Attach Services in CCW

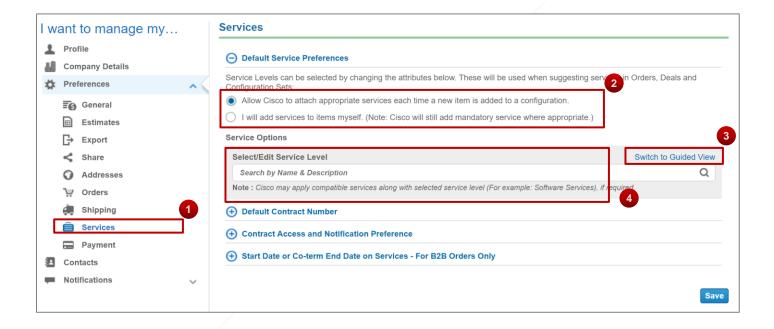## Contents

Attach Services in CCW

1 Setting Service Preferences

1.1 Setting Services Preferences in Estimate, Deals and Quotes, and Order

You can set your Service Preferences to apply to all of your Estimates, Deals and Quotes, and Orders from your Workspace Profile Preferences.

1. Click on **Services** under Preferences
2. Click on the radio button that allows Cisco to attach appropriate services each time an item is added. Otherwise, opt-out of auto-attach services by selecting 'I will add services myself.'
3. The Service Options widget can be in either Legacy View or Simplified View (illustrated). To switch between them, click on **Switch to Guided View** or **Switch to Simplified View** on the top right of the widget.
4. Search and select the appropriate Service Level to attach to all of your subsequent Estimates, Deals, Quotes, and Orders.

Note: Setting preferences within an Estimate, Deals and Quotes, or Order follows the same process. The preferences will only display for that specific Estimate, Deals and Quotes, or Order.

2 Attach Services

There are two ways to edit services using the Services Option widget. You can attach services at the Header level by clicking on **Edit Service** in the **More** dropdown on your Estimate, Deal, Quote, or Order (see the screenshot below for an example from an Estimate). The Service Level you select will apply to all selected lines of your configuration. Use

this option for basic Service Level changes. You can also click **Edit/Remove Service** on an individual line of your configuration. Use this option for more complex Service Level changes.

Remove Selected Lines	More ∧							☰
☐ ⊕	Hardware, Soft	Validate	ead Time ⓘ	Unit List Price (USD)	Qty	Unit Net Price (USD)	Discount (%)	Extended Net Price (USD)
		Apply Discount						
☑ ⊕	1.0 **UCSB-B20**	Remove Services	28 days	9,291.00	1	9,291.00	0.00	9,291.00
	more ❯	Edit Services						
	UCS B200 N U, mem, HD							
	Valid as of 21-Nov-2014 09:43:49 PST							
	Edit Options | Edit Service/Subscription | Validate | Add Note | More Actions ⌄							Add Subtotal
☐ ⊕	2.0 **UCSB-5108-AC2=**		21 days	29,825.00	1	29,825.00	0.00	29,825.00
	more ❯							
	UCS 5108 Blade Server AC2 Chassi s/0 PSU/8 fans/0 FEX							
	Valid as of 21-Nov-2014 09:40:03 PST							
	Edit Options | Edit Service/Subscription | Validate | Add Note | More Actions ⌄							Add Subtotal

2.1   Edit Services at the Header Level

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

ⓘ   **Note**: Selecting Services in an Estimate, Deals and Quotes or Order follows the same process.

1. Place a checkmark next to the desired SKUs before selecting **Edit Services** from the **More** dropdown.
2. **Select/Edit Service Level**

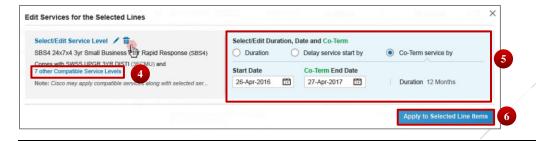| Edit Services for the Selected Lines	×
Select/Edit Service Level ② *Help search and specify service level*	**Select/Edit Duration, Date and Co-Term** *Helps specify contract tenure*
	Apply to Selected Line Items

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

Attach Services in CCW

4. Notice the Compatible Service Lines display after selecting a service.
5. Change the duration by entering in number of months, start date, or start and end date.
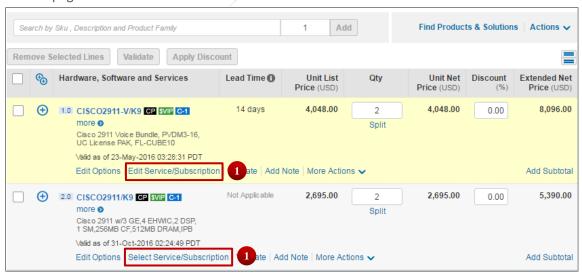6. Apply the Service to the Selected Lines (see Note below):

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

2.2 Attach Services on the Edit Services/Subscription page

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

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

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

Attach Services in CCW

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

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

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

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

8. You can always change to Legacy View by clicking on **Switch to Legacy Service Preference LOVs** to find services using all available dropdown menus.

9. Select from dropdown lists for the Service Program, Onsite Field Engineer, Advanced Hardware Replacement Level, and Software Application Upgrade.
10. Select **Switch to Simplified View** to go back to the improved search of services from the list of available service programs.

11. You can always check the rest of your items by selecting **Products not mapped to Services/Subscriptions**.
12. Delete all services at any time by selecting **Remove All Services**.

2.3   Attach Services to Unassigned products in the Edit Services/Subscriptions Page
Products that don't have services attached are listed under **Unassigned.**

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

Attach Services in CCW

Service SKU	Product SKU			Unit List Price (USD)	Qty	Total List Price (USD)
CISCO SOFTWARE SUPPORT SERVICE - S... (1 ITEM) 🗑 SERVICE PROGRAM	ECMU (SWSS UPGRADES) ✏ SUMMARY	Start Date 30-Jul-2017	End Date 29-Jul-2018	Duration ✏ 12 Months		
CON-ECMU-C1F1S19K SWSS UPGRADES SERVICE SKU Change Service | Remove Service	C1F1PISR1900SK9 Cisco ONE Foundation Perpetual ISR 1900 Std PRODUCT SKU			192.00	1 1	192.00
⊖ Unassigned						
➕ Add a Service SKU ①	C1-CISCO1921/K9 PRODUCT SKU Cisco ONE - ISR 1921				1	

Add Service ✕

Note: *These are available choices in program and if you like to review/choose a service level from a different program - then please click this link* **Service Options** *and navigate to desired program.*

○ SNTC NO RMA (SW)

○ CMB SPT SVC 24X7X4OS (NCH4P) (NCH4P)

○ CMB SPT SVC 24X7X2OS (NCH2P) (NCH2P)

◉ **SNTC 8X5XNBD (SNT)** ②

○ CMB SPT SVC 24X7X2 (NCH2) (NCH2)

○ CMB SVC 24X7X2OS (NCF2P)

Cancel **Apply** ③

Configuration Summary	All prices shown in USD
Services	192.00

Cancel **Done**

Cookie Policy \| Trademarks

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

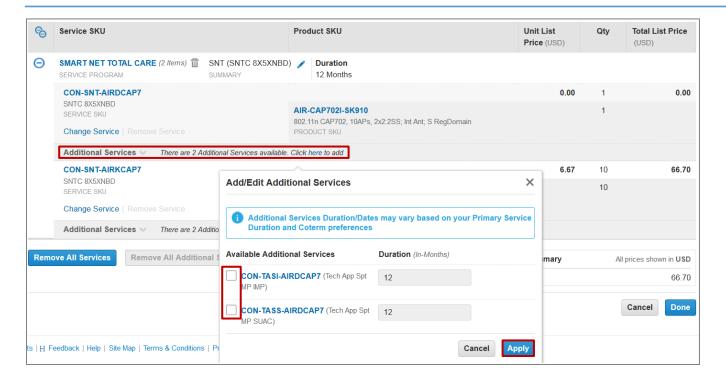| Service SKU	Product SKU				Qty	Total List Price
SMART NET TOTAL CARE (1 ITEM) 🗑 SERVICE PROGRAM	SNT (SNTC 8X5XNBD) ✏ SUMMARY	Start Date 30-Jul-2017	End Date 29-Jul-2018	Duration ✏ 12 Months		
CON-SNT-C1C1921 SNTC 8X5XNBD SERVICE SKU Change Service | Remove Service	C1-CISCO1921/K9 Cisco ONE - ISR 1921 PRODUCT SKU			22.33	1 1	22.33

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

EDIT SERVICES/SUBSCRIPTIONS C1-CISCO1921/K9   (USD)

⚠ **Service preferences cannot be applied to C1-CISCO1921/K9 configuration. System will restore any existing services on configuration. Please use Select/Change Services link to see available services. (CS410)**

2.4 Adding Secondary Services in the Edit Services/Subscriptions Page

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

Attach Services in CCW

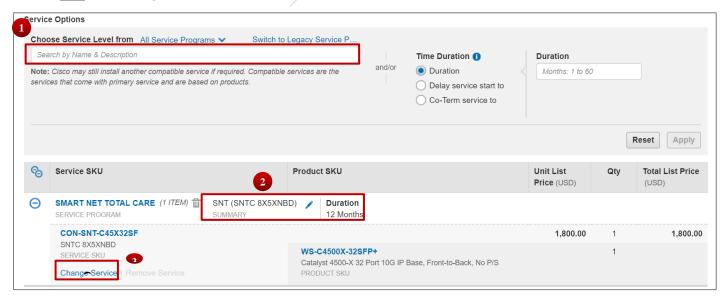## 2.5   Changing Services in the Edit Services/Subscriptions Page

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

1. Header Level Changes
2. Group Level Changes
3. Line Level changes

Attach Services in CCW

Line Level Change	Only the selected line changes. No other lines affected
Group Level Change	The Group Service will change. This might also affect other Service Groups based on compatibility with the new Group Service
Header Level Change	All Service lines and Groups will be affected according to service compatibility

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

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

Attach Services in CCW

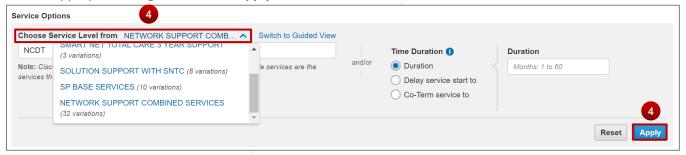|	Service SKU	Product SKU	Unit List Price (USD)	Qty	Total List Price (USD)
⊖	**SMARTNET SERVICES** *(1 ITEM)* 🗑 SERVICE PROGRAM	SU1 (IPS Svc, AR NBD) ✏ SUMMARY	**Duration** 12 Months		
	CON-SU1-2951VSEC IPS Svc, AR NBD SERVICE SKU		1,464.00	1	1,464.00
		C2951-VSEC/K9 Cisco 2951 Voice Sec. Bundle, PVDM3-32, UC&SEC Lic,FL-... PRODUCT SKU		1	
	Change Service | Remove Service				

Current Program: SMARTNET SERVICES ✕

Note: *These are available choices in* **SMARTNET SERVICES** *program and if you like to review/choose a service level from a different program - then please click this link* **Service Options** ③ *...igate to desired program.*

○ **IPS Sig and SW** (SUSW)

◉ **IPS Svc, AR 8x5x4 abc** (SU2)

○ **IPS Svc, AR 24x7x4** (SU3)

○ **IPS Svc, AR 24x7x2** (SU4)

○ **IPS Svc, AR NBD** (SU1)

○ **IPS Svc, Onsite NBD** (SUO1)

[Cancel] [**Apply**] ②

		Duration 12 Months			
			2,807.00	2	5,614.00
	FL-CUBEE-100-RED Unified Border Element Ent Lic, 100 Sessions, Redundancy PRODUCT SKU			2	

Configuration Summary   All prices shown in **USD**

Services   7,078.00

[Cancel] [**Done**]

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

Service Options ④

Choose Service Level from NETWORK SUPPORT COMB... ⌃   Switch to Guided View

NCDT   SMART NET TOTAL CARE 3 YEAR SUPPORT *(3 variations)*

Note: Cisc...   SOLUTION SUPPORT WITH SNTC *(8 variations)*   le services are the

services th...   SP BASE SERVICES *(10 variations)*

NETWORK SUPPORT COMBINED SERVICES *(32 variations)*

and/or

Time Duration ⓘ
◉ Duration
○ Delay service start to
○ Co-Term service to

Duration
Months: 1 to 60

④

[Reset] [**Apply**]

5. The system will automatically adjust all necessary Service programs in other Minor Product Lines as necessary.
Note: This will not affect Unassigned Products eligible for service.

6. Once all changes are complete, Click **Done**.
For **Header** level changes, refer to section 2.1. **Note:** Header Level changes <u>will</u> affect Unassigned Product lines eligible for service.
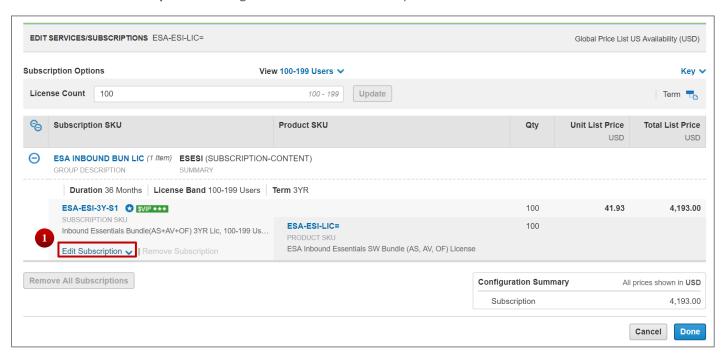
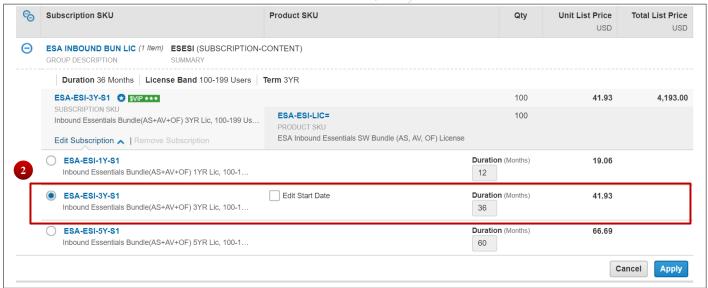## 2.6   Add/Edit a Corresponding Subscription

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

Attach Services in CCW

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

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

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

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

3   Remove Services

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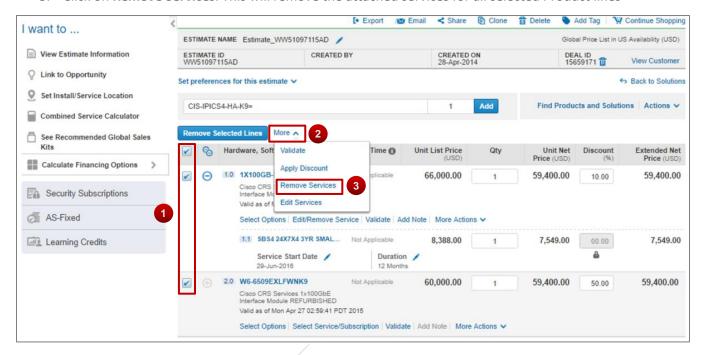
Attach Services in CCW

3.1 Removing services in Estimate, Deals and Quotes, or Order

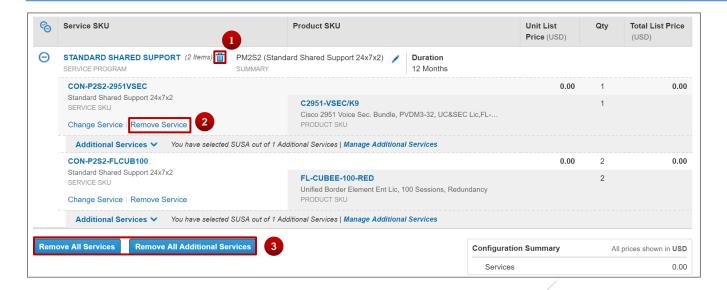> ℹ️ **Note**: Removing Services in an Estimate, Deals and Quotes, or Order follows the same process.

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

3.2 Remove services in Edit Service/Subscription page

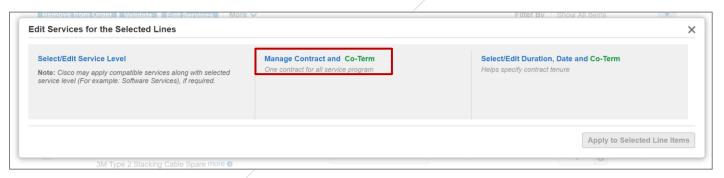1. On the Edit Service/Subscription page, click on the delete icon (🗑) next to the service program you want to remove. This will remove the service program for all products serviced by it.
2. Alternatively, if you only need to remove the service for one Product line, click on **Remove Service**, if applicable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

4 Manage Contract (Order Only)

When you Edit Services in Order, you will see an option to **Manage Contract and Co-Term**. This feature will enable you to select a new or existing contract number to apply to your Services.

5 Flexible Service Start (Order Only)

In Order, you can also choose to delay the start of your Service.

1. Select the Delay service start by radio button
2. Select Service Start Delay in the drop-down.
3. Enter the start delay (in number of days) and the duration of the Service

Attach Services in CCW

Edit Services for the Selected Lines   ✕

Select/Edit Service Level

Note: *Cisco may apply compatible services along with selected service level (For example: Software Services), if required.*

Manage Contract and Co-Term ✎ 🗑
One contract for all service program

Existing Contract Number

Select/Edit Duration, Date and Co-Term   ①

○ Duration   ● Delay service start by   ○ Co-Term service by

②

Select

Service Start Delay ▼

Service Start Delay

30

day(s) after Ship Date

Duration   ③

12

Note: *Service with Start Date, End Date or Last product shipped preference may be split and added on a seperate order.* Learn More

Apply to Selected Line Items