts where autopayments are turned on.

Note: Invoice will always show total amount and be paid on the transaction date.

Customers may **download their invoice on the same day of creation, after 16:00 (4:00 PM PST).** A notification will prompt informing customers when the invoice is being prepared.

My Invoices	• -							
STATUS	10 *	Search By Invoice Number	r	Search Involces	٩			
Invoice * 1231231	Type *	Created On *	Due On *	Subscription Id *	Po Number *	Invoice * Total	Balance *	Status *
1201201	Credit Memo	30-Oct-2018	30-Oct-2018			CAD (376.29)	CAD (376.29)	OPEN
	Invoice	30-Oct-2018	29-Nov-2018			USD 15,857.60	USD 0.00	CLOSED
	Invoice	30-Oct-2018	29-Nov-2018			USD 63,430.40	USD 0.00	CLOSED
	Invoice	24-Oct-2018	25-Oct-2018			CAD 993.27	GAD 993.27	PAST DUE
	Invoice	14-Oct-2018	14-Oct-2018			USD 2,500.05	USD 0.00	CLOSED
	Credit Memo	11-Oct-2018	11-Dct-2018			USD (335,640.00)	USD 0.00	CLOSED
	Invoice	10-Oct-2018	10-Oct-2018			USD 10,925.24	USD 0.00	CLOSED
	Invoice	10-Oct-2018	10-Dct-2018			USD 2,500.06	USD 0.00	CLOSED
	Invoice	08-Oct-2018	07-Nov-2018			USD 335,640.00	USD 0.00	CLOSED
	Invoice	08-Oct-2018	07-Nov-2018			USD 0.00	USD 0.00	CLOSED
View 10 y temo	Por Page					Resul	ts1of1 🖑 🤇 Provious	1 Next> >>>

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cisco

Commerce

- VDDECC



# **Review Your Invoices**

13. If a promotion is applied to the subscription for that month, it will show as part of the PA Program **Discount** value. The Extended Amount for the line will reflect the promotional credit.

14. Once the promotion expires, it will fall off the subscription and no longer show in the PA Program Discount value.

Note: near the bottom of the invoice the Extended Amount calculation formula is provided for clarity.

ahaha Commerce cisco EXPRESS RECURRING CHARGES PA TAX EXTENDED LINE DURATION TAX PROGRAM RATE SERVICE DESCRIPTION QTY RATE PRICE AMOUNT NO MONTH(S) AMOUNT DISCOUNT (%) (Excl. Tax) A-FLEX Collaboration Flex Plan Subscription ID: Billing Period: 15-Jun-20 to 14-Jul-20 A-FLEX-FILESTG-ENT-File Storage 1 5.140 0.00 0.00 0.00 Entitlement Der Haar / mth 2 A-FLEX-MC-ENT-Meetings Entitlement 1 257 0.00 0.00 0.00 (1) Per User / mth A-FLEX-MSG-ENT-Messaging 1 257 0.00 0 0.00 0.00 Entitlement Per User / mth A-FLEX-NUCM-MC-NU Cloud Meetings 257 32.25 0.00 0.00 1 8.288.25 0 Meetings (1) Der User / mit 1 0.00 A-FLEX-WX-STG-Included Webex 10 0.00 0 0.00

Per User / mth

Der Each / mth

0.00

0

0.00

0.00

PO

LINE#

Storage for Flex

A-SPK-VOIP-Included VoIP (1)

	A-FLEX Collaboration Flex Plan Subscription ID: Billing Period: 15-Sep-20 to 14-Oct-20						
19	A-FLEX-FILESTG-ENT-File Storage Entitlement	1	5,140	0.00 Per User / mth	0	0.00	0.00
20	A-FLEX-MC-ENT-Meetings Entitlement (1)	1	257	0.00 Per User / mth	0	0.00	0.00
21	A-FLEX-MSG-ENT-Messaging Entitlement	1	257	0.00 Per User / mth	0	0.00	0.00
14	A-FLEX-NUCM-MC-NU Cloud Meetings - Meetings (1)	1	257	32.25 Per User / mth	0	0.00	8,288.25
23	A-FLEX-WX-STG-Included Webex Storage for Flex	1	10	0.00 Per User / mth	0	0.00	0.00
24	A-SPK-VOIP-Included VoIP (1)	1	1	0.00 Per Each / mth	0	0.00	0.00

1

1

#### EXTENDED AMOUNT (Excl. Tax) = (DURATION \* QTY \* (RATE PRICE/PRICING TERM)) - PA PROGRAM DISCOUNT

# Review VAT/GST/TAX ID



15. On your invoice, the **VAT/GST or TAX ID** will be located in two places.

This includes on the top right and mid-left of invoices.

Customers who require a Form W-9 (Request for Taxpayer Identification Number and Certification) <u>You can</u> <u>download the form here.</u>





# **Italy E-Invoice**

For Customers with a *Bill To* address in Italy.

- 1. Open Quote > Select Address and Contacts
- 2. When Bill-To is in Italy, we need to add an e-invoice number.
  - a) Invoice number will default to seven 0's (0000000).
  - b) The customer must provide the PEC code (Posta Elettronica Certificata).
- 3. PEC email is required and will be provided by the customer from Italy's government.
  - a) This e-invoice will send to PEC Email.

DC Opportunity Number	Gustomer Name * HILTON ROME	Created By abeliam (on 13-Jun-		Status New
		1	2 3 And Contacts Review & Share	
Addresses and		Il not be able to Place the Order without valid VAT/G	ST/TAX ID	( )
	N ROME		HILTON ROME Viale Liegi, 62 ROMA, RM, 00198	

External Customer View

# Italy e-Invoicing

For Customers with a Bill To and Service To address in Italy, you can now Download an Invoice.

14. From the **Invoices** tab select the invoice you would like to view.

15. On the upper right click to Download Invoice

16. Select format: PDF File or CSV File.



CSV File Example



How do I get help with Cisco Commerce Express (CCE)

- Open a case at Customer Service Hub
- Search 'CCE'
- Click "Open case" under Cisco Commerce Express (CCE) Quoting Tool Support

#### How do I get help with new or existing quotes to provision an order from Cisco Commerce Express (CCE)?

• If you are working with a Cisco Sales Agent, their contact information is listed at the bottom of the email from Cisco

#### How do I get help with returns and replacements in Cisco Commerce Express?

- Open a case at <u>Customer Service Hub</u>
- Search 'CCE' > Click "Open a case" under Cisco Commerce Express (CCE) Quoting Tool Support.
- Select " "Agency Shipment Support"

For Exchanging a device placed on Cisco Commerce Express (CCE):

- •Open a case at Customer Service Hub
- •Search 'CCE' > Click "Open a case" under Cisco Commerce Express (CCE) Quoting Tool Support.

•Select "Agency Shipment Support".

How do I get help with order status, changes or cancellations in Cisco Commerce Express (CCE)? For Status:

•Open a case at Customer Service Hub

•Search 'CCE' > Click "Open a case" under Cisco Commerce Express (CCE) Quoting Tool Support.

•Select "Agency Order Support". and follow the steps to open a case

For Changes/Cancellations:

•Open a case at Customer Service Hub

•Search 'CCE' > Click "Open a case" under Cisco Commerce Express (CCE) Quoting Tool Support.

•Select "Changes/Cancellations" and follow the steps to open a case

Get help logging in to CCE here

Submit a Dispute here

#### **BILLING & COLLECTIONS**

- AMERICAS: <u>us01 cce@external.cisco.com</u> or <u>us02 cce@external.cisco.com</u> or <u>us03 cce@external.cisco.com</u> or <u>us04 cce@external.cisco.com</u> or <u>us05\_cce@external.cisco.com</u>
- EMEAR: <u>cceeu1@external.cisco.com</u> or <u>cceeu2@external.cisco.com</u>
- ASIA: <u>cce\_apjc\_asia1@external.cisco.com</u> or <u>cce\_apjc\_asia2@external.cisco.com</u> or <u>cce\_apjc\_asia3@external.cisco.com</u>
- JAPAN: <u>cce\_apjc\_jpn@external.cisco.com</u>
- INDIA: <u>cce\_apjc\_ind@external.cisco.com</u>
- ANZ: <u>cce apjc anz@external.cisco.com</u>



#### Resources

1. Cisco Commerce Express Help Center

Visit the Cisco Commerce Express Help Center to Learn More about CCE, Review FAQ's, and Get Help & Support.

http://cs.co/CiscoCommerceExpressHelpCenter

2. Log into Cisco Commerce Express

https://ccwdir.cloudapps.cisco.com/ccwdir/dashboard/quotes

3. Cisco Commerce Express - Customer Guide

https://www.cisco.com/E-Learning/gbo-

ccw/cdc bulk/Cisco Commerce Express/Cisco Commerce Express Customer Guide.pdf



# Resources



	Q4F19 Release June 9, 2019
Auto Reflect credit card payments	Credit card master data, when updated will auto reflect on that payment for all orders and subscriptions set.
Italy e-invoicing	Invoicing will be available electronically for compliance standards. E-Invoicing will require a code to receive via email.
Auto payments & Remaining Balance	Reminder to pay all remaining balance should be handled at the time of setting up Auto Payments to ensure timely payments.
Invoice Download	Customers may download invoices in the next 12 hours or, after 4:00pm PST
Suspend, Resume, Terminate notification	Notifications will be sent to customers starting from 10-45 days past due.
CCE Credit card availability	CCE and Credit card availability is now available to: Bolivia, British Virgin Islands, Cayman Islands, Honduras, Nicaragua, Paraguay, US Virgin Islands, Barbados, Bermuda, Aruba
Amex to Australia	Amex in Australia can be used as payment on CCE.
Help Center on Webex.com	View the FAQs, Support, and Resources here
	Q1F20 Release September 6, 2019
PO Update	PO Field Updateable for internal and external users
CCE Help	CCE Help Button on Dashboard



	Q1F20 Release September 6, 2019				
Place Order Highlight	Place Order Button highlighted for customers				
Credit Card, Autopay & Enhancement	Credit Card Auto Pay and Current Account Balance Enhancements				
Invoice notification	Invoice Messaging for Invoice being prepared				
Q1F20 Release October 6, 2019					
Credit Cards	CCE - Notification Enhancement for Autopay screen (Improve Autopay experience)				
Simplification Enhancements	Visibility of place order button(Pop-up warning message)				
	Support contact directly displayed to CCE tool				
	Invoice notification for download in 12 hours				
Additional Update	Reviewing Quote in CCE Dashboard				
	Manage PO (instruction update)				
	Country Availability List				
	Q2.1 Release November 19, 2019				
Email Notification	Notification made when customer makes a cc payment and one time payment				
Support Links	Support links to Support & Help on CCE Landing page				



	Q4F20 Release June 21, 2020
Viewing Promotions on a Quote	Viewing Promotions and Financial Summary details on quotes
Viewing Promotions on Review page of Quote	Viewing Promotions and Financial Summary details on Review page of quote
Reviewing Invoices with and without Promotions	Reviewing Invoices when a promotion is applied and when a promotion falls off
	Q1FY21 Release August 16, 2020
Tax Exemption Certificates	Cisco Webex LLC agency model was decommissioned and no longer needed. Tropo LLC agency model was replaced by Broadsoft Adaption LLC.
Manage Subscriptions	Provide additional clarification on who and how to update Primary Billing Contacts as well as billing address
Viewing Promotional Discount on Invoice in CCE	Viewing Promotional discounts at the line level on Invoices
	Q1FY21 Release September 13, 2020
Managing Auto Renewals for Subscriptions	Customer enabled to manage Auto Renewal settings in Subscription UI and see updated in History tab as well as run the Auto Renewal Change Report
Cancel a Subscription	How to create a case in Customer Service Hub to Cancel a Subscription
	Q2FY21 Release November 8, 2020
Managing Auto Renewals for Subscriptions	Update to how Customers can view Auto Renewal changes from History tab in Subscription UI
	Q2FY21 Release August 2021
Returns for Hardware	Hardware order shipment delivery. Hardware return for customers will be placed in Customer Service Hub
Support Resources	Support resources updated for customers (slide 112-114)
Tax Tools Update	Tax options, tax tools, Display & Agreement for customers (slide 35-37), Bank Remittance



Q4F22 Release May 8, 2022			
Direct Debit	Direct Debit Payment		
	New section for Direct Debit payment instructions		
Tax Exemption	Tax Exemption		
	New bullet re: best practice for entering details in field for the description of items that qualify for exemption.		
Q2FY23 January 10, 2023			
Subscription Cancellations	Subscription Cancellations Cancellation Request		
	Updated language to emphasize that approvals are required but not guaranteed for all mid-term and end-of-term cancellations.		
Docusign	Tax Display & Agreement		
	Removed slides with all Docusign steps, which are no longer required (previously slides 38-41).		
Tax Exemption	Exemption Tax Exemption		
	Added list of states where Broadsoft Adaption LLC is registered to collect taxes.		
Q3FY23 February 1, 2023			
Subscription Cancellations	Subscription Cancellations Cancellation Request		
	Updated language to emphasize that approvals are required but not guaranteed for all mid-term and end-of-term cancellations.		
Subscription Cancellations	Subscription Cancellations Canellation Request		
	Updated screenshot for CS Hub that includes new Cancel Webex Subscription labels and options.		



Q3FY23 March 9, 2023		
Create and Manage a Quote	Create a Cisco.com Account (CCO ID)	
	Updated broken links for Register page and CCE dashboard	
Q3FY23 April 5, 2023		
Subscription Cancellations	Subscription Cancellations Cancellation Request	
	111 – 113 Updated screenshots for cancellations.	
Q2FY24 – February 7, 2024		
Support	Support	
	Updated support aliases for all regions	

# **Country Availability List**

Cou	ntry Name	17.	Cayman Islands	34.	Germany
1.	Albania	18.	Chile	35.	Ghana
2.	Argentina	19.	Colombia	36.	Greece
3.	Aruba	20.	Congo	37.	Guatemal
4.	Australia	21.	Costa Rica	38.	Guinea
5.	Austria	22.	Croatia	39.	Hong Kon
6.	Bangladesh	23.	Cyprus	40.	Honduras
7.	Barbados	24.	Czech Republic	41.	Hungary
8.	Bermuda	25.	Denmark	42.	Iceland
9.	Belarus	26.	Dominican Republic	43.	India
10.	Belgium	27.	Ecuador	44.	Indonesia
11.	Benin	28.	Egypt	45.	Israel
12.	Bolivia	29.	El Salvador	46.	Italy
13.	Bosnia & Herzegovina	30.	Estonia	47.	Jamaica
14.	British Virgin Island	31.	Ethiopia	48.	Japan
15.	Bulgaria	32.	Finland	49.	Kazakhsta
16.	Canada	33.	France	50.	Kenya

Germany
Ghana
Greece
Guatemala
Guinea
Hong Kong
Honduras
Hungary
Iceland
India
Indonesia
Israel
Italy
Jamaica
Japan
Kazakhstan
Konya

51.	Latvia	68.	Panama
52.	Lithuania	69.	Papua New G
53.	Luxembourg	70.	Paraguay
54.	Macedonia	71.	Peru
55.	Malaysia	72.	Philippines
56.	Malta	73.	Poland
57.	Mauritius	74.	Portugal
58.	Mexico	75.	Puerto Rico
59.	Moldova	76.	Qatar
60.	Morocco	77.	Romania
61.	Netherlands	78.	Saudi Arabia
62.	Netherlands Antilles	79.	Senegal
63.	New Zealand	80.	Serbia
64.	Nicaragua	81.	Singapore
65.	Nigeria	82.	Slovakia
66.	Norway	83.	Slovenia
67.	Pakistan	84.	South Africa

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	85.	Spain
v Guinea	86.	Sri Lanka
	87.	Sweden
	88.	Switzerland
i	89.	Tanzania
	90.	Thailand
	91.	Tunisia
D	92.	Uganda
	93.	Ukraine
	94.	United Arab Emirates
ia	95.	United Kingdom
	96.	United States
	97.	Uruguay
	98.	US Virgin Islands
	99.	Venezuela
	100	.Vietnam
ca	101	.Zimbabwe

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