

# Netwitness Communities Portal & CPQ

Distributors' Guide Only

# Net New Deal

# 1- Find End User Account

# Find the End User Account

- The first step is to search and find the End User account.
- You can enter the account name, ID, address, etc., in the main search box, located under the Netwitness logo.
- Under 'Accounts', system will show all existing accounts that match the criteria entered.

The screenshot displays the NetWitness web application interface. At the top, the NetWitness logo is visible. Below it, a search bar contains the text '1100 MASS MUTUAL'. The user's name 'brian.schnurr' is shown in the top right corner. The navigation menu includes 'Home', 'DEAL REG.', 'CPQ', 'CASES', 'GAF', 'REBATES', 'REPORTS', 'PARTNER FINDER', and 'MORE'. The user's role 'PRM Admin: Brian Schnurr' and 'SecurWorld Tier: Distributor' are displayed below the navigation menu.

The search results are categorized into 'Leads' and 'Accounts'. The 'Leads' section shows 2 results sorted by Relevance. The 'Accounts' section shows 1 result, which is highlighted with a blue box and a red arrow pointing to the 'ACCOUNT NAME' column.

NAME	LEAD RECORD TYPE	PHONE	COMPANY	EMAIL	LEAD STATUS	OWNER ALIAS	PRIMARY PROGRAM
Mass Mutual	Deal Registration		1100 MASS MUTUAL	mass@yahoo.com	NEW	bschn	
Mass Mutual	Deal Registration		1100 MASS MUTUAL	converttest@ohio.com	NEW	bschn	

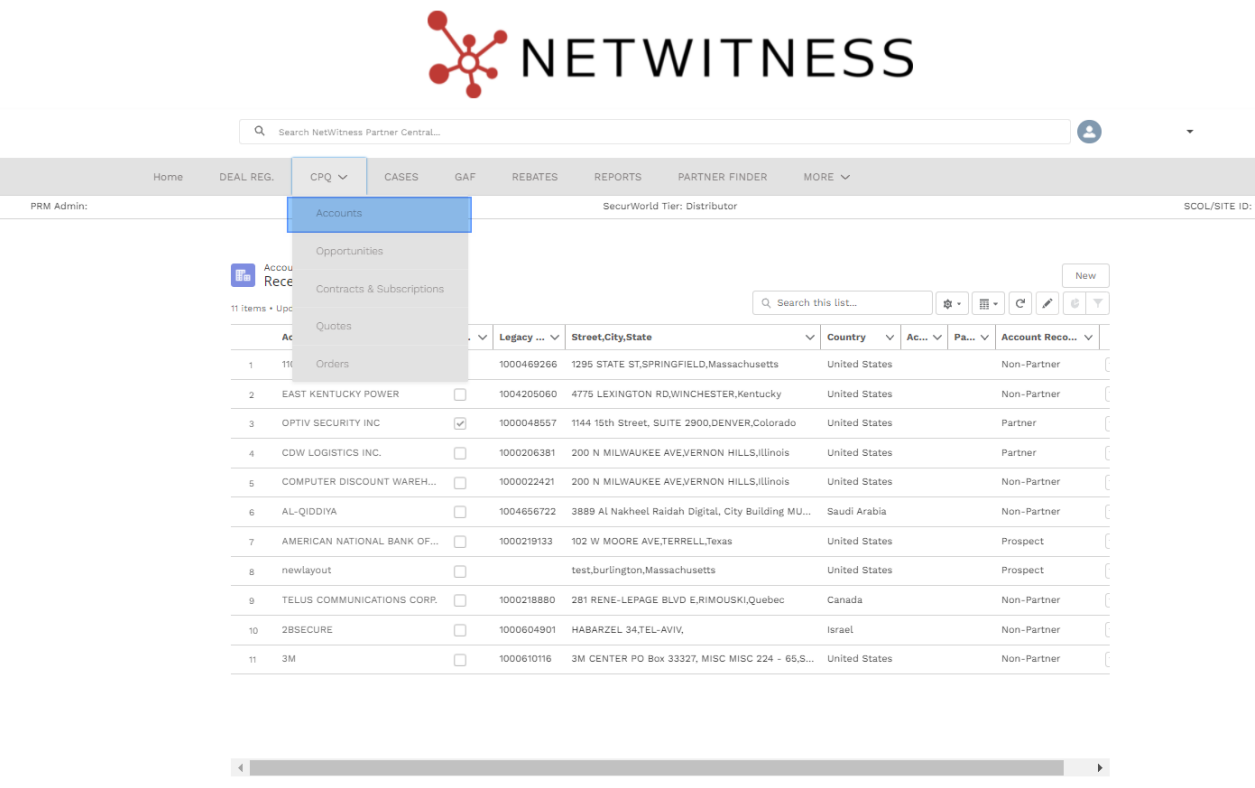
OPPORTUNITY NAME	OPPORTUNITY RECORD TYPE	ACCOUNT NAME	STAGE	EXPECTED CLOSED DATE
1100 MASS MUTUAL: 22AGAWEAE-IN - 1100 MASS MUTUAL	Deal Registration	1100 MASS MUTUAL	Discovery	10/25/2021
1100 MASS MUTUAL: Pattl Oct 11 v2	Direct and Channel	1100 MASS MUTUAL	Discovery	11/6/2021
1100 MASS MUTUAL: 22AGM6EAE-IE - 1100 MASS MUTUA...	Deal Registration	1100 MASS MUTUAL	Discovery	11/6/2021
1100 MASS MUTUAL: ConverttestNWQA	Direct and Channel	1100 MASS MUTUAL	Discovery	11/4/2021
1100 MASS MUTUAL: Pattl Oct 11	Direct and Channel	1100 MASS MUTUAL	Discovery	11/5/2021

ACCOUNT NAME	IS HQ	LEGACY SAP ID	STREET,CITY,STATE	COUNTRY	ACCOUNT OWNER ALIAS	PARENT AC
1100 MASS MUTUAL	<input type="checkbox"/>	1000469266	1295 STATE ST,SPRINGFIELD,Massachusetts	United States		

# Find the End User Account

- You can also go to the CPQ section, and select 'Accounts'
- This will bring your most recently viewed accounts.

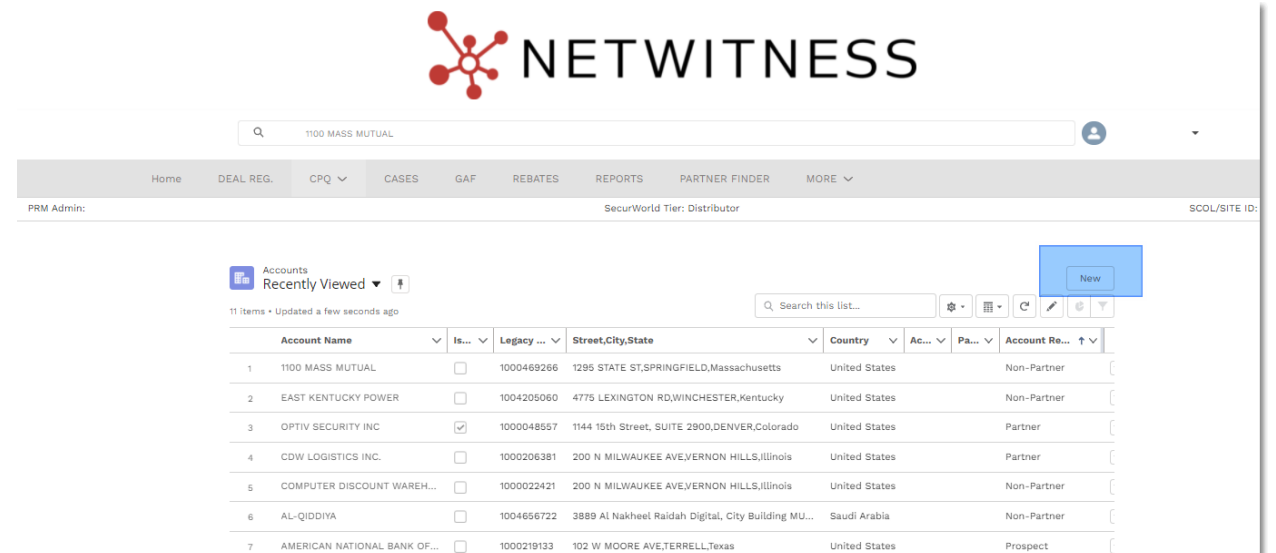


The screenshot displays the NetWitness Partner Central web application. At the top, the NetWitness logo is visible. Below it is a search bar and a navigation menu with options: Home, DEAL REG., CPQ, CASES, GAF, REBATES, REPORTS, PARTNER FINDER, and MORE. The 'CPQ' menu is expanded, showing 'Accounts' as the selected option. The main content area shows a table of accounts with columns for Legacy ID, Street, City, State, Country, Account Rec., and Pa... (Partner). The table contains 11 rows of account data.

	Legacy ...	Street, City, State	Country	Ac...	Pa...	Account Reco...
1	1000469266	1295 STATE ST, SPRINGFIELD, Massachusetts	United States			Non-Partner
2	1004205060	4775 LEXINGTON RD, WINCHESTER, Kentucky	United States			Non-Partner
3	1000048557	1144 15th Street, SUITE 2900, DENVER, Colorado	United States			Partner
4	1000206381	200 N MILWAUKEE AVE, VERNON HILLS, Illinois	United States			Partner
5	1000022421	200 N MILWAUKEE AVE, VERNON HILLS, Illinois	United States			Non-Partner
6	1004656722	3889 Al Nakheel Raidah Digital, City Building MU...	Saudi Arabia			Non-Partner
7	1000219133	102 W MOORE AVE, TERRELL, Texas	United States			Prospect
8		test.burlington, Massachusetts	United States			Prospect
9	1000218880	281 RENE-LEPAGE BLVD E, RIMOUSKI, Quebec	Canada			Non-Partner
10	1000604901	HABARZEL 34, TEL-AVIV,	Israel			Non-Partner
11	1000610116	3M CENTER PO Box 33327, MISC MISC 224 - 65,S...	United States			Non-Partner

# Create a new End User Account

- If you cannot find the account, you will have an option to create a new End User account.
- Go to CPQ → Accounts → click on 'NEW'



The screenshot shows the NetWitness Accounts page. At the top, there is a search bar with the text "100 MASS MUTUAL" and a user profile icon. Below the search bar is a navigation menu with options: Home, DEAL REG., CPQ (selected), CASES, GAF, REBATES, REPORTS, PARTNER FINDER, and MORE. The page title is "PRM Admin: SecurWorld Tier: Distributor" and "SCOL/SITE ID:". The main content area is titled "Accounts" and "Recently Viewed". It shows a list of 11 items, updated a few seconds ago. A blue "New" button is highlighted in the top right corner of the list area. The list contains the following data:

Account Name	Is...	Legacy ...	Street, City, State	Country	Ac...	Pa...	Account Re...
1 100 MASS MUTUAL	<input type="checkbox"/>	1000469266	1295 STATE ST, SPRINGFIELD, Massachusetts	United States			Non-Partner
2 EAST KENTUCKY POWER	<input type="checkbox"/>	1004205060	4775 LEXINGTON RD, WINCHESTER, Kentucky	United States			Non-Partner
3 OPTIV SECURITY INC	<input checked="" type="checkbox"/>	1000048557	1144 15th Street, SUITE 2900, DENVER, Colorado	United States			Partner
4 CDW LOGISTICS INC.	<input type="checkbox"/>	1000206381	200 N MILWAUKEE AVE, VERNON HILLS, Illinois	United States			Partner
5 COMPUTER DISCOUNT WAREH...	<input type="checkbox"/>	1000022421	200 N MILWAUKEE AVE, VERNON HILLS, Illinois	United States			Non-Partner
6 AL-QIDDIYA	<input type="checkbox"/>	1004656722	3889 Al Nakheel Ralidah Digital, City Building MU...	Saudi Arabia			Non-Partner
7 AMERICAN NATIONAL BANK OF...	<input type="checkbox"/>	1000219133	102 W MOORE AVE, TERRELL, Texas	United States			Prospect

# Create a new End User Account

- A form will open. Complete the required information and then click on SAVE
- Account will be created as a “prospect” account, and you will be able to proceed with opportunity creation.

New Account: Prospect

Account Information

Parent Account  
Search Accounts...

Account Owner  
Brian Schnurr

\*Account Name  
TEST Account CM

\*Account Type  
End User

Local account name

Phone

UCID

Website  
test.com

Legacy SAP ID

Industry  
--None--

\*Account Currency  
USD - U.S. Dollar

Account Record Type  
Prospect

Additional Information

Comments

Address Information

Address  
Search Address

Country  
United States

Street  
Test Street 257

City  
Boston

State/Province  
--None--

Zip/Postal Code  
0H25 HY89

Cancel Save & New Save

# 2- Create the Opportunity

# Create the Opportunity

- On the End User account, click on 'Create Opportunity'

The screenshot displays the NetWitness Partner Central interface for an account named "1100 MASS MUTUAL". The account record type is "Non-Partner" and the Legacy SAP ID is "1000469266". The account owner is "Lorraine Westerdale". The global region is "Americas". The account name is "1100 MASS MUTUAL" and the account type is "Non-Partner". The account currency is "USD - U.S. Dollar". The account record type is "Non-Partner". The amount rollup is "USD 2,908,391.91". The target account is "1100 MASS MUTUAL". The account is not a Fortune 500 company, top identity, or HQ. The account is not a top NetWitness or top RSA All Products account.

The interface includes a search bar at the top, a navigation menu with options like "DEAL REG.", "CPQ", "CASES", "GAF", "REBATES", "REPORTS", "PARTNER FINDER", and "MORE". The account details are organized into sections: "Account Record Type", "Legacy SAP ID", "Account Owner", "Global Region", "Target Account", "Parent Account", "Account Name", "Account Type", "Legacy SAP ID", "Account Currency", "US Federal", "Canada Federal", "EMEA Government", "APJ Government", "Top NetWitness", "Top RSA All Products", "Global Region", "Account Owner", "Local account name", "Phone", "Website", "Account Record Type", "Amount Rollup", "Target Account", "Fortune 500", "Top Identity", "Is HQ", "Account Team (0)", "Related Contacts (3+)", and "Contacts (3+)". The "Create Opportunity" button is highlighted in blue.

# Create the Opportunity

- Complete all the required fields, which are flagged with a red dot \*
- The Currency selected on the opportunity must be the currency required on the quote
- A Price Book per sales region must be entered on the opportunity
- Please note, **Partner Contact** is also mandatory
- Once done, click SAVE

**Create Opportunity**

**Opportunity Information**

Account Name: 1100 MASS MUTUAL X

\* Opportunity Name: TEST 27/10

\* Stage: Discovery

\* Opportunity Owner: Brian Baber

\* Opportunity Currency: USD - U.S. Dollar

Sales Channel: Channel-Distributor

Deal Type: New Logo

Opportunity Source: --None--

Partner Projected Amount: [Empty]

\* Expected Closed Date: Nov 16, 2021

Is this a term renewal?

\* Price Book: NetWitness US Price Book X

Is this an Upsell opportunity?

\* Primary Contact: Dan Fry X

**Distributor, Partner, Alliance**

Distributor: INGRAM MICRO X

Influencer: Search Accounts... Q

\* Partner Name: OPTEO SECURITY INC X

Partner Comments: [Empty]

Partner Contact: Alex Shiff X

Global Alliance Partner: Search Accounts... Q

Alliance Opportunity Type: --None--

**RFP Information**

Due Date: [Empty]

Type of Bid Request: --None--

Save Cancel

# 3- Submit for Deal Registration

# Submit Deal Registration

- Once opportunity has been created, if the deal is Deal Reg. eligible, you should submit it before continuing with Quote creation.
- To do this, click on 'submit for Deal Registration'

Opportunity  
1100 MASS MUTUAL: TEST 27/10

+ Follow Edit Create Quote Submit for Deal Registration

Account Name  
1100 MASS MUTUAL

Opportunity Owner  
To Be Assigned

Expected Closed Date  
11/16/2021

Expected Value

Deal Type  
New Logo

Deal Registration

Opportunity Name  
1100 MASS MUTUAL: TEST 27/10

Partner Projected Amount

Deal Partner Owner

Do Not Use Partner Contact Lookup

Sales Org

Sales Channel  
Channel-Distributor

Quote Type

Deal Type  
New Logo

▼ Distributor, Partner, Alliance

Distributor  
INCORPUS MICHIGAN

Partner (Reseller)  
RITHS.BRANDITY, INC

Probability (%)  
10%

Stage  
Discovery

Expected Close Date

Expected Closed Date  
11/16/2021

Primary Contact  
Dan Fry

RSA Forecast Category

Influencer

Partner Comments

Products (0)

Quotes (0)

Orders (0)

Service Contracts (0)

Opportunity Team (3)

- To Be Assigned (Opportunity Owner)
- Brian Schnurr (Opportunity Owner)
- Lorraine Westerdale (Account Owner)

View All

# Submit Deal Registration

- DR form will open.
- Most information will be pulled from the opp. and populated on the form.
- You will need to add:
  - End User contact email address
  - Deal Classification
  - Opportunity Contact details
  - Deal Description
  - Projected value
  - Select product
- Once done click **SAVE & SUBMIT**

**New Deal Registration**

**End User Information**

\* Company: LOOP LLC  
Local Company Name: \_\_\_\_\_  
\* Street: GEGrid Solutions 10865 Willows, Road NE  
\* City: REDMOND  
\* Country: United States  
State/Province: Washington  
\* Zip/Postal Code: 98052  
Lead Record Type: Deal Registration  
Website: \_\_\_\_\_  
\* Lead Status: NEW  
\* First Name: \_\_\_\_\_  
\* Last Name: \_\_\_\_\_  
\* Email: \_\_\_\_\_  
Primary Contact Work Phone: \_\_\_\_\_  
\* Deal Classification: --None--  
 Is this a US Federal Customer

**Contact Information**

\* Partner Account: INSIGHT DIRECT USA X  
\* Partner Contact: Search  
 Do Not Use Partner Contact Lookup  
Partner Contact First Name: \_\_\_\_\_  
Partner Contact Last Name: \_\_\_\_\_  
Partner Contact Email: \_\_\_\_\_  
\* Opportunity Contact First Name: \_\_\_\_\_  
\* Opportunity Contact Last Name: \_\_\_\_\_  
\* Opportunity Contact Email Name: \_\_\_\_\_  
OR  
 Same as Submitter

**Deal Information**

\* Deal Description: \_\_\_\_\_  
Competitive Vendor: \_\_\_\_\_  
\* Projected Value: \_\_\_\_\_  
\* Expected Close Date: Feb 17, 2022  
*Opportunities that are part of an RFP are not eligible for Deal Registration*  
Is this a Managed Services Deal? --None--

**Notes**

Notes: \_\_\_\_\_  
Attachments can be added after you 'Save' or 'Save and Submit'

**Product Selection**

\* Select which product family: RSA NetWitness Platform

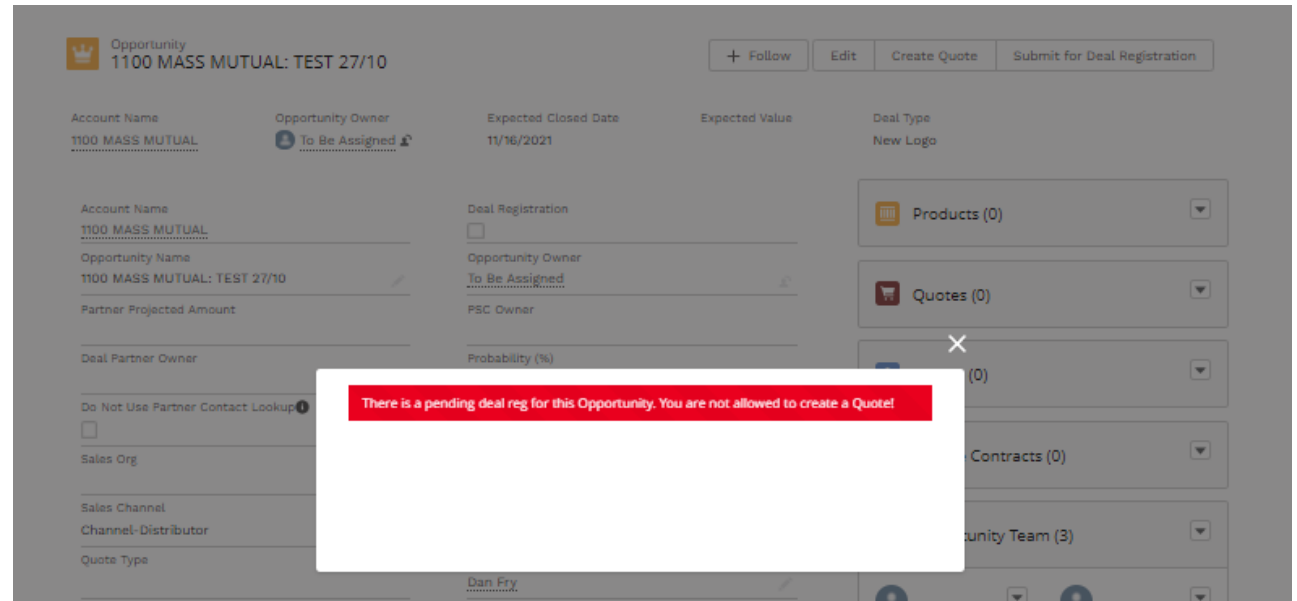
*Please select from only one dropdown list*

RSA NetWitness: --None--  
RSA NetWitness Endpoint: --None--  
RSA NetWitness Orchestrator: --None--  
 Is this a term renewal

Save Save And Submit Cancel

# Submit Deal Registration

- Once DR is submitted, you won't be able to proceed with Quote creation until the DR is actioned (approved or declined).



# Submit Deal Registration

- You can see your submitted DRs under the Deal Reg section.

The screenshot displays the NetWitness user interface. At the top, the NetWitness logo is visible. Below it is a search bar containing the ID '0066s000004s35bAAI' and a user profile for 'Brian Bahrour'. A navigation menu includes 'Home', 'DEAL REG.', 'CPQ', 'CASES', 'GAF', 'REBATES', 'REPORTS', 'PARTNER FINDER', and 'MORE'. The user's role is 'PRM Admin' and their 'SecurWorld Tier' is 'Distributor'. The page title is 'RSA SecurWorld Leads', with links to deal registration and maintenance renewal overviews. Below this is a table of leads with columns for Name, Company, Job, State/Province, Phone, Email, Lead Status, Owner, and Created Date. Two leads are listed, both from '1100 MASS MUTUAL' in 'Massachusetts' with email 'test@1100.com' and status 'NEW'. The first lead was created on 10/19/2021 at 6:03 AM, and the second on 10/27/2021 at 10:36 AM.

	<input type="checkbox"/>	<b>Na...</b> ↑	<b>Company</b>	<b>Job ...</b>	<b>State/Provi...</b>	<b>Pho...</b>	<b>Email</b>	<b>Lea...</b>	<b>Ow...</b>	<b>Own...</b>	<b>Created Date</b>	
1	<input type="checkbox"/>	Dan Fry	1100 MASS MUTUAL		Massachusetts		test@1100.com	NEW	Brian Bahrour	Brian Bahrour	10/19/2021, 6:03 AM	▼
2	<input type="checkbox"/>	Dan Fry	1100 MASS MUTUAL		Massachusetts		test@1100.com	NEW	Brian Bahrour	Brian Bahrour	10/27/2021, 10:36 AM	▼

# Submit Deal Registration

- Once DR is approved, a 'Deal Registration Information' section will appear in the opportunity, showing:

- DR code
- DR type
- DR discount
- DR status
- Expiration Date
- Link to request an extension

SecurWorld Tier: Distributor

<input type="checkbox"/> <b>Discovery</b> Sold To INGRAM MICRO Sold To SAP ID 1000384146 Sales Org  Sales Channel Channel-Distributor Quote Type  Is this a U.S. Federal Customer? <input type="checkbox"/> Is this a term renewal? <input type="checkbox"/> Is this an Upsell opportunity? <input type="checkbox"/> Competitive Analysis  Partner Information Partner Name OPTIV SECURITY INC Partner Contact Alex Shiff Partner Contact First Name Alex Partner Contact Last Name Shiff Partner Contact Email alex.shiff@optiv.com.nwqa Partner Comments	<b>Discovery</b> Expected Closed Date 11/16/2021 Price Book NetWitness US Price Book Deal Type Expansion RSA Forecast Category  Closed Lost Reason  Closed Reason Comments	Orders (0) Service Contracts (0) Open Activities (0) Activity History (0) Notes & Attachments (0) Upload Files Or drop files
--	---	--

**Deal Registration Information**

Deal Registration Code 22AY2CEAU-IE	Deal Registration Status Approved
Submission Date 10/27/2021, 10:32 AM	Expiration Date 12/4/2021, 4:35 PM
Approval Date 11/4/2021, 5:35 PM	Days Left Until Expiration 30
Deal Reg Type Incremental	Link to Expiration Action Request Deal Extension
Deal Registration Discount 15%	RSA Product Family RSA NetWitness Endpoint
Deal Description test	NSP Number

▼ RSA NetWitness Platform

# 4- Create Quote

# Create Quote

- If you submitted the opportunity for Deal Registration, once DR is approved, you will be able to proceed with Quote creation.
- From the opp., click on 'Create Quote' button.

Opportunity  
1100 MASS MUTUAL: 22AY2CEAU-IE - 1100 MASS MUTUAL - RSA Netwitness Endpoint

+ Follow Edit Printable View **Create Quote**

Account Name	Expected Closed Date	Expected Value	Opportunity Owner
1100 MASS MUTUAL	11/16/2021		To Be Assigned

Account Name: 1100 MASS MUTUAL

Opportunity Name: 1100 MASS MUTUAL: 22AY2CEAU-IE - 1100 MASS MUTUAL - RSA Netwitness Endpoint

Partner Projected Amount: USD 70,000.00

Deal Partner Owner

Do Not Use Partner Contact Lookup:

Sold To: INGRAM MICRO

SoldTo SAP ID

Deal Registration:

Opportunity Owner: To Be Assigned

PSC Owner

Probability (%): 10%

Stage: Discovery

Expected Closed Date: 11/16/2021

Price Book

Deal Registration Extension Re... (0)

Products (0)

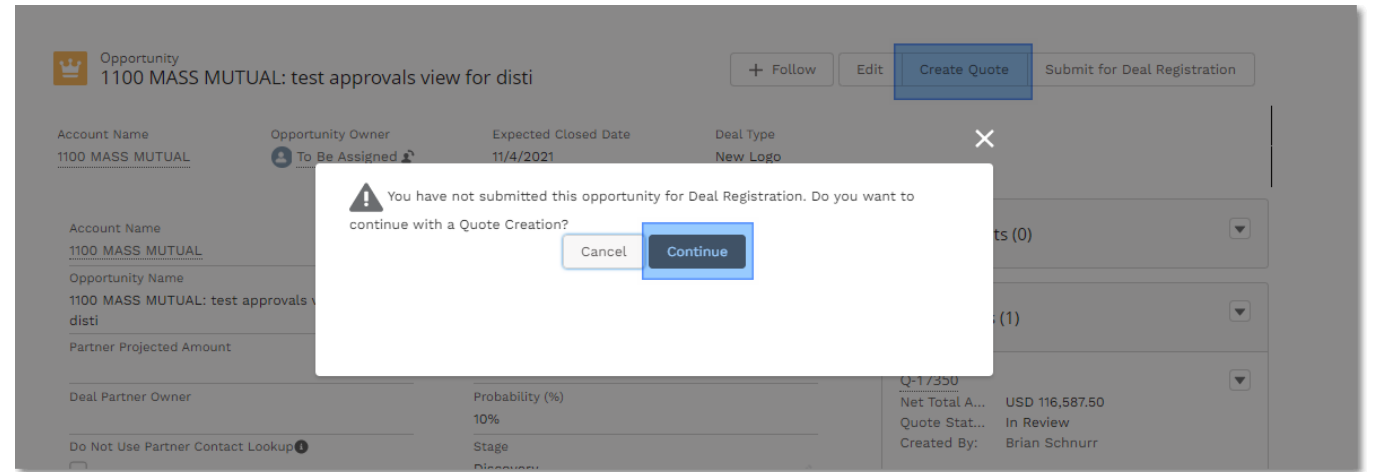
Quotes (0)

Orders (0)

Service Contracts (0)

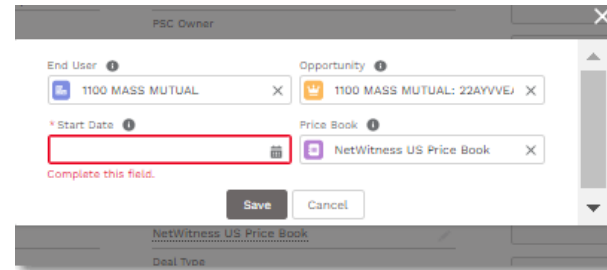
# Create Quote

- Please note Deal Registration is not mandatory. So, if the deal is not Deal Reg eligible (for example in the case of a Public Tender) and you wish to proceed without submitting one, you can.
- From the opp., click on 'Create Quote'. A Pop-up message will appear alerting you there is no DR linked to this opp. Just click on 'Continue' and you'll be able to create the Quote.

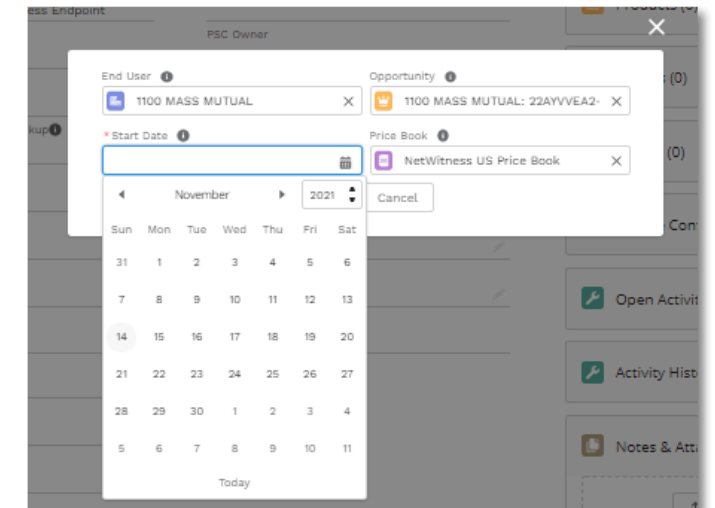


# Create Quote

- The Create New Quote box appears and confirms the End User account, Start Date and Price Book
- Enter the start date here



The screenshot shows a dialog box titled "PSC Owner" with a close button (X) in the top right corner. It contains four fields: "End User" with a dropdown menu showing "1100 MASS MUTUAL", "Opportunity" with a dropdown menu showing "1100 MASS MUTUAL: 22AYVVE/", "Start Date" with a calendar icon and a red box around it, and "Price Book" with a dropdown menu showing "NetWitness US Price Book". Below the "Start Date" field, there is a red asterisk and the text "Complete this field." At the bottom of the dialog are "Save" and "Cancel" buttons.



The screenshot shows the same "PSC Owner" dialog box, but with a calendar open for the "Start Date" field. The calendar is for the month of November 2021. The date 14 is selected. The calendar has a header with "November" and "2021", and a "Cancel" button to the right. The background of the dialog is dimmed.

# Create Quote

- Quote is created. You will see the Quote number on the top left side.
- Quote Details page is broken out into Deal Information, Status, Contract Information, Discount Information, Accounts, Subsidiary, Documents, Notes & NetSuite Information
- In the Deal Information section, you will see:
  - ✓ Opportunity Link & Sales Rep
  - ✓ Quote number
  - ✓ Order Type & Channel
  - ✓ PO Information

Quote  
Q-20164

Opportunity ⓘ  
1100 MASS MUTUAL: 22AYVVEA2-IE - 1100 MASS  
MUTUAL - RSA NetWitness Endpoint

Primary ⓘ

Currency  
USD - U.S. Dollar

Currency Exchange  
1.000000

Type ⓘ  
Quote

Order Type  
New

Sales Channel  
Channel-Distributor

CPQ Start Date

Sales Rep ⓘ  
To Be Assigned

Owner  
John.Bohannon

Last Modified By  
John.Bohannon, 11/14/2021, 11:08 AM

Created By  
John.Bohannon, 11/14/2021, 11:08 AM

PO Number

PO Date

PO Amount

# Create Quote

- The Status section shows:
    - ✓ Quote & Approval Status
    - ✓ Expire Date
    - ✓ Ordered Status
  - The Contract section Shows:
    - ✓ Start Date
    - ✓ Payment Terms
    - ✓ Number of Months for Deal
- \*End date is not populated for Net New Deals

▼ Status

Quote Status ⓘ Draft	Submitted Date ⓘ
Approval Status ⓘ	Submitted User ⓘ
Ordered ⓘ <input type="checkbox"/>	Expires On ⓘ 12/14/2021

▼ Contract Information

Start Date ⓘ 11/25/2021	Payment Terms ⓘ Net 30
No. Of Months ⓘ 12	
End Date ⓘ	

# Create Quote

- The Discount section Shows:
  - ✓ List & Net price
  - ✓ Overall discount level
  - ✓ Deal Reg code & discount if applicable

Quote Q-19384

Opportunity: 1100 MASS MUTUAL: 22AY2CEAU-IE - 1100 MASS MUTUAL - RSA NetWitness Endpoint

Primary:

Currency: USD - U.S. Dollar

Currency Exchange: 1.000000

Type: Quote

Order Type: New

Sales Channel: Channel-Distributor

CPQ Start Date

Status: Quote Status: Approved

Approval Status: Approved

Ordered:

Contract Information: Start Date: 11/4/2021

No. Of Months

End Date

Discount Information: List Amount: USD 238,330.00; Net Total Amount: USD 152,600.00; Overall Discount: 35.97%; Deal Registration Code: 22AY2CEAU-IE; Deal Registration Discount: 15%

Sold To

Sales Rep: Lori Griffin

Owner: Brian Schnurr

Last Modified By: 11/12/2021, 4:31 AM

Created By: 11/4/2021, 7:09 PM

PD Number: 1234567

PD Date: 11/12/2021

PD Amount: USD 152,600.00

Submitted Date: 11/4/2021

Submitted User: Brian Schnurr

Expires On: 12/4/2021

Payment Terms: Net 30

Quote Lines (3): QL-0109671, QL-0109672, QL-0109673

Approvals (1): A-00695

Orders (1): 0500007827

Notes & Attachments (2): RSA Quote - P..., RSA Quote - P...

# Create Quote

- The Accounts section provides address and contact information which have defaulted from the Opportunity, only some of these accounts can be update at the quote level:
  - ✓ Sold to – cannot be updated
  - ✓ End User – cannot be updated
  - ✓ Ship to – can be updated
  - ✓ Install at – can be updated
  - ✓ Bill to – can be updated
  - ✓ Reseller – cannot be updated

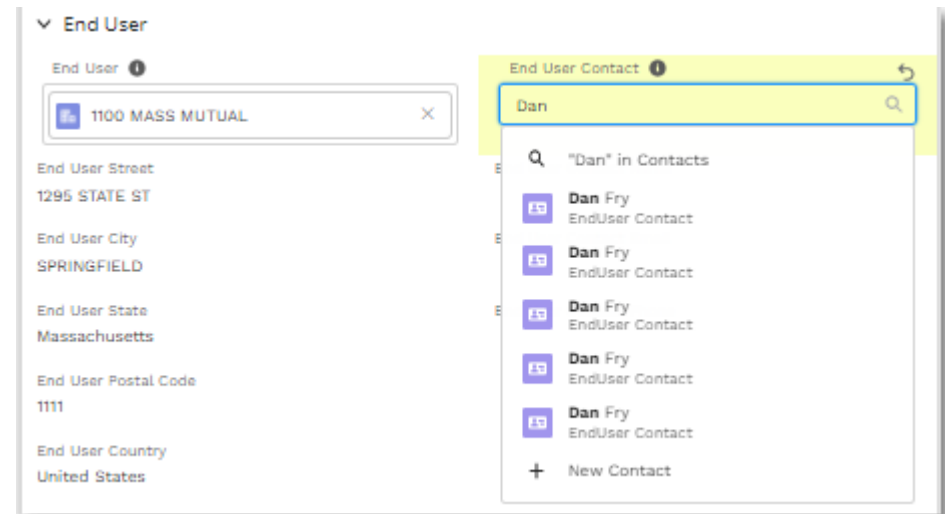
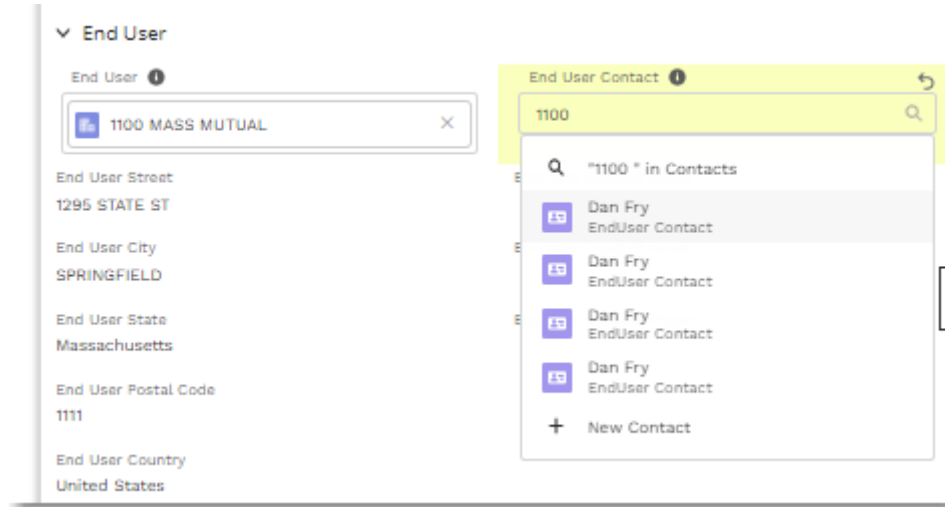
**\*All accounts must have contact selected\***

The screenshot displays a quote creation interface with four main sections: Sold To, Partner (Reseller), End User, and Ship To. Each section contains a list of fields for address and contact information, with some fields pre-filled with example data. The Sold To section includes fields for Street, City, State, Postal Code, and Country. The Partner (Reseller) section includes fields for Street, City, State, Postal Code, and Country. The End User section includes fields for Street, City, State, Postal Code, and Country. The Ship To section includes fields for Street, City, State, and Postal Code. Each section also has a corresponding contact information field (Name, Email, Phone) with a dropdown menu to select a contact.

Section	Field	Value
Sold To	Sold To Street	1600 E SAINT ANDREW PL, MISC MISC MISC MISC GLOBAL IS FINANCE, DEPT
	Sold To City	SANTA ANA
	Sold To State	California
	Sold To Postal Code	92705
	Sold To Country	United States
	Sold To Contact	[Dropdown]
Partner (Reseller)	Partner (Reseller) Street	1144 15th Street, SUITE 2900
	Partner (Reseller) City	DENVER
	Partner (Reseller) State	Colorado
	Partner (Reseller) Postal Code	80202
	Partner (Reseller) Country	United States
	Partner (Reseller) Contact	[Dropdown]
End User	End User Street	1295 STATE ST
	End User City	SPRINGFIELD
	End User State	Massachusetts
	End User Postal Code	01111
	End User Country	United States
	End User Contact	[Dropdown]
Ship To	Ship To Street	1295 STATE ST
	Ship To City	SPRINGFIELD
	Ship To State	Massachusetts
	Ship To Contact	[Dropdown]
	Ship To Contact Name	[Text]
	Ship To Contact Email	[Text]

# Searching a Contact

- There are two ways to search and add a contact to the account:
  - Copy and paste the copy name or UCID into the contact field:
    - A list of known contacts will appear, click on Show All Results to see every contact and select the required contact
  - If the contact's name is known type the name in the contact field, the contact will appear and click to select it



# Creating a Contact

- If you need to add a new contact, select 'new contact' in the drop down
- In the New Contact box select the contact type and click next
- In the next page enter the account you are linking the contact to.
- Enter the first and last name
- Enter the email address and phone number
- Click Save

The first screenshot shows the 'End User' form with a dropdown menu for 'End User Contact' open, highlighting the 'New Contact' option. The second screenshot shows the 'New Contact' dialog box with 'EndUser Contact' selected. The third screenshot shows the 'New Contact: EndUser Contact' form with various fields for contact information, role, and currency.

# Create Quote

- Subsidiary Section is where the Legal Sales Entity is entered
- Quote Documents will show the type of output and T&C's used for the Transaction
- Notes Section is where you can enter notes for the order management Team (Internal), Shipping Instructions, Invoice Output & Approval Reason
  - ✓ Approval Reason must contain a discount driver for any pricing discount above list price

The screenshot displays the 'Subsidiary Information' section of a NetSuite form. The 'Subsidiary' field is highlighted in yellow and contains a dropdown menu with 'US80 RSA Security LLC' selected. Below this, there are input fields for 'Subsidiary ID', 'Subsidiary Name', 'Subsidiary Street', 'Subsidiary City', 'Subsidiary State', 'Subsidiary Postal Code', and 'Subsidiary Country'. The 'Quote Document Options' section includes checkboxes for 'Include Standard Terms and Conditions' (checked) and 'Include Custom Terms and Conditions' (unchecked), along with a 'Quote Template' dropdown set to 'Indirect'. The 'Notes' section contains four text areas: 'Output Text', 'Internal Notes', 'Shipping Comment', and 'Approval Reason Notes'. The 'NetSuite Information' section includes a 'NetSuite ID' field and a 'NetSuite Integration Status' dropdown set to 'Draft'. A 'NetSuite Integration Message' field is also present at the bottom.

# Create Quote

- To add products, click on 'Edit Lines'

The screenshot displays the NetWitness Partner Central interface. At the top, a green success message reads "Success! New Quote has been created." The main header includes a search bar and navigation tabs: DEAL REG., CPQ, CASES, GAF, REBATES, REPORTS, PARTNER FINDER, and MORE. The user is identified as Brian Schnurr. The main content area shows a quote card for "Quote Q-19384". To the right of the quote card are buttons for "Edit", "Edit Lines" (highlighted in blue), and "Submit for Approval". Below these are several summary cards: "Quote Lines (0)", "Approvals (0)", "Orders (0)", and "Notes & Attachments (0)". The quote details are organized into two columns:

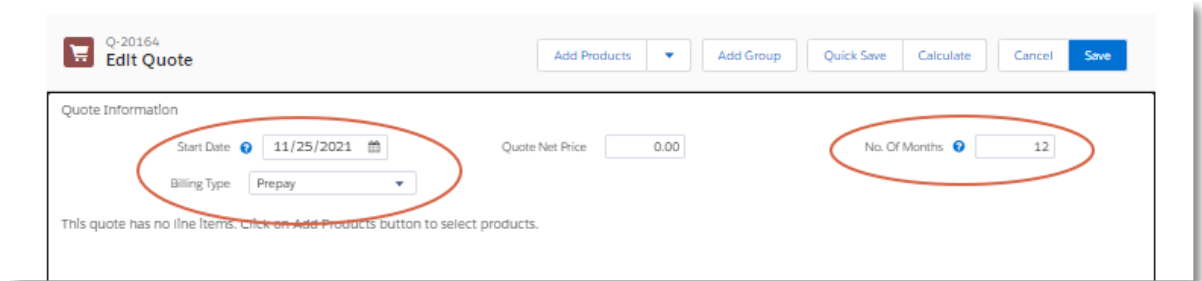
- Opportunity:** 1100 MASS MUTUAL: 22AY2CEAU-IE - 1100 MASS MUTUAL - RSA Netwitness Endpoint
- Primary:**
- Currency:** USD - U.S. Dollar
- Currency Exchange:** 1.000000
- Type:** Quote
- Order Type:** New
- Sales Channel:** Channel-Distributor
- Status:** Quote Status: Draft, Approval Status: [blank]

Additional fields on the right side include:

- Sales Rep:** Lori Griffin
- Owner:** Brian Schnurr
- Last Modified By:** Brian Schnurr, 11/4/2021, 7:09 PM
- Created By:** Brian Schnurr, 11/4/2021, 7:09 PM
- PO Number:** [blank]
- PO Date:** [blank]
- PO Amount:** [blank]
- Submitted Date:** [blank]
- Submitted User:** [blank]

# Create Quote

- In the next screen you can amend the start date & apply a billing type for the whole deal
- On this screen you can also amend the number of months you want to price, when ready to add your product click the 'Add Products' button



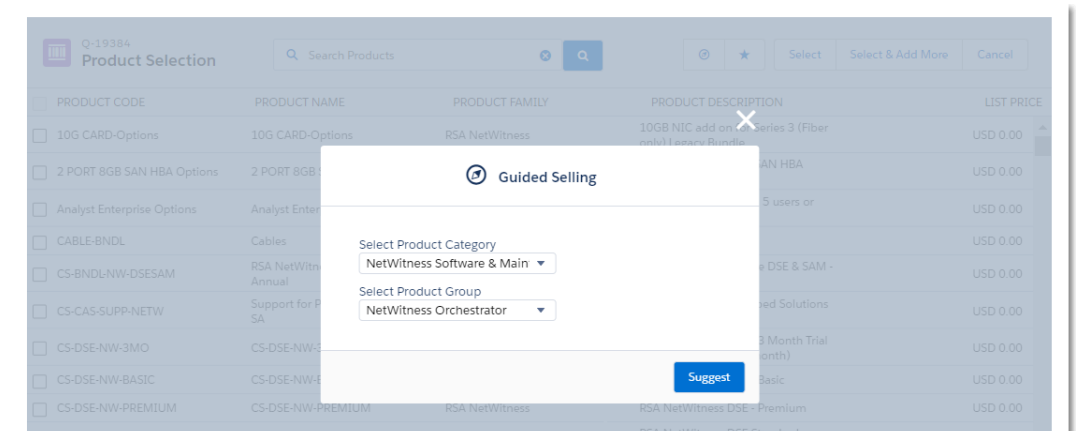
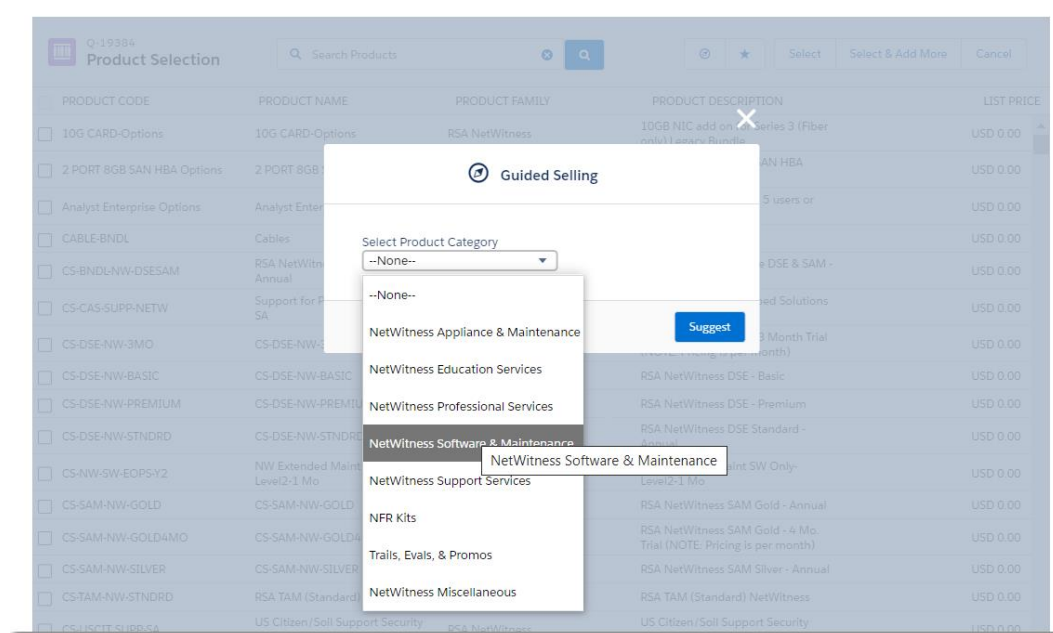
The screenshot displays the 'Edit Quote' interface for quote Q-20164. The interface includes a header with a shopping cart icon, the quote ID 'Q-20164', and the title 'Edit Quote'. Below the header are several action buttons: 'Add Products' (with a dropdown arrow), 'Add Group', 'Quick Save', 'Calculate', 'Cancel', and 'Save'. The main content area is titled 'Quote Information' and contains the following fields:

- Start Date:** A date picker field set to '11/25/2021', circled in red.
- Billing Type:** A dropdown menu currently set to 'Prepay', circled in red.
- Quote Net Price:** A text input field containing '0.00'.
- No. Of Months:** A text input field containing '12', circled in red.

At the bottom of the form, there is a message: 'This quote has no line items. Click on Add Products button to select products.'

# Add Products

- The Guided Selling feature will allow you to search by product category



# Add Products

- Select the product you wish to add
- Configure your product (enter the quantity or usage you require)
- Select the license type for that product
- Once done, click 'SAVE'

Q-19384 Product Selection

Search Products

Select Select & Add More Cancel

PRODUCT CODE	PRODUCT NAME	PRODUCT FAMILY	PRODUCT DESCRIPTION	LIST PRICE
<input type="checkbox"/> RSA-0019100	Orchestrator Subscription SW Options	RSA NetWitness	RSA NetWitness Orchestrator	USD 0.00
<input checked="" type="checkbox"/> RSA-0019130	Orchestrator Cloud Subscription SW Options	RSA NetWitness	NetWitness Orchestrator Cloud Subscription Software	USD 0.00
<input type="checkbox"/> RSA-0019140	Orchestrator OnPrem Subscription SW Options	RSA NetWitness	NetWitness Orchestrator OnPrem Subscription Software	USD 0.00

Q-19384 Configure Products

Apply Rules Cancel Save

Orchestrator Cloud Subscription SW Options

License Type New

Cloud  
Choose at least 1 of the following:

QUANTITY	PRODUCT CODE	PRODUCT NAME	PRODUCT DESCRIPTION	UNIT PRICE
<input checked="" type="checkbox"/> 1	NW-OCH-CLD-STARTER	NW Orch Cloud Starter Sub Lic 1M	NW Orch Cloud Starter Sub Lic 1M	USD 0.00
<input type="checkbox"/> 1	NW-OCH-CLD-STD	NW Orch Cloud Standard Sub Lic 1M	NW Orch Cloud Standard Sub Lic 1M	USD 0.00
<input type="checkbox"/> 1	NW-OCH-CLD-LARGE	NW Orch Cloud Large Sub Lic 1M	NW Orch Cloud Large Sub Lic 1M	USD 0.00
<input type="checkbox"/> 1	NW-OCH-CLD-STR-DEV	NW Orch Cloud Starter Dev Sub Lic 1M	NW Orch Cloud Starter Dev Sub Lic 1M	USD 0.00
<input type="checkbox"/> 1	NW-OCH-CLD-STD-DEV	NW Orch Cloud Standard Dev Sub Lic 1M	NW Orch Cloud Standard Dev Sub Lic 1M	USD 0.00
<input type="checkbox"/> 1	NW-OCH-CLD-LRG-DEV	NW Orch Cloud Large Dev Sub Lic 1M	NW Orch Cloud Large Dev Sub Lic 1M	USD 0.00
<input type="checkbox"/> 1	NW-OCH-CLD-SML-PLB	NW Orch Cloud Small Playbk Sub Lic 1M	NW Orch Cloud Small Playbk Sub Lic 1M	USD 0.00
<input type="checkbox"/> 1	NW-OCH-CLD-MED-PLB	NW Orch Cloud Medium Playbk Sub Lic 1M	NW Orch Cloud Medium Playbk Sub Lic 1M	USD 0.00
<input type="checkbox"/> 1	NW-OCH-CLD-LRG-PLB	NW Orch Cloud Large Playbk Sub Lic 1M	NW Orch Cloud Large Playbk Sub Lic 1M	USD 0.00
<input type="checkbox"/> 1	NW-OCH-CLD-POC	NW Orch Cloud POC Sub Lic 1M	NW Orch Cloud POC Sub Lic 1M	USD 0.00
<input type="checkbox"/> 1	NW-OCH-CLD-STORAGE	NW Orch Cloud ExtraStrg per GB SubLic 1M	NW Orch Cloud ExtraStrg per GB SubLic 1M	USD 0.00

Upgrade  
Choose at least 1 of the following:

QUANTITY	PRODUCT CODE	PRODUCT NAME	PRODUCT DESCRIPTION	UNIT PRICE
<input type="checkbox"/> 1	NW-OCH-CLD-ADDUSER	NW Orch Cloud Addl Full User SubLic 1M	NW Orch Cloud Addl Full User SubLic 1M	USD 0.00



# Add Products

- You will be taken back to the Quote Line Editor page.
- To save any changes you've made click on 'Quick Save'
- If you need to make any changes on the configuration, go to the far right and click on the wrench icon.

Q-19384  
Edit Quote

Add Products Add Group Quick Save Calculate Cancel Save

Quote Net Price 178,747.50 No. Of Months

QUANTITY	START DATE	NO. OF MONTHS	RSA MATERIAL	DISCOUNT %	NET PRICE	LIST PRICE	
1	11/4/2021		RSA-0019130			USD 0.00	
10	11/4/2021		RSA-0019130	25.00%	USD 82,500.00	USD 110,000.00	Reconfigure Line
10	11/4/2021		RSA-0019130	25.00%	USD 96,247.50	USD 128,330.00	

SUBTOTAL: USD 178,747.50  
QUOTE TOTAL: USD 178,747.50

# Add Products

- You will also have an option to clone the line or delete it.
- If you wish to add more products to the Quote, click on 'Add Products' again, and repeat the same steps.

Q-19384 Edit Quote

Quote Net Price: 178,747.50 No. Of Months:

QUANTITY	START DATE	NO. OF MONTHS	RSA MATERIAL	DISCOUNT %	NET PRICE	LIST PRICE	
1	11/4/2021		RSA-0019130			USD 0.00	
10	11/4/2021		RSA-0019130	25.00%	USD 82,500.00	USD 110,000.00	
10	11/4/2021		RSA-0019130	25.00%	USD 96,247.50	USD 128,330.00	
SUBTOTAL:						USD 178,747.50	
QUOTE TOTAL:						USD 178,747.50	

Q-19384 Edit Quote

Quote Net Price: 178,747.50 No. Of Months:

QUANTITY	START DATE	NO. OF MONTHS	RSA MATERIAL	DISCOUNT %	NET PRICE	LIST PRICE	
1	11/4/2021		RSA-0019130			USD 0.00	
10	11/4/2021		RSA-0019130	25.00%	USD 82,500.00	USD 110,000.00	
10	11/4/2021		RSA-0019130	25.00%	USD 96,247.50	USD 128,330.00	
SUBTOTAL:						USD 178,747.50	
QUOTE TOTAL:						USD 178,747.50	

# Billing Type

- You can update the billing type on the line item by clicking on the arrow on the far right to expand the drawer information which exposes the line item level information

Q-20164 Edit Quote

Quote Net Price: 2,100,060.7 No. Of Months: 12

QUANTITY	START DATE	NO. OF MONTHS	RSA MATERIAL	DISCOUNT %	NET PRICE	LIST PRICE	
1	11/25/2021	12	RSA-0019100		USD 0.00	USD 0.00	☆ ↗ 🗑️ ▶
20	11/25/2021	12	RSA-0019100	25.00%	USD 2,100,060.00	USD 2,800,080.00	☆ ↗ 🗑️ ▶

BILLING TERM: Prepay  
 NET UNIT PRICE: USD 105,003.00  
 TIERED PRICE:    
 PRICED:    
 COMPUTER ID: /   
 NETSUITE SERIAL NO: /   
 REPLACE SERIAL NUMBER: /

1 11/25/2021 ED-NW-TRAINCREDIT 25.00% USD 0.75 USD 1.00 ☆ ↗ 🗑️ ▶

SUBTOTAL: USD 2,100,060.75  
QUOTE TOTAL: USD 2,100,060.75

Q-20164 Edit Quote

Quote Information

Start Date: 11/25/2021 Quote Net Price: 2,100,060.7 No. Of Months: 12

Billing Type: Prepay

#	PRODUCT CODE	DESCRIPTION	QUANTITY	START DATE	NO. OF MONTHS	RSA MATERIAL	DISCOUNT %	
1	RSA-0019100	RSA NetWitness Orchestrator	1	11/25/2021	12	RSA-0019100		
2	NW-OCH-PPM-4U-S	NW Orchstrator +4Urr Sub Lic 1M-DMSTO	20	11/25/2021	12	RSA-0019100	25.00%	USD 2,100,060.00

**BILLING TYPE**  
 Prepay  
 BILLING TERM: Prepay  
 NET UNIT PRICE: USD 105,003.00  
 PRICING METHOD: List  
 TIERED PRICE:    
 PRICED:    
 USER LEVEL EFFECTIVE: 1  
 COMPUTER ID: /   
 NETSUITE SERIAL NO: /   
 PREVIOUS SERIAL NUMBER: /   
 REPLACE SERIAL NUMBER: /

3 ED-NW-TRAINCREDIT RSA NetWitness Training Credit 1 11/25/2021 ED-NW-TRAINCREDIT 25.00%

# Price your Quote

- Any upfront discounts applying on the Quote (Disti. standard discount, Deal registration discount) will show under the 'Discount %' column.
- Please note this column shows the total discount. On the Quote details page, you'll have a 'Discount Information' section. And you'll have a detailed discount breakdown in the Quote proposal\* document.

\* Refer to slide 29-31

Q-19384 Edit Quote

Quote Net Price: 178,747.50

No. Of Months:

Prepay

DESCRIPTION	QUANTITY	START DATE	NO. OF MONTHS	RSA MATERIAL	DISCOUNT %	NET PRICE	LIST PRICE
RSA NetWitness Orchestrator Cloud	1	11/4/2021		RSA-0019130			USD 0.0
NW Orch Cloud Starter Sub Lic 1M	10	11/4/2021		RSA-0019130	25.00%	USD 82,500.00	USD 110,000.0
NW Orch Cloud Starter To Std Sub Lic1M	10	11/4/2021		RSA-0019130	25.00%	USD 96,247.50	USD 128,330.0
						SUBTOTAL:	USD 178,747.50
						QUOTE TOTAL:	

# Price your Quote

- To price the Quote, you have 2 options:
  - You can enter your requested price under the Net Price column.
- OR**
- You can enter the percentage of discount required under the 'Discount %' column.
- Once done click on 'Quick Save' or 'Calculate' to see the new Quote total.
- To save the changes and exit the editor page, click 'SAVE'

Q-19384 Edit Quote

Add Products Add Group Quick Save Calculate Cancel Save

11/4/2021 Quote Net Price 178,747.50 No. Of Months

Prepay

DESCRIPTION	QUANTITY	START DATE	NO. OF MONTHS	RSA MATERIAL	DISCOUNT %	NET PRICE	LIST PRICE
RSA NetWitness Orchestrator Cloud	1	11/4/2021		RSA-0019130			USD 0.0
NW Orch Cloud Starter Sub Lic 1M	10	11/4/2021		RSA-0019130	34.00%	USD 82,500.00	USD 110,000.0
NW Orch Cloud Starter To Std Sub Lic1M	10	11/4/2021		RSA-0019130	25.00%	USD 80,000.00	USD 128,330.0
						SUBTOTAL:	USD 178,747.50
							QUOTE TOTAL

# Submit Quote for Approval

- Anything above standard discount will require approval.
- Before submitting the Quote for approval, click on EDIT and enter the **Order Type** (for New deals and Renewals it will automatically populate, but you will need to manually enter it for amendments), **Subsidiary** (country) and **'Approval Reason Notes'** (approval reason must contain a discount driver for any pricing discount above list price).
- Then click 'SAVE'

The screenshot displays the NetSuite interface for editing a quote (Q-19384). The main window shows quote details such as Opportunity (1100 MASS MUTUAL), Sales Rep (Lori Griffin), and Currency (USD). An 'Edit Quote' modal is open, showing fields for Bill To Postal Code (92705), Bill To Country (United States), and Subsidiary Information. The Subsidiary dropdown is open, showing 'Ireland' selected. The 'Approval Reason Notes' field is highlighted in blue, with the text 'Enter justification here'. The modal also includes sections for Quote Document Options (Include Standard Terms and Conditions checked), Notes (Output Text, Internal Notes, Shipping Comment, Invoice Notes), and NetSuite Information. Buttons for 'Cancel', 'Save & New', and 'Save' are visible at the bottom right of the modal.

# Submit Quote for Approval

- Click 'Submit for Approval'
- You will receive an email notification once Quote is approved.
- **IMPORTANT**: If you haven't requested any additional discount, you will still need to click 'Submit for Approval'. But instead of being routed to the Sales Ops. Team for review, Quote will auto-approve.

The screenshot displays a quote form for 'Quote Q-19384'. The form is divided into several sections:

- Opportunity:** 1100 MASS MUTUAL: 22AY2CEAU-IE - 1100 MASS MUTUAL - RSA Netwitness Endpoint
- Primary:**
- Currency:** USD - U.S. Dollar
- Currency Exchange:** 1.000000
- Type:** Quote
- Order Type:** New
- Sales Channel:** Channel-Distributor
- Status:** Quote Status: Draft, Approval Status:
- Ordered:**
- Sales Rep:** Lori Griffin
- Owner:** Brian Schnurr
- Last Modified By:** Brian Schnurr, 11/4/2021, 7:40 PM
- Created By:** Brian Schnurr, 11/4/2021, 7:09 PM
- Submitted Date:** 12/4/2021
- Submitted User:** [User]
- Expires On:** 12/4/2021

At the top right, there are buttons for 'Edit', 'Edit Lines', and 'Submit for Approval'. The 'Submit for Approval' button is highlighted in blue. Below the main form, there are sections for 'Quote Lines (3)', 'Approvals (0)', 'Orders (0)', and 'Notes & Attachments (0)'. The 'Quote Lines' section lists three items with their respective product codes, descriptions, and quantities.

# Quote Proposal

- To extract a **Quote Proposal**, click on 'Create Proposal'
- A new window will open as Conga Composer generates the document.

The screenshot shows a CRM interface for a Quote Proposal. At the top left, there is a shopping cart icon and the text 'Quote Q-19384'. On the right, there are buttons for 'Edit', 'Recall Approval', and 'Create Proposal' (highlighted in blue). The main content is divided into two columns of fields:

- Left Column:**
  - Opportunity: 1100 MASS MUTUAL: 22AY2CEAU-IE - 1100 MASS MUTUAL - RSA Netwitness Endpoint
  - Primary:
  - Currency: USD - U.S. Dollar
  - Currency Exchange: 1.000000
  - Type: Quote
  - Order Type: New
  - Sales Channel: Channel-Distributor
  - CFO Start Date: (empty)
- Right Column:**
  - Sales Rep: Lori Griffin
  - Owner: Brian Schnurr
  - Last Modified By: Brian Schnurr, 11/4/2021, 7:53 PM
  - Created By: Brian Schnurr, 11/4/2021, 7:09 PM
  - PO Number: (empty)
  - PO Date: (empty)
  - PO Amount: (empty)

Below the main form, there are two sections:

- Quote Lines (3):** A list of three quote lines with details like Product, Product Co., and Quantity.
- Approvals (1):** A section showing one approval with ID A-00695.

The screenshot shows the Conga Composer interface. At the top, there is a 'Return to Quote' link and the Conga Composer logo. Below the logo, the quote ID 'Q-19384' is displayed. A progress bar is shown with the text 'Gathering template(s)'. At the bottom, there is a 'Debug Uri' link and copyright information: 'Copyright © 2006-2021 AppExtremes, Inc - dba Conga. All rights reserved.' and '8.20.345.0 USW1C-076851776C3D7A015'.

# Quote Proposal

- Once document is created you will be taken back to the Quote.
- Go to 'Notes & Attachments' section to open the doc.

The screenshot displays a CRM interface for a Quote Proposal. At the top left, there is a shopping cart icon and the text "Quote Q-19384". The main content is organized into several sections:

- Opportunity:** 1100 MASS MUTUAL: 22AY2CEAU-IE - 1100 MASS MUTUAL - RSA Netwitness Endpoint. Includes a "Primary" checkbox.
- Currency:** USD - U.S. Dollar. **Currency Exchange:** 1.000000.
- Type:** Quote. **Order Type:** New. **Sales Channel:** Channel-Distributor. **CPQ Start Date:** (empty).
- Status:** Quote Status: In Review. Approval Status: Pending. Ordered: (checkbox).
- Sales Rep:** Lori Griffin. **Owner:** Brian Schnurr. **Last Modified By:** Brian Schnurr, 11/4/2021, 7:53 PM. **Created By:** Brian Schnurr, 11/4/2021, 7:09 PM.
- Submitted Date:** 11/4/2021. **Submitted User:** Brian Schnurr. **Expires On:** 12/4/2021.


On the right side, there are three panels:

- Quote Lines (3):** Lists three items with details like Product, Product Co., and Quantity.
- Approvals (1):** Shows one approval with ID A-00695.
- Orders (0):** Shows zero orders.
- Notes & Attachments (1):** Shows one attachment: "RSA Quote - Proposal - a3a6s000000CxBF... Nov 12, 2021 • Attachment".

At the top right, there are buttons for "Edit", "Recall Approval", and "Create Proposal".

# Quote Proposal

- If the Quote is in draft status or pending approval, Quote proposal will have a 'DRAFT' watermark. Once Quote is approved, this will no longer show.
- On the top right corner, you will have your Quote#, DR code (if there is one linked to the opp.), quote expiration date, etc.
- Then you'll have a section showing the products, quantity, list and net price; and a discount column showing a breakdown of the discounts that are applying on the Quote.



**RSA Quote**  
US80 RSA Security LLC

**Quote Creation Date** 11/4/2021 7:09:31 PM  
**Quote #** Q300014395  
**Valid Until** 12/4/2021 12:00:00 AM  
**Deal Reg. Code** 22AY2CEAU-IE  
**Quote Prepared By** Brian Schwarz  
**Email** brian.schwarz@progeniesecurity.com

Customer Type: **New**  
 Quote Currency: **USD**

This quotation (i) expires if not accepted by the above date; and (ii) is subject to the terms and conditions set forth in Exhibit A (and Exhibit B, if applicable), attached hereto. Unless otherwise stated all currencies are in U.S. Dollars. Prices below do not include applicable taxes or shipping charges.

Sold To	Reseller	End User	Ship To	Bill To
PROGRAM MICRO  1800 E SAINT ANDREW PL. MISC MISC MISC MISC GLOBAL IS FINANCE, DEPT SANTA ANA, California 92705 United States	OPTIX SECURITY INC  1144 15th Street, SUITE 2000 DENVER, Colorado 80202 United States	1100 MASS MUTUAL  1295 STATE ST SPRINGFIELD, Massachusetts 1111 United States	1100 MASS MUTUAL  1295 STATE ST SPRINGFIELD, Massachusetts 1111 United States	PROGRAM MICRO  1295 STATE ST SPRINGFIELD, Massachusetts 1111 US

**Hardware/Software**

Item	Description	Qty	Start Date	Term	List Price	Disc. %	Unit Net Price	Ext. Net Price
RSA-0019130 Serial Number: Licensed Quantity: 1 Billing Plan Type: Prepay	RSA NetWitness Orchestrator Cloud	1	11/04/2021		USD 0.00	Standard: 0% Deal Reg: 15% Negotiated:	USD 0.00	USD 0.00
NW-OCH-CLD-STARTER Serial Number: Licensed Quantity: 1 Billing Plan Type: Prepay	NW Orch Cloud Starter Sub Lic 1M	10	11/04/2021		USD 11,000.00	Standard: 10% Deal Reg: 15% Negotiated: 34%	USD 7,260.00	USD 72,600.00
NW-OCH-CLD-UPGRD-A Serial Number: Licensed Quantity: 1 Billing Plan Type: Prepay	NW Orch Cloud Starter To Std Sub Lic1M	10	11/04/2021		USD 12,833.00	Standard: 10% Deal Reg: 15% Negotiated: 38%	USD 8,000.00	USD 80,000.00
<b>Subtotal:</b>							<b>152,600</b>	

# Multiple Quotes for one opportunity

- You can have **multiple Quotes** linked to the **same opportunity**.
- You won't be able to re-version an existing Quote, but you can clone it. To do this, go to the drop-down option and click 'Clone with Related'
- **IMPORTANT**: Please note **only 1 Quote can be Primary**, and that's the quote you'll be able to place to order.

Quote Q-19384

Opportunity  
1100 MASS MUTUAL: 22AY2CEAU-IE - 1100 MASS MUTUAL - RSA Netwitness Endpoint

Primary

Currency  
USD - U.S. Dollar

Currency Exchange  
1.000000

Type  
Quote

Sales Rep  
Lori Griffin

Owner  
Brian Schnurr

Last Modified By  
Brian Schnurr, 11/4/2021, 7:53 PM

Created By  
Brian Schnurr, 11/4/2021, 7:09 PM

PO Number

PO Date

Quote Lines (3)

QL-0109671  
Product: Orchestrator Cloud Subscription S...  
Product Co... RSA-0019130  
Quantity: 1.00

QL-0109672  
Product: NW Orch Cloud Starter Sub Lic 1M  
Product Co... NW-OCH-CLD-STARTER  
Quantity: 10.00

QL-0109673  
Product: NW Orch Cloud Starter To Std Sub...  
Product Co... NW-OCH-CLD-UPGRD-A  
Quantity: 10.00

View All

Clone with Related

Quote Line (3)

LINE NAME	NUMBER	GROUP	PRODUCT NAME	LIST UNIT PRICE	QUANTITY	CUSTOMER TOTAL	NET TOTAL
QL-0109671	1		Orchestrator Cloud Subscription SW Options	USD 0.00	1.00	USD 0.00	USD 0.00
QL-0109672	2		NW Orch Cloud Starter Sub Lic 1M	USD 11,000.00	10.00	USD 110,000.00	USD 72,600.00
QL-0109673	3		NW Orch Cloud Starter To Std Sub Lic 1M	USD 12,833.00	10.00	USD 128,330.00	USD 80,000.00

# Multiple Quotes for one opportunity

- A new Quote will be generated with the exact same information as the original one (same products, configuration and status).
- If your original Quote is in approved status, the cloned one will also be approved. Therefore, if you want to make any changes on this second quote, you will have to 'Recall the Approval' to be able to edit it. Once changes are made, you will have to submit it for approval.

Quote Q-20135

Recalculating... Processing

Opportunity 1  
1100 MASS MUTUAL: 22AY2CEAU-IE - 1100 MASS MUTUAL - RSA Netwitness Endpoint

Primary 1

Currency  
USD - U.S. Dollar

Currency Exchange  
1.000000

Type 1  
Quote

Order Type  
New

Sales Channel  
Channel-Distributor

CPQ Start Date

▼ Status

Quote Status 1  
Approved

Approval Status 1  
Approved

Ordered 1

Sales Rep 1  
Lori Griffin

Owner  
Brian Schnurr

Last Modified By  
Brian Schnurr, 11/12/2021, 3:36 AM

Created By  
Brian Schnurr, 11/12/2021, 3:36 AM

PO Number  
1234567

PO Date  
11/12/2021

PO Amount  
USD 152,600.00

Submitted Date 1  
11/4/2021

Submitted User 1  
Brian Schnurr

Expires On 1  
12/4/2021

Edit Recall Approval Create Proposal ▼

Quote Lines (3)

QL-0116899  
Product: Orchestrator Cloud Subscription S...  
Product Co... RSA-0019130  
Quantity: 1.00

QL-0116900  
Product: NW Orch Cloud Starter Sub Lic 1M  
Product Co... NW-OCH-CLD-STARTER  
Quantity: 10.00

QL-0116901  
Product: NW Orch Cloud Starter To Std Sub...  
Product Co... NW-OCH-CLD-UPGRD-A  
Quantity: 10.00

View All

Approvals (0)

Orders (0)

Notes & Attachments (0)

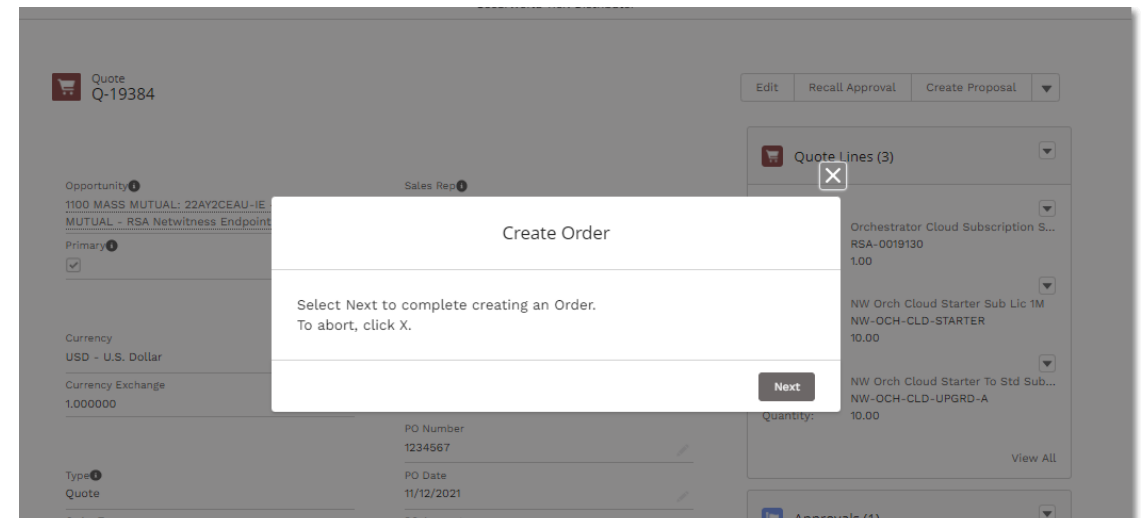
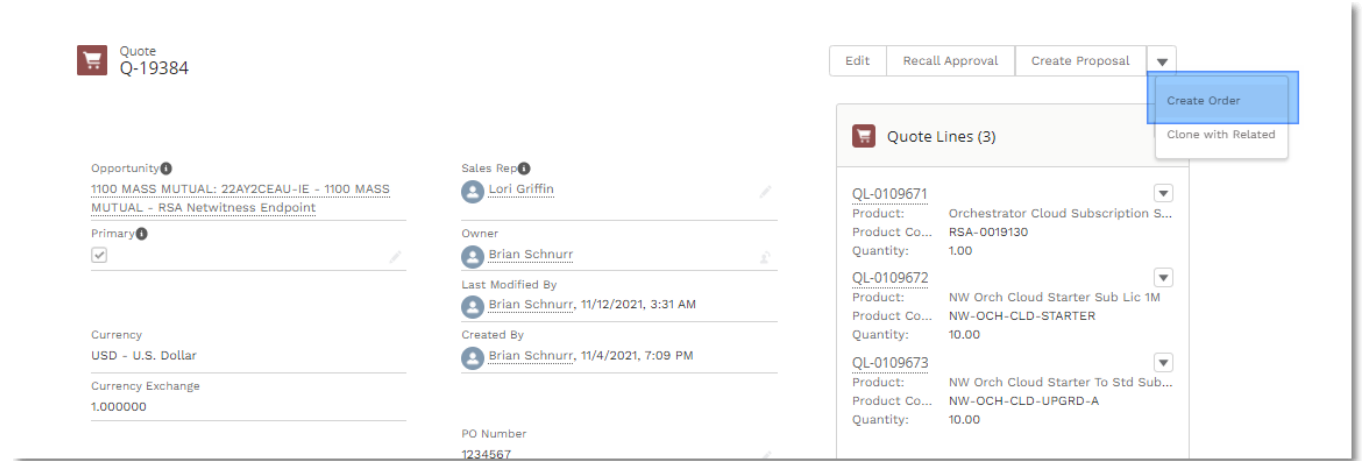
Upload Files

Or drop files

# 5- Place Order

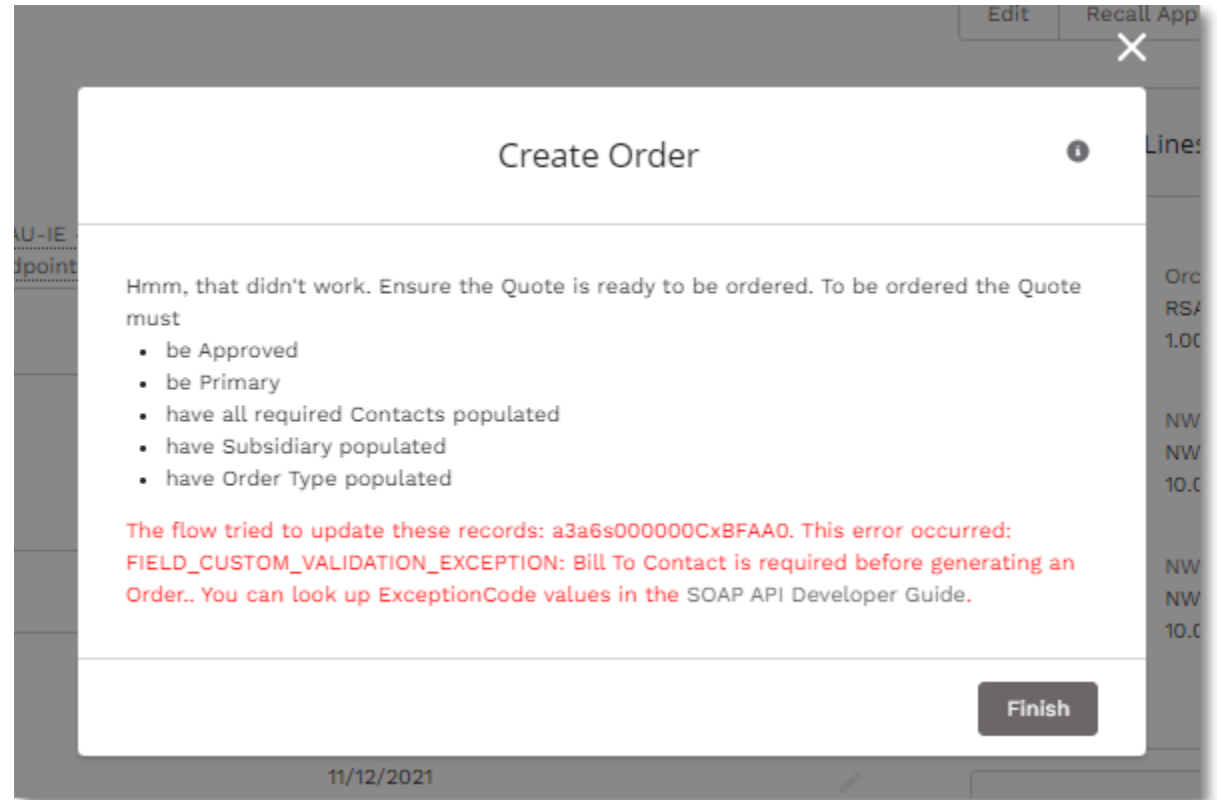
# Place Order

- After Quote is approved, you need to make sure all mandatory fields are filled in before you can place the order:
  - Quote needs to be flagged as Primary
  - PO information needs to be entered (PO#, PO Date, PO Amount)
  - All contact details must be filled
  - Order Type
  - Subsidiary
- To place the order, select 'Create Order' from the dropdown.
- Click NEXT



# Place Order

- If something is missing, you won't be able to place the order and will receive an error message.
- Click on Finish to go back to the Quote and check all required information is populated.



# Place Order

- Once order is placed, the 'Ordered' checkbox will be checked and you will be able to see the Order number under the 'Orders' section

Quote Q-19384

Opportunity  
1100 MASS MUTUAL: 22AY2CEAU-IE - 1100 MASS MUTUAL - RSA Netwitness Endpoint

Primary

Currency  
USD - U.S. Dollar

Currency Exchange  
1.000000

Type  
Quote

Order Type  
New

Sales Channel  
Channel-Distributor

CPQ Start Date

▼ Status

Quote Status  
Approved

Approval Status  
Approved

Ordered

Sales Rep  
Lori Griffin

Owner  
Brian Schnurr

Last Modified By  
Brian Schnurr, 11/12/2021, 4:31 AM

Created By  
Brian Schnurr, 11/4/2021, 7:09 PM

PO Number  
1234567

PO Date  
11/12/2021

PO Amount  
USD 152,600.00

Submitted Date  
11/4/2021

Submitted User  
Brian Schnurr

Expires On  
12/4/2021

Edit Recall Approval Create Proposal

Quote Lines (3)

- QL-0109671  
Product: Orchestrator Cloud Subscription S...  
Product Co... RSA-0019130  
Quantity: 1.00
- QL-0109672  
Product: NW Orch Cloud Starter Sub Lic 1M  
Product Co... NW-OCH-CLD-STARTER  
Quantity: 10.00
- QL-0109673  
Product: NW Orch Cloud Starter To Std Sub...  
Product Co... NW-OCH-CLD-UPGRD-A  
Quantity: 10.00

View All

Approvals (1)

- A-00695

View All

Orders (1)

- 0500007827  
Account Na... 1100 MASS MUTUAL  
Status: Draft/Ready for Review  
Order Amo... USD 152,600.00

View All

# Place Order

- If you click on the order number, you will be able to see the order details and status.
- When the Order is updated to Activate status, the service contract is created. You will find the contract under 'Service Contracts' section.

The screenshot displays the NetWitness order management interface for Order 3700007831. The top header shows the order number and a summary table with columns: Account Name (1100 MASS MUTUAL), Contract Number (3700007831), Order Start Date (12/4/2021), Status (Activate), and Order Amount (USD 1,940,373.60).

The main content area is divided into several sections:

- Order Information:** Contains fields for Quota Number (Q300010691), Opportunity (1100 MASS MUTUAL: Renewal Opportunity), Order Number (3700007831), Original Order Number (3700007831), Order Currency (USD - U.S. Dollar), Order Amount (USD 1,940,373.60), Payment Term (Net 30), Order Reason, Order Type (Renewal), COM Order Type (Renewal), SAP OrderType, Sales Channel (Channel-Distributor), End User (Account Name: 1100 MASS MUTUAL, End User UCID: 1000469266, End User Street: 1295 STATE ST, End User City: SPRINGFIELD), Order Owner (Brian Schnurr), Last Modified By (Cecilia Martin, 11/12/2021, 10:55 AM), and Created By (Brian Schnurr, 11/12/2021, 10:54 AM).
- Status:** A dropdown menu is open, showing 'Activate' as the selected option.
- Order Products (3):** Lists three products: 'Orchestrator Clou...' (Pro: RSA-0019130, Qu: 1.00, Cu: 1.00), 'NW Orch Cloud St...' (Pro: NW-OCH-CLD..., Qu: 10.00, Cu: 10.00), and another 'NW Orch Cloud St...' (Pro: NW-OCH-CLD..., Qu: 10.00, Cu: 10.00).
- Service Contracts (1):** Shows one service contract with details: 'Service Contract' (ID: 6300008589, Sta: 12/4/2021, En: 12/3/2022).
- Notes & Attachments (0):** Includes an 'Upload Files' button and a note 'Or drop files'.

# Amendments & Renewals

# Amendments

- Once the order has been activated and contracted, the Service Contract will be created.
- If you need to add more users, upgrade license type, etc.; you will have to 'amend' the existing service contract.

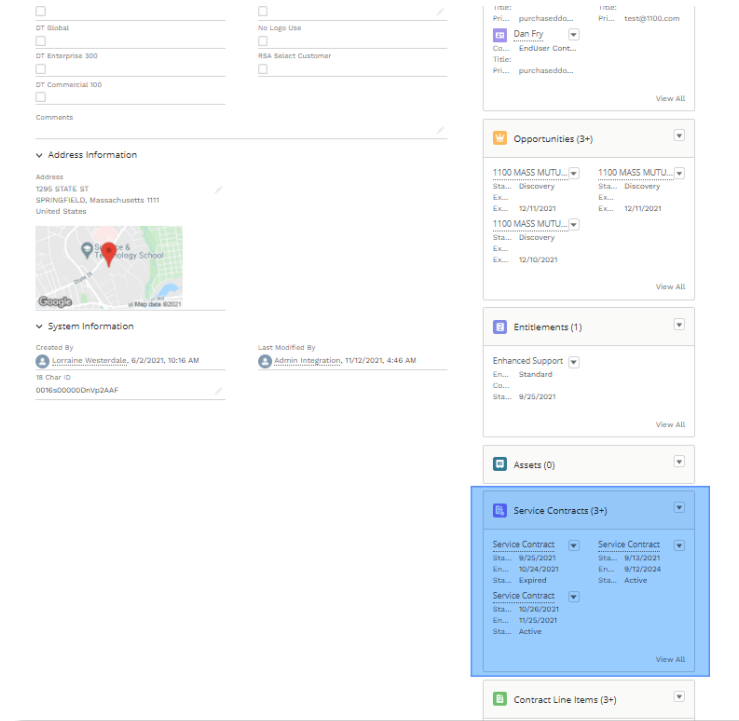
# Amendments

- To amend a contract, the first step is to locate the Service Contract in question. There are 2 ways you can do this:

## Option 1

Find the End User account and go to the 'Service Contracts' section.

Click on View all and select the Contract you want to amend.



Accounts > 1100 MASS MUTUAL  
Service Contracts

4 Items • Sorted by Contract Name • Updated a few seconds ago

	Contract Name ↑	Start Date	End Date	Status
1	Service Contract	9/25/2021	10/24/2021	Expired
2	Service Contract	9/13/2021	9/12/2024	Active
3	Service Contract	10/26/2021	11/25/2021	Active
4	Service Contract	11/4/2021	12/3/2021	Active

# Amendments

## Option 2

Under CPQ select the option 'Contracts & Subscriptions'

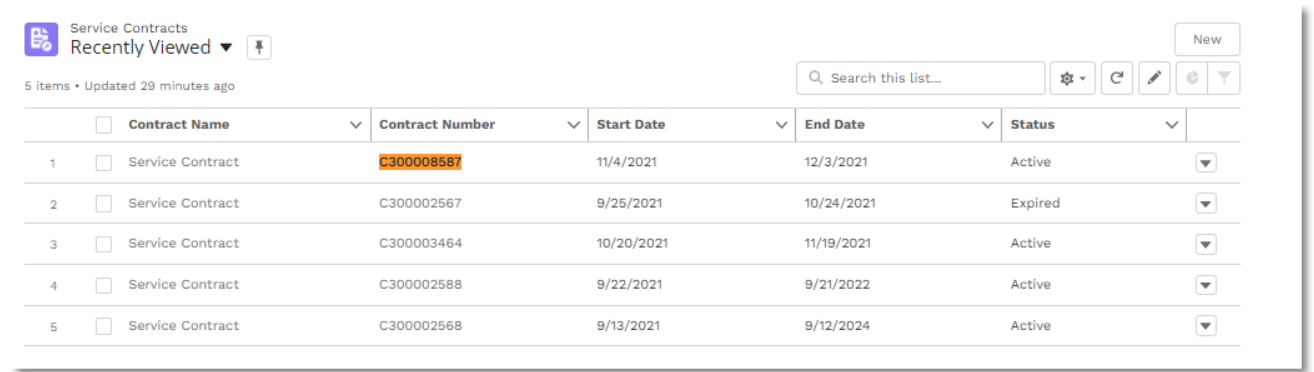
You can change your view to see All service Contracts.

The screenshot shows the NetWitness Partner Central interface. At the top, the NetWitness logo is displayed. Below it is a search bar and a navigation menu with options: Home, DEAL REG., CPQ, CASES, GAF, REBATES, REPORTS, PARTNER FINDER, and MORE. The CPQ menu is expanded, showing sub-options: Accounts, Opportunities, Contracts & Subscriptions (highlighted), Quotes, and Orders. The main content area displays a welcome message and several category tiles: Sales, Technical, Services, Marketing, and Executive. Below this, a 'Service Contracts' section is visible, showing a 'Recently Viewed' list. A dropdown menu is open over this list, with 'All Service Contracts' selected. The table below shows the details of the contracts.

	LIST VIEWS	End Date	Status		
1	✓ Recently Viewed (Pinned list)	10/24/2021	Expired		
2	<input type="checkbox"/> Service Contract	C300003464	10/20/2021	11/19/2021	Active
3	<input type="checkbox"/> Service Contract	C300002588	9/22/2021	9/21/2022	Active
4	<input type="checkbox"/> Service Contract	C300002568	9/13/2021	9/12/2024	Active

# Amendments

- Select the Service Contract you want to amend



Service Contracts  
Recently Viewed

5 items • Updated 29 minutes ago

Search this list...

	<input type="checkbox"/> Contract Name	<input type="checkbox"/> Contract Number	<input type="checkbox"/> Start Date	<input type="checkbox"/> End Date	<input type="checkbox"/> Status	
1	<input type="checkbox"/> Service Contract	C300008587	11/4/2021	12/3/2021	Active	▼
2	<input type="checkbox"/> Service Contract	C300002567	9/25/2021	10/24/2021	Expired	▼
3	<input type="checkbox"/> Service Contract	C300003464	10/20/2021	11/19/2021	Active	▼
4	<input type="checkbox"/> Service Contract	C300002588	9/22/2021	9/21/2022	Active	▼
5	<input type="checkbox"/> Service Contract	C300002568	9/13/2021	9/12/2024	Active	▼

# Amendments

- The Service Contract details page shows:

- Currency
  - This currency the must be used for all renewals and amendments
- Start & End Date
  - All renewals will start from the end date
  - All amendments will automatically co-term to this end date
- Subsidiary
- End User, Ship To and Install at
- Contracted line items in the contract lines section
- Serial numbers and License Qty are captured in the line-item level detail
- The Entitlements created from the contract. If applicable an asset will show at the line-item level

Service Contract  
C300008589

Amend

Contract Name  
Service Contract

Service Contract Owner  
Lorraine Westerdale

Account Name  
1100 MASS MUTUAL

Contact Name

Opportunity  
1100 MASS MUTUAL: Renewal Opportunity

Quote  
Q300010691

Order Number  
3700007831

Original Order Number  
3700007831

Contract ID  
00010547

Contract Name  
Service Contract

Subsidiary  
USB80 RSA Security LLC

Currency  
USD - U.S. Dollar

Sales Channel  
Channel- Distributor

Renewal Quoted

Sold To

Sold To  
INGRAM MICRO

Sold To UCID  
10003B4146

Partner Information

Partner (Reseller)  
OPTIV SECURITY INC

PartResell UCID  
1000048557

Distributor

Distributor  
INGRAM MICRO

PartDistr UCID  
10003B4146

End User

Account Name  
1100 MASS MUTUAL

EndUser UCID  
1000469266

Ship To

Service Contract Owner  
Lorraine Westerdale

Last Modified By  
Brandt Bellamy, 11/12/2021, 11:00 AM

Created By  
Cecilia Martin, 11/12/2021, 10:55 AM

Status  
Inactive

Start Date  
12/4/2021

End Date  
12/3/2022

CPQ PO Date  
11/12/2021

CPQ PO Number  
7775889

SoldTo Contact  
Brian Schnurr

Reseller Contact  
Thomas Cini

End User Contact  
Dan Fry

Contract Line Items (3)

00000001 Pro... Orchestrator ... Pro... RSA-0019130 Sta... 12/4/2021	00000002 Pro... NW Orch Clou... Pro... NW-OCH-CLD... Sta... 12/4/2021
00000003 Pro... NW Orch Clou... Pro... NW-OCH-CLD... Sta... 12/4/2021	

Entitlements (0)

Amendment Opportunities (0)

Co-Terminated Quotes (0)

Renewal Opportunities (1)

1100 MASS MUTU...

# Amendments

- Once inside the Service Contract, click on AMEND
- The next screen shows you what is available on the contract for upselling
- Click AMEND again

LINE ITEM NUMBER	PRODUCT	QUANTITY
00000001	Orchestrator Cloud Subscription SW Options	1.0
00000002	NW Orch Cloud Starter Sub Lic 1M	10.0
00000003	NW Orch Cloud Starter To Std Sub Lic1M	10.0

# Amendments

- What will happen in the background is that the amendment opportunity and amendment quote are being generated.
- You'll be taken directly to the Quote line editor page in the amendment Quote.

The screenshot shows the 'Edit Quote' interface for quote Q-20150. At the top, there are buttons for 'Add Products', 'Add Group', 'Quick Save', 'Calculate', 'Cancel', and 'Save'. Below this is the 'Quote Information' section with fields for 'Start Date' (11/12/2021), 'Quote Net Price' (0.00), and 'Billing Type' (Prepay). A table below contains three items:

#	PRODUCT CODE	DESCRIPTION	QUANTITY	EFFECTIVE QUANT...	START DATE	CALCULATED SUB...	RSA MATERIAL	DISC
1	RSA-0019130	RSA NetWitness Orchestrator Cloud	1	0	11/12/2021	1	RSA-0019130	
2	NW-OCH-CLD-STARTER	NW Orch Cloud Starter Sub Lic 1M	20	0	11/12/2021	1	RSA-0019130	
3	NW-OCH-CLD-UPGRD-A	NW Orch Cloud Starter To Std Sub Lic1M	20	0	11/12/2021	1	RSA-0019130	

# Amendments

- If you wish to submit a Deal Registration, you need to do to it at this point.
- To exit the quote line editor, click on Cancel.
- Back in the Quote details, click on the opportunity link to access the opportunity, and submit the Deal Reg. *(you can refer to slides 12-16 that explain how to submit a DR)*
- Once DR is approved, you'll be able to proceed. Click on Edit Lines to go the Quote Line Editor.

Q-20150  
Edit Quote

Add Products Add Group Quick Save Calculate Cancel Save

Quote Information

Start Date 11/12/2021 Quote Net Price 0.00 Billing Type Prepay

#	PRODUCT CODE	DESCRIPTION	QUANTITY	EFFECTIVE QUANT...	START DATE	CALCULATED SUB...	RSA MATERIAL	DISC
1	RSA-0019130	RSA NetWitness Orchestrator Cloud	1	0	11/12/2021	1	RSA-0019130	
2	NW-OCH-CLD-STARTER	NW Orch Cloud Starter Sub Lic 1M	20	0	11/12/2021	1	RSA-0019130	
3	NW-OCH-CLD-UPGRD-A	NW Orch Cloud Starter To Std Sub Lic1M	20	0	11/12/2021	1	RSA-0019130	

Quote Q-20150

Edit Edit Lines Submit for Approval

Opportunity 1  
1100 MASS MUTUAL: Amendment for contract #00010545

Primary

Account Name 1100 MASS MUTUAL Opportunity Owner Lorraine Westerdale  
Expected Closed Date 11/12/2021 Deal Type

Brandt Bellamy, 11/12/2021, 12:10 PM  
Created By Brandt Bellamy, 11/12/2021, 12:10 PM

Currency USD - U.S. Dollar  
Currency Exchange 1.000000

PO Number  
PO Date  
PO Amount

Type Amendment  
Order Type

Sales Channel Channel-Distributor  
CPO Start Date

Quote Lines (3)

QL-0116982  
Product: Orchestrator Cloud Subscription S...  
Product Co... RSA-0019130  
Quantity: 1.00

QL-0116983  
Product: NW Orch Cloud Starter Sub Lic 1M  
Product Co... NW-OCH-CLD-STARTER  
Quantity: 20.00

QL-0116984  
Product: NW Orch Cloud Starter To Std Sub...  
Product Co... NW-OCH-CLD-UPGRD-A  
Quantity: 20.00

View All

Approvals (0)

Orders (0)

# Amendments

- Move to the far right and click on the wrench to make the required adjustments

The screenshot displays the 'Edit Quote' interface for quote Q-20138. The top section shows 'Quote Information' with fields for Start Date (11/12/2021), Quote Net Price (0.00), and Billing Type (Prepay). Below this is a table of products:

#	PRODUCT CODE	DESCRIPTION	QUANTITY	EFFECTIVE QUANT...	START DATE	CALCULATED SUB...	RSA MATERIAL	DISC
1	RSA-0019130	RSA NetWitness Orchestrator Cloud	1	0	11/12/2021		1 RSA-0019130	
2	NW-OCH-CLD-STARTER	NW Orch Cloud Starter Sub Lic 1M	10	0	11/12/2021		1 RSA-0019130	
3	NW-OCH-CLD-UPGRD-A	NW Orch Cloud Starter To Std Sub Lic1M	10	0	11/12/2021		1 RSA-0019130	

The bottom section shows a detailed view of the products with columns for Effective Quant..., Start Date, Calculated Sub..., RSA Material, Discount %, Net Price, and List Price. A wrench icon is visible in the right margin of the table, indicating the location for amendments. The bottom right corner shows a subtotal and quote total of USD 0.00.

# Amendments

- Select the License Type accordingly

Q-20138  
Configure Products

Orchestrator Cloud Subscription SW Options

License Type: **New**

**Cloud**  
Choose at least 1 of the following:

QUANTITY	PRODUCT CODE	PRODUCT NAME	PRODUCT DESCRIPTION	UNIT PRICE
<input checked="" type="checkbox"/> 10	NW-ORCH-CLD-SML-PLB	NW Orch Cloud Starter Sub Lic 1M	NW Orch Cloud Starter Sub Lic 1M	USD 11,000.00
<input type="checkbox"/> 1	NW-ORCH-CLD-MED-PLB	NW Orch Cloud Standard Sub Lic 1M	NW Orch Cloud Standard Sub Lic 1M	USD 0.00
<input type="checkbox"/> 1	NW-ORCH-CLD-LRG-PLB	NW Orch Cloud Large Sub Lic 1M	NW Orch Cloud Large Sub Lic 1M	USD 0.00
<input type="checkbox"/> 1	NW-ORCH-CLD-POC	NW Orch Cloud Starter Dev Sub Lic 1M	NW Orch Cloud Starter Dev Sub Lic 1M	USD 0.00
<input type="checkbox"/> 1	NW-ORCH-CLD-POC	NW Orch Cloud Standard Dev Sub Lic 1M	NW Orch Cloud Standard Dev Sub Lic 1M	USD 0.00
<input type="checkbox"/> 1	NW-ORCH-CLD-POC	NW Orch Cloud Large Dev Sub Lic 1M	NW Orch Cloud Large Dev Sub Lic 1M	USD 0.00
<input type="checkbox"/> 1	NW-ORCH-CLD-SML-PLB	NW Orch Cloud Small Playbk Sub Lic 1M	NW Orch Cloud Small Playbk Sub Lic 1M	USD 0.00
<input type="checkbox"/> 1	NW-ORCH-CLD-MED-PLB	NW Orch Cloud Medium Playbk Sub Lic 1M	NW Orch Cloud Medium Playbk Sub Lic 1M	USD 0.00
<input type="checkbox"/> 1	NW-ORCH-CLD-LRG-PLB	NW Orch Cloud Large Playbk Sub Lic 1M	NW Orch Cloud Large Playbk Sub Lic 1M	USD 0.00
<input type="checkbox"/> 1	NW-ORCH-CLD-POC	NW Orch Cloud POC Sub Lic 1M	NW Orch Cloud POC Sub Lic 1M	USD 0.00
<input type="checkbox"/> 1	NW-ORCH-CLD-STORAGE	NW Orch Cloud ExtraStrg per GB SubLic 1M	NW Orch Cloud ExtraStrg per GB SubLic 1M	USD 0.00

**Upgrade**  
Choose at least 1 of the following:

QUANTITY	PRODUCT CODE	PRODUCT NAME	PRODUCT DESCRIPTION	UNIT PRICE
<input type="checkbox"/> 1	NW-ORCH-CLD-ADDUSER	NW Orch Cloud Addtl Full User C. 1M	NW Orch Cloud Addtl Full User C. 1M	USD 0.00

**License Type Menu:**

- New
- Renewal
- License Quantity Upgrade
- Advance Warra
- Try and Buy
- Try and Buy Sale
- Return Order

# Amendments

- Make the necessary updates in the configuration and **SAVE**.

Q-20138 **Configure Products** Apply Rules Cancel Save

Orchestrator Cloud Subscription SW Options

License Type

**Cloud**  
Choose at least 1 of the following:

QUANTITY	PRODUCT CODE	PRODUCT NAME	PRODUCT DESCRIPTION	UNIT PRICE
<input checked="" type="checkbox"/> 20	NW-OCH-CLD-STARTER	NW Orch Cloud Starter Sub Lic 1M	NW Orch Cloud Starter Sub Lic 1M	USD 11,000.00
<input type="checkbox"/> 1	NW-OCH-CLD-STD	NW Orch Cloud Standard Sub Lic 1M	NW Orch Cloud Standard Sub Lic 1M	USD 0.00
<input type="checkbox"/> 1	NW-OCH-CLD-LARGE	NW Orch Cloud Large Sub Lic 1M	NW Orch Cloud Large Sub Lic 1M	USD 0.00
<input type="checkbox"/> 1	NW-OCH-CLD-STR-DEV	NW Orch Cloud Starter Dev Sub Lic 1M	NW Orch Cloud Starter Dev Sub Lic 1M	USD 0.00
<input type="checkbox"/> 1	NW-OCH-CLD-STD-DEV	NW Orch Cloud Standard Dev Sub Lic 1M	NW Orch Cloud Standard Dev Sub Lic 1M	USD 0.00
<input type="checkbox"/> 1	NW-OCH-CLD-LRG-DEV	NW Orch Cloud Large Dev Sub Lic 1M	NW Orch Cloud Large Dev Sub Lic 1M	USD 0.00
<input type="checkbox"/> 1	NW-OCH-CLD-SML-PLB	NW Orch Cloud Small Playbk Sub Lic 1M	NW Orch Cloud Small Playbk Sub Lic 1M	USD 0.00

# Amendments

- Quantity will show the new TOTAL quantity.
- Effective quantity will show the additional units that will be acquired in this new transaction.

The screenshot shows the 'Edit Quote' interface for quote Q-20138. At the top, there are buttons for 'Add Products', 'Add Group', 'Quick Save', 'Calculate', 'Cancel', and 'Save'. Below this is the 'Quote Information' section with fields for 'Start Date' (11/12/2021), 'Quote Net Price' (152,600.00), and 'Billing Type' (Prepay). The main part of the interface is a table with the following data:

#	PRODUCT CODE	DESCRIPTION	QUANTITY	EFFECTIVE QUANT...	START DATE	CALCULATED SUB...	RSA MATERIAL	DISC...
1	RSA-0019130	RSA NetWitness Orchestrator Cloud	1	0	11/12/2021	1	RSA-0019130	
2	NW-OCH-CLD-STARTER	NW Orch Cloud Starter Sub Lic 1M	20	10	11/12/2021	1	RSA-0019130	
3	NW-OCH-CLD-UPGRD-A	NW Orch Cloud Starter To Std Sub Lic1M	20	10	11/12/2021	1	RSA-0019130	

# Amendments

- Discounts applied in the original Quote will be carried over into the amendment Quote.
- You can change these as required.
- Then click SAVE.

Q-20138 Edit Quote

Net Price: 152,600.00 Billing Type: Prepay

EFFECTIVE QUANT...	START DATE	CALCULATED SUB...	RSA MATERIAL	DISCOUNT %	NET PRICE	LIST PRICE	
0	11/12/2021	1	RSA-0019130		USD 0.00	USD 0.00	>
10	11/12/2021	1	RSA-0019130	34.00%	USD 72,600.00	USD 110,000.00	>
10	11/12/2021	1	RSA-0019130	37.66%	USD 80,000.00	USD 128,330.00	>
					SUBTOTAL: USD 152,600.00		
					QUOTE TOTAL: USD 152,600.00		

Q-20138 Edit Quote

Net Price: 152,600.00 Billing Type: Prepay

EFFECTIVE QUANT...	START DATE	CALCULATED SUB...	RSA MATERIAL	DISCOUNT %	NET PRICE	LIST PRICE	
0	11/12/2021	1	RSA-0019130		USD 0.00	USD 0.00	>
10	11/12/2021	1	RSA-0019130	30.00%	USD 80,000.00	USD 110,000.00	>
10	11/12/2021	1	RSA-0019130	34.00%	USD 80,000.00	USD 128,330.00	>
					SUBTOTAL: USD 152,600.00		
					QUOTE TOTAL: USD 152,600.00		

# Amendments

- Subsidiary information will be carried over from the original Quote.
- Enter the Approval Reason Notes and Order Type

Quote Q-20138

Opportunity  
1100 MASS MUTUAL: Amendment for contract #00010545

Primary

Currency  
USD - U.S. Dollar

Currency Exchange  
1.000000

Type  
Amendment

Order Type  
Amendment

Sales Channel  
Channel-Distributor

CPQ Start Date

Sales Rep  
Lorraine Westerdale

Owner  
Brian Schnurr

Last Modified By  
Brian Schnurr, 11/12/2021, 10:10 AM

Created By  
Brandt Bellamy, 11/12/2021, 9:36 AM

PO Number  
775296

PO Date  
11/12/2021

PO Amount  
USD 161,697.80

Bill To State  
California

Bill To Postal Code  
92705

Bill To Country  
United States

Subsidiary Information

Subsidiary  
US80 RSA Security LLC

Subsidiary ID  
US80 RSA Security LLC

Subsidiary Name  
US80 RSA Security LLC

Quote Document Options

Include Standard Terms and Conditions

Include Custom Terms and Conditions

Notes

Output Text

Shipping Comment

Approval Reason Notes

NetSuite Information

NetSuite ID

NetSuite Integration Status  
Draft

Bill To Contact Phone

Subsidiary Street

Subsidiary City

Subsidiary State

Subsidiary Postal Code

Subsidiary Country

Quote Template  
Indirect

Internal Notes

Invoice Notes

# Amendments

- Submit Quote for approval

The screenshot displays the NetWitness interface for a Quote (Q-20138). At the top right, there are buttons for 'Edit', 'Edit Lines', and 'Submit for Approval'. The main content is divided into several sections:

- Quote Header:** Quote Q-20138
- Opportunity:** 1100 MASS MUTUAL: Amendment for contract #00010545. It is marked as Primary.
- Currency:** USD - U.S. Dollar, Currency Exchange: 1.000000.
- Type:** Amendment.
- Sales Channel:** Channel-Distributor.
- Sales Rep:** Lorraine Westerdale.
- Owner:** Brian Westerdale.
- Last Modified By:** Brian Westerdale, 11/12/2021, 9:54 AM.
- Created By:** Brandt Bellamy, 11/12/2021, 9:36 AM.
- Quote Lines (3):**
  - QL-0116905: Product: Orchestrator Cloud Subscription S..., Product Co...: RSA-0019130, Quantity: 1.00.
  - QL-0116906: Product: NW Orch Cloud Starter Sub Lic 1M, Product Co...: NW-OCH-CLD-STARTER, Quantity: 20.00.
  - QL-0116907: Product: NW Orch Cloud Starter To Std Sub..., Product Co...: NW-OCH-CLD-UPGRD-A, Quantity: 20.00.
- Approvals (0)**
- Orders (0)**

# Amendments

- Once Quote is approved, fill in the mandatory fields:
  - Quote needs to be flagged as Primary
  - PO information needs to be entered (PO#, PO Date, PO Amount)
  - All contact details must be filled (contacts will also be brought from the original quote, but you can change them if required).
- **IMPORTANT:** Make sure you've selected the **Order Type 'Amendment'**

Quote Q-20138

Opportunity ⓘ  
1100 MASS MUTUAL: Amendment for contract #00010545

Primary ⓘ

Currency  
USD - U.S. Dollar

Currency Exchange  
1.000000

Type ⓘ  
Amendment

Order Type  
--None--  
--None--  
Amendment  
Replacement  
Return

Sales Rep ⓘ  
Lorraine Westerdale

Owner  
Brian Schnurr

Last Modified By  
Cecilia Martin, 11/12/2021, 9:58 AM

Created By  
Brandt Bellamy, 11/12/2021, 9:36 AM

PO Number  
775296

PO Date  
11/12/2021

PO Amount

Status  
Quote Status ⓘ  
Approved

Submitted Date ⓘ  
11/12/2021

Edit Recall Approval Create Proposal

Quote Lines (3)

QL-0116905  
Product: Orchestrator Cloud Subscription S...  
Product Co... RSA-0019130  
Quantity: 1.00

QL-0116906  
Product: NW Orch Cloud Starter Sub Lic 1M  
Product Co... NW-OCH-CLD-STARTER  
Quantity: 20.00

QL-0116907  
Product: NW Orch Cloud Starter To Std Sub...  
Product Co... NW-OCH-CLD-UPGRD-A  
Quantity: 20.00

Approvals (1)  
A-00724

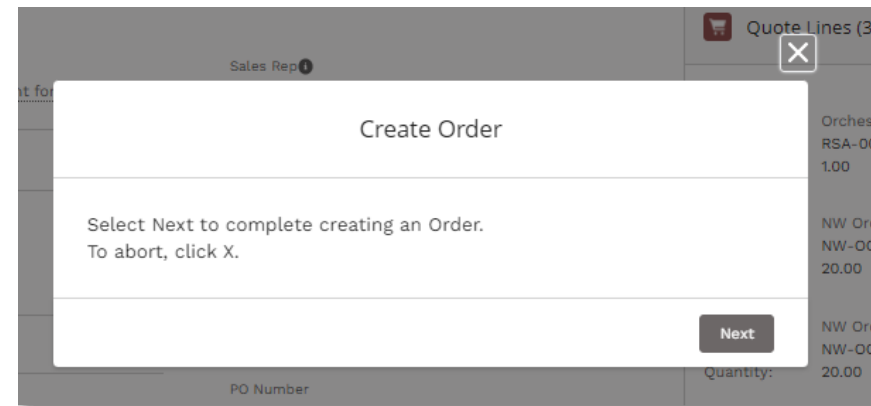
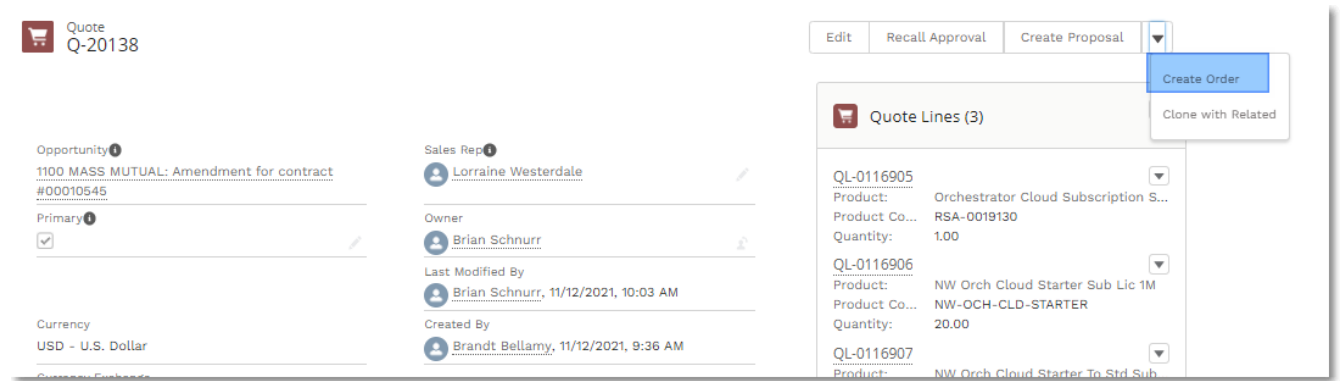
Orders (0)

Notes & Attachments (0)

Upload Files

# Amendments

- To place the order, select 'Create Order' from the dropdown.
- Click NEXT



# Amendments

- Once the amendment order is activated and contracted, if you access the Service Contract again, you'll see the additional amendment lines

Service Contract C300008587

Contract Name: Service Contract  
 Service Contract Owner: Lorraine Westerdale  
 Account Name: 1100 MASS MUTUAL  
 Contact Name: [Redacted]

Opportunity: 1100 MASS MUTUAL: 22AY2CEAU-IE - 1100 MASS MUTUAL - RSA Netwitness Endpoint  
 Quote: Q300009938  
 Order Number: 3600007828  
 Original Order Number: 0500007827  
 Contract ID: 00010545  
 Contract Name: Service Contract  
 Subsidiary: US80 RSA Security LLC  
 Currency: USD - U.S. Dollar

Service Contract Owner: Lorraine Westerdale  
 Last Modified By: Cecilia Martin, 11/12/2021, 10:11 AM  
 Created By: Cecilia Martin, 11/12/2021, 4:44 AM

Status: Active  
 Start Date: 11/4/2021  
 End Date: 12/3/2021

Contract Line Items (3+)

- 00000001: Product Name: Orchestrator Cloud Subscription S..., Product Code: RSA-0019130, Start Date: 11/4/2021
- 00000002: Product Name: NW Orch Cloud Starter Sub Lic 1M, Product Code: NW-OCH-CLD-STARTER, Start Date: 11/4/2021
- 00000003: Product Name: NW Orch Cloud Starter To Std Sub..., Product Code: NW-OCH-CLD-UPGRD-A, Start Date: 11/4/2021

Service Contracts > Service Contract  
 Contract Line Items

5 items • Sorted by Line Item Number • Updated a few seconds ago

Line Item Nu...	Product Name	Product Code	Start Date	End Date
1	Orchestrator Cloud Subscription SW Options	RSA-0019130	11/4/2021	12/3/2021
2	NW Orch Cloud Starter Sub Lic 1M	NW-OCH-CLD-STARTER	11/4/2021	12/3/2021
3	NW Orch Cloud Starter To Std Sub Lic1M	NW-OCH-CLD-UPGRD-A	11/4/2021	12/3/2021
4	NW Orch Cloud Starter Sub Lic 1M	NW-OCH-CLD-STARTER	11/12/2021	12/3/2021
5	NW Orch Cloud Starter To Std Sub Lic1M	NW-OCH-CLD-UPGRD-A	11/12/2021	12/3/2021

**Amendment Lines**

# Renewals

- Renewal opportunity will be automatically generated by the System once the original order is booked.
- Renewal Quote will be automatically created 120 days before contract expires.

# Renewals

- To access the renewal opportunity and quote, you need to locate the Service Contract in question.

*Please refer to slides 41-43 that explain how to find a Service Contract*

- Once inside the Service Contract go to the 'Renewal Opportunity' section and click in the opportunity link to open it.

Service Contract  
C300008587

Amend

Contract Name	Service Contract Owner	Account Name	Contact Name
Service Contract	Lorraine Westerdale	1100 MASS MUTUAL	

Opportunity  
1100 MASS MUTUAL: 22AY2CEAU-IE - 1100 MASS MUTUAL - RSA Netwitness Endpoint

Quote  
Q300009938

Order Number  
3600007828

Original Order Number  
0500007827

Contract ID  
00010545

Contract Name  
Service Contract

Subsidiary  
US80 RSA Security LLC

Currency  
USD - U.S. Dollar

Sales Channel  
Channel-Distributor

Renewal Quoted

Sold To  
Sold To  
INGRAM MICRO  
Sold To UCID  
1000384146

Partner Information  
Partner (Reseller)  
OPTIV SECURITY INC  
PartResell UCID  
1000048557

Distributor  
INGRAM MICRO  
PartDistr UCID  
1000384146

Service Contract Owner  
Lorraine Westerdale

Last Modified By  
Cecilia Martin, 11/12/2021, 10:11 AM

Created By  
Cecilia Martin, 11/12/2021, 4:44 AM

Status  
Active

Start Date  
11/4/2021

End Date  
12/3/2021

CPQ PO Date  
11/12/2021

CPQ PO Number  
1234567

SoldTo Contact  
Brian Schnurr

Reseller Contact  
Thomas Cini

Contract Line Items (3+)

Item ID	Description	Item ID	Description
00000001	Pro... Orchestrator ...	00000002	Pro... NW Orch Clou...
Pro... RSA-0019130		Pro... NW-OCH-CLD...	
Sta... 11/4/2021		Sta... 11/4/2021	
00000003	Pro... NW Orch Clou...		
Pro... NW-OCH-CLD...			
Sta... 11/4/2021			

View All

Entitlements (0)

Amendment Opportunities (1)

1100 MASS MUTU...  
View All

Co-Terminated Quotes (1)

Q-20138  
Sta... 11/12/2021  
Qu... Approved  
View All

Renewal Opportunities (1)

1100 MASS MUTU...  
View All

# Renewals

- Renewal Quote will be already created (if its within 120 days before contract expiration).
- Click on the Quote number to open it.
- **IMPORTANT:** For **Maint Renewal Deals**, Reseller should continue submitting the Maint. Renewal **Deal Reg**, as they do today. If approved, DR will be linked to the renewal opportunity. This should be done **before Quote is priced and approved.**

Opportunity  
1100 MASS MUTUAL: Renewal Opportunity

+ Follow Edit Create Quote Submit for Deal Registration

Account Name: 1100 MASS MUTUAL  
Opportunity Owner: Cecilia Martin  
Expected Closed Date: 12/3/2021  
Deal Type: [Blank]

Account Name: 1100 MASS MUTUAL  
Opportunity Name: 1100 MASS MUTUAL: Renewal Opportunity  
Partner Projected Amount: [Blank]  
Deal Partner Owner: [Blank]  
Do Not Use Partner Contact Lookup: [Blank]  
Sales Org: [Blank]  
Sales Channel: Channel-Distributor  
Quote Type: [Blank]  
Deal Type: [Blank]

Distributor, Partner, Alliance  
Distributor: [Blank]  
Partner (Reseller): OFEV SECURITY INC.  
Partner Contact: [Blank]  
Global Alliance Partner: [Blank]

Deal Registration: [Blank]  
Opportunity Owner: Cecilia Martin  
PSC Owner: [Blank]  
Probability (%): 10%  
Stage: Discovery  
Expected Close Date: [Blank]  
Expected Closed Date: 12/3/2021  
Primary Contact: [Blank]  
RSA Forecast Category: [Blank]  
Influencer: [Blank]  
Partner Comments: [Blank]  
Alliance Opportunity Type: [Blank]

Products (3)  
Orchestrator Cloud Subscription SW Options  
Units: 1.00  
Price per U...: USD 0.00  
Total Price: USD 0.00  
NW Orch Cloud Starter Sub Lic 1M  
Units: 10.00  
Price per U...: USD 87,120.00  
Total Price: USD 871,200.00  
NW Orch Cloud Starter To Std Sub Lic1M  
Units: 10.00  
Price per U...: USD 96,000.00  
Total Price: USD 960,000.00  
View All

Quotes (1)  
Q-20137  
Net Total A...: USD 1,831,200.00  
Quote Stat...: Draft  
Created By: Brandt Bellamy  
View All

Orders (0)

# Renewals

- Once inside the Quote, click on **EDIT LINES** to access the Quote line Editor
- Discounts applied in the original Quote will be carried over into the renewal Quote.
- You can change these if needed.
- Then click **SAVE**.

Quote Q-20137

Opportunity: 1100 MASS MUTUAL: Renewal Opportunity

Primary:

Currency: USD - U.S. Dollar

Currency Exchange: 1.000000

Type: Renewal

Order Type:

Sales Channel: Channel-Distributor

CPQ Start Date:

Status: Draft

Sales Rep: Cecilia Martin

Owner: Cecilia Martin

Last Modified By: Brandt Bellamy, 11/12/2021, 5:00 AM

Created By: Brandt Bellamy, 11/12/2021, 5:00 AM

PO Number:

PO Date:

PO Amount:

Submitted Date:

Quote Lines (3)

- QL-0116902  
Product: Orchestrator Cloud Subscription S...  
Product Co...: RSA-0019130  
Quantity: 1.00
- QL-0116903  
Product: NW Orch Cloud Starter Sub Lic 1M  
Product Co...: NW-OCH-CLD-STARTER  
Quantity: 10.00
- QL-0116904  
Product: NW Orch Cloud Starter To Std Sub...  
Product Co...: NW-OCH-CLD-UPGRD-A  
Quantity: 10.00

Approvals (0)

Orders (0)

Notes & Attachments (0)

Q-20137 Edit Quote

Add Products Add Group Quick Save Calculate Cancel Save

Quote Information

Start Date: 12/4/2021 Quote Net Price: 1,831,200.C Billing Type: Prepay

PRODUCT CODE	DESCRIPTION	QUANTITY	START DATE	CALCULATED SUB...	RSA MATERIAL	DISCOUNT %	NET
RSA-0019130	RSA NetWitness Orchestrator Cloud	1	12/4/2021	12	RSA-0019130		US
NW-OCH-CLD-STARTER	NW Orch Cloud Starter Sub Lic 1M	10	12/4/2021	12	RSA-0019130	34.00%	USD 960
NW-OCH-CLD-UPGRD-A	NW Orch Cloud Starter To Std Sub Lic1M	10	12/4/2021	12	RSA-0019130		S

# Renewals

- Subsidiary information will carry over from the original Quote.
- Enter the Approval Reason Notes

Bill To State ⓘ California	Bill To Contact Phone ⓘ
Bill To Postal Code ⓘ 92705	
Bill To Country ⓘ United States	
▼ Subsidiary Information	
Subsidiary US80 RSA Security LLC	Subsidiary Street
Subsidiary ID US80 RSA Security LLC	Subsidiary City
Subsidiary Name US80 RSA Security LLC	Subsidiary State
	Subsidiary Postal Code
	Subsidiary Country
▼ Quote Document Options	
Include Standard Terms and Conditions ⓘ <input checked="" type="checkbox"/>	Quote Template ⓘ Indirect
Include Custom Terms and Conditions ⓘ <input type="checkbox"/>	
▼ Notes	
Output Text ⓘ	Internal Notes
Shipping Comment	Invoice Notes
Approval Reason Notes	
▼ NetSuite Information	
NetSuite ID	NetSuite Integration Status Draft

# Renewals

- Submit Quote for approval

The screenshot displays a quote management interface for quote Q-20138. The top right corner features buttons for 'Edit', 'Edit Lines', and 'Submit for Approval'. The main content is divided into three sections: quote details, sales representative information, and a list of quote lines.

**Quote Details:**

- Quote ID: Q-20138
- Opportunity: 1100 MASS MUTUAL: Amendment for contract #00010545
- Primary:
- Currency: USD - U.S. Dollar
- Currency Exchange: 1.000000
- Type: Amendment
- Order Type: (blank)
- Sales Channel: Channel-Distributor
- CPQ Start Date: (blank)

**Sales Representative Information:**

- Sales Rep: Lorraine Westerdale
- Owner: Brian Westerdale
- Last Modified By: Brian Westerdale, 11/12/2021, 9:54 AM
- Created By: Brandt Bellamy, 11/12/2021, 9:36 AM
- PO Number: (blank)
- PO Date: (blank)
- PO Amount: (blank)

**Quote Lines (3):**

- QL-0116905: Product: Orchestrator Cloud Subscription S..., Product Co...: RSA-0019130, Quantity: 1.00
- QL-0116906: Product: NW Orch Cloud Starter Sub Lic 1M, Product Co...: NW-OCH-CLD-STARTER, Quantity: 20.00
- QL-0116907: Product: NW Orch Cloud Starter To Std Sub..., Product Co...: NW-OCH-CLD-UPGRD-A, Quantity: 20.00

Additional sections at the bottom show 'Approvals (0)' and 'Orders (0)'.

# Renewals

- Once Quote is approved, fill in the mandatory fields:
  - Quote needs to be flagged as Primary
  - PO information needs to be entered (PO#, PO Date, PO Amount)
  - All contact details must be filled (contacts will also be brought from the original quote, but you can change them if required).
- **IMPORTANT:** Make sure **Order Type** is 'Renewal'

The screenshot shows a CRM interface for a quote titled "1100 MASS MUTUAL: Renewal Opportunity". The form is divided into several sections:

- Opportunity:** 1100 MASS MUTUAL: Renewal Opportunity. Primary checkbox is checked.
- Currency:** USD - U.S. Dollar. Currency Exchange: 1.000000.
- Type:** Renewal.
- Order Type:** A dropdown menu with options: --None--, --None-- (checked), and Renewal (highlighted in blue).
- CPQ Start Date:** A date picker field.
- Status:** Quote Status is Approved.
- Sales Rep:** Cecilia Martin.
- Owner:** Cecilia Martin.
- Last Modified By:** Cecilia Martin, 11/12/2021, 10:51 AM.
- Created By:** Brandt Bellamy, 11/12/2021, 5:00 AM.
- PO Number:** 7775889.
- PO Date:** 11/12/2021.
- PO Amount:** 1,940,373.60 (highlighted in yellow).
- Submitted Date:** 11/12/2021.

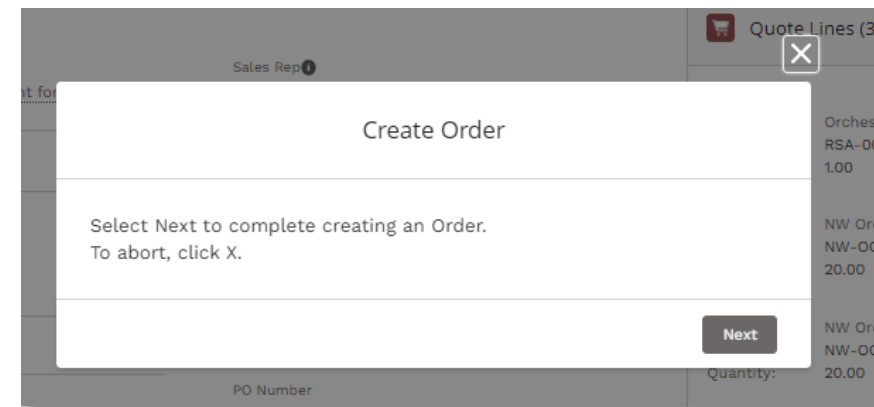
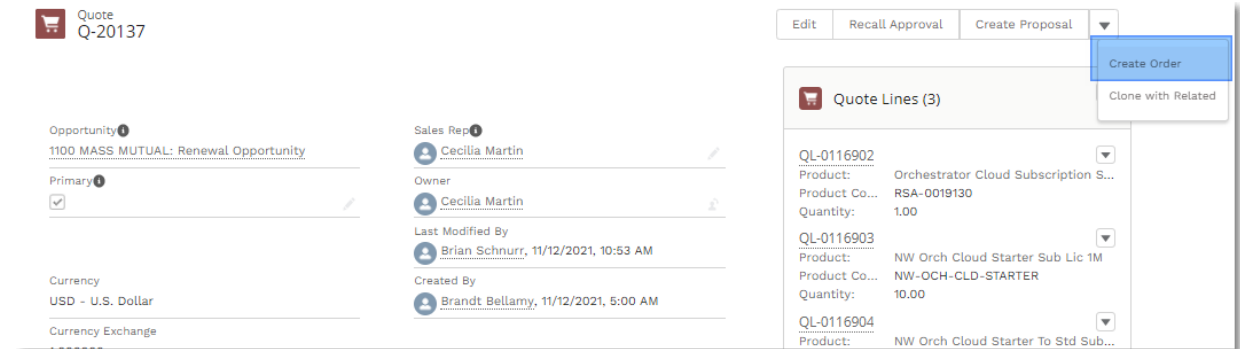
On the right side, there are several panels:

- Quote Lines (3):** Lists three quote lines with details like Product, Product Co..., and Quantity.
- Approvals (1):** Shows one approval with ID A-00726.
- Orders (0):** Shows zero orders.
- Notes & Attachments (0):** Shows zero notes and attachments.

At the top right, there are buttons for "Edit", "Recall Approval", and "Create Proposal".

# Renewals

- To place the order, select 'Create Order' from the dropdown.
- Click NEXT



# Renewals

- Once order is placed, the 'Ordered' checkbox will be checked and you will be able to see the Order number under the 'Orders' section

Quote Q-20137

Opportunity 1  
1100 MASS MUTUAL: Renewal Opportunity

Primary 1

Currency  
USD - U.S. Dollar

Currency Exchange  
1.000000

Type 1  
Renewal

Order Type  
Renewal

Sales Channel  
Channel-Distributor

CPQ Start Date

▼ Status

Quote Status 1  
Approved

Approval Status 1  
Approved

Ordered 1

Sales Rep 1  
Cecilia Martin

Owner  
Cecilia Martin

Last Modified By  
Brian Schnurr, 11/12/2021, 10:54 AM

Created By  
Brandt Bellamy, 11/12/2021, 5:00 AM

PO Number  
7775889

PO Date  
11/12/2021

PO Amount  
USD 1,940,373.60

Submitted Date 1  
11/12/2021

Submitted User 1  
Brian Schnurr

Expires On 1  
12/12/2021

Edit Recall Approval Create Proposal

Quote Lines (3)

QL-0116902  
Product: Orchestrator Cloud Subscription S...  
Product Co... RSA-0019130  
Quantity: 1.00

QL-0116903  
Product: NW Orch Cloud Starter Sub Lic 1M  
Product Co... NW-OCH-CLD-STARTER  
Quantity: 10.00

QL-0116904  
Product: NW Orch Cloud Starter To Std Sub...  
Product Co... NW-OCH-CLD-UPGRD-A  
Quantity: 10.00

View All

Approvals (1)

A-00726

View All

Orders (1)

3700007831  
Account Na... 1100 MASS MUTUAL  
Status: Activate  
Order Amo... USD 1,940,373.60

View All

# Renewals

- If you click on the order number, you will be able to see the order details and status.
- Once activated and contracted, the Service Contract will also show.

The screenshot displays the NetWitness Order Management System interface for Order 3700007831. At the top, a summary bar shows the Account Name (1100 MASS MUTUAL), Contract Number (3700007831), Order Start Date (12/4/2021), Status (Activate), and Order Amount (USD 1,940,373.60).

The main content area is divided into two columns. The left column, titled "Order Information", contains the following details:

- Quote Number: Q300010691
- Opportunity: 1100 MASS MUTUAL: Renewal Opportunity
- Order Number: 3700007831
- Original Order Number: 3700007831
- Order Currency: USD - U.S. Dollar
- Order Amount: USD 1,940,373.60
- Payment Term: Net 30
- Order Reason: (empty)
- Order Type: Renewal
- COM Order Type: Renewal
- SAP OrderType: (empty)

The right column contains the following details:

- SalesRep: Cecilia Martin
- Order Owner: [User Profile]
- Last Modified By: Cecilia Martin, 11/12/2021, 10:55 AM
- Created By: [User Profile], 11/12/2021, 10:54 AM
- Activated Date: 11/12/2021, 10:55 AM
- Activated By: Cecilia Martin
- COM:
- Special Revenue:
- Status: Activate (highlighted in a blue box)
- PO Amount: USD 1,940,373.60

On the right side, there are three expandable panels:

- Order Products (3)**: Lists three products with their quantities and cumulative values.
  - Orchestrator Cloud Subscription SW Options (Product Co... RSA-0019130): Quantity: 1.00, Cumulative ... 1.00
  - NW Orch Cloud Starter Sub Lic 1M (Product Co... NW-OCH-CLD-STARTER): Quantity: 10.00, Cumulative ... 10.00
  - NW Orch Cloud Starter To Std Sub Lic1M (Product Co... NW-OCH-CLD-UPGRD-A): Quantity: 10.00, Cumulative ... 10.00
- Service Contracts (1)**: Shows one service contract.
  - Service Contract (Contract N... C300008589): Start Date: 12/4/2021, End Date: 12/3/2022
- Notes & Attachments (0)**: Shows no notes or attachments.

# FAQ

■ Order Status:

<b>Status</b>	<b>Meaning</b>
<i>Draft / Ready for Review</i>	<i>Waiting on COM Team or review and update</i>
<i>Reviewed Ready For Sync</i>	<i>Reviewed by COM Team and ready to pass to NetSuite</i>
<i>Synced</i>	<i>Order has passed to NetSuite for Fulfilment and Billing</i>
<i>Error</i>	<i>Issue in the integration process and a error message is displayed</i>
<i>Activate</i>	<i>Order has completed Fulfilment and Billing</i>
<i>Cancelled</i>	<i>Order has been cancelled in NetSuite and/or CPQ</i>

■ Q:If a user is working on a quote, will this quote be locked for other users?

A: No, if a user is working on a Quote, other users will be able to access it.

■ Q: Multiple Ship Tos

A: If one of the products included in the Quote needs to be shipped to a different location, go to Quote lines → View all. Then on the correspondent line, click on the drop-down option → EDIT → Enter the required Ship To Address for that specific product → SAVE

Quotes > Q-19384  
Quote Lines

3 Items • Sorted by Number • Updated a few seconds ago

Line Name	Product	Product Code	Quan...	List Price	Net Total	Nu...
1 QL-0109671	Orchestrator Cloud Subscription SW Options	RSA-0019130	1.00	USD 0.00	USD 0.00	1
2 QL-0109672	NW Orch Cloud Starter Sub Lic 1M	NW-OCH-CLD-STARTER	10.00	USD 110,000.00	USD 72,600.00	2
3 QL-0109673	NW Orch Cloud Starter To Std Sub Lic1M	NW-OCH-CLD-UPGRD-A	10.00	USD 128,330.00	USD 80,000.00	3

Buttons: Edit, Delete

■ Q:Where should I enter shipping instructions or special requirements?

A: in the notes section, you will be able to enter Shipping Comments. In the Internal notes you can enter comments/requirements that should be considered by the order management team before booking the order.

The screenshot displays a NetSuite form with the following sections and fields:

- Bill To:** INGRAM MICRO, 1600 E SAINT ANDREW PL, MISC MISC MISC MISC GLOBAL IS FINANCE, DEPT, SANTA ANA, California, 92705, United States.
- Subsidiary Information:** USB0 RSA Security LLC.
- Quote Document Options:** Include Standard Terms and Conditions (checked), Include Custom Terms and Conditions (unchecked).
- Notes:** Shipping Comment (highlighted in blue), Internal Notes (highlighted in blue), Invoice Notes.
- NetSuite Information:** NetSuite ID, NetSuite Integration Status (Draft), NetSuite Integration Message.

- Q: If I've placed an order by mistake and want to cancel it, what should I do?

*A: Log a case with the Channel Operations Team and request the order to be cancelled.*

*You will be able to use the same opportunity, but you will have to create a brand-new quote and start the process again.*

- Q: How long is a Quote valid for?

*A: Quote is valid for 30 days from approval date.*

- Q: Today when creating a renewal or amendment we would take the serial number and search in RSA Online. This would pull through all information required to quote, such as count, expiry date, End User site ID, etc. How will we find out these details when RSA online is decommissioned?

*A: In CPQ, renewal and amendments quotes are created from the Service Contract. So will already have all the required information. For example, End User site ID will be pulled from the original order/contract, so you won't have to search for the correct site ID. Also, serial numbers will be brought from the original service contract.*

- Q: Can we make changes on a Quote that has been already approved?

*A: Yes, you can. Click the 'Recall Approval' button, this will take the Quote back to 'Draft' status. Click on 'Edit Lines' to open the 'Quote Line Editor', make the necessary changes and then submit it again for approval.*

- Q: Will the quote also be available in excel format?

*A: Not for go live - the quote proposal will be in pdf.*

- Q:will we be able to quote different product solutions on a single quote (for example, SecurID + Netwitness)?

*A: No. Each BU will have its own instance of CPQ/Communities. If you want to quote and order a SecurID deal, you will have to do it on SecurID Communities Portal. If you want to place a NW order, you will have to do it on NW Communities. Same for Archer.*

- Q:Can I create a new Partner account?

*A: No. Distributors can submit requests to create new End User accounts. If a Reseller wants to become a registered Partner, they will have to submit the application form. This will be reviewed by the Channel Team, and if approved, the Partner account will be set up and Reseller users will have to register to get Portal access.*

- **Q:** If my DR is about to expire, how can I extend it?

*A: Expiration date, link to request extension, etc. will all show under the DR Information section at opportunity level.*

*Disti will have to go to the opportunity and click on that link to extend the DR.*

The screenshot displays a CRM interface with several sections:

- Sold To:** INGRAM MICRO, SoldTo SAP ID: 1000384146, Sales Org, Sales Channel: Channel-Distributor, Quote Type.
- Discovery:** Expected Closed Date: 12/10/2021, Price Book: NetWitness US Price Book, Deal Type: Expansion, RSA Forecast Category: Unqualified.
- Competitive Analysis:** Closed Lost Reason, Closed Reason Comments.
- Partner Information:** Partner Name, Partner Contact: Aaron Prillwitz, Partner Contact First Name: Aaron, Partner Contact Last Name, Partner Contact Email, Partner Comments.
- Deal Registration Information:** Deal Registration Code: 22AYVVEA2-IE, Submission Date: 11/1/2021, 10:05 AM, Approval Date: 11/1/2021, 10:08 AM, Deal Reg Type: Incremental, Deal Registration Discount: 15%, Deal Description: test, Deal Registration Status: Approved, Expiration Date: 12/1/2021, 9:08 AM, Days Left Until Expiration: 17. A blue box highlights the **Link to Expiration Action** and **Request Deal Extension** buttons.
- RSA NetWitness Platform:** RSA Product Family: RSA NetWitness Endpoint, NSP Number.
- Right Sidebar:** Orders (0), Service Contracts (0), Open Activities (0), Activity History (0), Notes & Attachments (0) with an Upload Files button.

# Appendix

# Thank You

