Cisco Commerce Express

Customer User Guide

February 2024

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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.

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CCE Basics

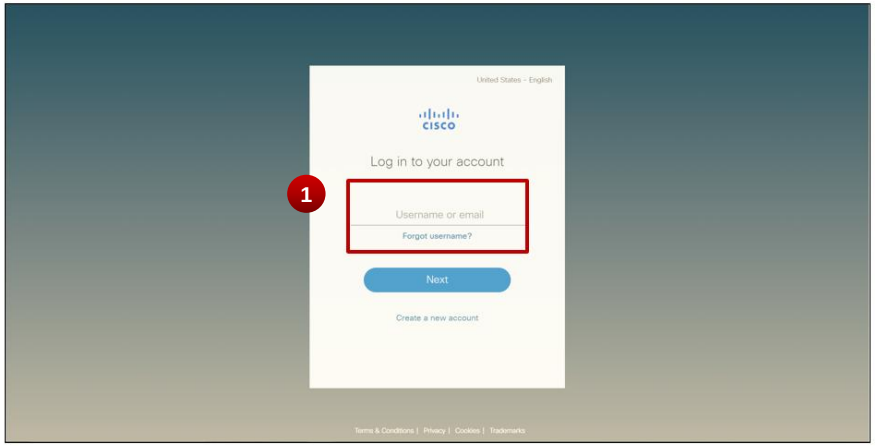
CCE Basics

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.

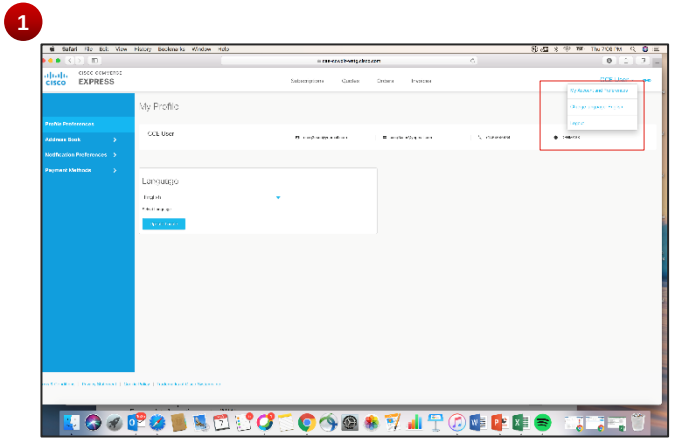


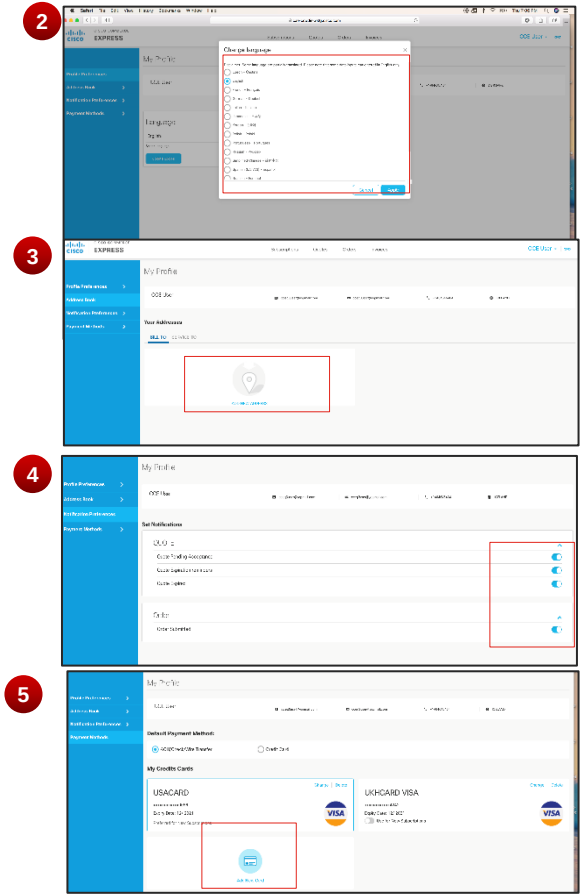
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CCE Basics

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**.

1. 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**
5. Add (ach/check/wire transfer or credit card) payment methods, **preferred payments**, or change methods.





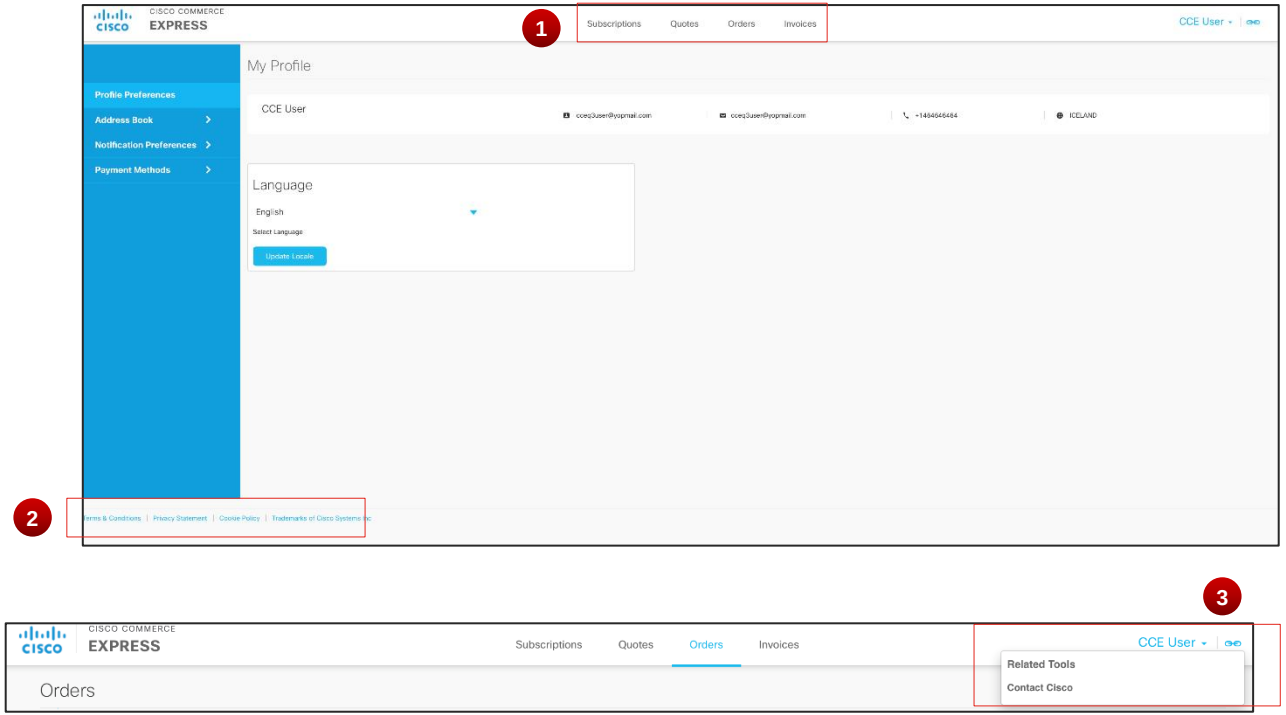
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CCE Basics

1. 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.

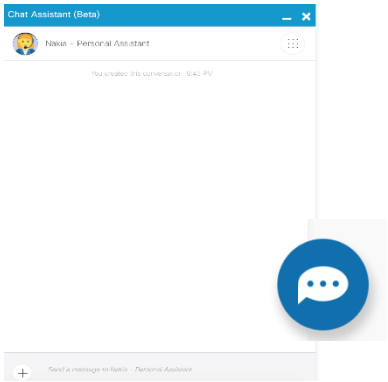
3. Click the to view related tools or to contact Cisco.



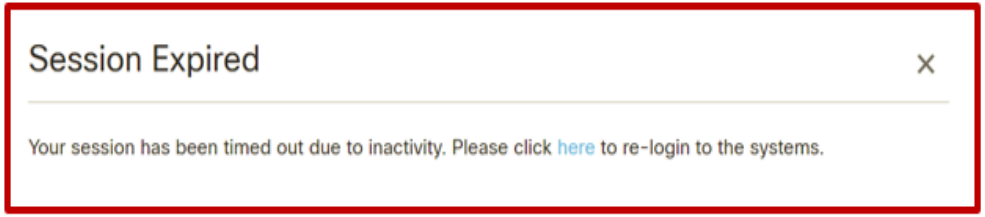
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CCE Basics

Note: Click the minimize button to minimize the Chat Assistant.



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



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Reviewing Quote in CCE Dashboard

Sales will share with customers a quote in CCE.

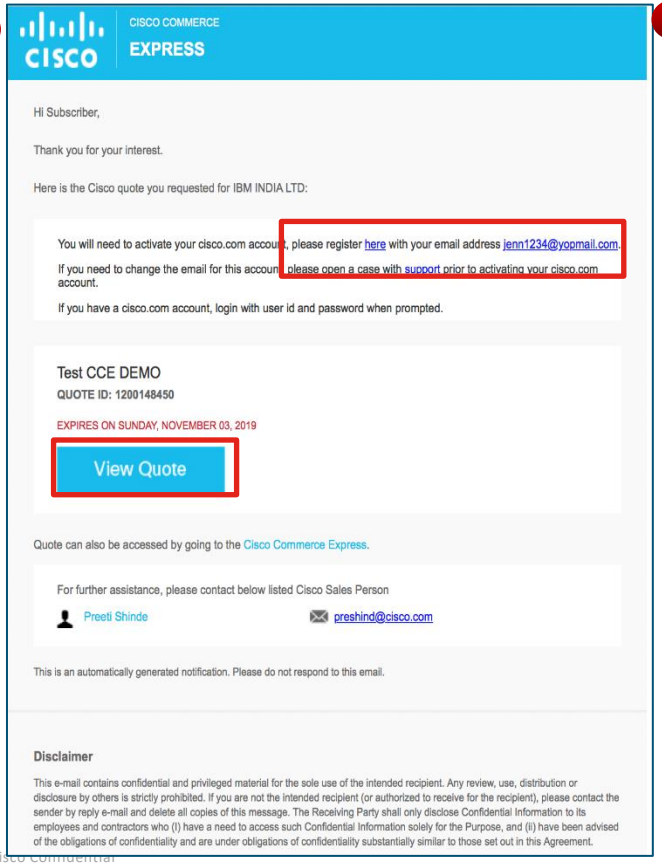
Diagram A
If a user is a **New user on CCE,** they must register for a Cisco.com Account.

Return to Quote email and click to View Quote. Enter your Cisco.com Account information.

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

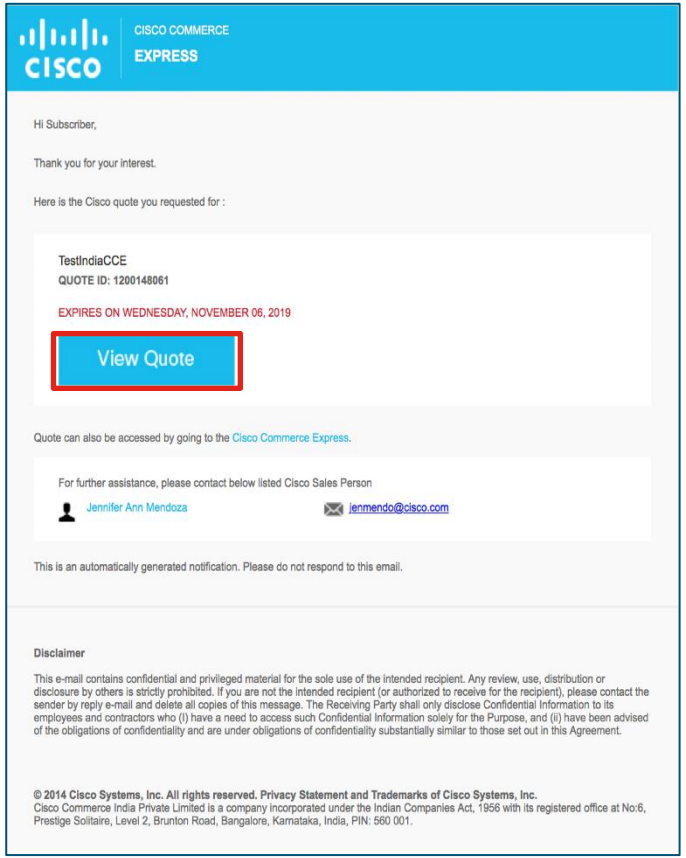
Diagram B
For **returning users**, please click to **View Quote**. Now enter your Cisco.com Account information.

A



New

B



Returning

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Tax Exemption (US)

Tax Exemption

Overview:

- The products & services purchased are subject to applicable sales taxes in the ship-to and service-to 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 (https://www.cisco.com/c/en/us/buy/customer-support-information/united-states-sales-tax.html), including references to State-by-State Tax Exemption forms.

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Manage Quotes from Dashboard

Manage Quotes from Dashboard

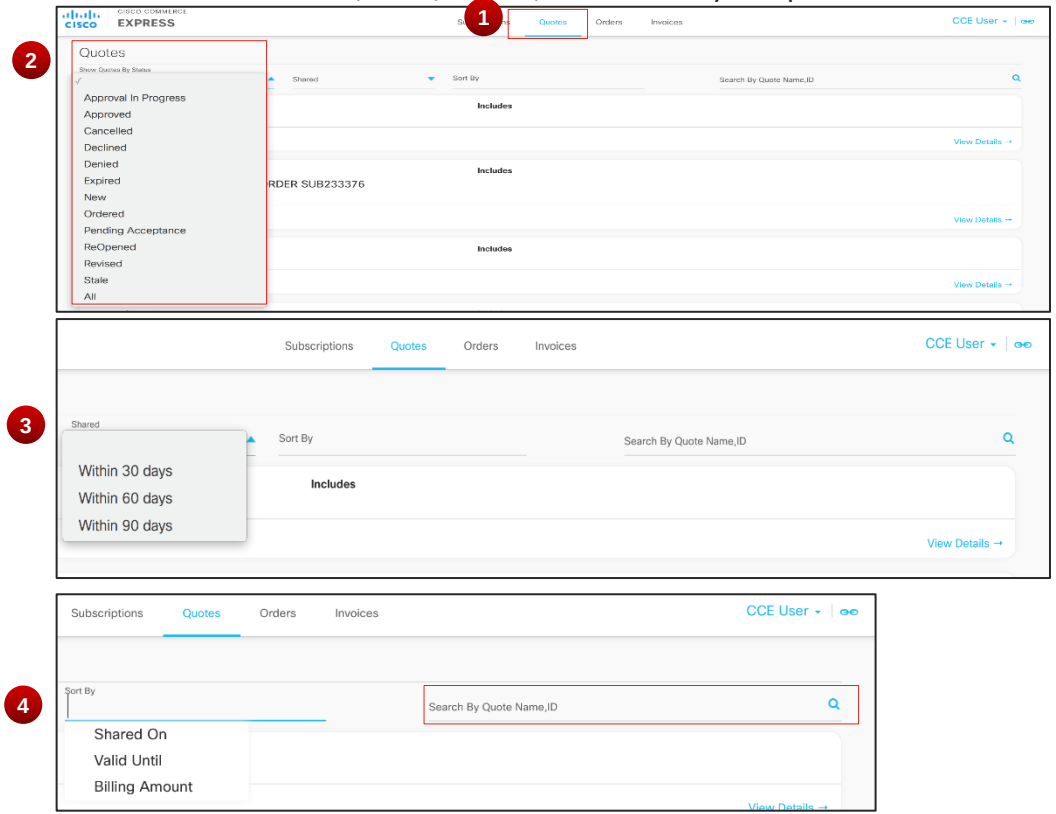
Overview:
Customers may now manage **quotes** created by Cisco directly in Cisco Commerce Express platform. After a quote has been shared with you it is visible in Cisco Commerce Express Quotes Dashboard. You can now sort, filter, search, and view all your quotes. You have access only to quotes
that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

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.*



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Manage a Quote and Place an Order

Manage a Quote and Place an Order

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

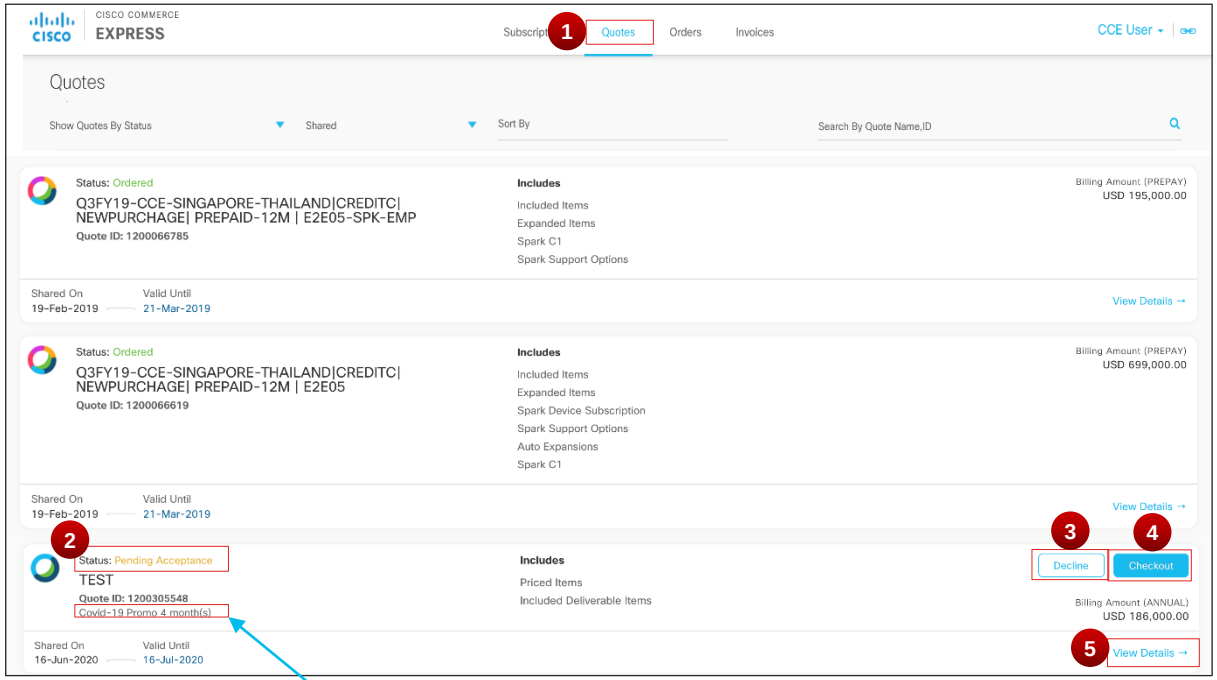
1. From the Cisco Commerce Express homepage, click Quotes to view the **Quote** dashboard.

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**.



Note: If a promotion is applied on the quote, it will be shown here.

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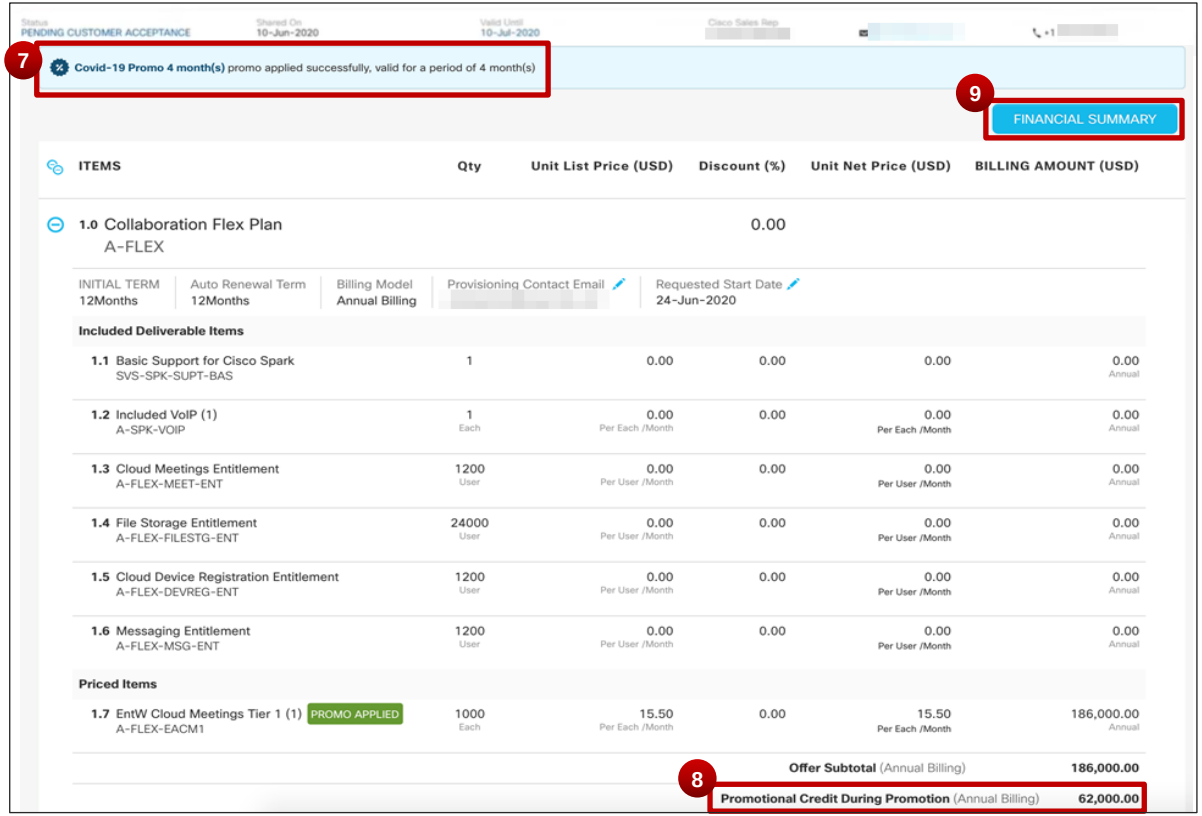
Manage a Quote and Place an Order

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**.



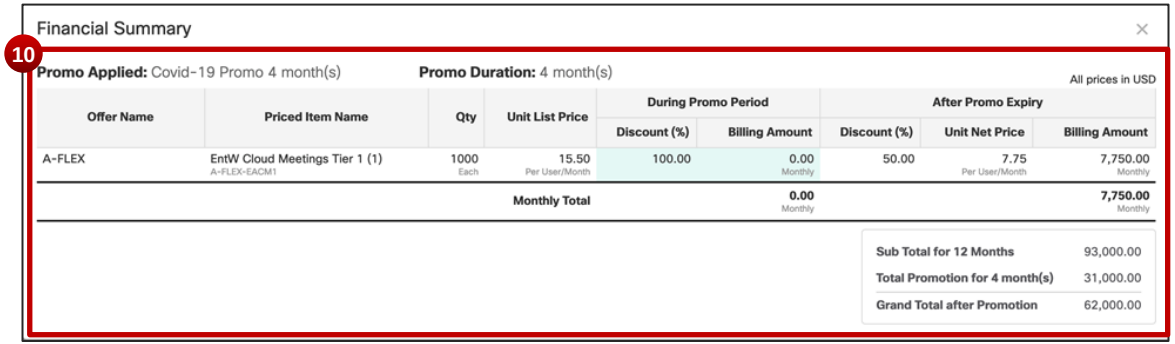
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Manage a Quote and Place an Order

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.



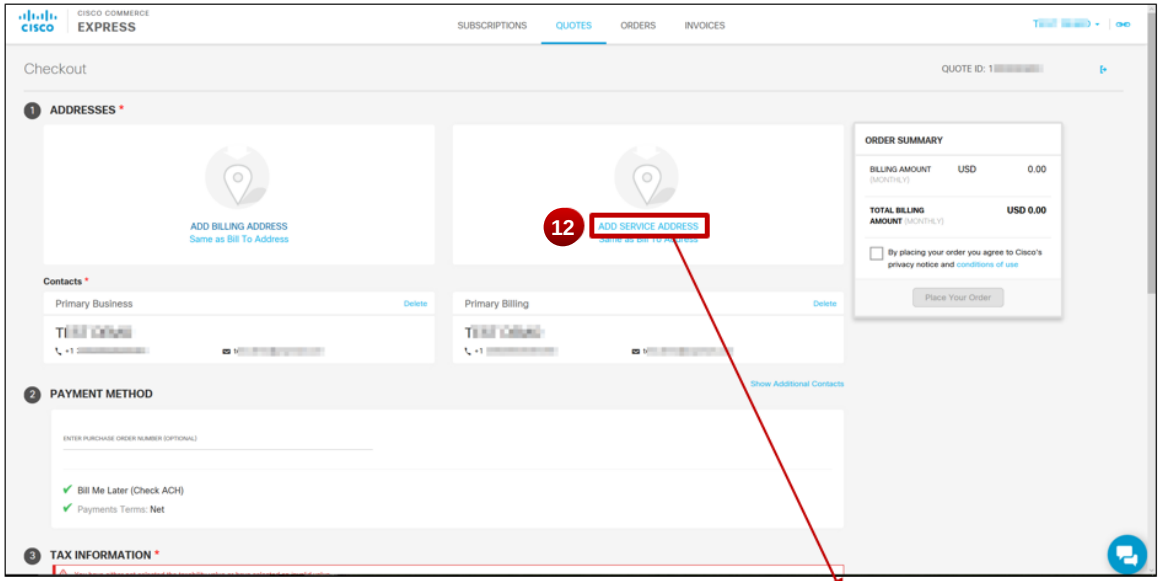


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Manage a Quote and Place an Order

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

13. Click **Add New Address**.





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Manage a Quote and Place an Order

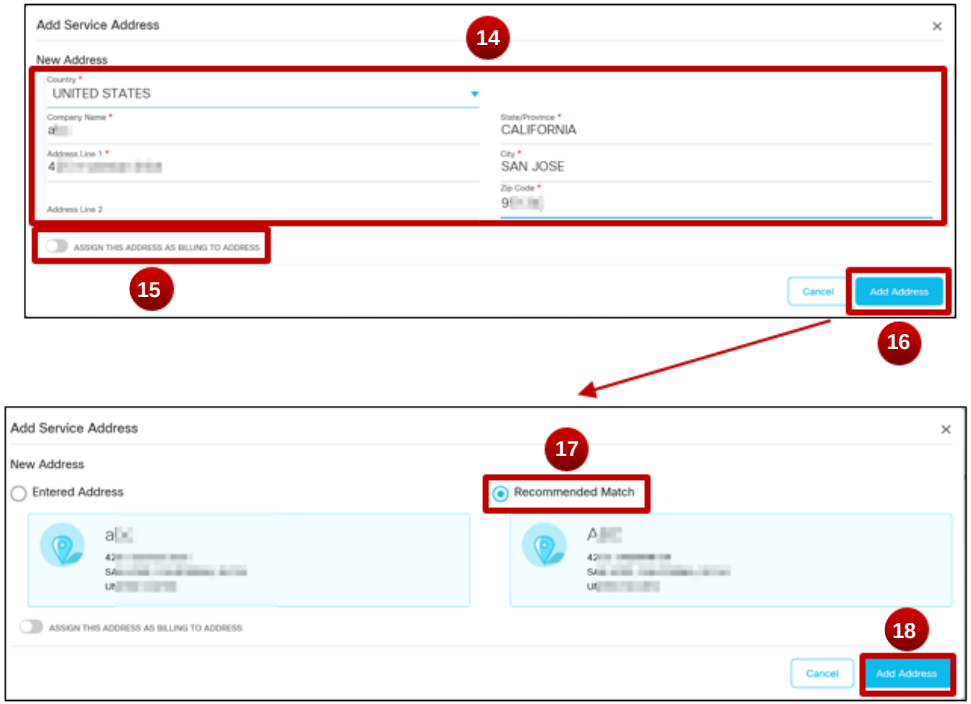
14. Complete all fields in the **Add Service Address** box. In the Checkout page, click Add Service Address, if applicable.

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

16. Click **Add Address**.

17. Click **Recommended** Match.

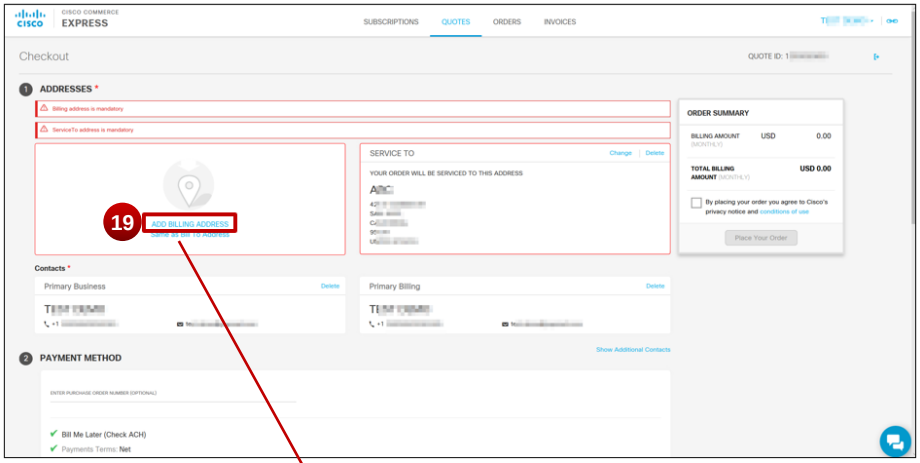
18. Click Add Address.



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Manage a Quote and Place an Order

19. Click **Add Billing Address**.



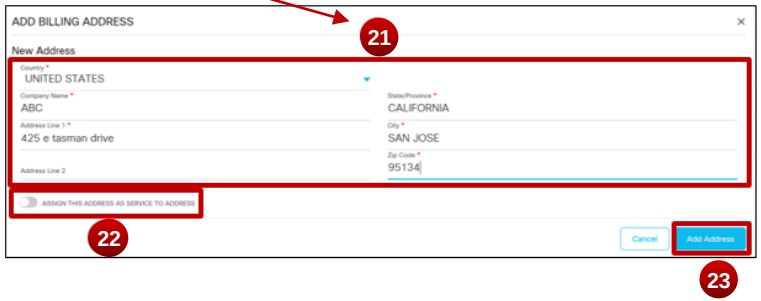
20. Click Add New Address.



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

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

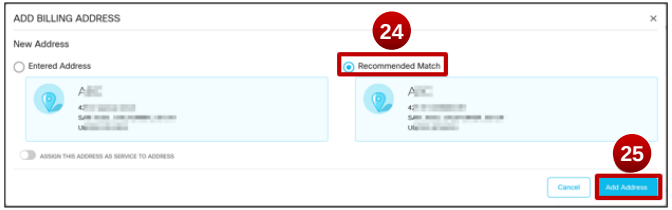
23. Click Add Address.



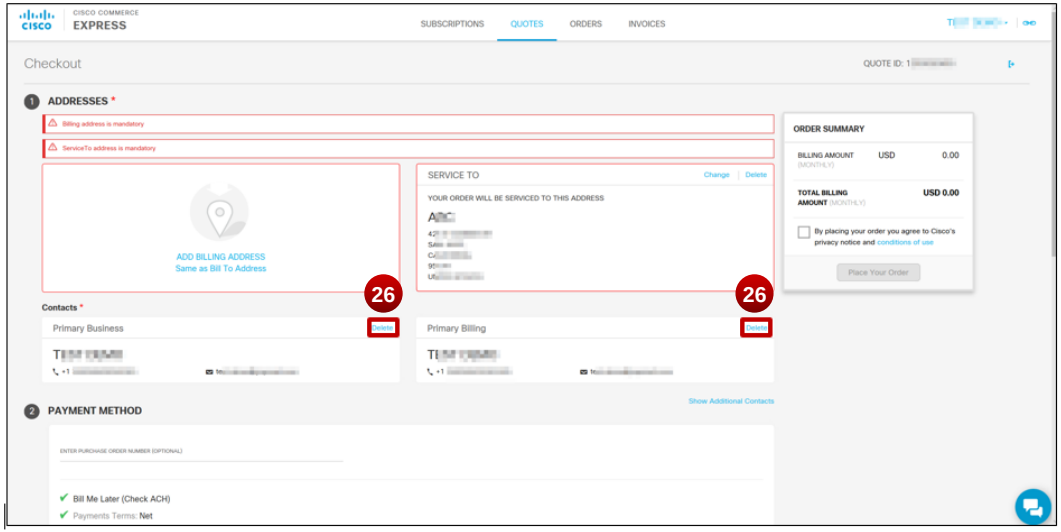
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Manage a Quote and Place an Order

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



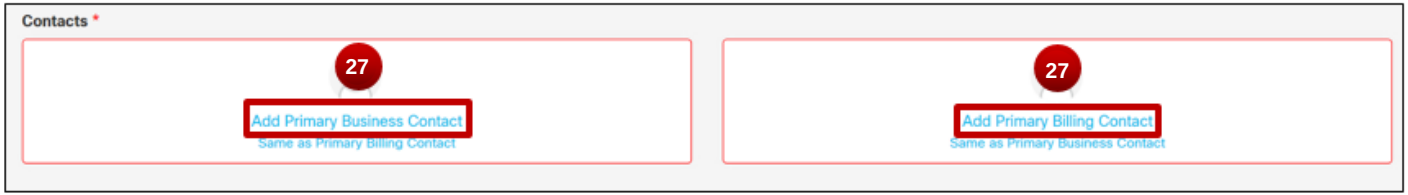
26. To delete an existing Primary Business or Primary Billing contact, click Delete.



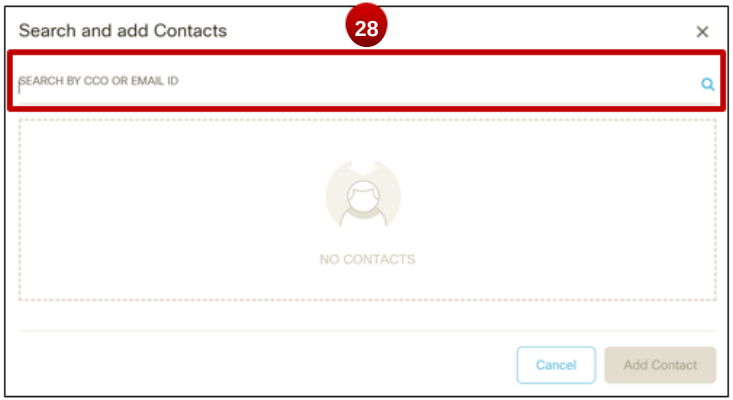
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Manage a Quote and Place an Order

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.

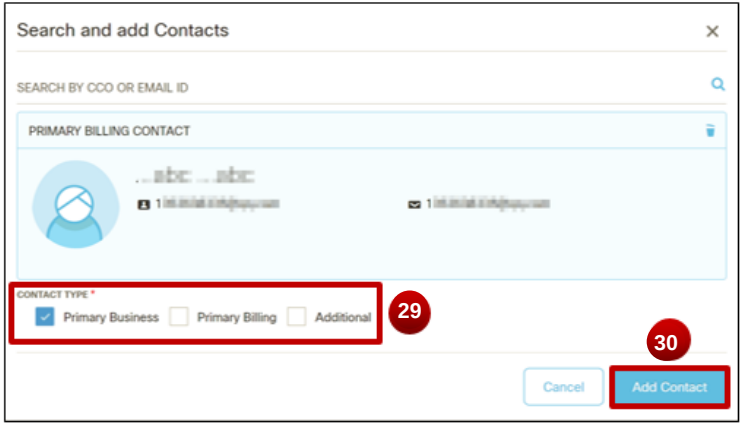


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Manage a Quote and Place an Order

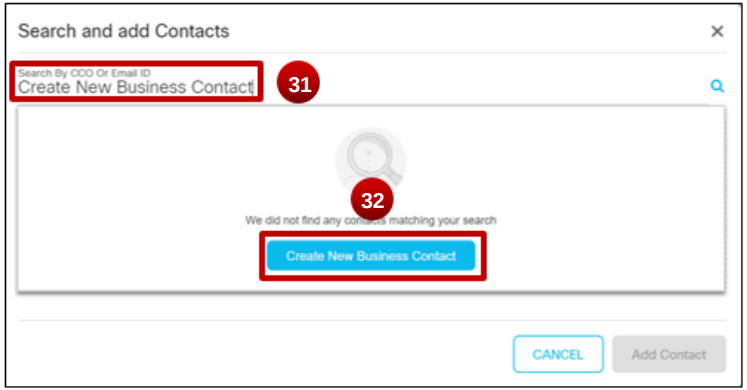
29. Select all applicable contact types

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

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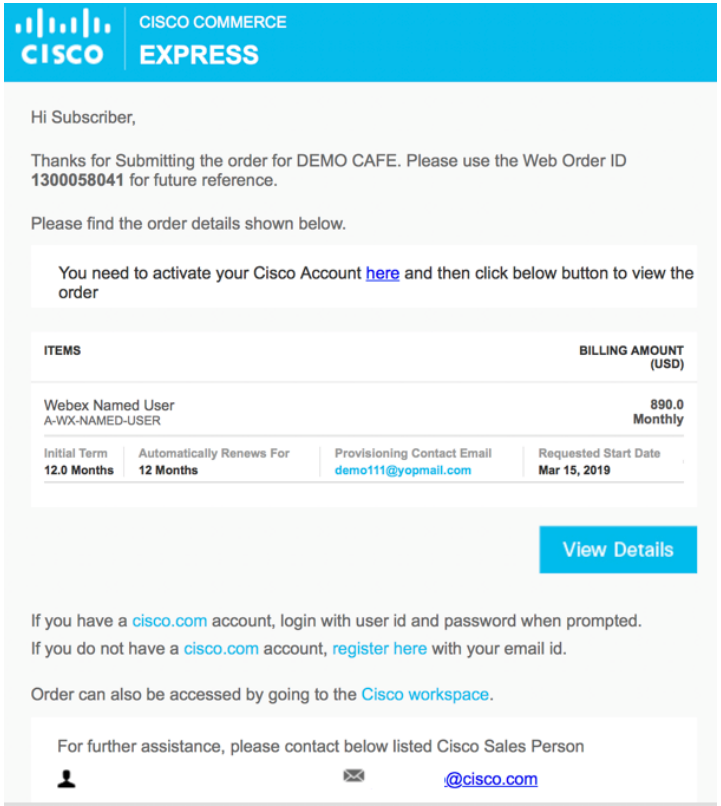
Cisco.com Account (CCO ID)

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



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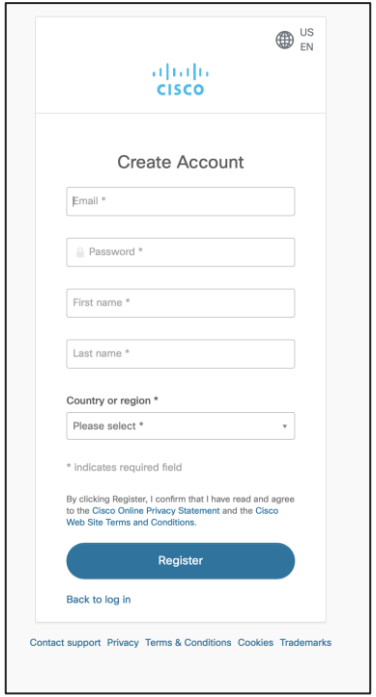
Create a Cisco.com Account (CCO ID)

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

1. Go to the Register page
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:

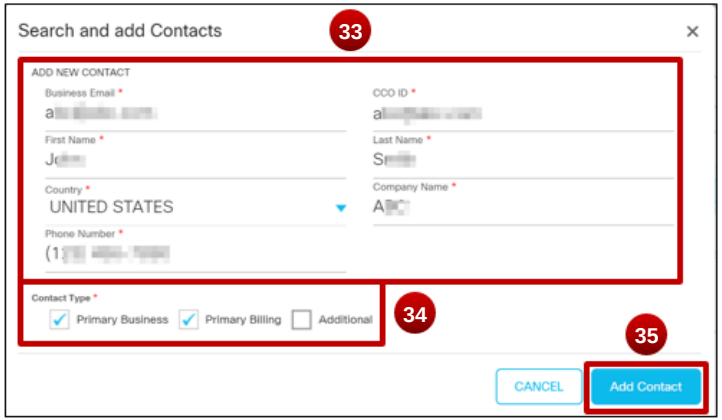
- Sales should ‘share order’ or invoice with you and add you as a contact to the account.
- Your internal business contact can add you as a billing, secondary, or support contact to the account directly in CCE.
- You can create a ticket to request to be added www.cisco.com/go/cs



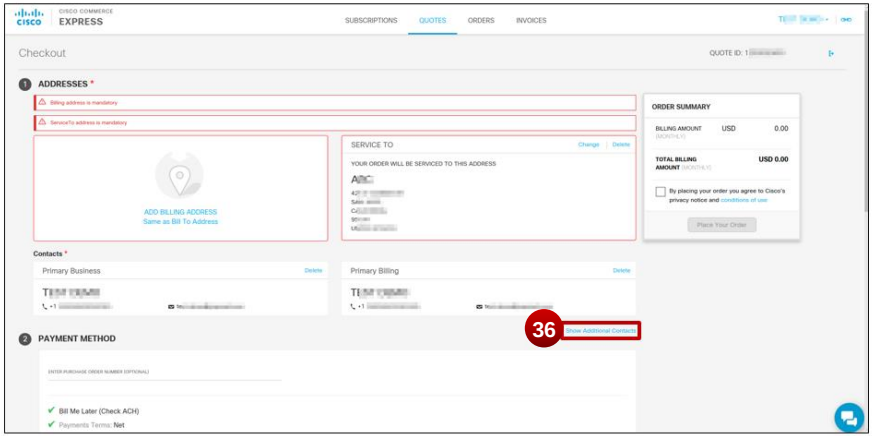
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Manage a Quote and Place an Order

33. Complete “Add New Contact” details
34. Select all applicable contact types
35. Click Add Contact



36. To see additional contacts, click Show Additional Contacts



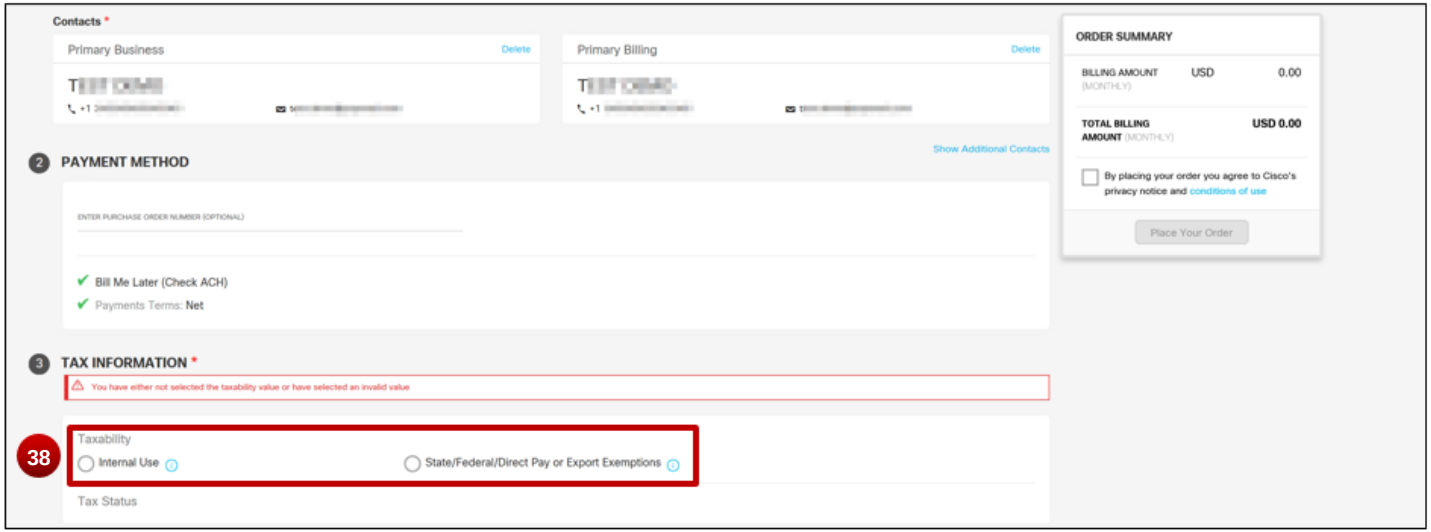
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Manage a Quote and Place an Order

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



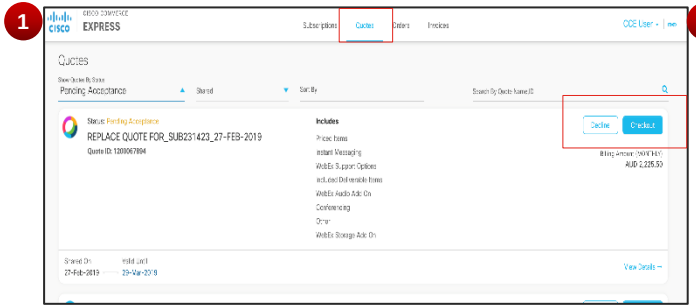
38. Click the applicable taxability selection in the Tax Information box.

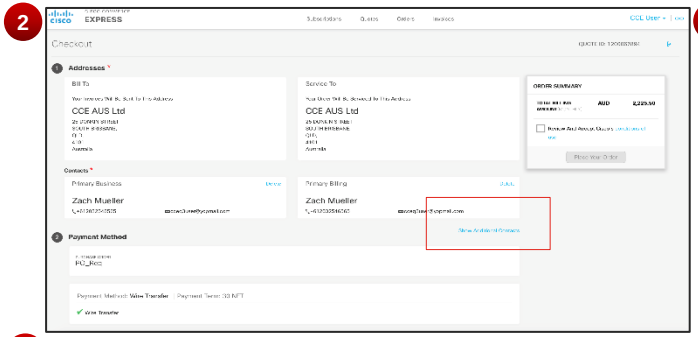


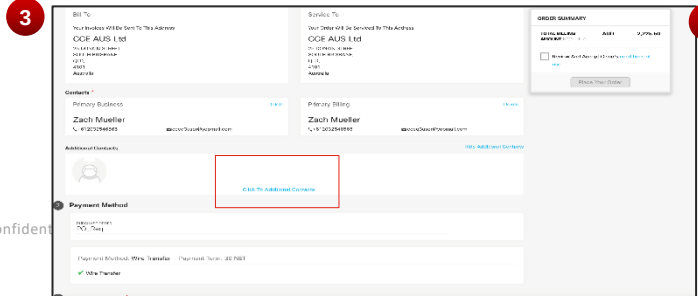
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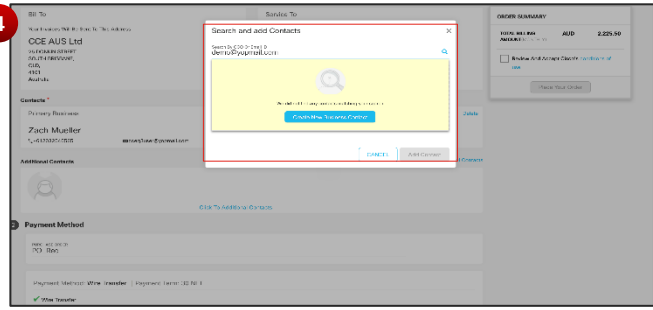
Add a Secondary Billing contact

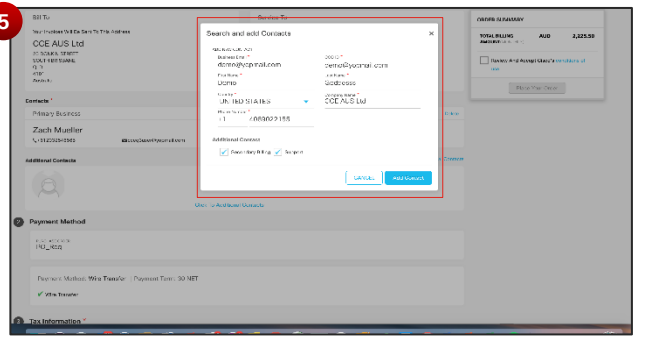
1. To add a secondary contact Select Quote
2. Go to Check Out
3. Show Additional Contacts
4. Click to add Additional Contacts
5. Search to assign user or click to Create New User Contact. Select secondary billing or support role
6. Review Secondary contact has been added

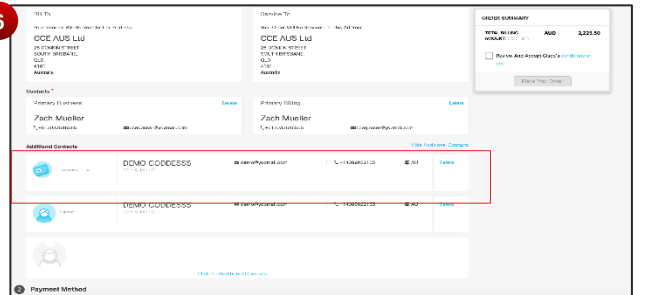








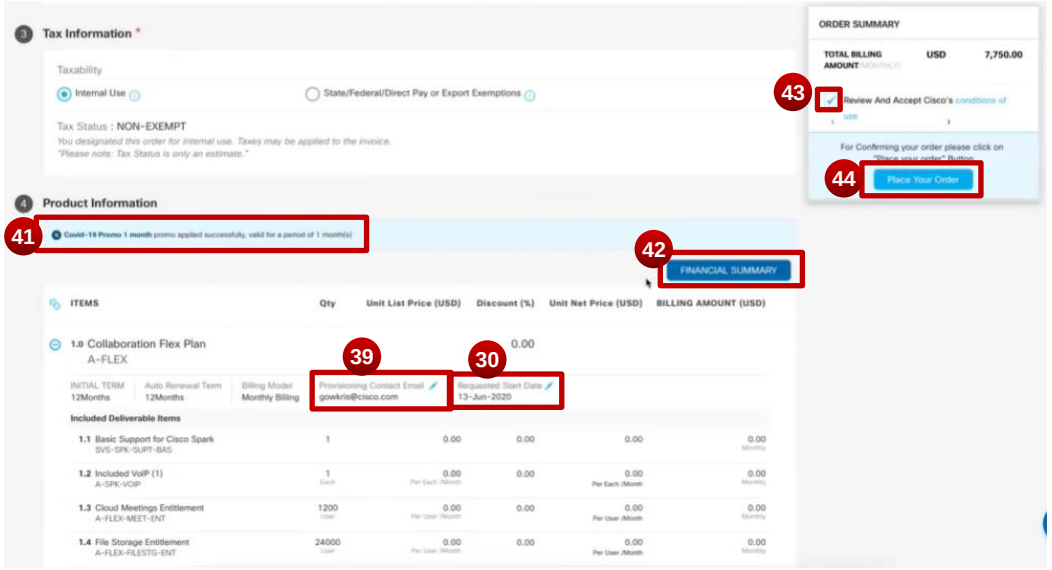




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Manage a Quote and Place an Order

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 Sum□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



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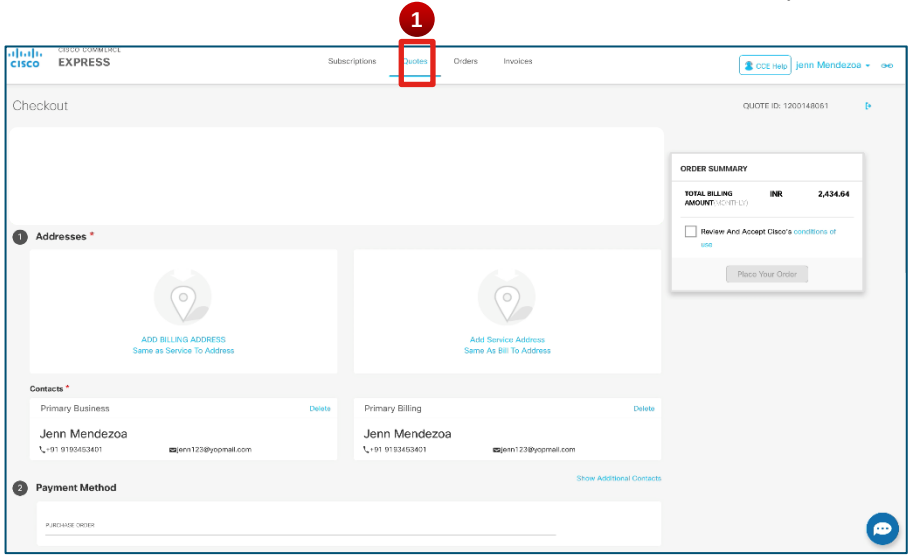
Manage Purchase Order# (PO #)

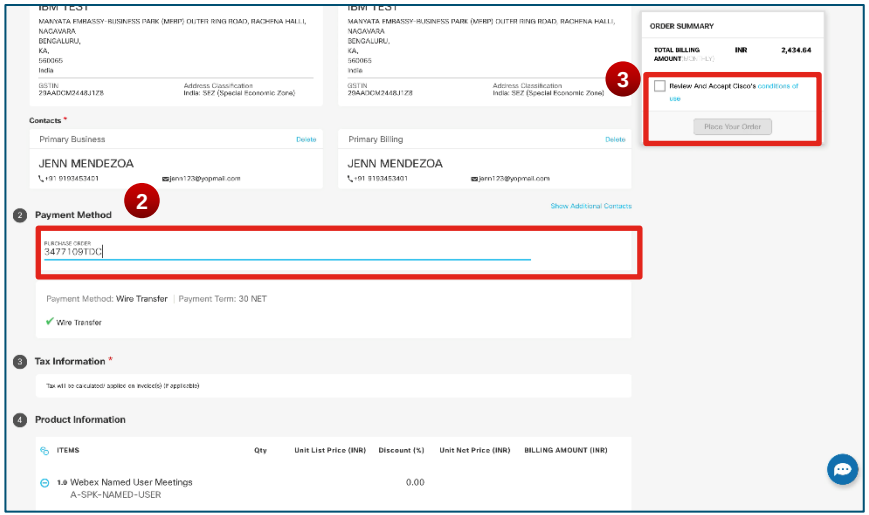
Adding a PO Number to a new order:

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.**

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



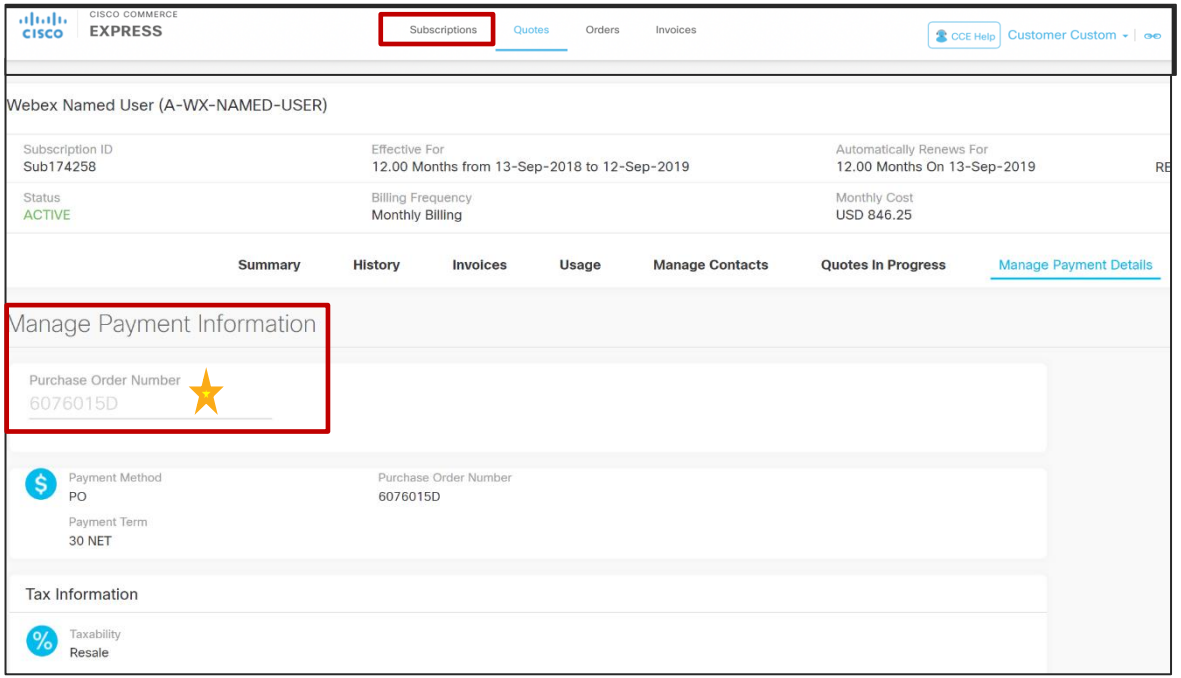


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Manage Purchase Order # (PO)

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

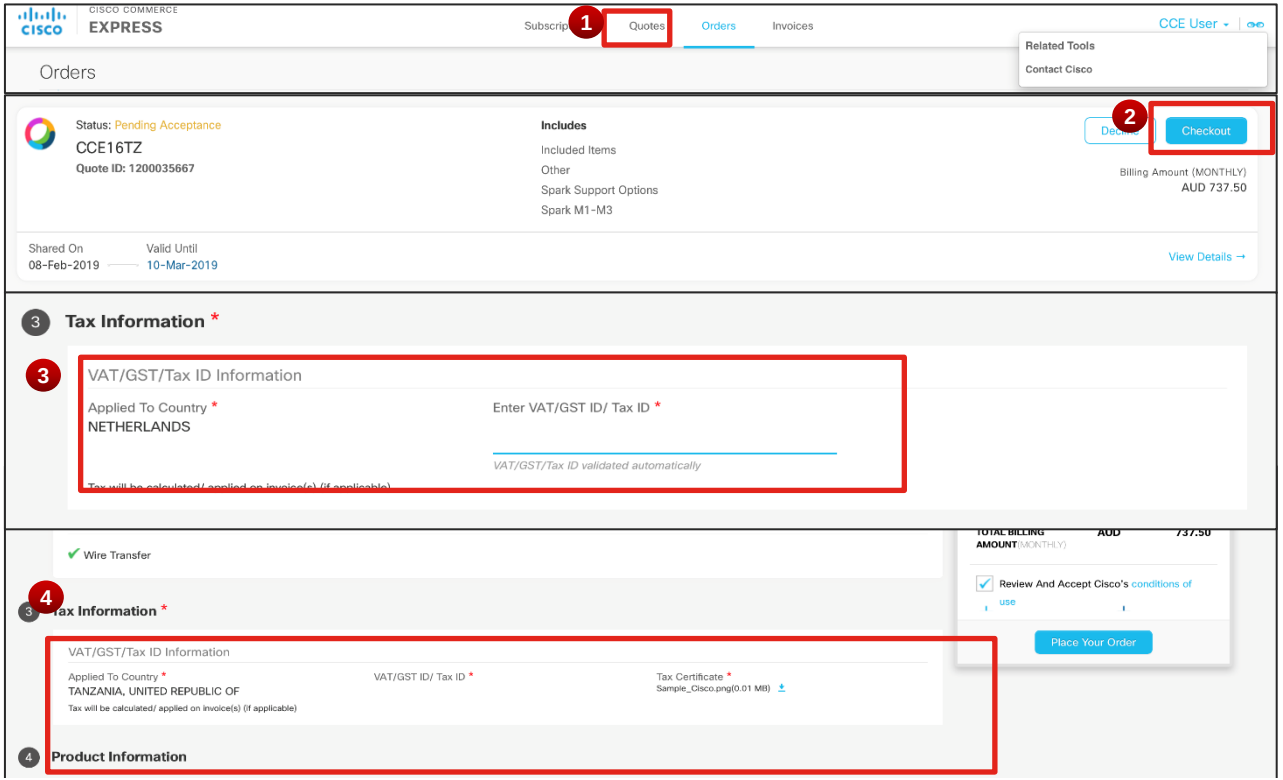
1. Select the **Subscription UI** > Manage Payment Details > Update PO Field.



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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
4. For countries that do not have a manual/automated VAT ID lookup link.



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Tax Options

1. **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

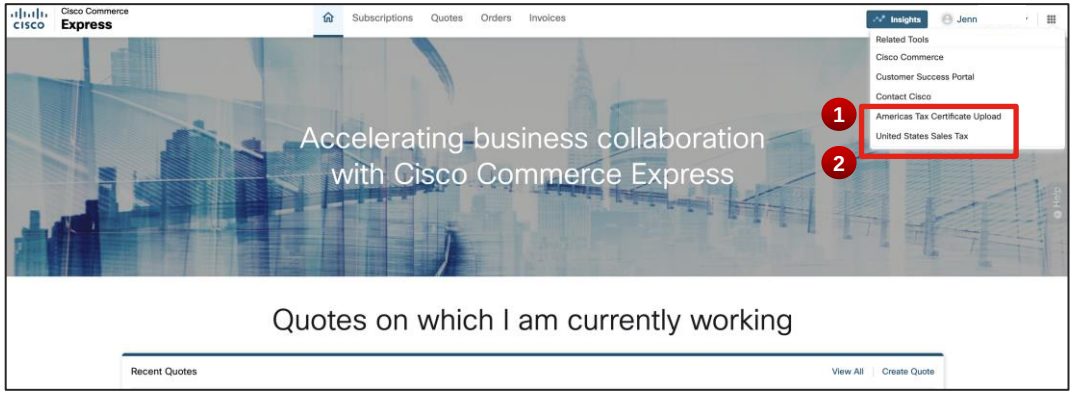




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Tax Tools in CCE

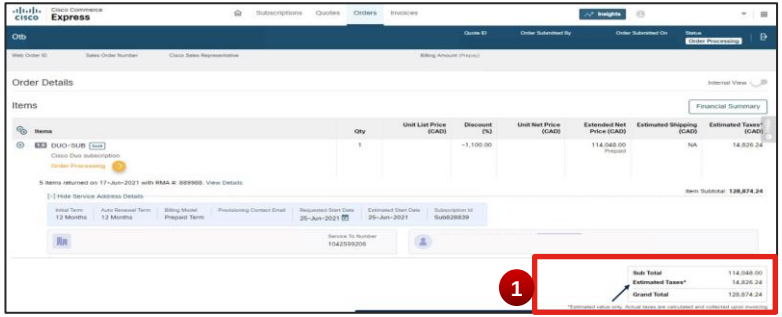
1. Link is included to allow customers to redirect to Customer Service Hub to upload their tax certificate
2. Link to Cisco Tax website for general sales tax information



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Tax Display & Agreement

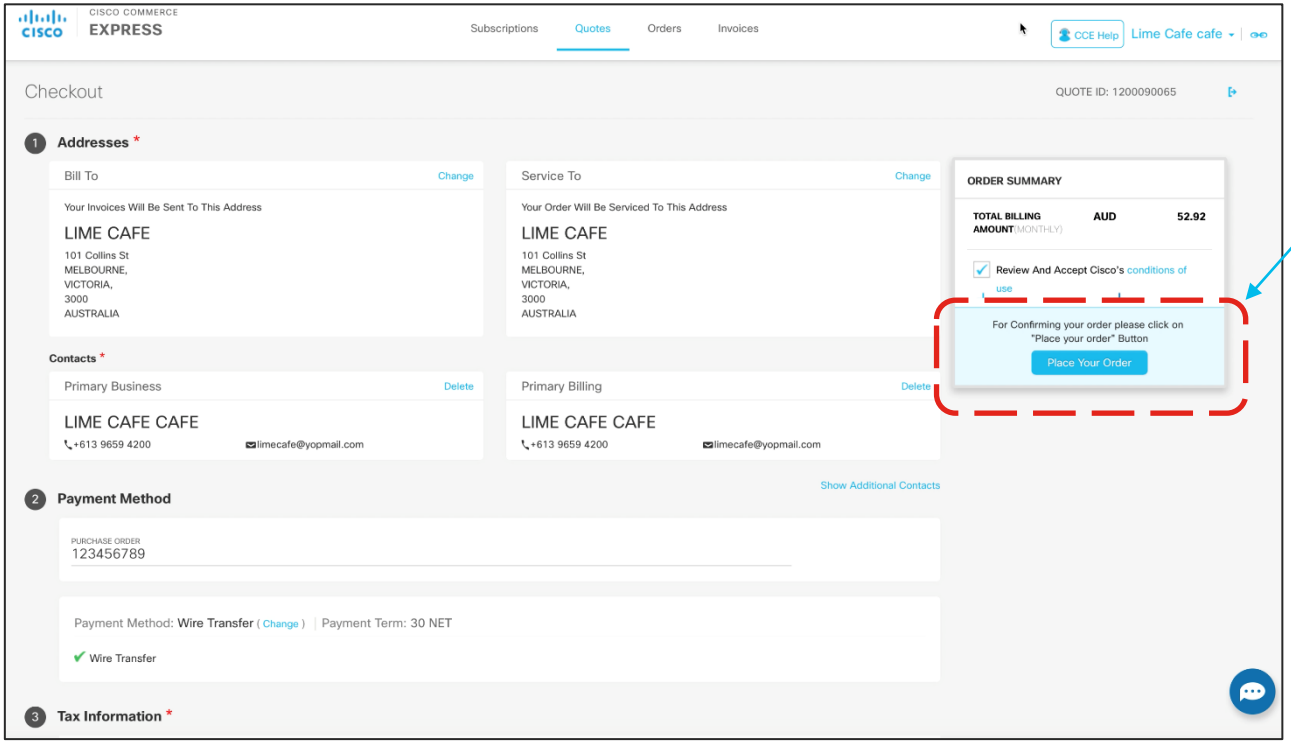
1. Estimated tax will be displayed for customers
2. Customer must acknowledge the estimated sales tax agreement





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Place Order Highlight

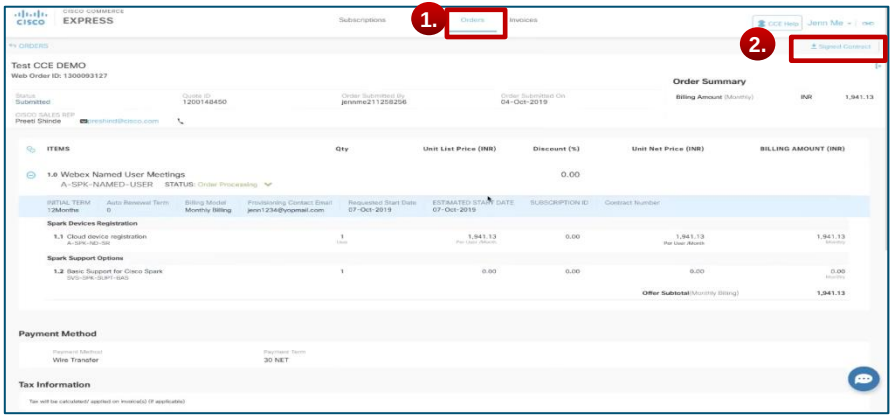


The Place Order button is now highlighted for customers when confirming and placing orders.

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Download Your Signed Contract

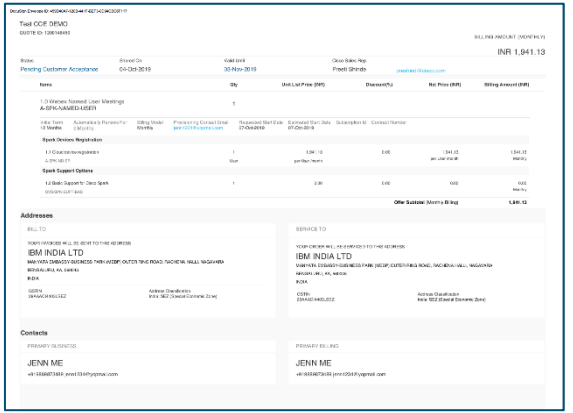
1. From the Orders Screen
2. To the left click Signed Contract
3. The file will download and include:
   a) copy of signed T&C
   b) copy of your invoice.



3. a)



3. b)



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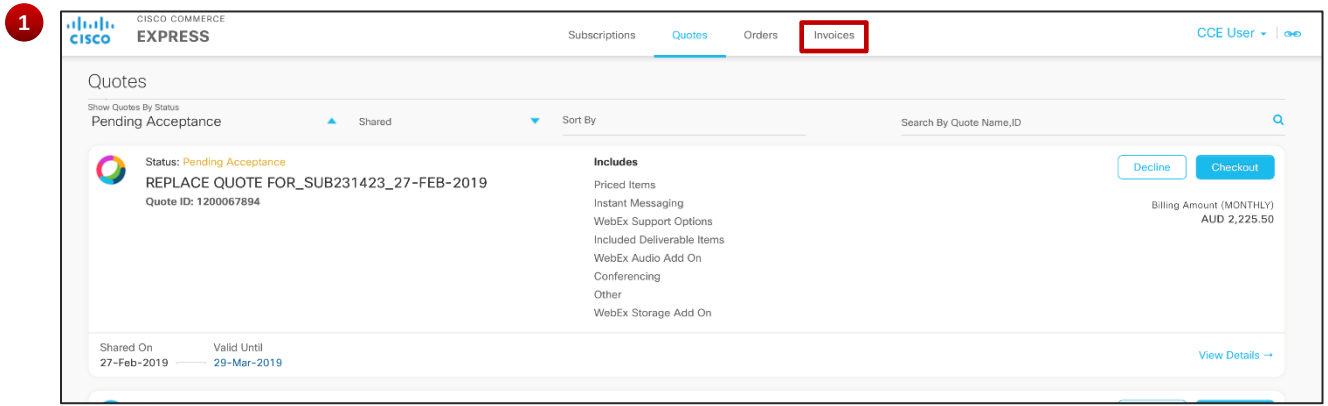
View, Download and Print Invoices

View, Download and Print Invoices

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.



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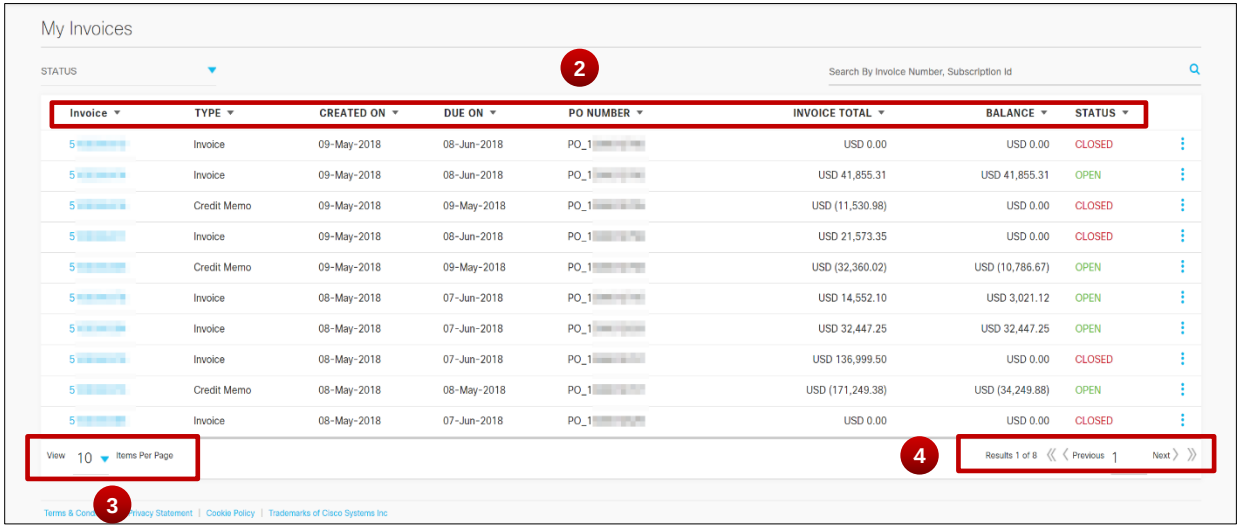
View, Download and Print Invoices

2. Sort them by clicking the up/down arrow icon next to each Column 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.

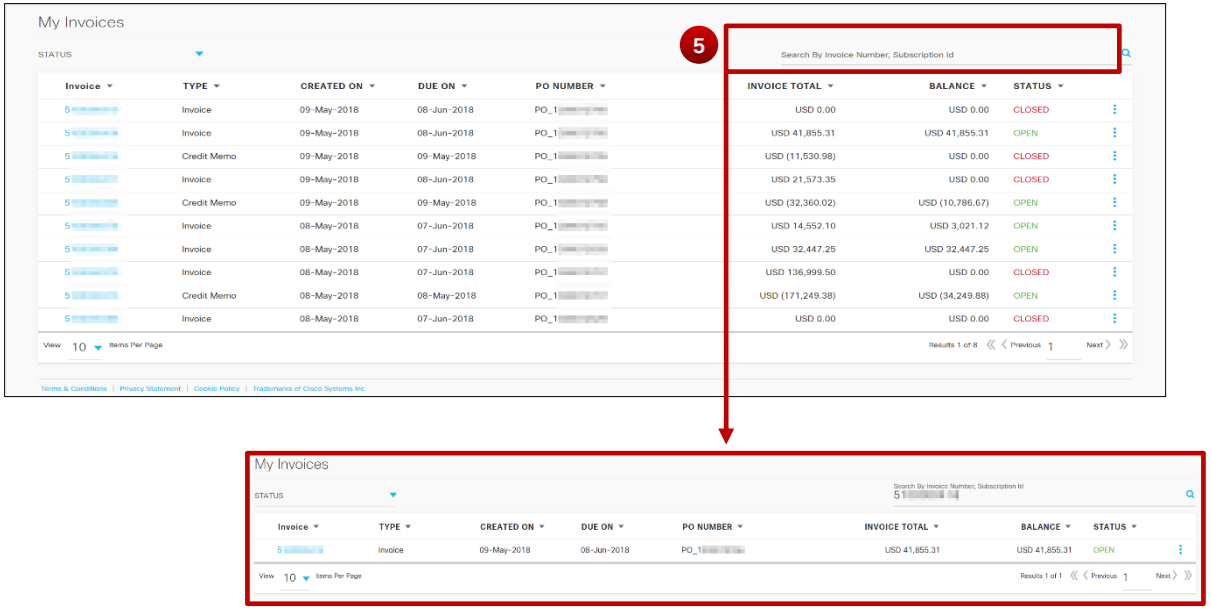
4. Use the single arrows to advance or return a page and the double arrows to advance or return to the last page and first page, respectively.



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View, Download and Print Invoices

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

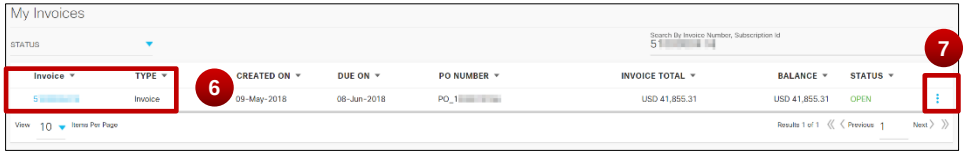


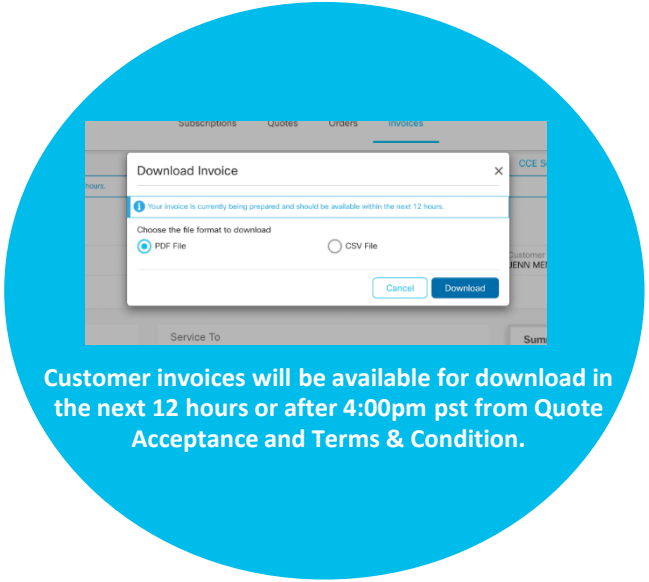
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View, Download and Print Invoices

6. To **view more details** of the invoice, click the **Invoice Numb**er.

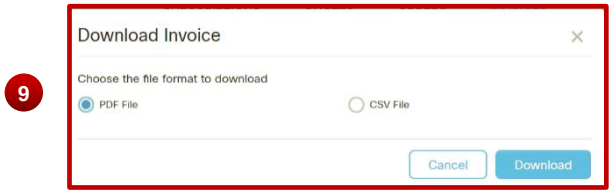
7. To **download the invoice**, click the 3 vertical dots icon.





9. Click **Download** Invoice.





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View, Download and Print Invoices

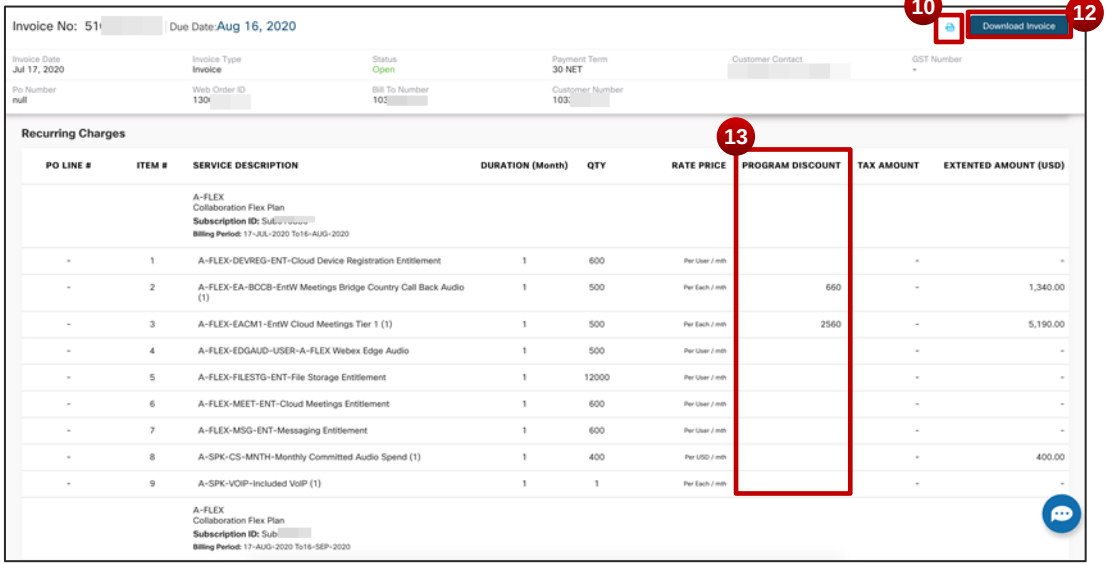
10. To **print** the invoice, click the nter icon.

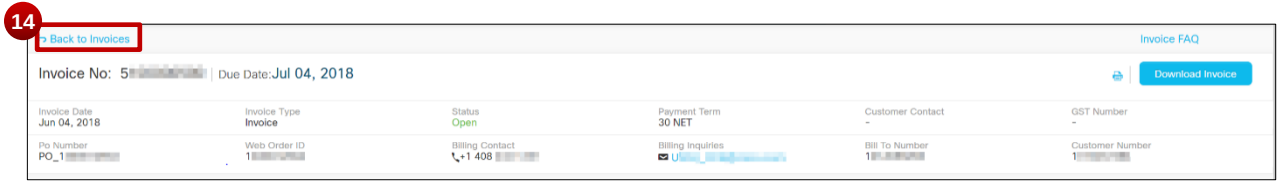
11. To view **Invoice FAQs**, click Invoice FAQs
Note: Invoice FAQs are also available at the bottom of the .pdf version of the Invoice.

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**.





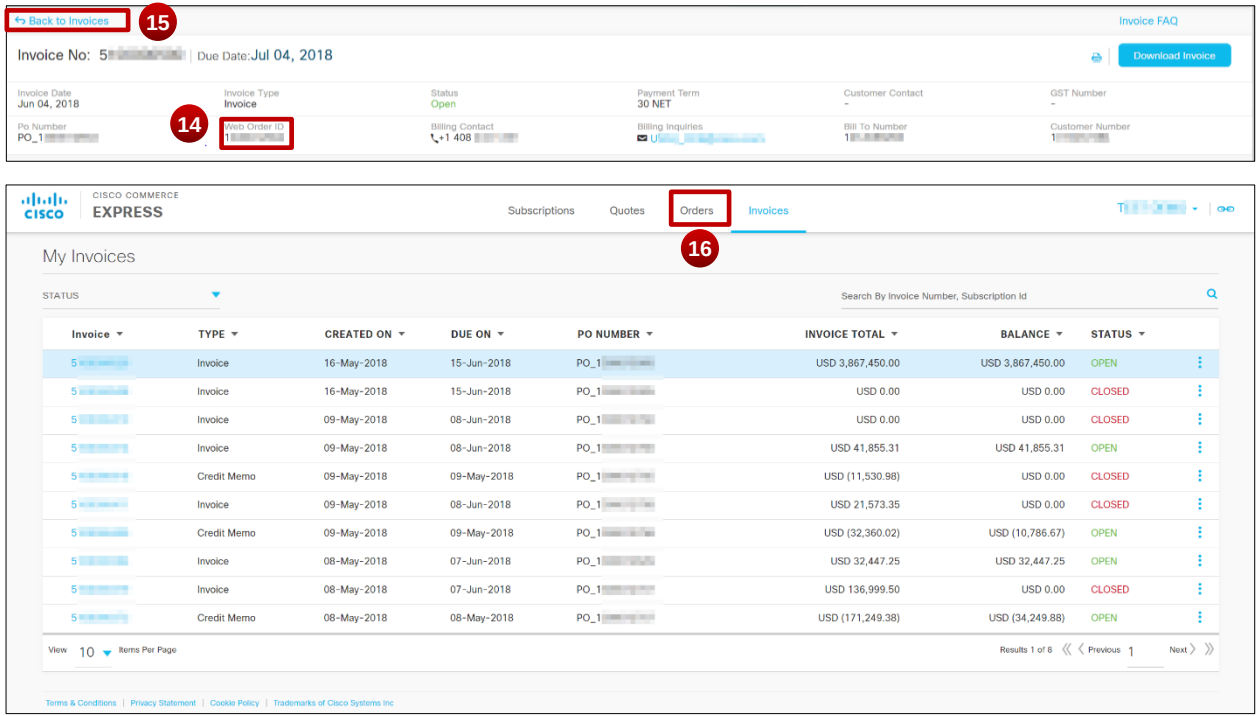
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View, download and Print Invoices

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

15. Click Back to Invoices.

16. Click Orders.

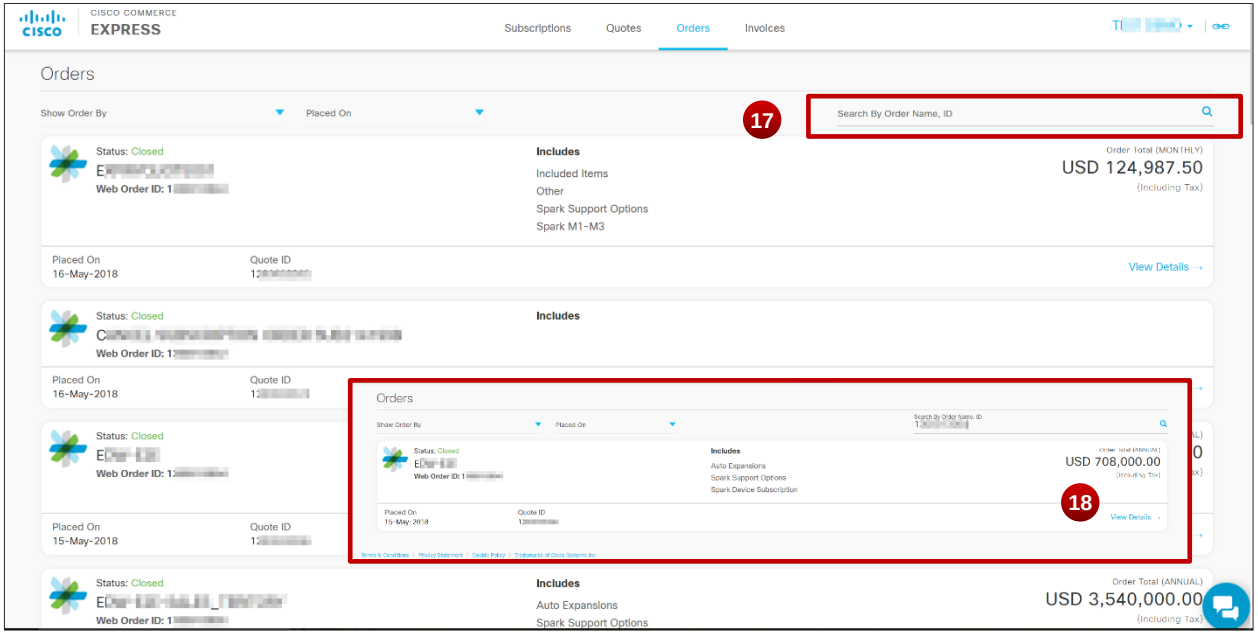


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View, download and Print Invoices

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

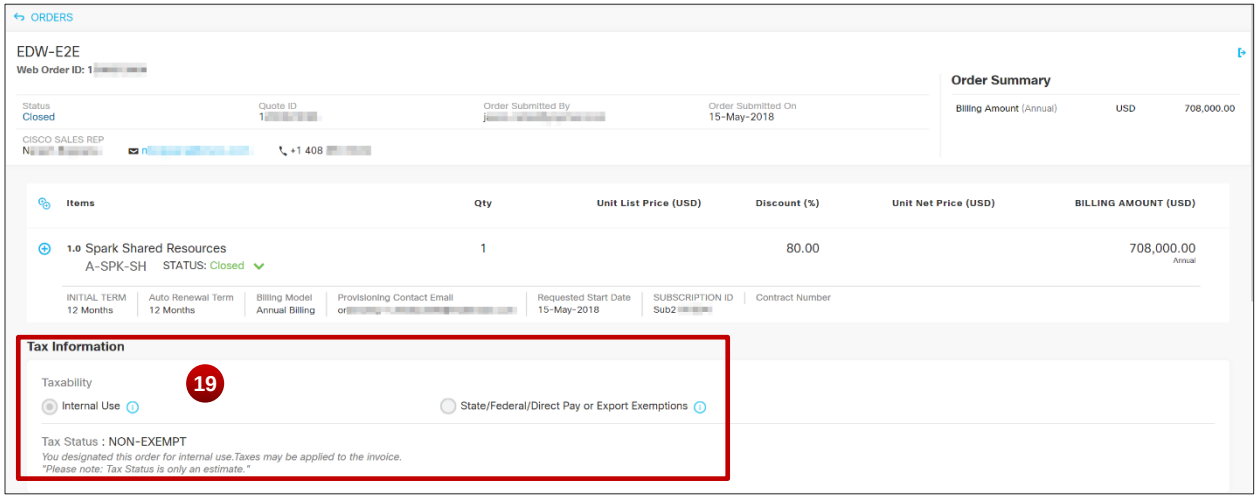
18. Click View Details.



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View, download and Print Invoices

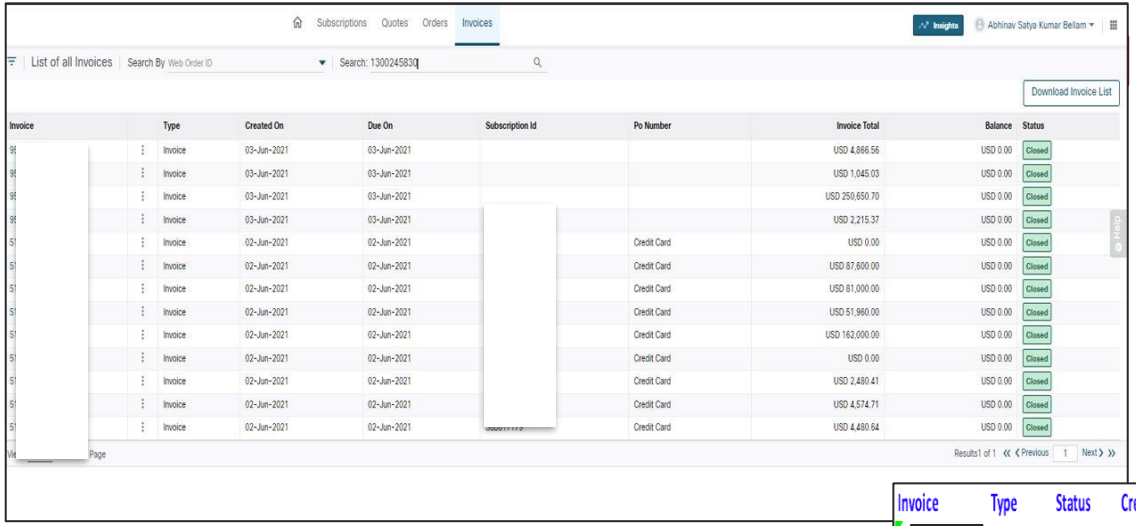
19. On the Order Details page, you will see the Taxability section below the Items section.



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Invoice export

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



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	Type	Status	Created On	Due On	Subscription Id	Web Order ID	PO Number	Currency C	Invoice 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

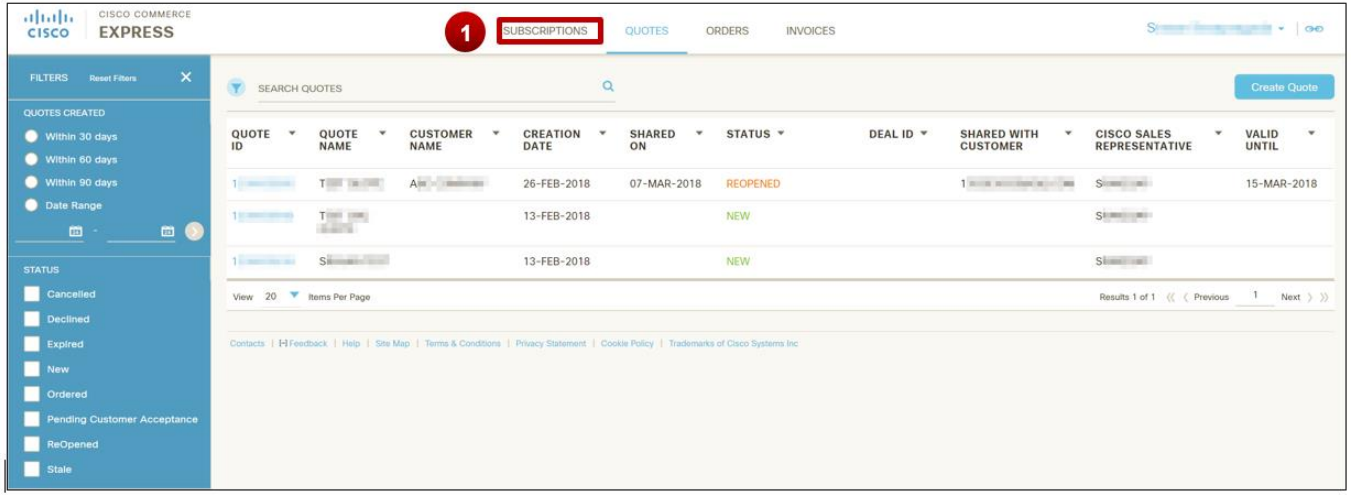
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View and Manage Subscriptions from Dashboard

View and Manage Subscriptions from Dashboard

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

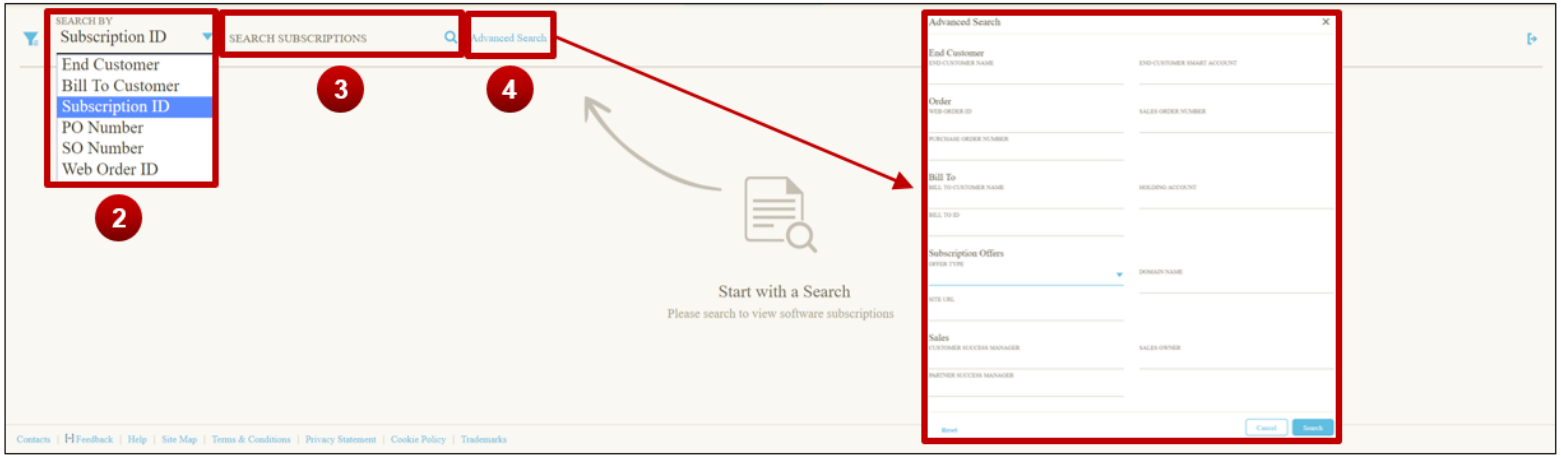
1. From the Cisco Commerce Express homepage, click **Subscriptions**



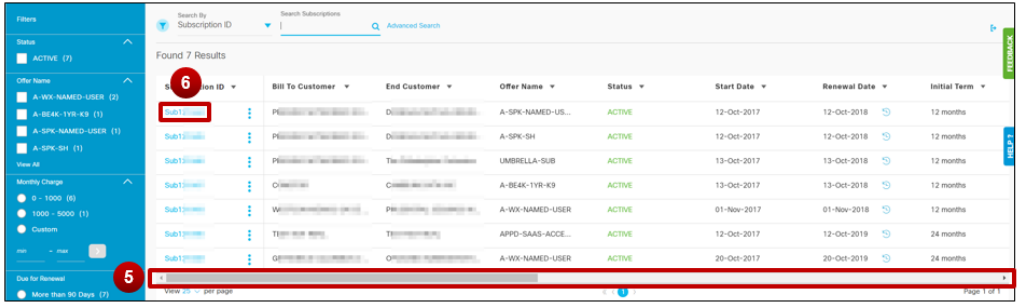
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View and Manage Subscriptions from Dashboard

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.



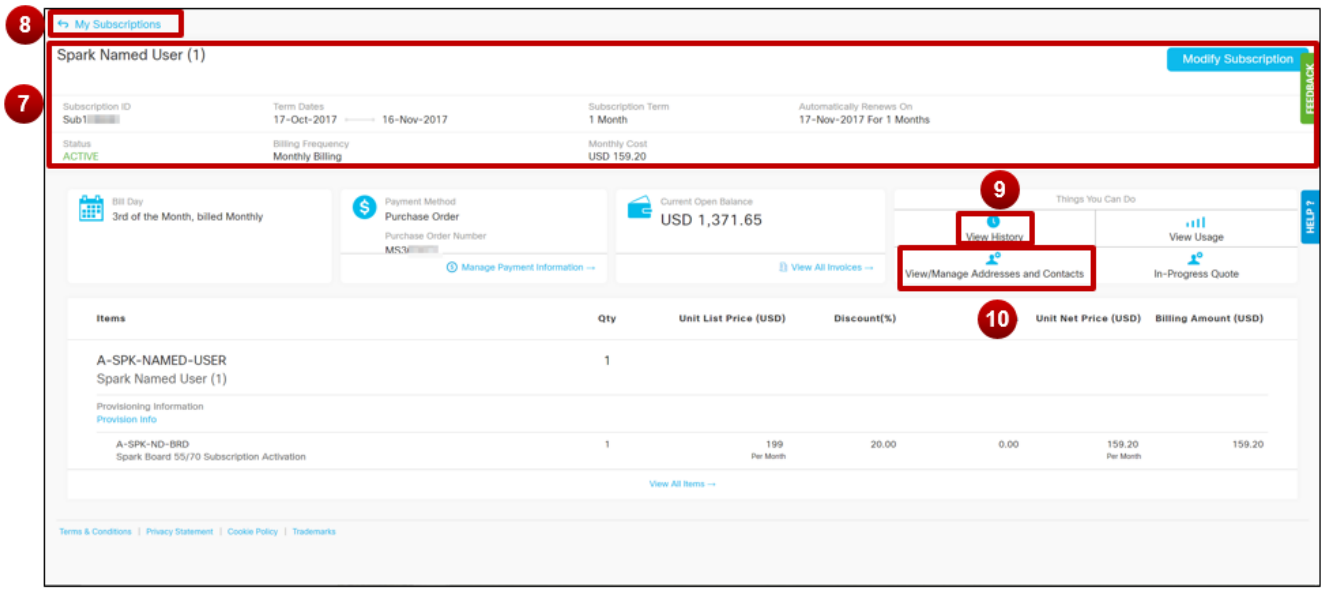
5. Use the scroll bar to view high-level details of the subscription.
6. To view more details of the subscription, click on the Subscription ID



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View and Manage Subscriptions from Dashboard

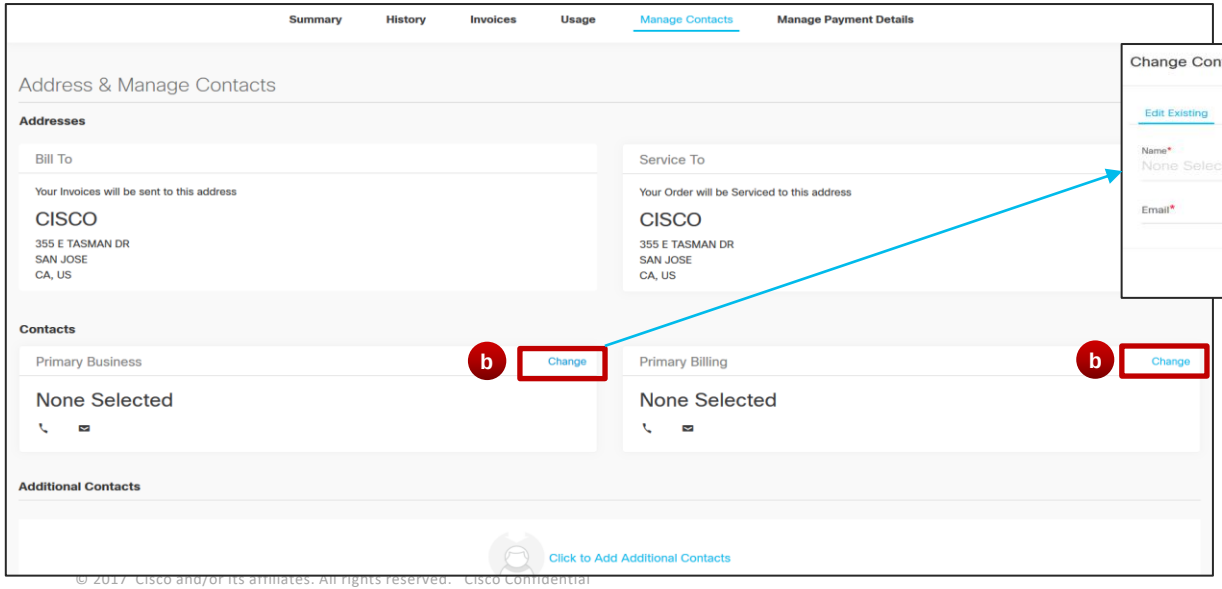
7. **View subscription** details in the Subscription header.
8. To return to the subscription menu, click **My Subscriptions**.
9. To view history, click **View History**.
10. To **view and manage addresses and contacts**, click View/Manage Addresses and Contacts.

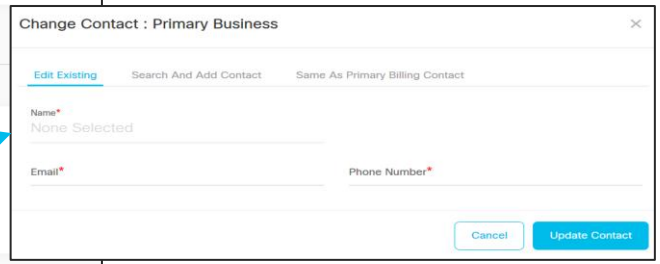


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View and Manage Subscriptions from Dashboard

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.





In the pop-up, there are 3 options:

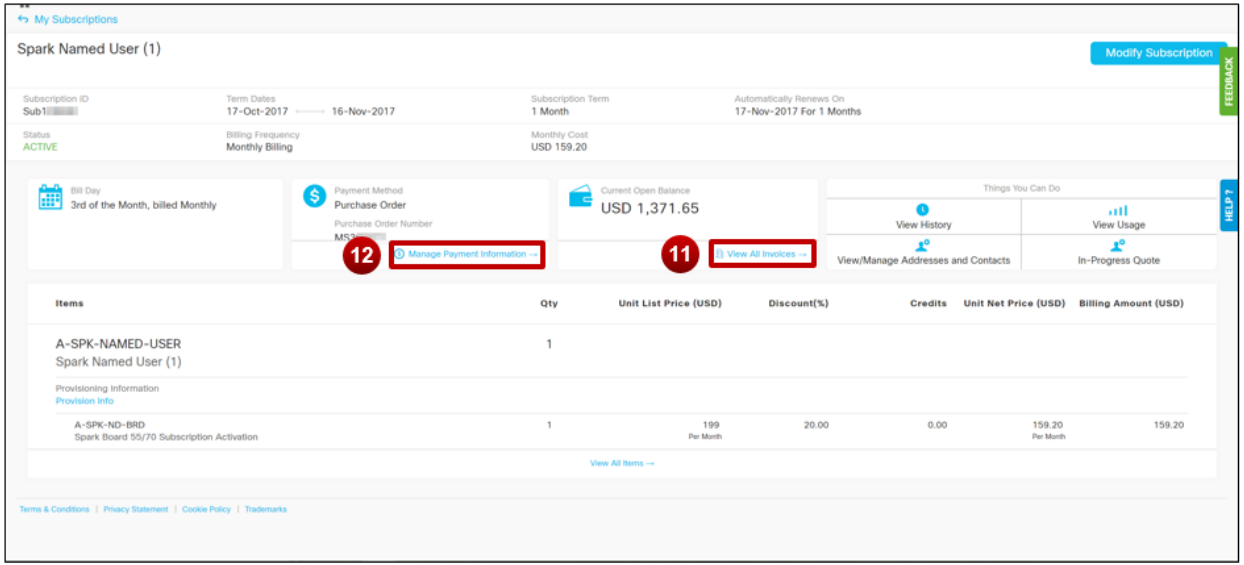
- Edit Existing
- Search and Add Contact
- Same as Primary Billing Contact

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View and Manage Subscriptions from Dashboard

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

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



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

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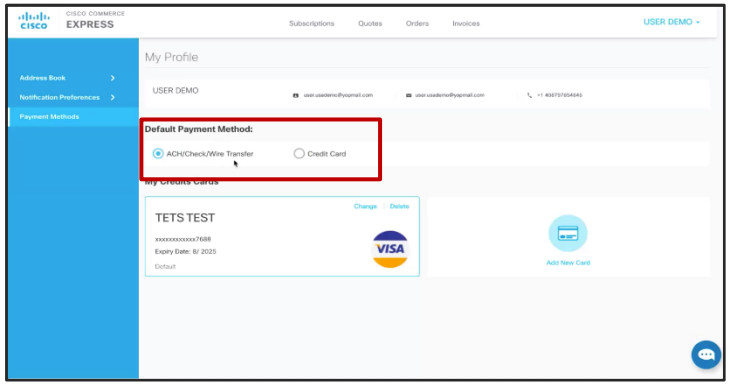
cisco Commerce EXPRESS

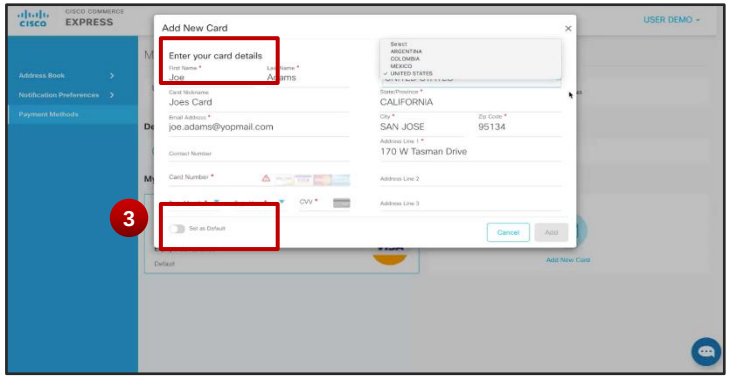
Credit Card Payment

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  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 Germany	Jamaica	Netherlands	Portugal	Sweden	Vietnam
Barbados	Congo	Ghana	Kazakhstan	Netherlands Antilles	Puerto Rico	Switzerland	Zimbabwe
Belarus	Costa Rica	Greece	Kenya	New Zealand	Qatar	Tanzania	*Japan CC is in Progress*
Belgium	Croatia	Guatemala	Latvia	Nicaragua	Romania	Thailand	
Benin	Cyprus	Guinea	Lithuania	Nigeria	Saudi Arabia	Tunisia	
Bermuda	Czech Republic	Honduras	Luxembourg	Norway	Senegal	Uganda	
Bolivia	Denmark	Hong Kong	Macedonia	Pakistan	Serbia	Ukraine	
Bosnia & Herzegovina	Dominican Republic	Hungary	Malaysia	Panama	Singapore	United Arab Emirates	
British Virgin							

Credit Card Payment Methods

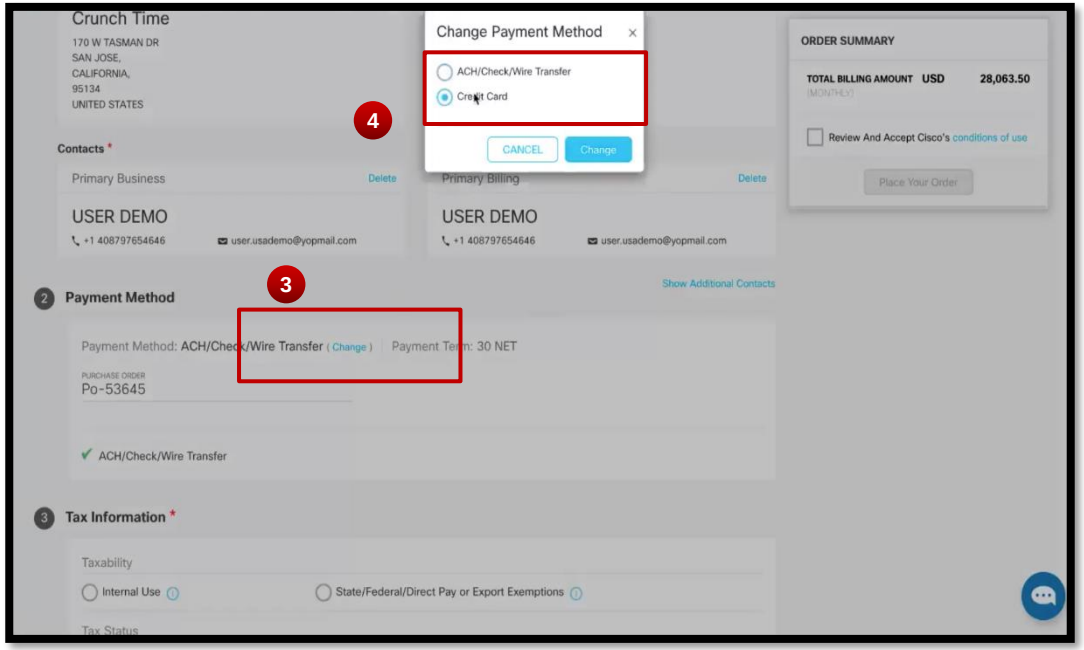
3. Customers can select **Payment Method.** Click **change** to select Credit Card method of payment.

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.

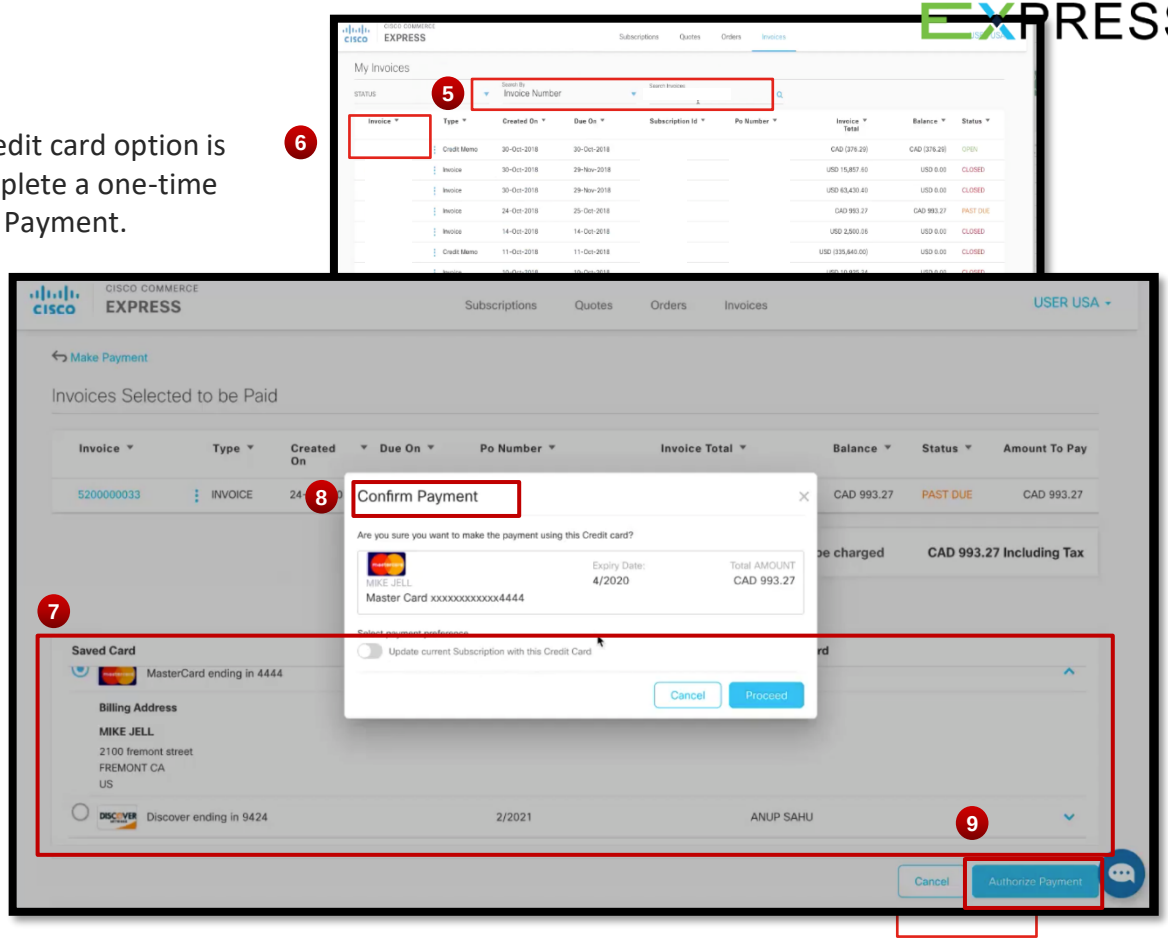


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One-Time Payment

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.

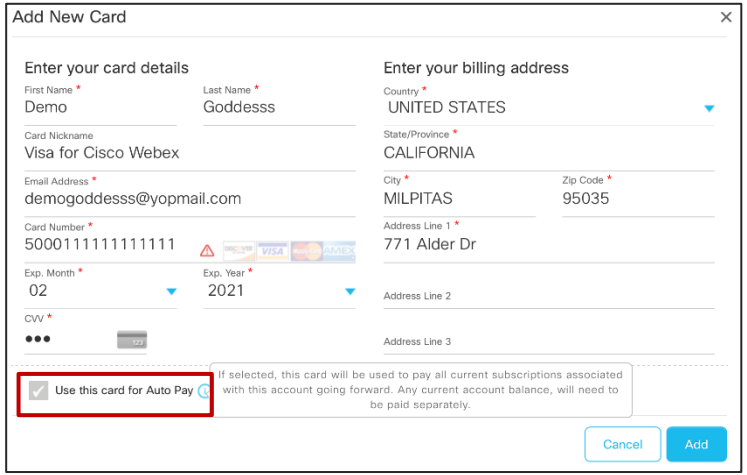
Note: You can slide the toggle to Update Current Subscription with this Credit card.

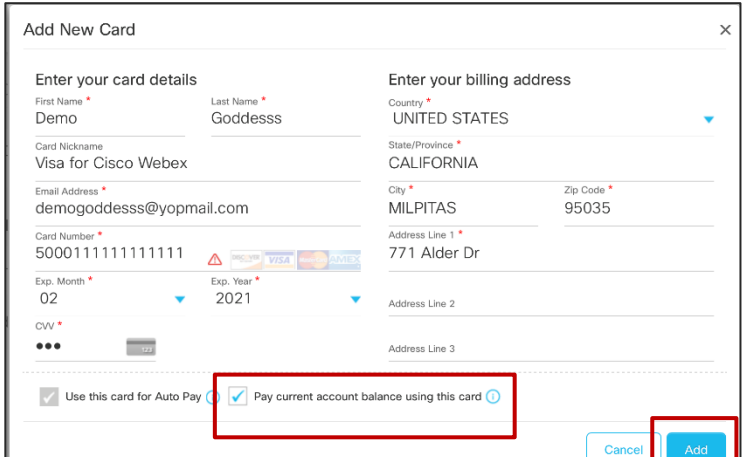
9. Click Authorize Payment

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Auto Pay Enhancements

1. Credit Card **Auto Pay enhancement** now includes setting any existing or new credit card for Auto Pay.
2. **All subscription** can be updated on the profile page including any **outstanding payment** customers might have using the same credit card.
3. 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.





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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.

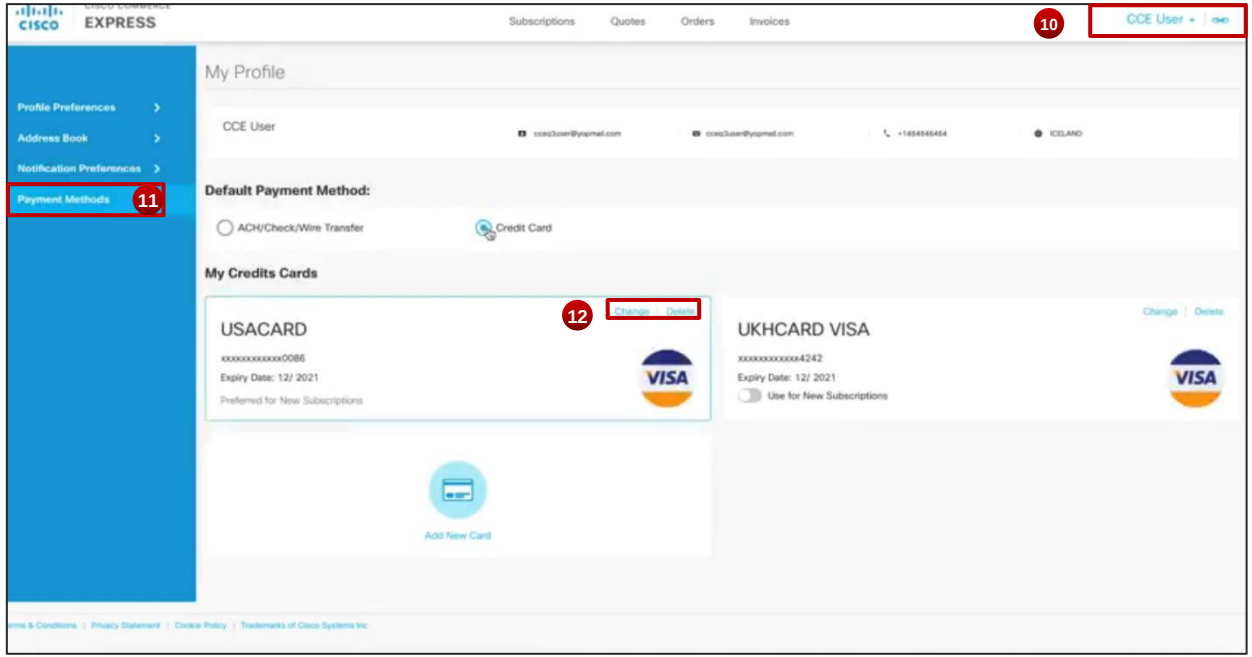
Once the cc data is updated, it will be automatically applied to all subscriptions and orders where the card is **set as default** for payment.

10. Go to your User Profile

11. Click on **Payment Method**

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

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



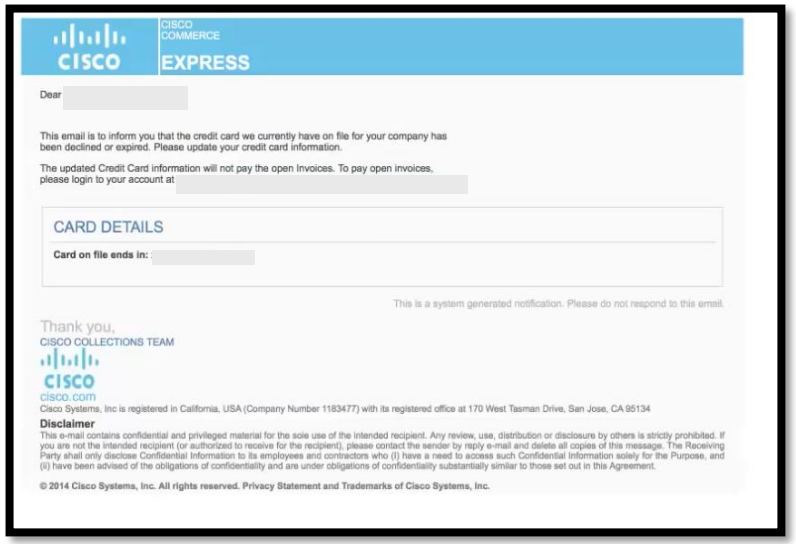
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Credit Card Decline Email Notification

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.

10



CISCO COMMERCE EXPRESS

Dear

This email is to inform you that the credit card we currently have on file for your company has been declined or expired. Please update your credit card information.

The updated Credit Card information will not pay the open Invoices. To pay open invoices, please login to your account at

CARD DETAILS

Card on file ends in:

This is a system generated notification. Please do not respond to this email.

Thank you,
CISCO COLLECTIONS TEAM
CISCO
cisco.com

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Disclaimer

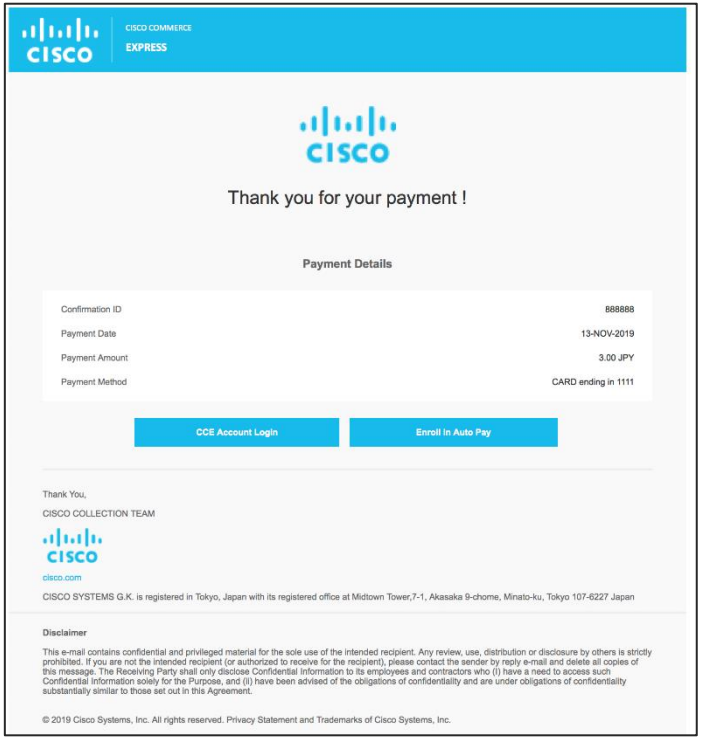
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Email Notification Payment

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



CISCO COMMERCE EXPRESS

CISCO

Thank you for your payment !

Payment Details

Confirmation ID	888888
Payment Date	13-NOV-2019
Payment Amount	3.00 JPY
Payment Method	CARD ending in 1111

CCE Account Login | Enroll In Auto Pay

Thank You,

CISCO COLLECTION TEAM

CISCO

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cisco Commerce EXPRESS

Direct Debit Payment

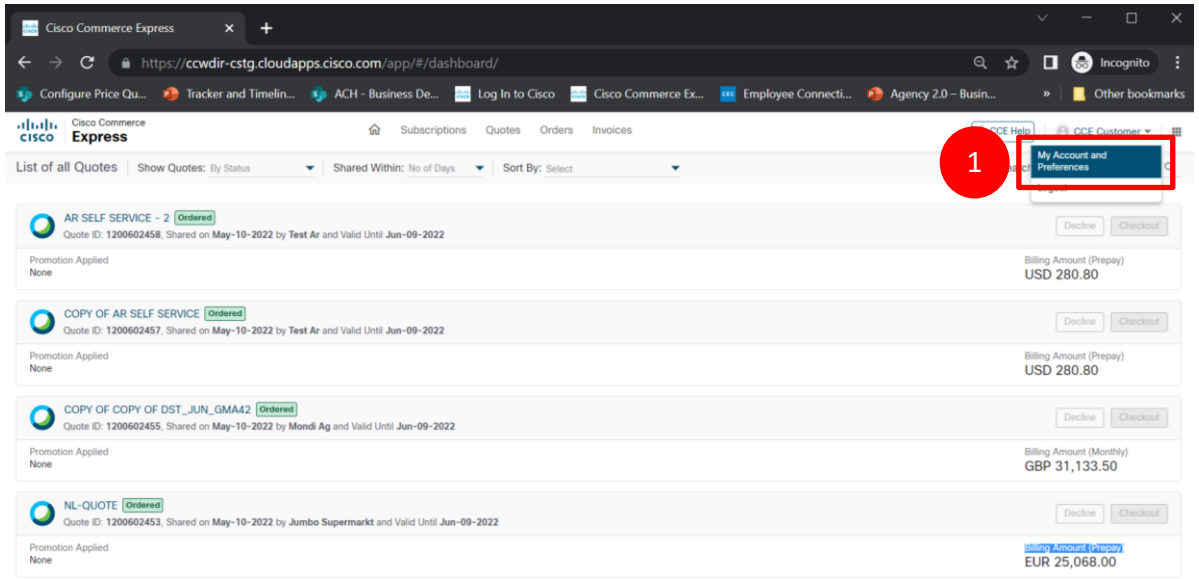
Direct Debit Payment Method

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.

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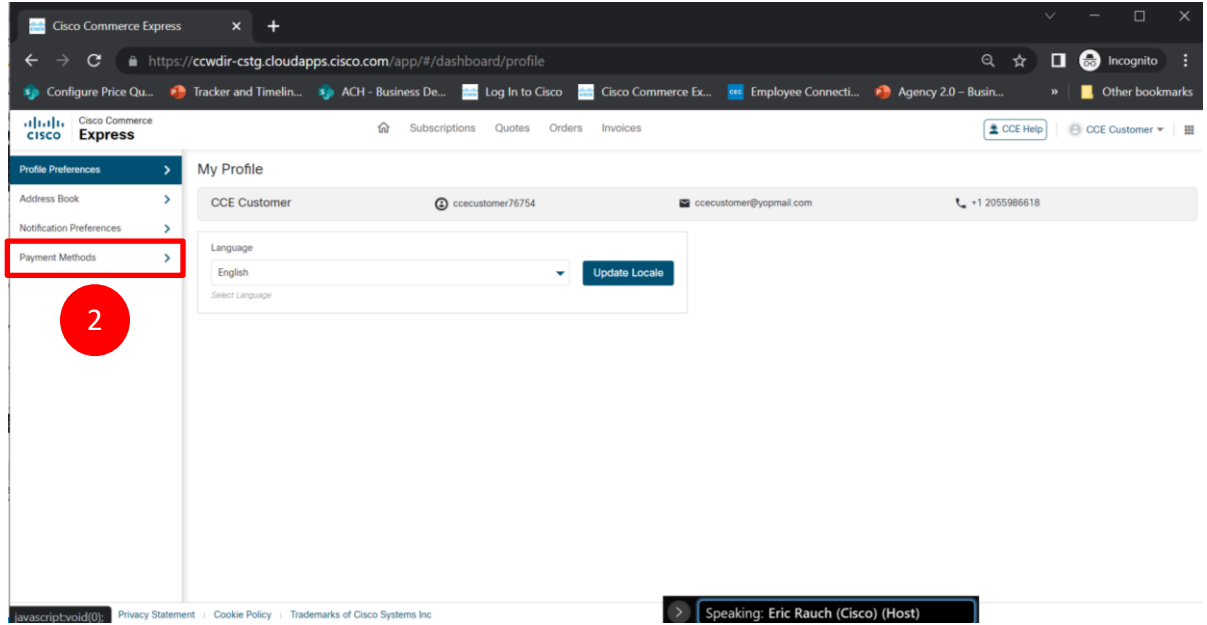
Add Direct Debit Payment Method: Profile & Preference Page



1. Log into CCE and select *My Account and Preferences*

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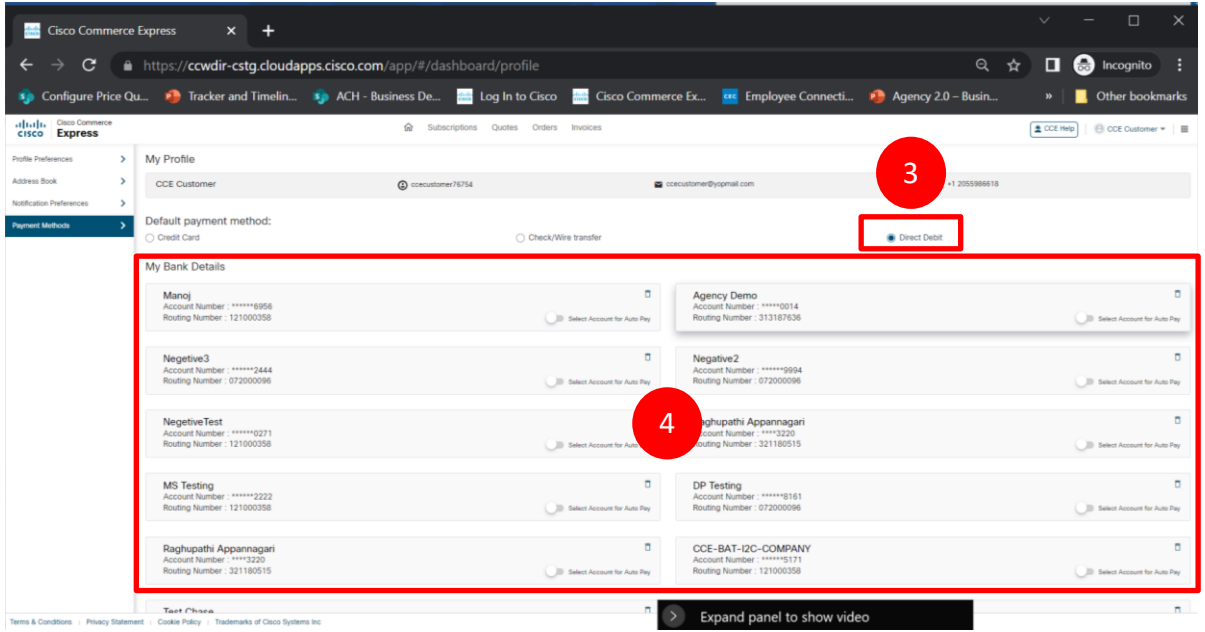
Add Direct Debit Payment Method: Profile & Preference Page



2 Select *Payment Methods*

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Add Direct Debit Payment Method: Profile & Preference Page

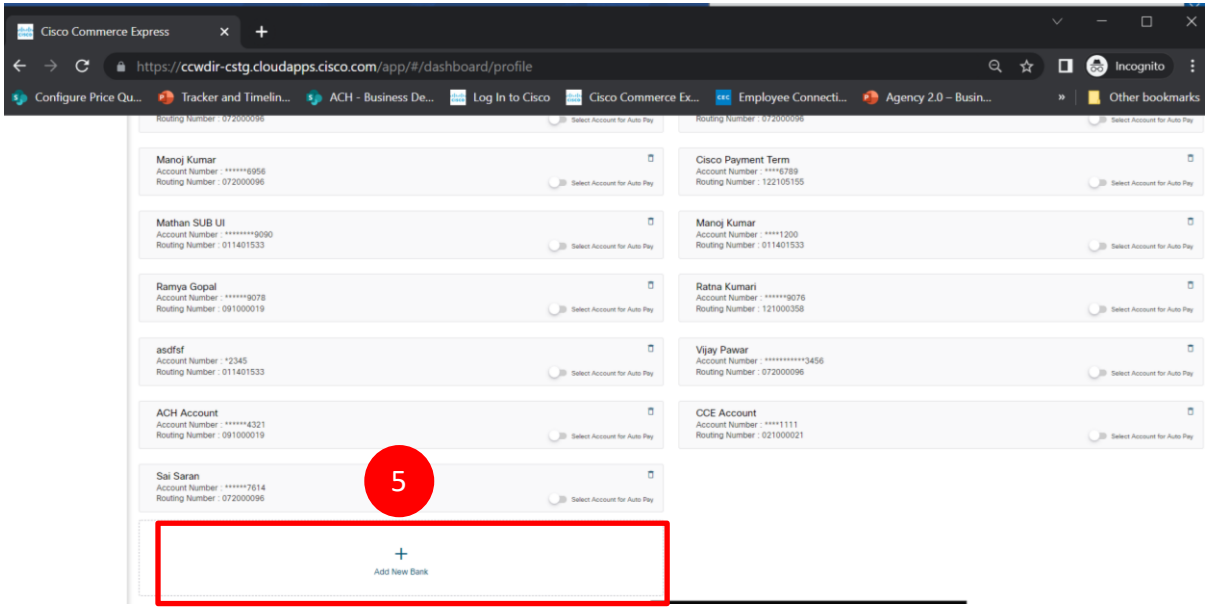


3 Selects *Direct Debit*

4 Select from existing accounts or add a new account (see step 5)

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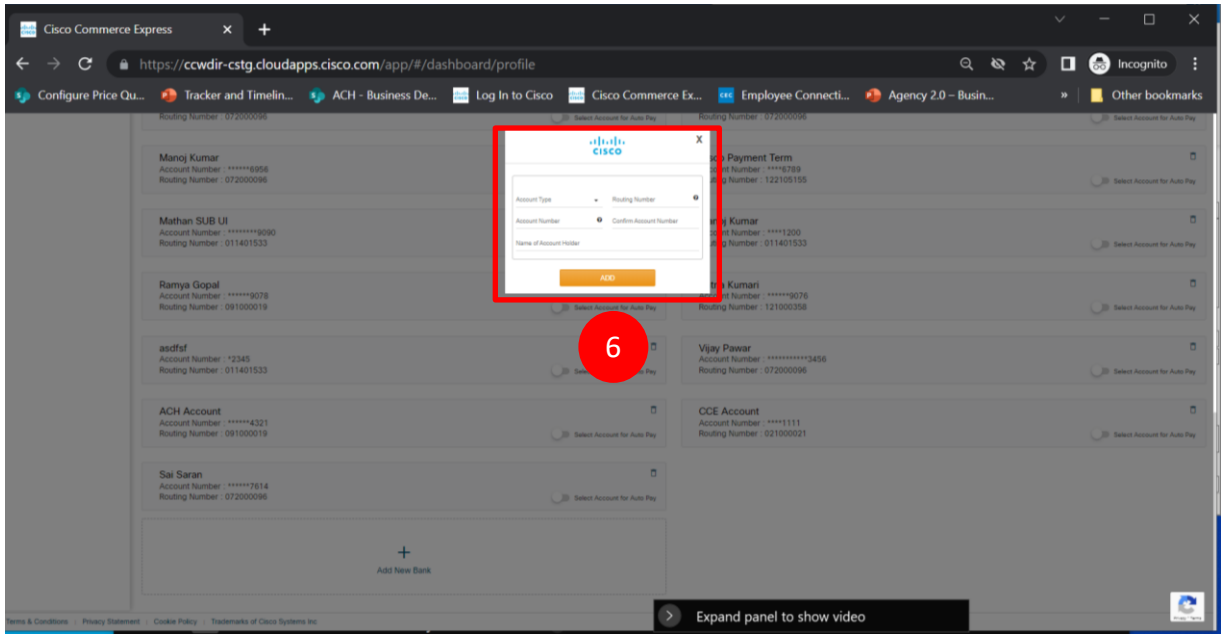
Add Direct Debit Payment Method: Profile & Preference Page



5 Click + to add a new bank account

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Add Direct Debit Payment Method: Profile & Preference Page



6 Add new bank account details

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

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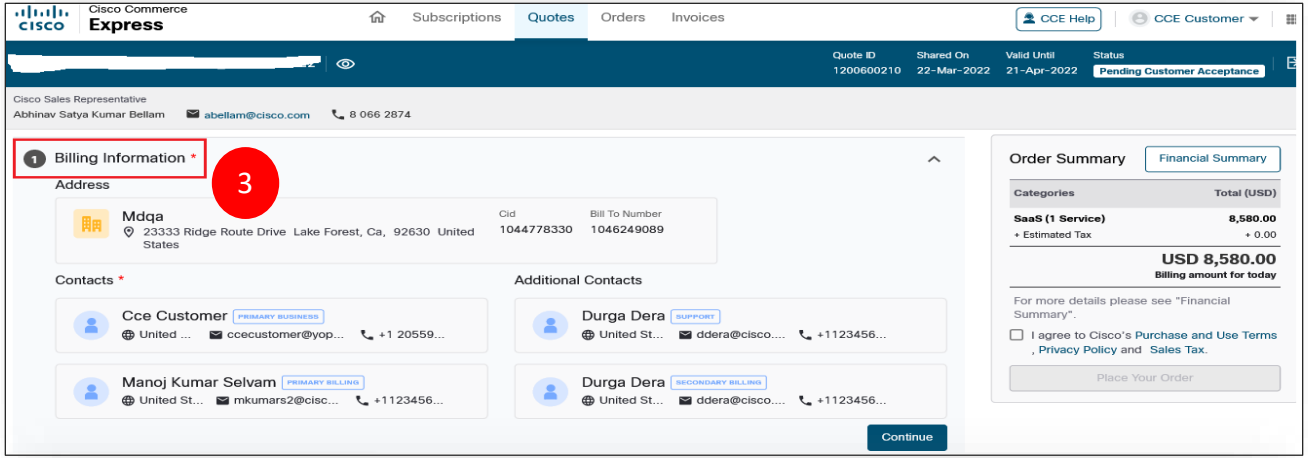
Quote Search and Checkout
Order Checkout Page



1. Log into CCE to view quote
2. Search for approved quotes and select *Checkout*

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Verify Billing Information / Update Tax Information Order Checkout Page



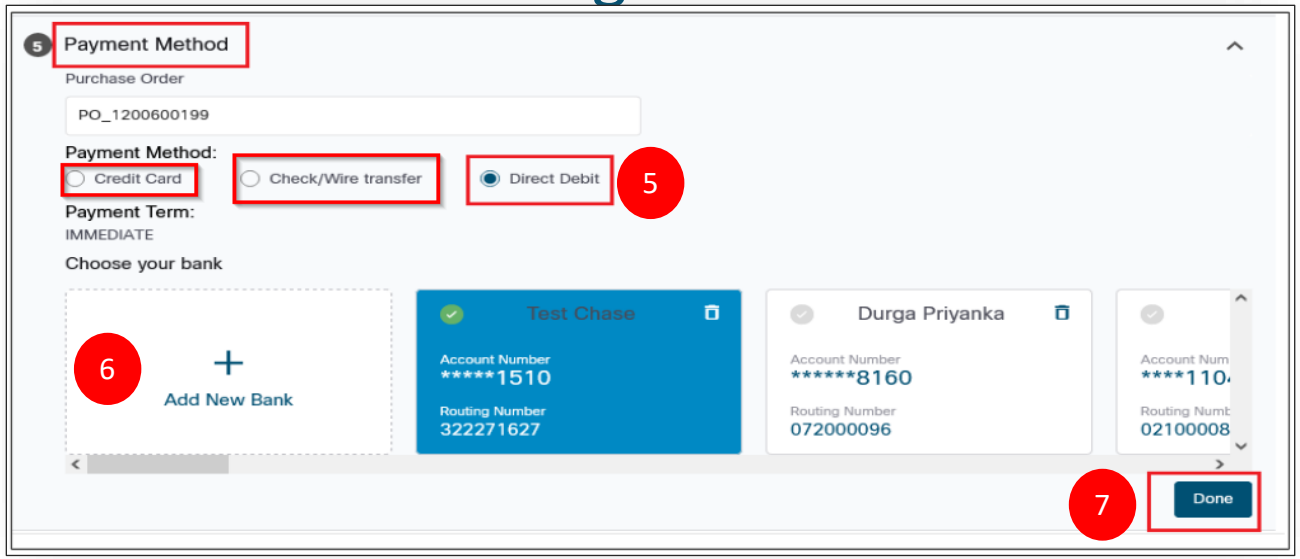


3 Billing Information will be displayed on the quote. Please verify the billing information.

4 Review and select appropriate tax information, then click *Continue*

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Choose Payment Method for SAAS Orders Order Checkout Page

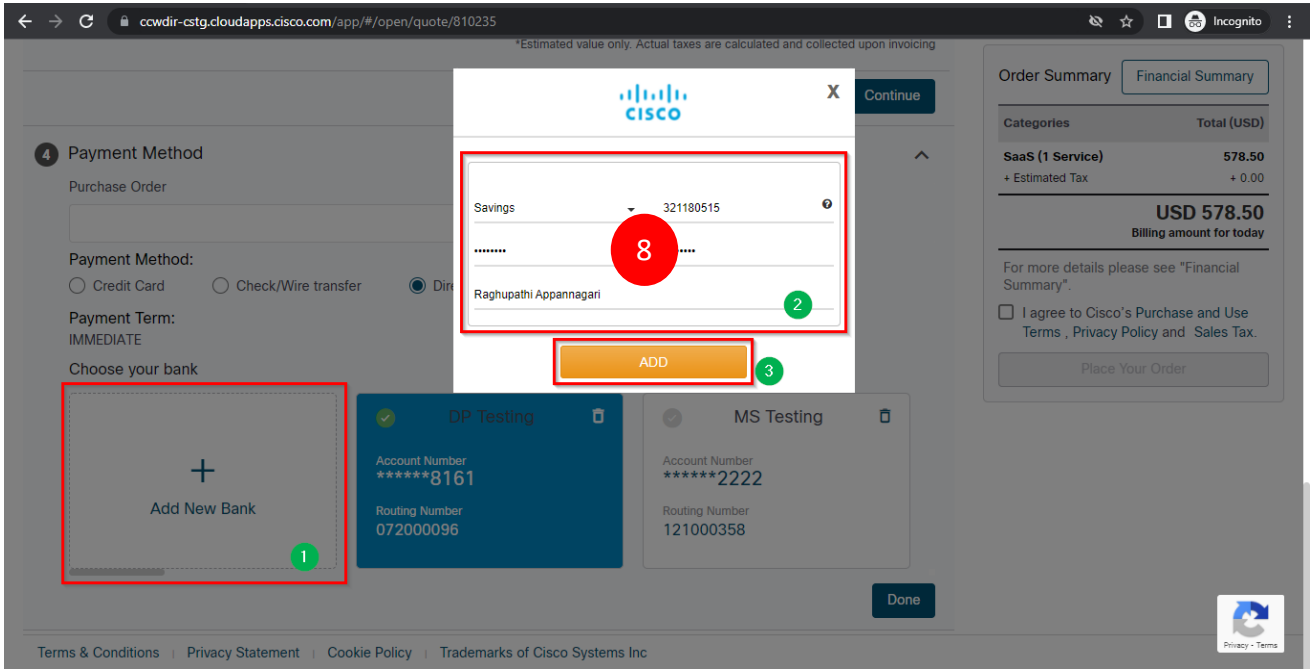


5. Select *Direct Debit* and choose preferred bank account
6. Select from existing accounts or click + to add a new bank account (see step 8)
7. Click *Done* when complete

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)

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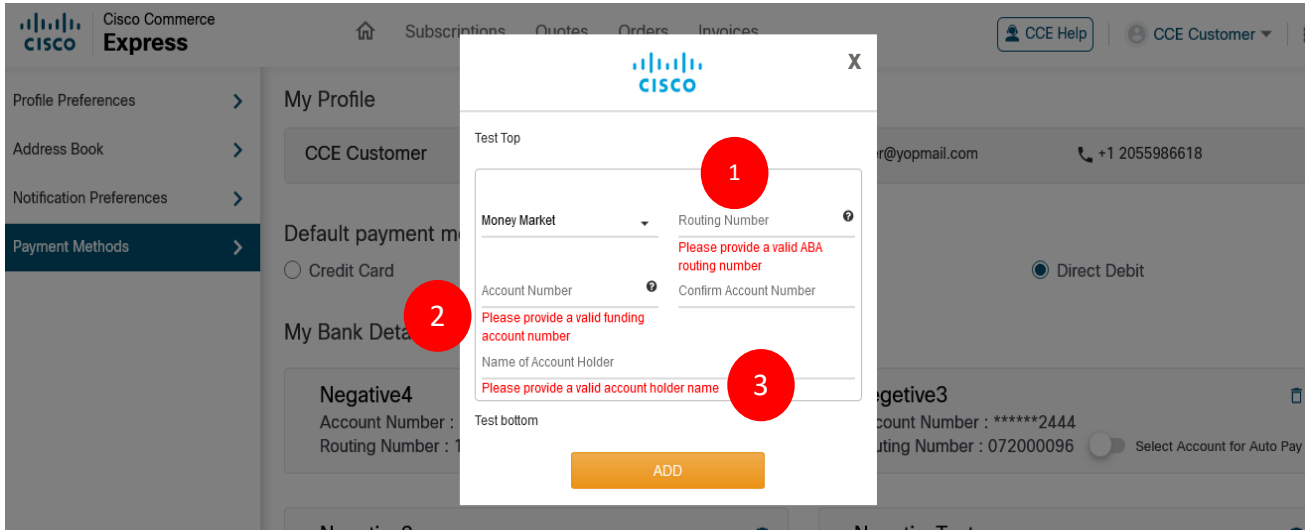
Adding New Bank Details
Order Checkout Page – Enter New Bank Account Details



8 Enter the new account details and click *Add*

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Adding New Bank Details Error Messages

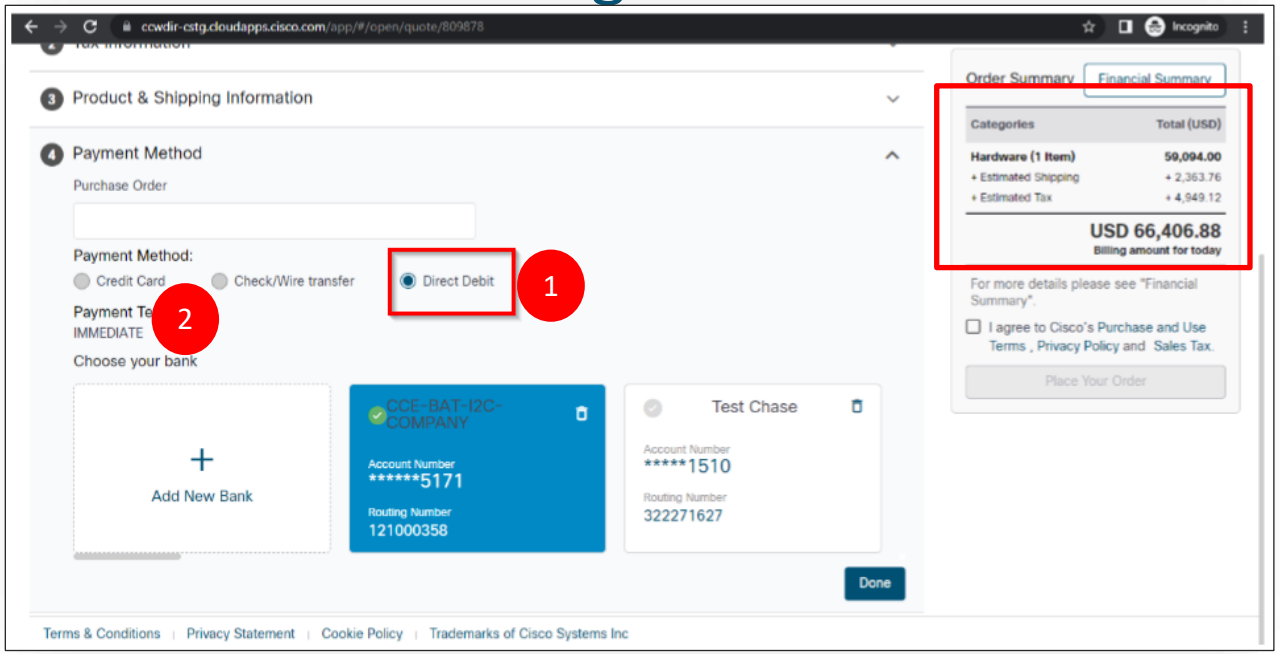


System will display an error message in the following scenarios:

1. 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)*

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Choose Payment Method for **Hardware** Order
Order Checkout Page

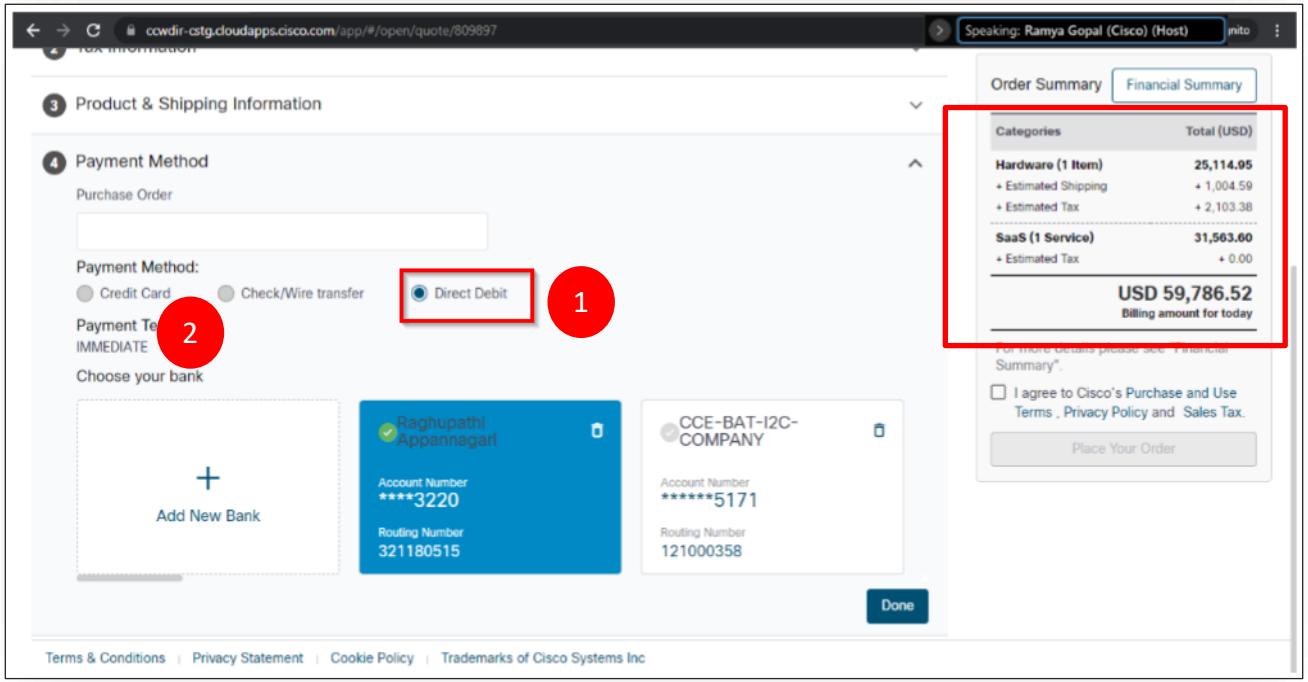


1. For HW SKUs with value greater than $50K, Direct Debit method will be enabled and selected by default.
2. Credit Card & Check/Wire Transfer options will be disabled (greyed out).

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

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

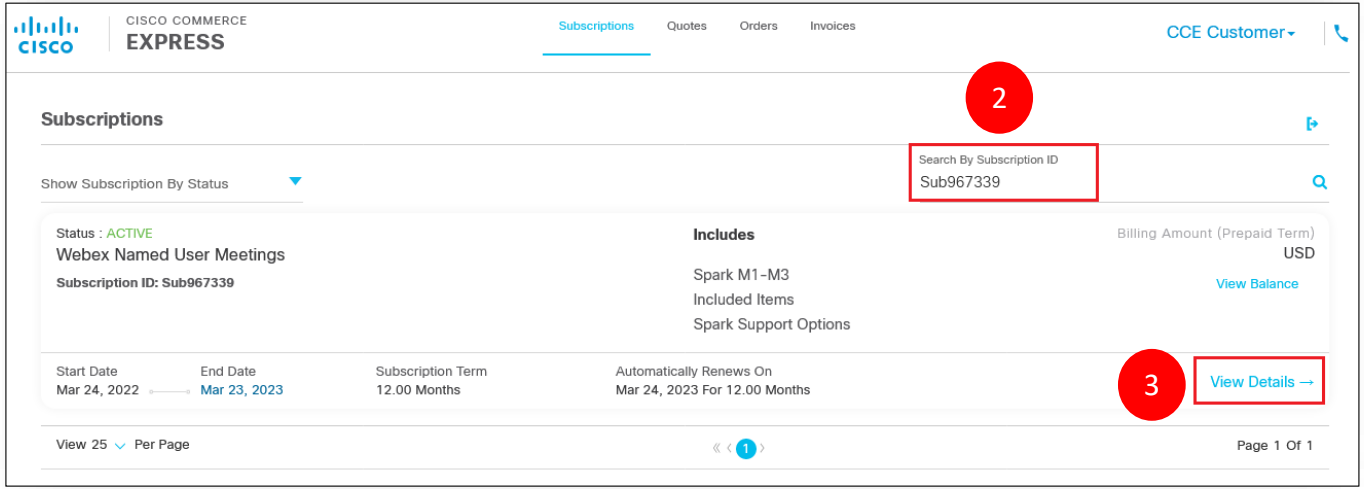


1. For Hybrid SKUs with value greater than $50K, Direct Debit method will be enabled and selected by default.
2. Credit Card & Check/Wire Transfer options will be disabled (greyed out).

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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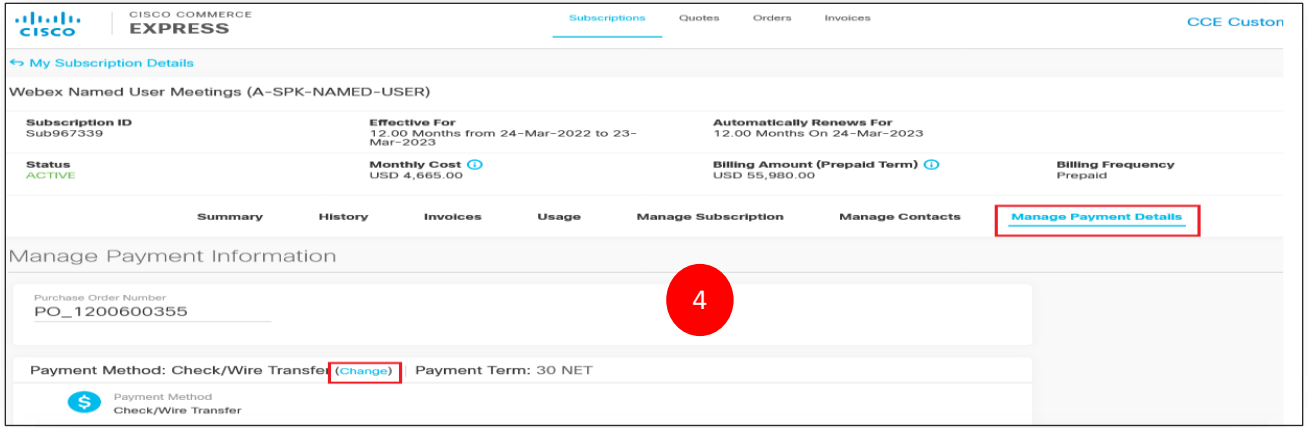
Changing Payment Methods in Subscription UI

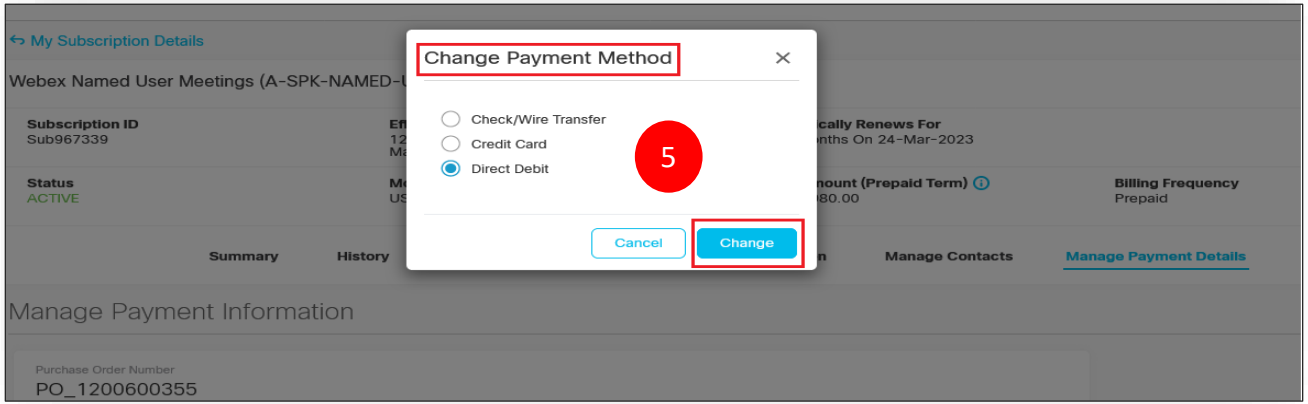


1. Log into CCE to view subscription
2. Search by *Subscription ID*
3. Click on *View Details* to access the subscription

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Changing Payment Methods in Subscription UI



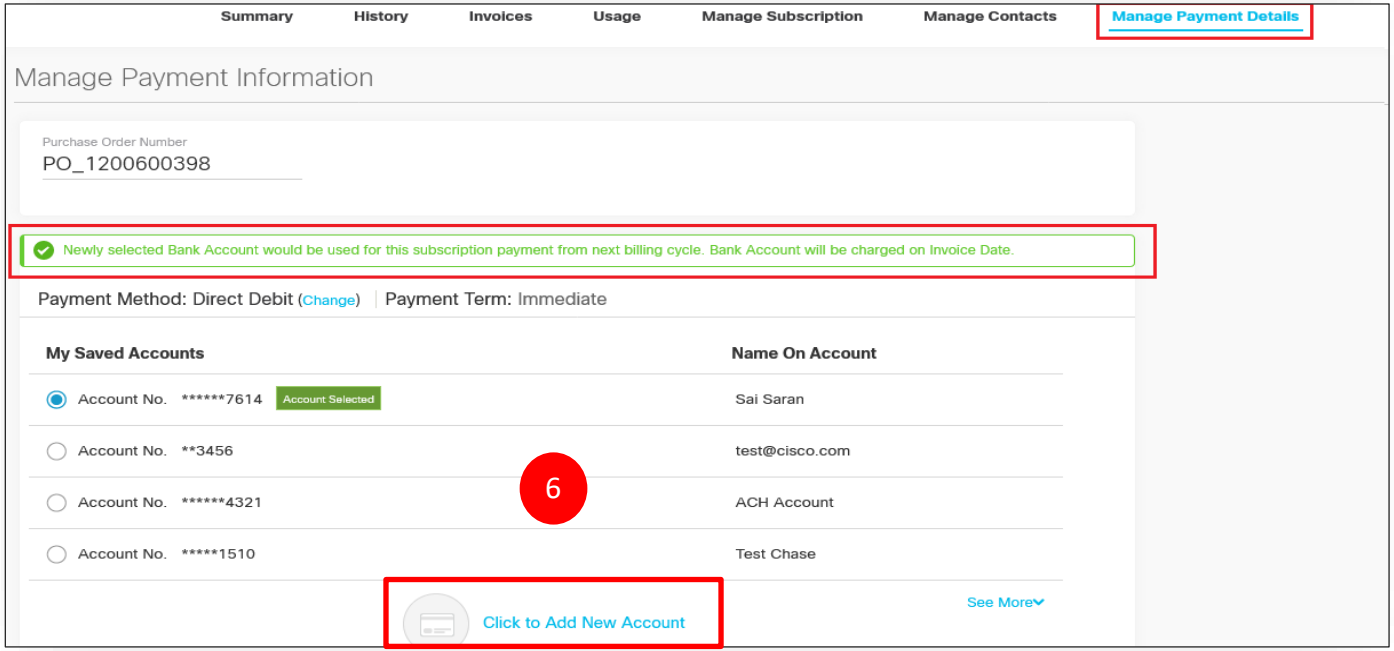


4 Click on *Manage Payment Details* tab and click on *Change Payment Method*

5 Select *Direct Debit* and click on *Change*.

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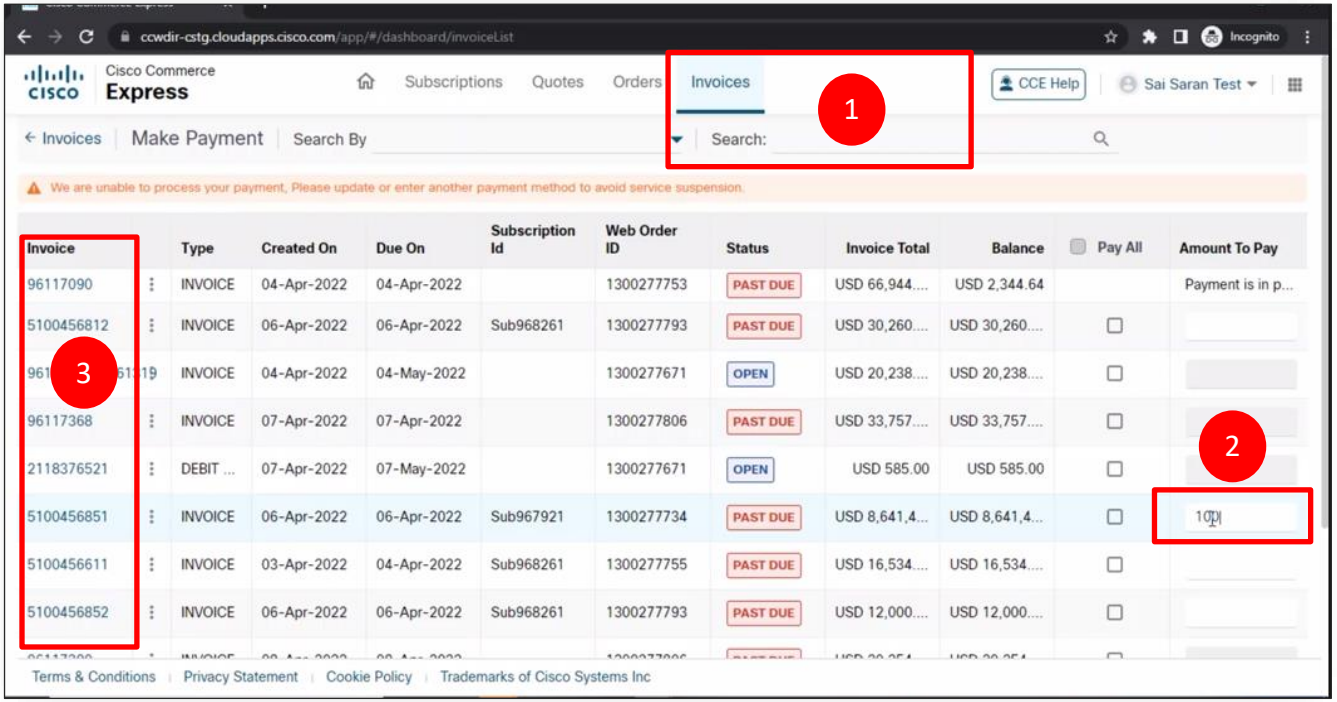
Changing Payment Methods in Subscription UI



6 Select from *My Saved Accounts*, or click at bottom to add new account

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Order with Open/Past Due Invoice One-Time Payment



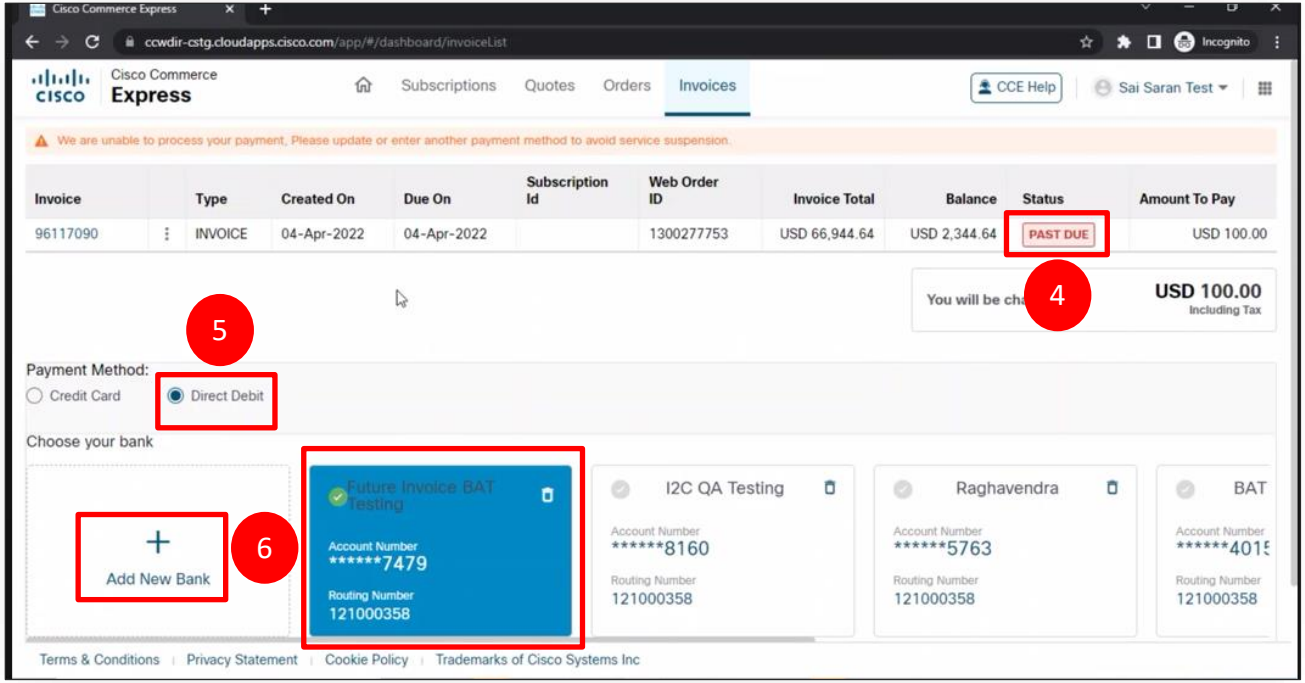
Orders with open or past due invoices resulting from a transactional error require a one-time payment to correct.

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

1. Click on the *Invoice* tab and search by either Customer Name, Invoice Number, PO Number, Subscription ID, or Web Order ID.
2. Enter the payment amount in *Amount to Pay* field.
3. To view the invoice details, click on the *Invoice* hyperlink (see steps 4-8).

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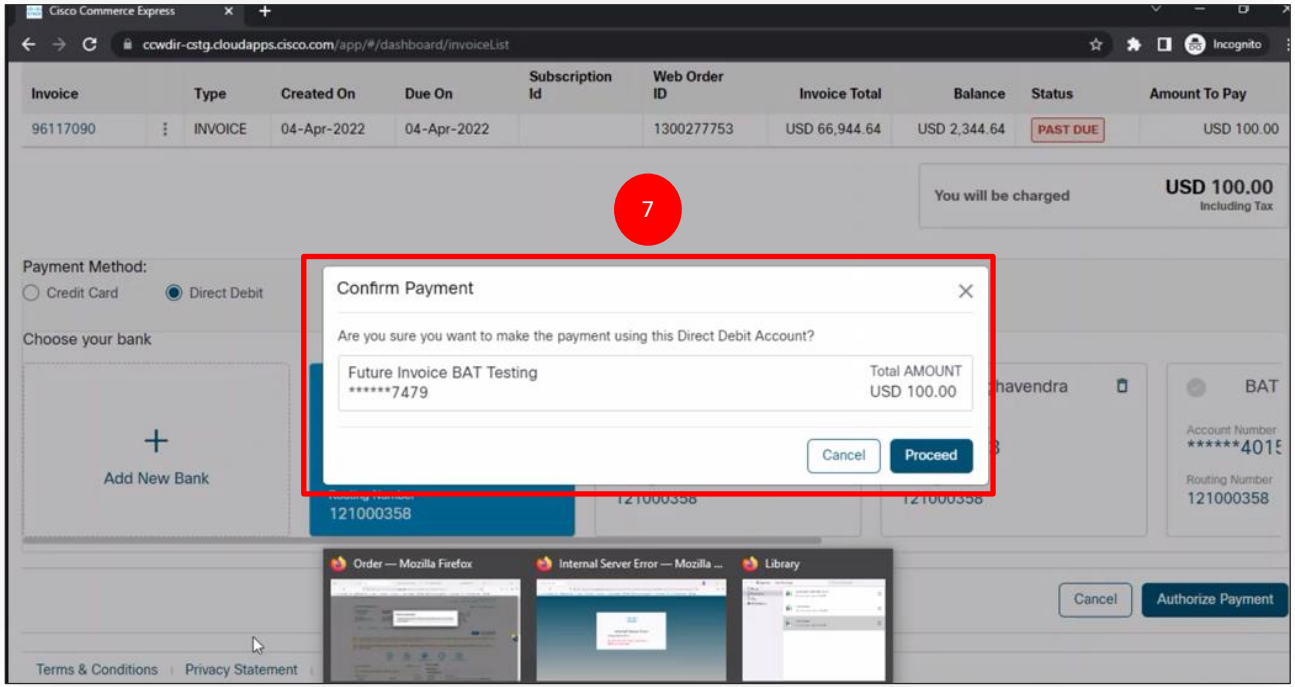
Order with Open/Past Due Invoice One-Time Payment



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

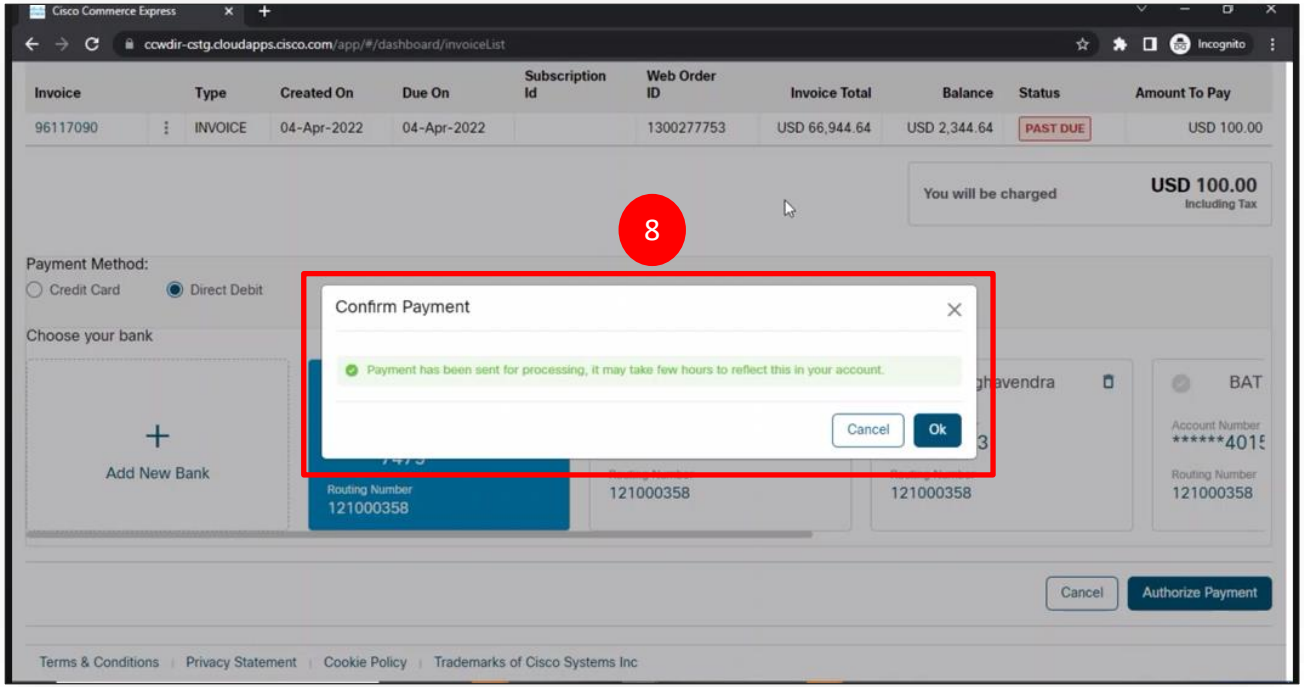
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Order with Open/Past Due Invoice One-Time Payment



7 Confirm payment by clicking *Proceed*

Order with Open/Past Due Invoice One-Time 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."

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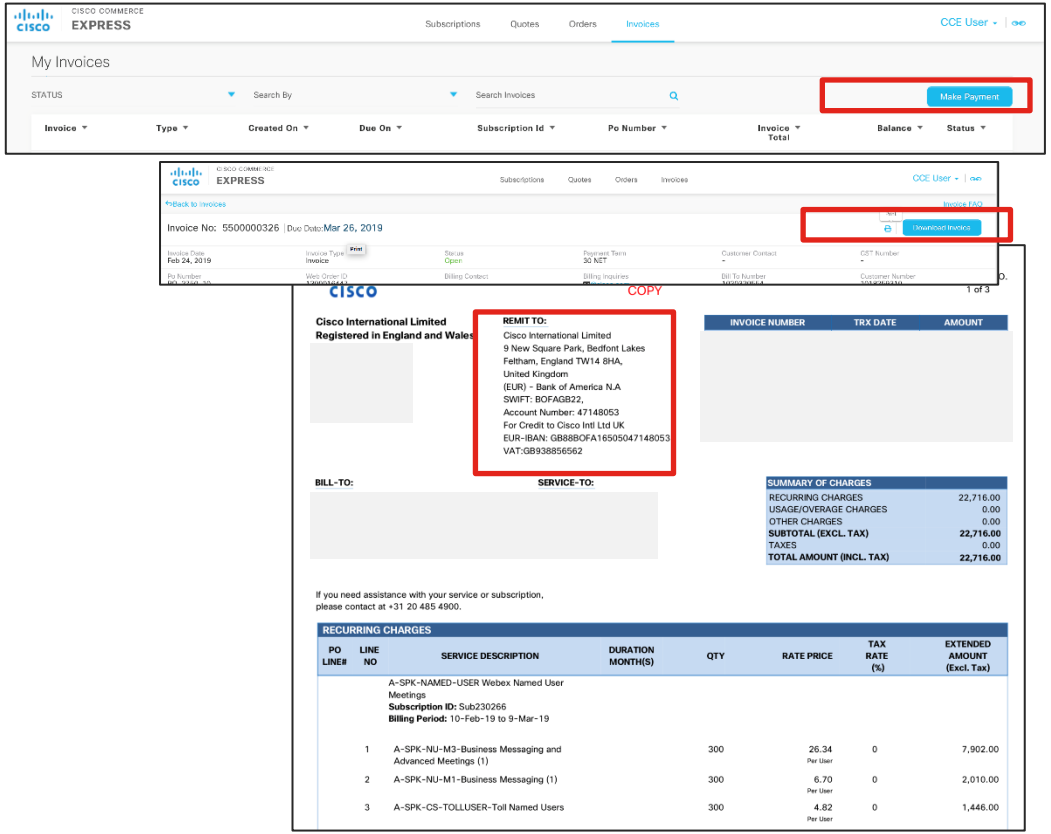
Global Banking Remit

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:

Microsoft Excel 97 - 2004 Worksheet



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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

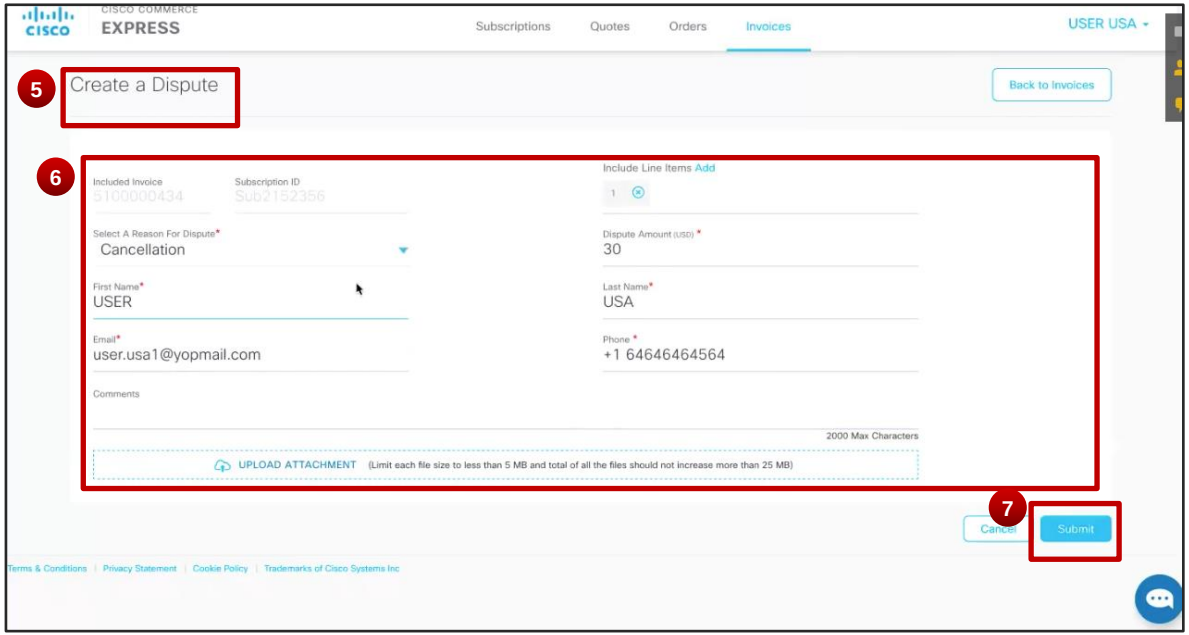
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Create a Dispute

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.**

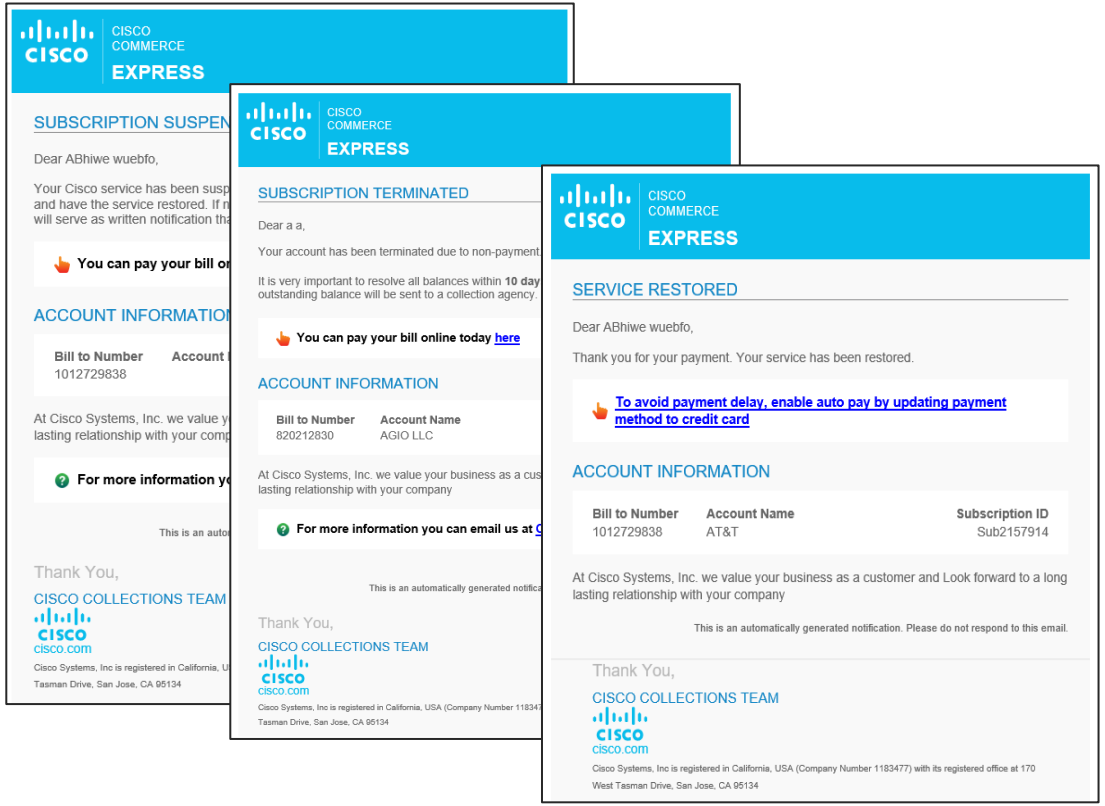


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Suspended, Restored and Terminated Notifications

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.



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Suspended, Restored and Terminated Notifications

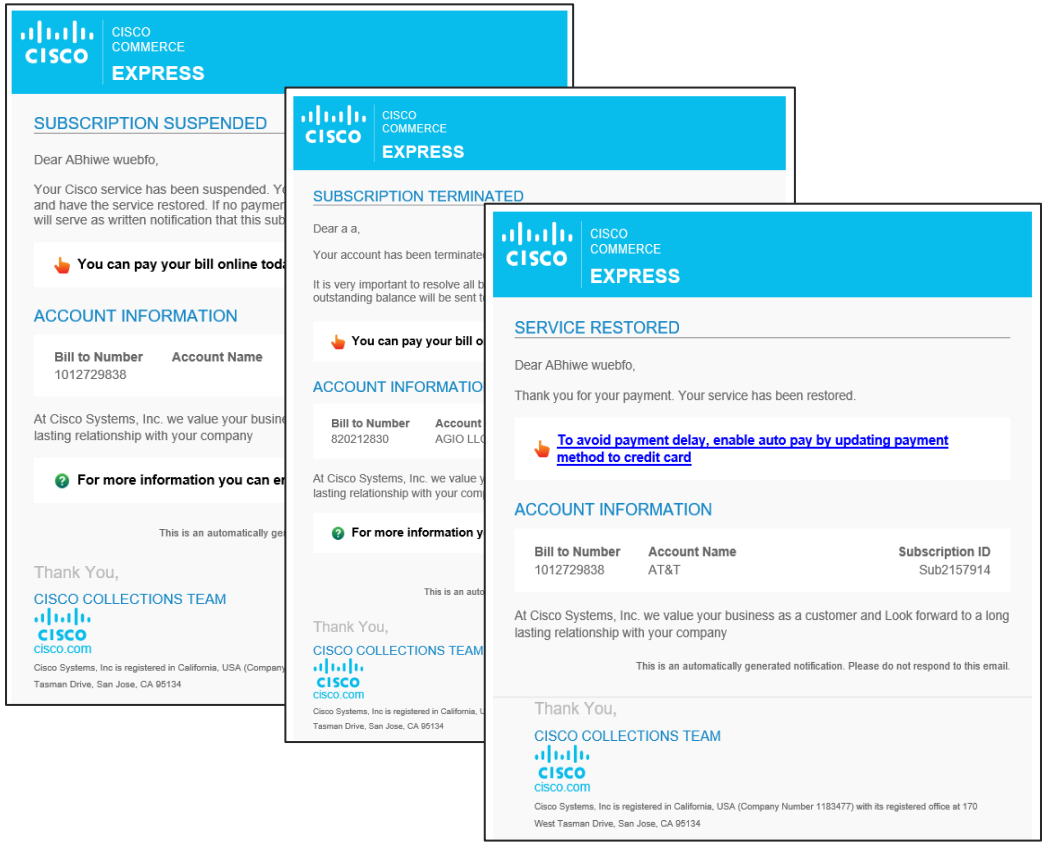
Notifications will be sent:

- Late Notification - 10 Day Past Due Notification
- Late Notification - 25 Day Past Due Notification
- Pre-suspension – 45 Day Past Due Notification

- Suspension Notification
  - 60 days

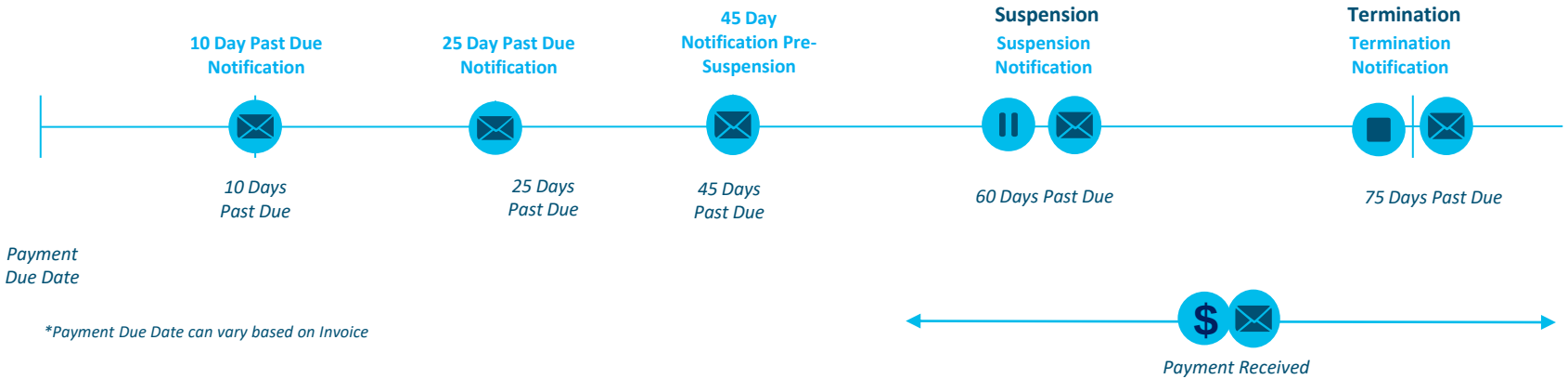
- Termination Notification
  - 75 days

- If **payment received** prior to termination, an automated **resumption** notification will be sent to customer



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SRT Policy: Communication Process



Attributes		Automated Communication Process
✉	**Email Communication**	Email notification regarding delinquent payment status: • At 10 days past due, customer will be alerted that payment is past due • At 25 days past due customer will be alerted of payment is still past due • At 45 days past due customer will be sent Pre-suspension notification
⏸	**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 Managing Auto-Renewal for Subscriptions 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.

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Managing Auto Renewal for Subscriptions

Turn OFF Auto-Renew
via Subscription UI

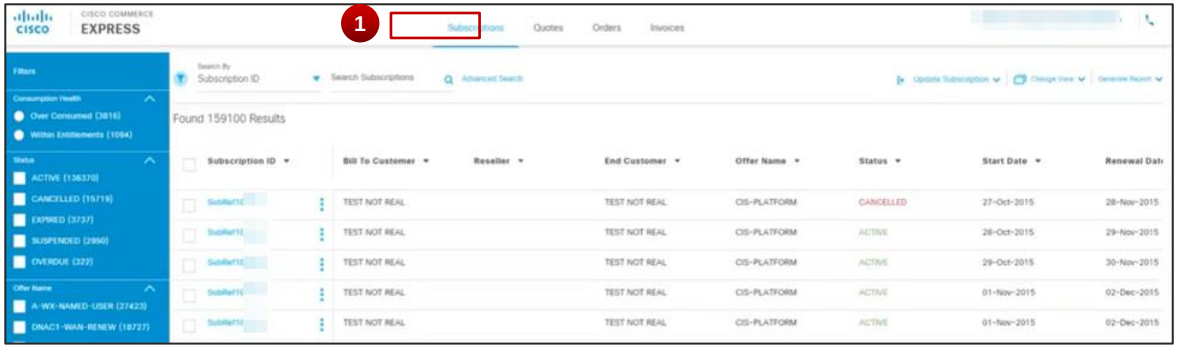
Considerations when turning auto-renew OFF via Subscription UI:

- 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 Customer Service Hub 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.

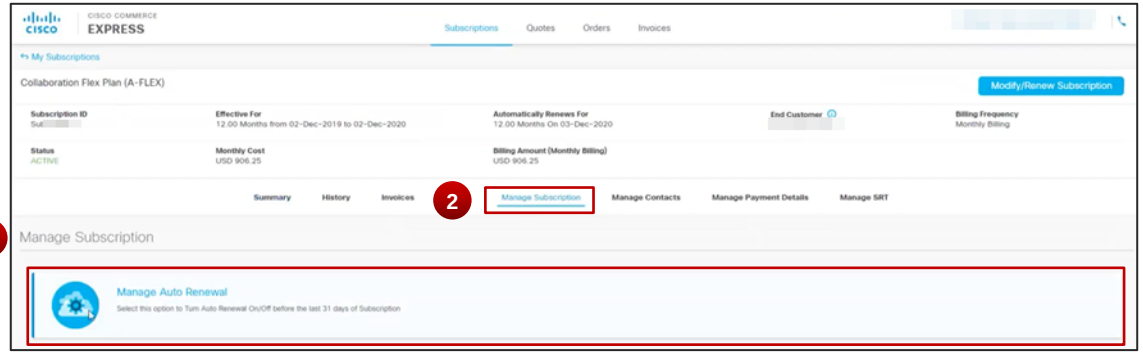
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Turn OFF Auto-Renew
via Subscription UI

1. 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.

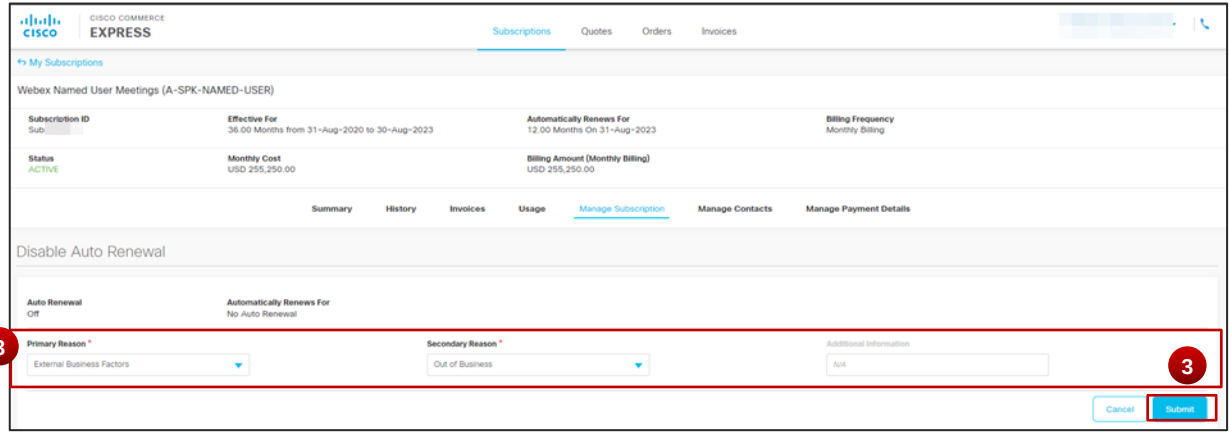


TIP When clicking on **Manage Auto-Renew** the system will either disable or enable auto-renew based on the current setting.

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

Turn OFF Auto-Renew
via Subscription UI

3 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**.



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

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Turn ON Auto-Renew
via Subscription UI

Considerations when turning auto-renew ON via Subscription UI:

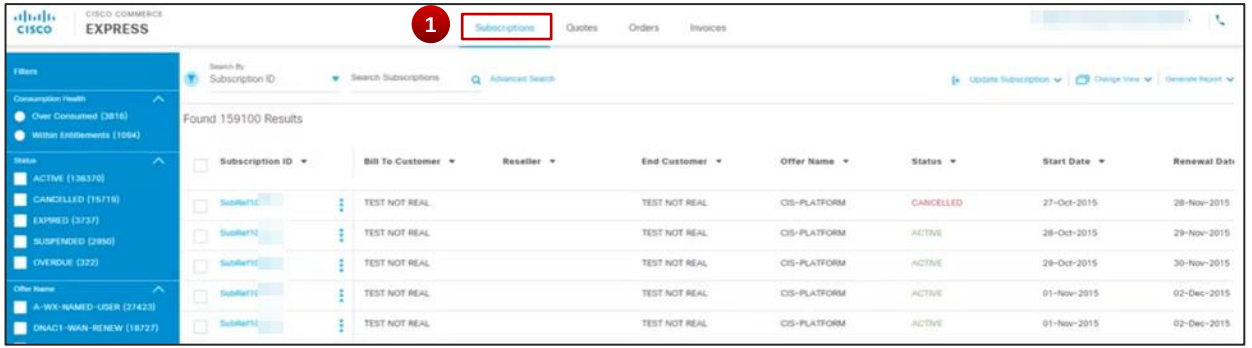
- When turning auto-renew ON via the Subscription UI, it must be completed **no less than 30 days from the end of term.**
- Turning Auto-Renew ON cannot be completed less than 30 days from the end of term. If it's less than 30 days from the end of term, Customers should complete a manual renewal prior 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.

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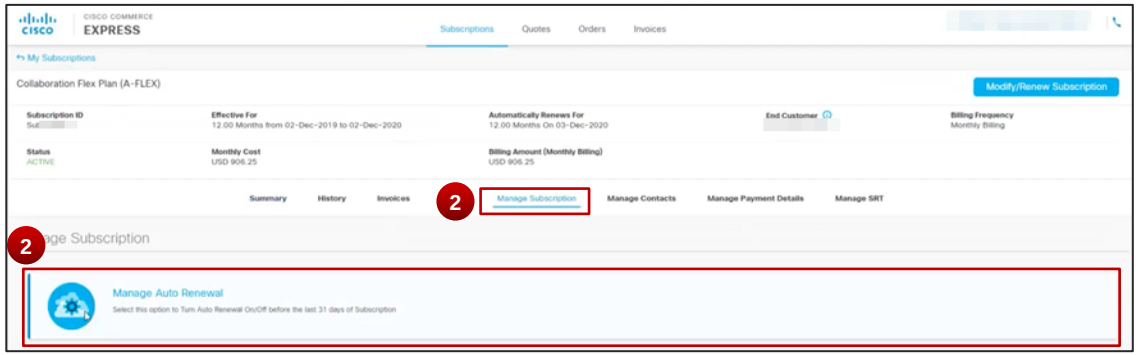
Turn ON Auto-Renew

via Subscription UI

1. 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.

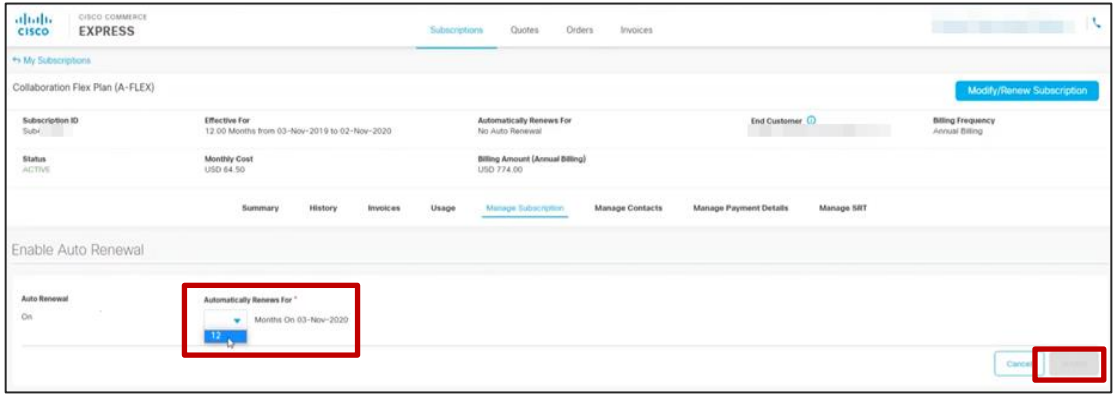


TIP When clicking on **Manage Auto-Renew** the system will either disable or enable auto-renew based on the current setting.

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

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**.



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.

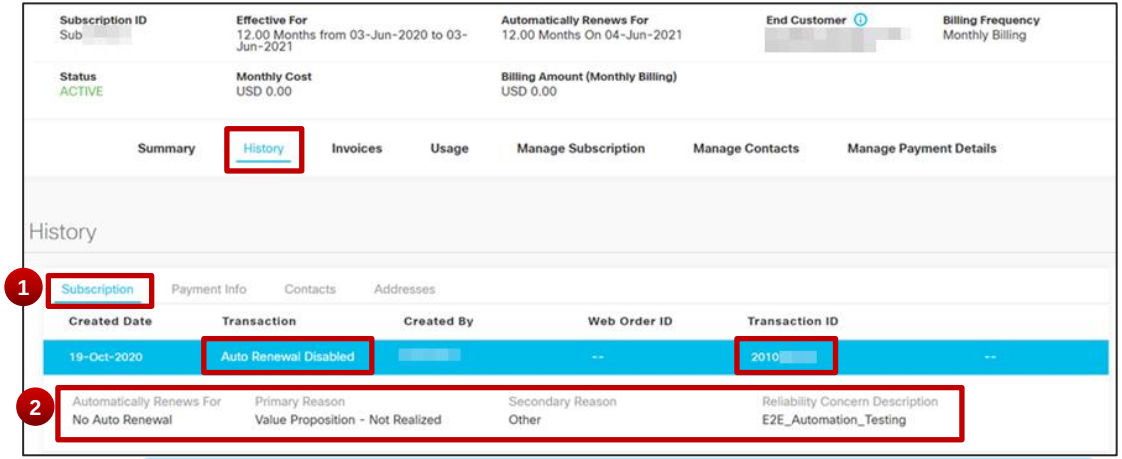
TIP If the auto-renew turn on request can't be processed an appropriate error message will show and inform the user as to why.

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Viewing Auto Renewal Changes from the History Tab

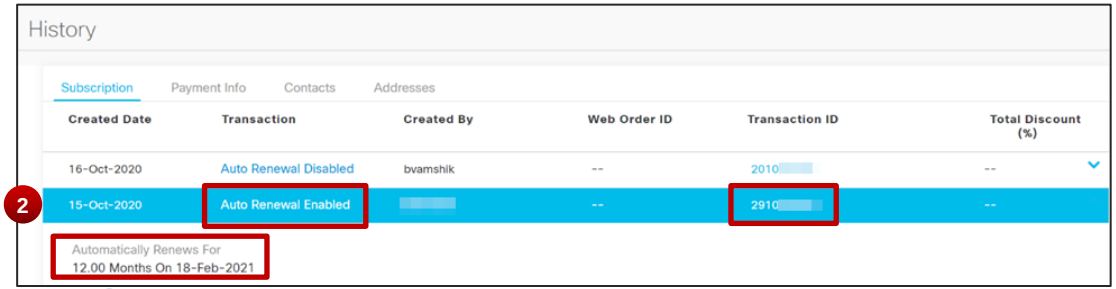
1. Turning Auto Renew On and Off will show as a transaction in the **History** tab from **Subscription UI** under the **Subscription** tab

TIP 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 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.

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

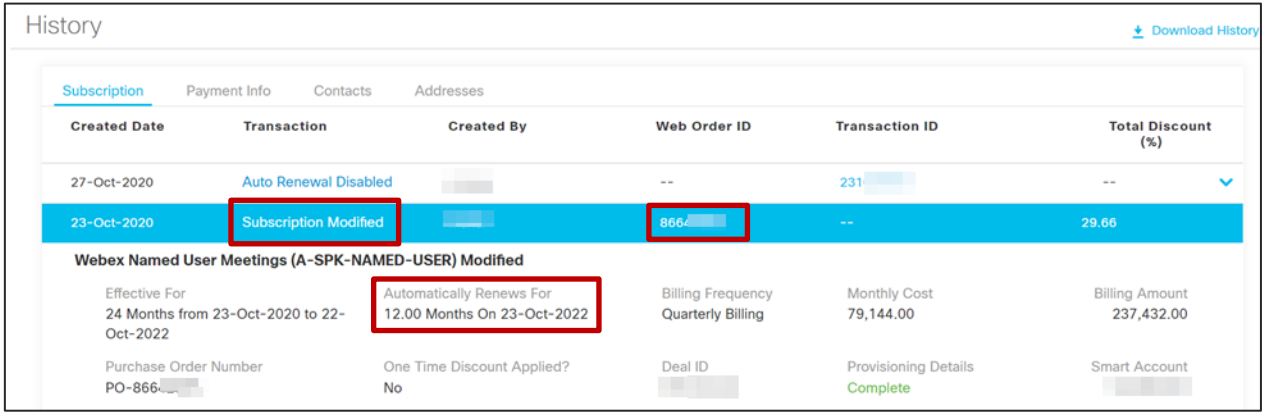


TIP Auto Renew enabled from Subscription UI will show as **Auto Renew Enabled** Transaction type, have a **Transaction ID**, and show the **renewal term and date.**

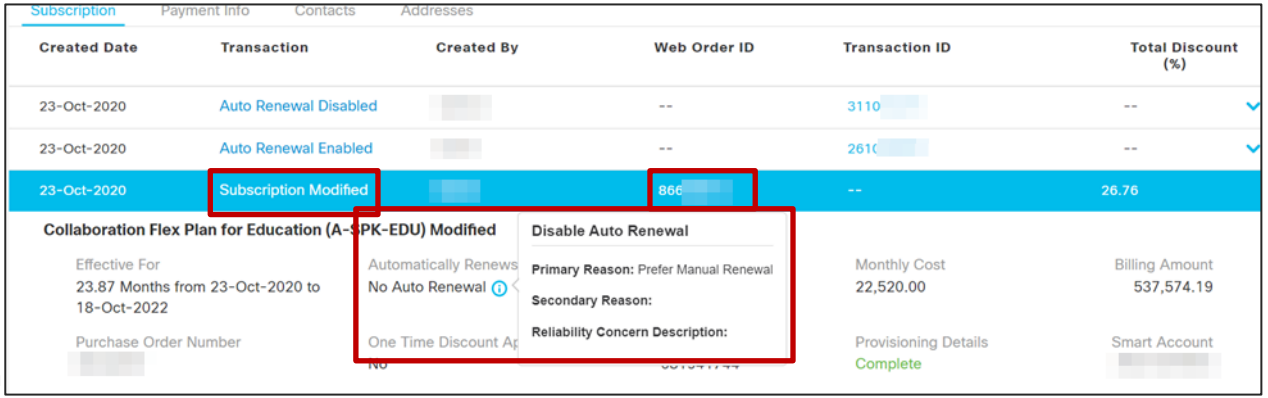
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Viewing Auto Renewal Changes from the History Tab

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.



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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
- Partner Success Manager Email
- Bill To ID
- End Customer Name
- Reseller Name
- Deal Id
- Web Order ID
- Order Type
- Auto Renewal Flag
- Automatically Renews for
- Reason Code Tier 1
- Reason Code Tier 2
- Additional Comment
- Initiated By

Auto Renewal Change Report

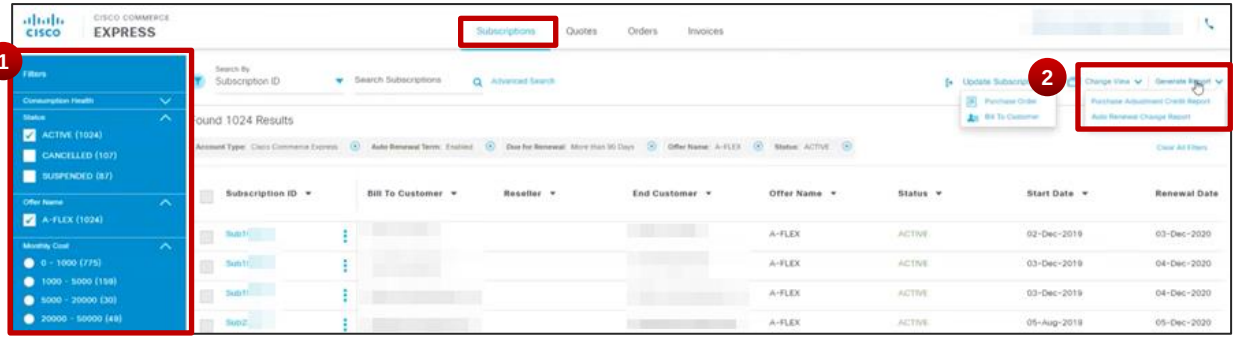
Breakdown of the Report Columns

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

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



TIP 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.

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

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



TIP The user entered date range cannot be greater than one (1) month.

Why Turn OFF Auto Renewal:

- The following slides call out AR scenarios where direct customers may choose to turn off auto renew
  - End of Sale/End of Life PIDs
  - List Price Change 90 Days Before Renewal

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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: 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 <SubID> 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>	<Day, date>
<PID NAME2>	<Day, date>

View Subscription

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.

CCW: 35, 60- and 90-day AR notification if the subscription have EOS/EOL PID and replacement available.

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 auto-renew with these replacement PIDs.

- If you wish to add more licenses/services, please contact a Cisco Renewal Sales Representative before your scheduled Renewal Date.
  Cisco 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
Xxx	Yyy
Xxx	Yyy

View Subscription

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 auto-renew.

- 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>

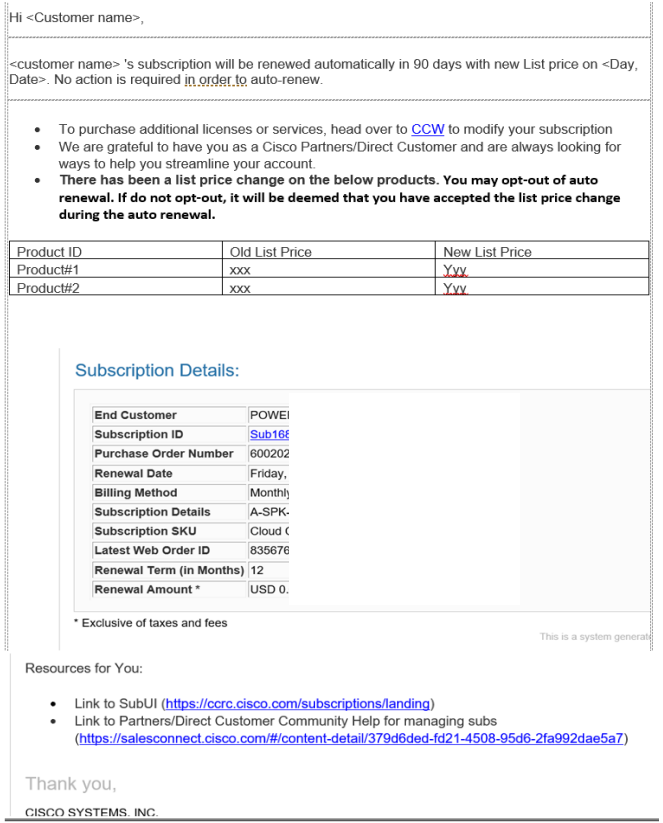
Current EOS/EOL PID	Replacement PID
xxx	Yyy
xxx	Yyy

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	Yyy
Product#2	xxx	Yyy

Subscription Details:

End Customer	POWEI
Subscription ID	Sub16
Purchase Order Number	600202
Renewal Date	Friday,
Billing Method	Monthl
Subscription Details	A-SPK-
Subscription SKU	Cloud (
Latest Web Order ID	835676
Renewal Term (in Months)	12
Renewal Amount *	USD 0.

* Exclusive of taxes and fees

This is a system generat

Resources for You:

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

Thank you,

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Cancel a Subscription

Subscription Cancellations
Cancellation Requests

- 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 **Customer Service Hub (CSH).** 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.

Subscription Cancellations

Cancellation Request

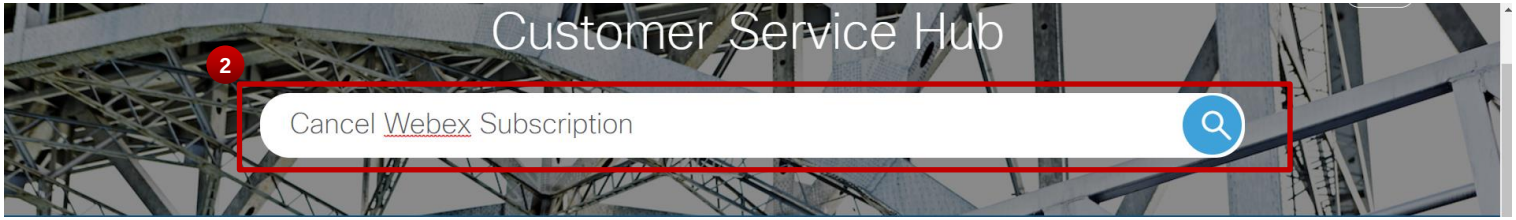
1. To request a mid term or end of term subscription cancellation request for any CCE subscriptions, go to Customer Service Hub to initiate a cancellation request case.

TIP

Note: If you are wanting to turn auto-renew off, this can be done no less than 30 days from the end of term. Customers have been enabled to turn auto-renew off themselves in CCE Subscription UI. Review the Auto Renewal for Subscriptions 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.

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

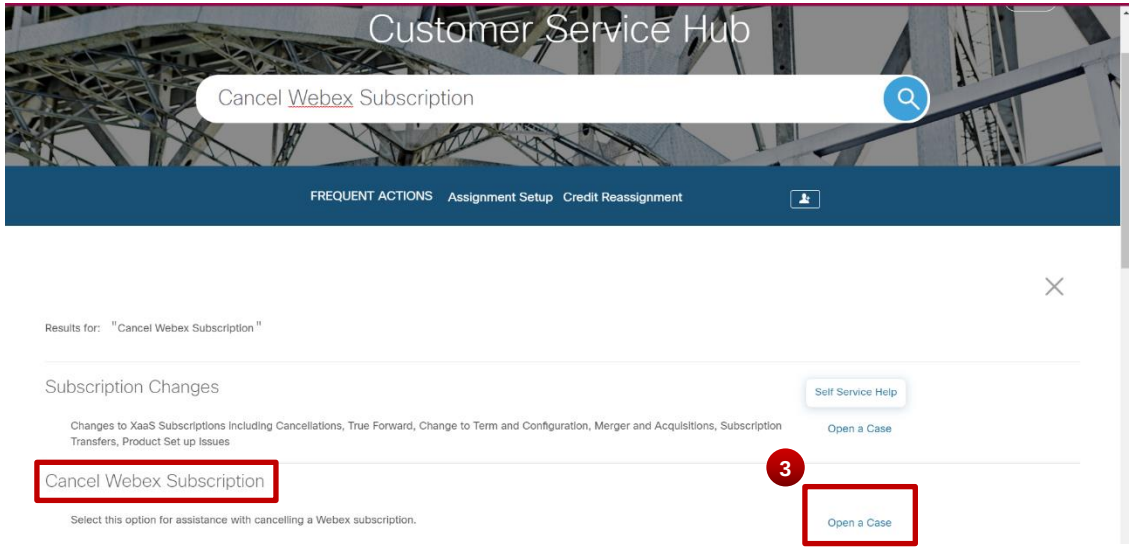


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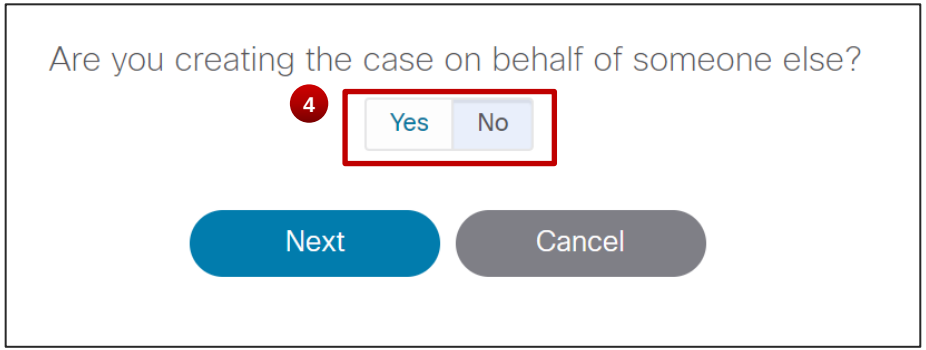
Subscription Cancellations

Cancellation Request

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



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



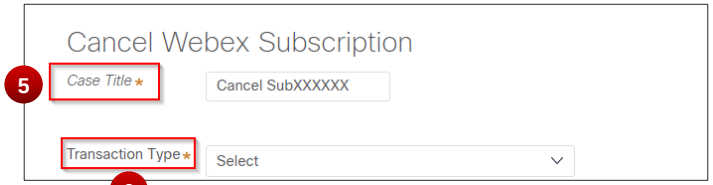
TIP

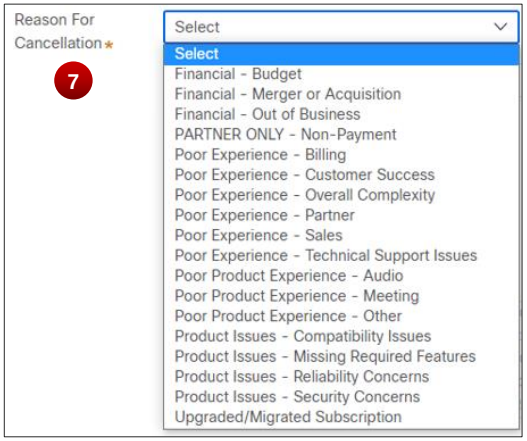
Note: If you are creating the case on behalf of someone else, you will be prompted to provide the CCO ID of the person.

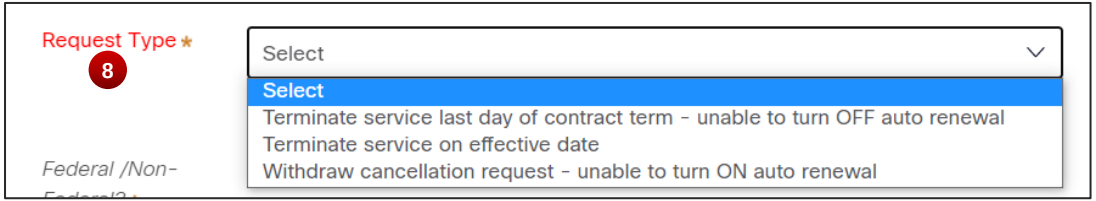
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Subscription Cancellations
Cancellation Request

5. Under **Case Title**, submit a title for your case (e.g. Cancel SubXXXXXX)
6. From the **Transaction Type** dropdown, select CCE
7. Select a **Reason Code** from the dropdown list
8. 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.







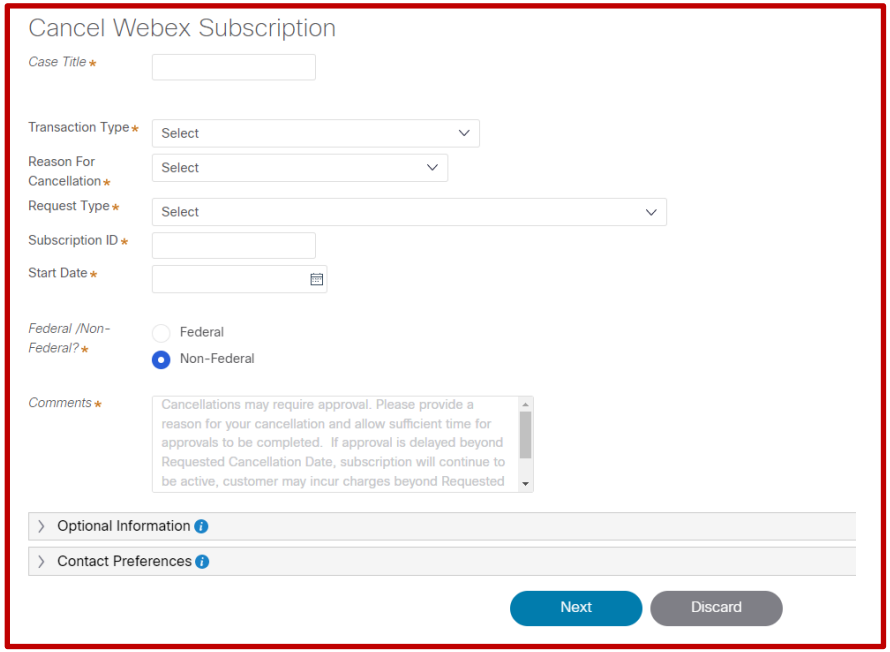
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Subscription Cancellations

Cancellation Request

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

- Please Note: **All mid-term and end-of-term cancellations are exceptions and approval is NOT guaranteed.** 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.



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**.

*Note: withdrawing a cancellation must be done **prior to the cancellation transaction date**

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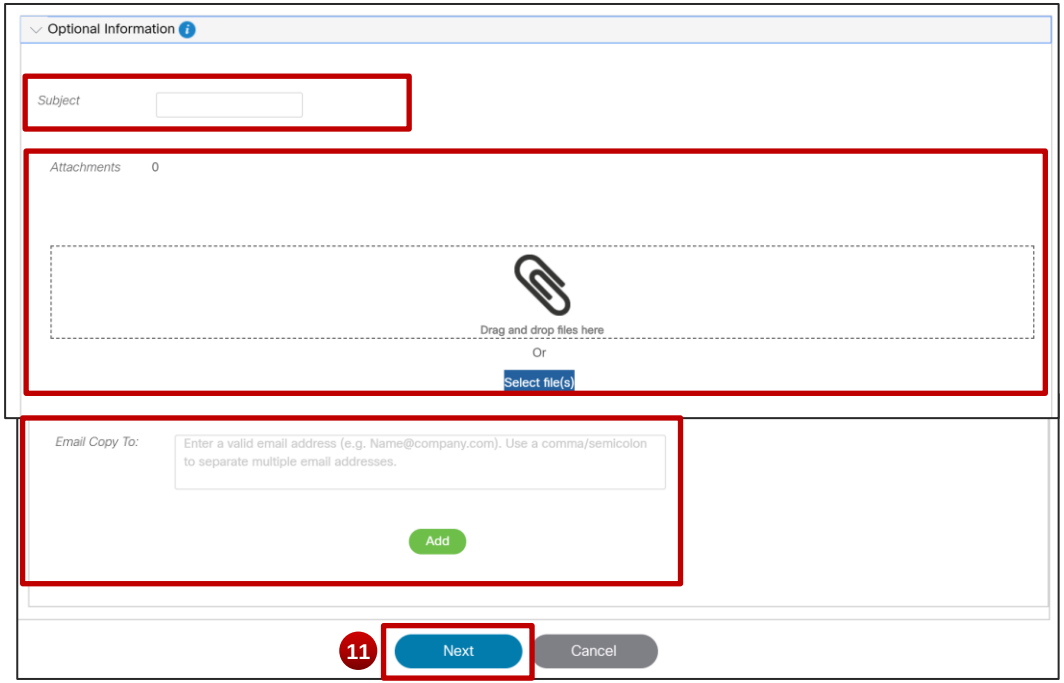
Subscription Cancellations

Cancellation Request

10 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.

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

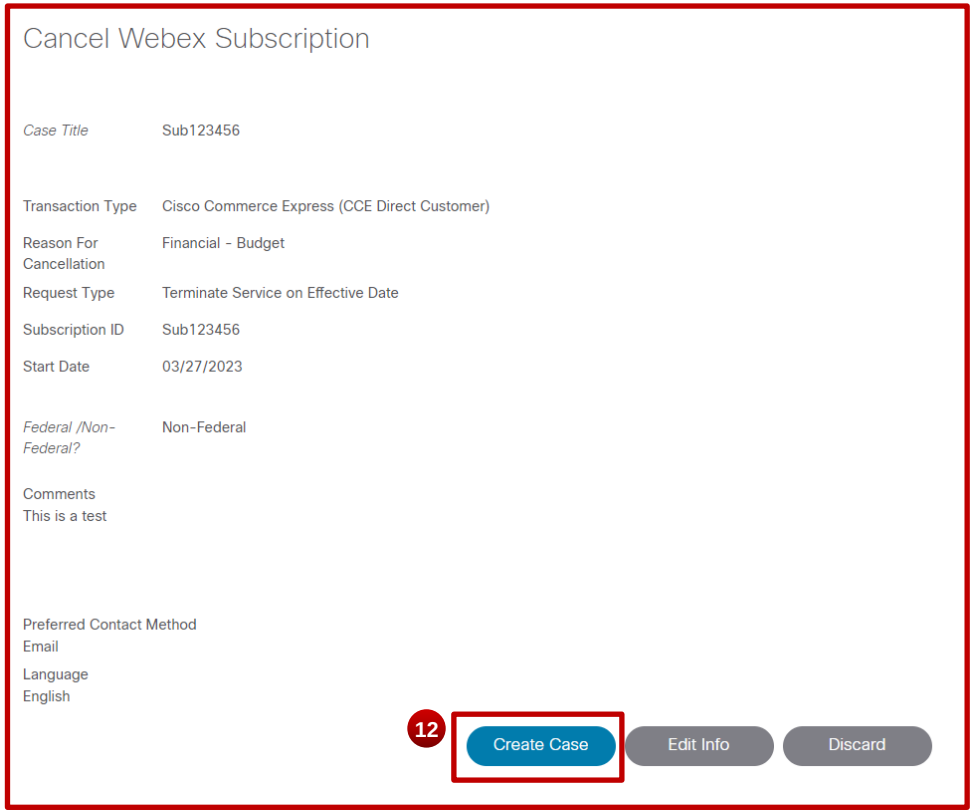
10



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Subscription Cancellations
Cancellation Request

12 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.**



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Hardware Shipment & Returns

Hardware Shipment

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

Returns must be initiated in Customer Service Hub

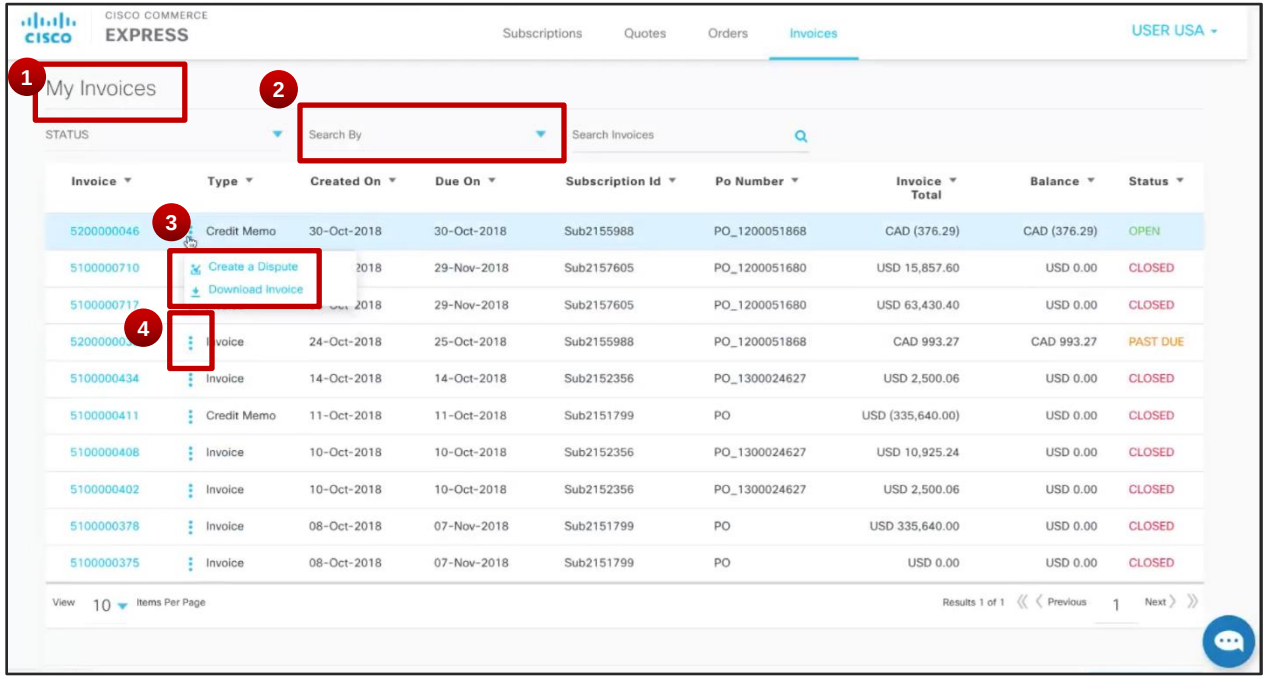
1. Open a case at Customer Service Hub
2. Search ‘CCE’ > Click "Open a case" under Cisco Commerce Express (CCE) Quoting Tool Support.
3. Select "Agency Shipment Support"

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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,
4. and select **Create a Dispute.**
   Note: You can search by disputes or click the SAF Numbers which provide details/notes of dispute.



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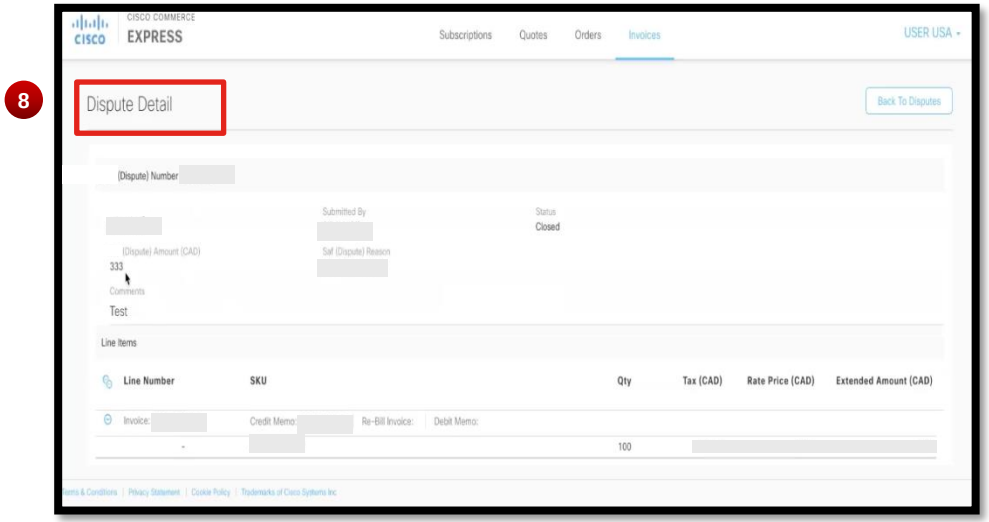
cisco Commerce EXPRESS

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.



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Review Your Invoices

9. Click **Invoices**

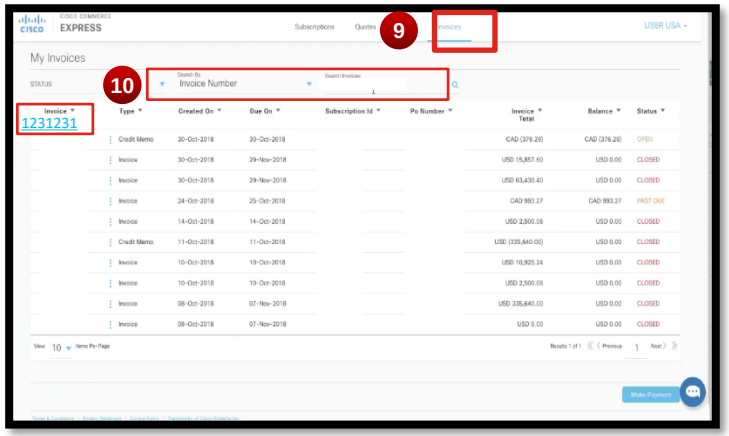
10. Click **Invoice Number link** on left

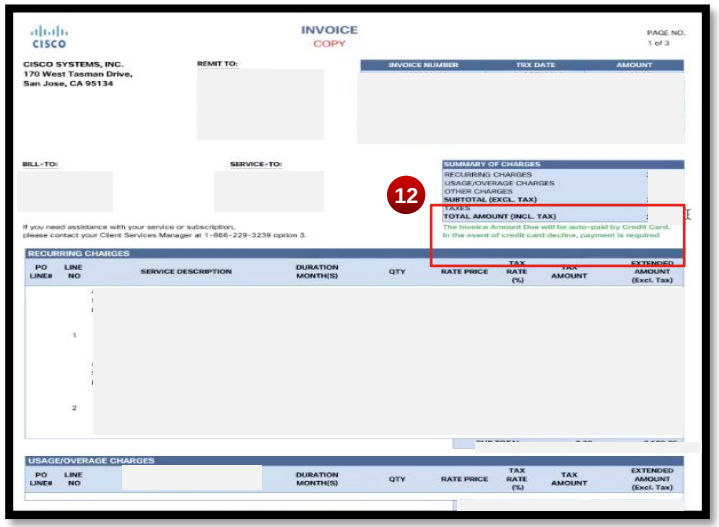
11. Click **Download as PDF** to review the Invoice

12. **Message notification(s)** will be highlighted at the header and footer of the page for accounts where auto-payments 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.





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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.

RECURRING CHARGES

A-FLEX Collaboration Flex Plan
Subscription ID: [redacted]
Billing Period: 15-Jun-20 to 14-Jul-20

PO LINE#	LINE NO	SERVICE DESCRIPTION	DURATION MONTH(S)	QTY	RATE PRICE	PA PROGRAM DISCOUNT	TAX RATE (%)	TAX AMOUNT	EXTENDED AMOUNT (Excl. Tax)
	1	A-FLEX-FILESTG-ENT-File Storage Entitlement	1	5,140	0.00 Per User / mth		0	0.00	0.00
	2	A-FLEX-MC-ENT-Meetings Entitlement (1)	1	257	0.00 Per User / mth		0	0.00	0.00
	3	A-FLEX-MSG-ENT-Messaging Entitlement	1	257	0.00 Per User / mth		0	0.00	0.00
13	4	A-FLEX-NUCM-MC-NU Cloud Meetings - Meetings (1)	1	257	32.25 Per User / mth	8,288.25	0	0.00	0.00
	5	A-FLEX-WX-STG-Included Webex Storage for Flex	1	10	0.00 Per User / mth		0	0.00	0.00
	6	A-SPK-VOIP-Included VoIP (1)	1	1	0.00 Per Each / mth		0	0.00	0.00

A-FLEX Collaboration Flex Plan
Subscription ID: [redacted]
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	22	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

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

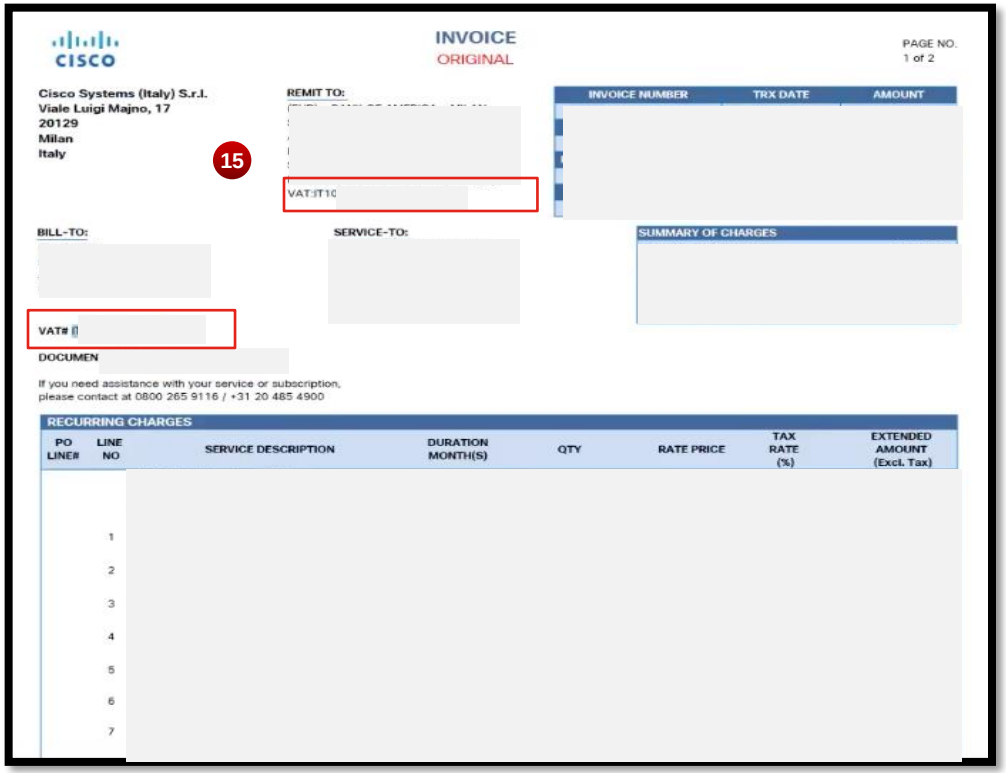
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Review VAT/GST/TAX ID

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) **You can download the form here.**



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Italy E-Invoice

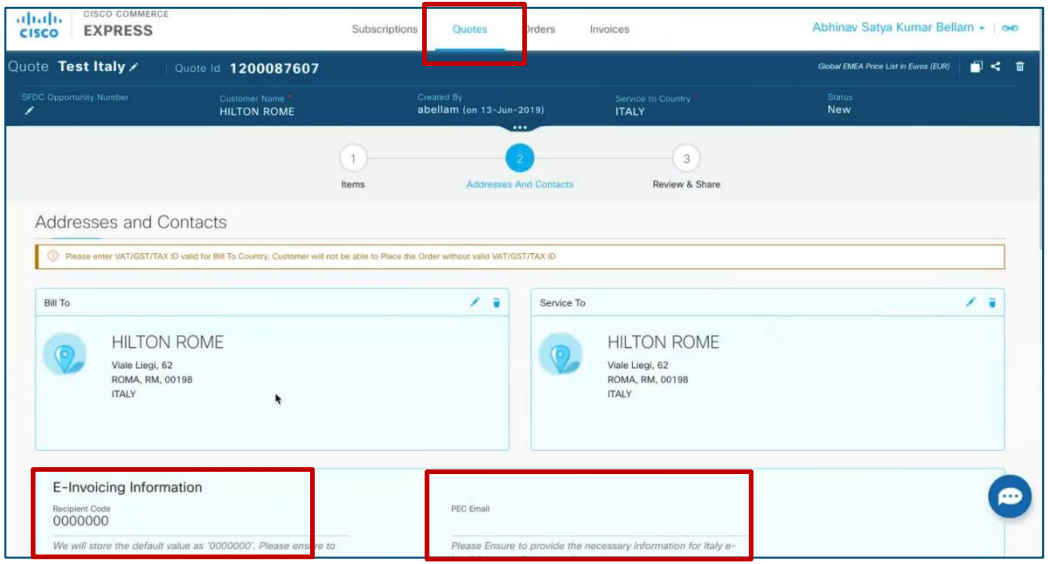
For Customers with a ***Bill To*** address in **Italy.**

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.

External Customer View



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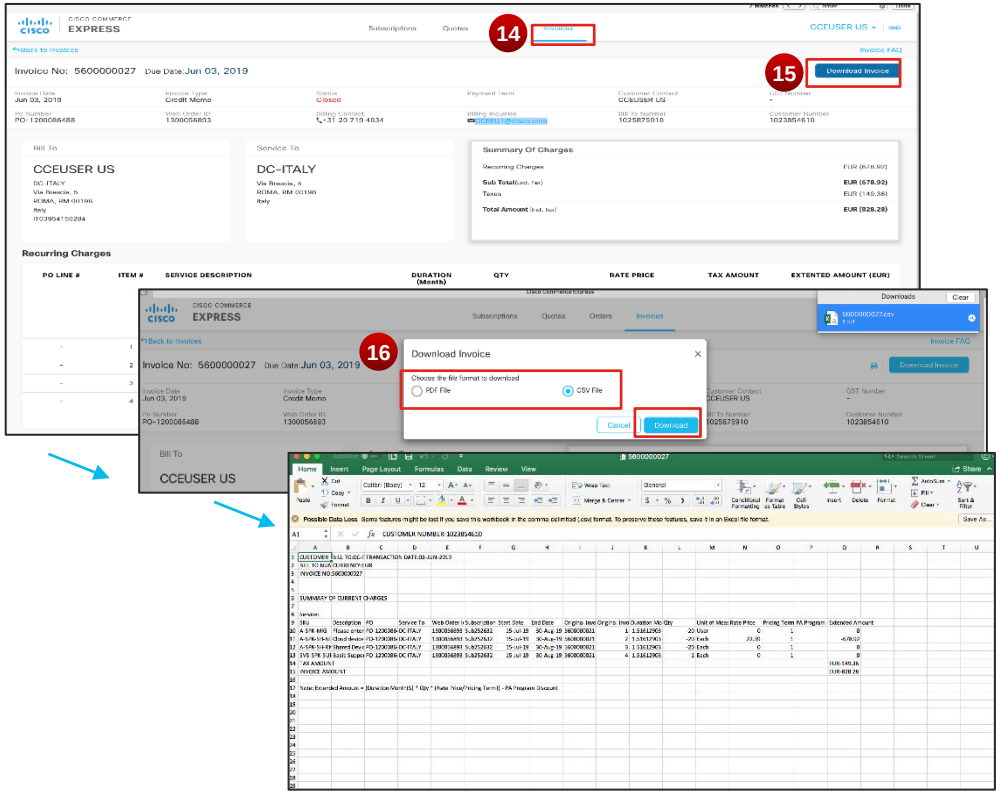
Italy e-Invoicing

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

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cisco Commerce EXPRESS

Support

Support

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 Customer Service Hub
- Search ‘CCE’ > Click "Open a case" under Cisco Commerce Express (CCE) Quoting Tool Support.
- Select " "Agency Shipment Support"

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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

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Support

Get help logging in to CCE here

Submit a Dispute here

BILLING & COLLECTIONS

- AMERICAS: us01_cce@external.cisco.com or us02_cce@external.cisco.com or us03_cce@external.cisco.com or us04_cce@external.cisco.com or us05_cce@external.cisco.com
- EMEAR: cceeu1@external.cisco.com or cceeu2@external.cisco.com
- ASIA: cce_apjc_asia1@external.cisco.com or cce_apjc_asia2@external.cisco.com or cce_apjc_asia3@external.cisco.com
- JAPAN: cce_apjc_jpn@external.cisco.com
- INDIA: cce_apjc_ind@external.cisco.com
- ANZ: cce_apjc_anz@external.cisco.com

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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

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cisco Commerce EXPRESS

Resources

Version Updates

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

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Version Updates

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

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Version Updates

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

Version Updates

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	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.

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Version Updates

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

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Country Availability List

Commerce EXPRESS

Country Name

1. Albania
2. Argentina
3. Aruba
4. Australia
5. Austria
6. Bangladesh
7. Barbados
8. Bermuda
9. Belarus
10. Belgium
11. Benin
12. Bolivia
13. Bosnia & Herzegovina
14. British Virgin Island
15. Bulgaria
16. Canada
17. Cayman Islands
18. Chile
19. Colombia
20. Congo
21. Costa Rica
22. Croatia
23. Cyprus
24. Czech Republic
25. Denmark
26. Dominican Republic
27. Ecuador
28. Egypt
29. El Salvador
30. Estonia
31. Ethiopia
32. Finland
33. France
34. Germany
35. Ghana
36. Greece
37. Guatemala
38. Guinea
39. Hong Kong
40. Honduras
41. Hungary
42. Iceland
43. India
44. Indonesia
45. Israel
46. Italy
47. Jamaica
48. Japan
49. Kazakhstan
50. Kenya
51. Latvia
52. Lithuania
53. Luxembourg
54. Macedonia
55. Malaysia
56. Malta
57. Mauritius
58. Mexico
59. Moldova
60. Morocco
61. Netherlands
62. Netherlands Antilles
63. New Zealand
64. Nicaragua
65. Nigeria
66. Norway
67. Pakistan
68. Panama
69. Papua New Guinea
70. Paraguay
71. Peru
72. Philippines
73. Poland
74. Portugal
75. Puerto Rico
76. Qatar
77. Romania
78. Saudi Arabia
79. Senegal
80. Serbia
81. Singapore
82. Slovakia
83. Slovenia
84. South Africa
85. Spain
86. Sri Lanka
87. Sweden
88. Switzerland
89. Tanzania
90. Thailand
91. Tunisia
92. Uganda
93. Ukraine
94. United Arab Emirates
95. United Kingdom
96. United States
97. Uruguay
98. US Virgin Islands
99. Venezuela
100. Vietnam
101. Zimbabwe


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