



Step-By-Step User Guide

# Netformx ChannelXpert™ Step-By-Step User Guide for Lifecycle Incentives (LCI)

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**Revision History**

Date	Document Version	Modified By	Changes
08/10/2023	6.4	Mike Johnson	Initial version

## Netformx ChannelXpert Overview

The Netformx LifecycleXpert™ application, powered by ChannelXpert™, brings program intelligence to Sales and Customer Experience teams so they can increase profitability by maximizing Cisco Lifecycle Incentives (LCI) reward submission and collection. This is achieved by automating the management of LCI reward requirements and deadlines for Use/Activate and Adopt phases.

LifecycleXpert helps you analyze and prioritize LCI opportunities, determine where to take action on plans and activities, see what's needed to meet milestones and due dates, and track payments to ensure you get paid. It gives you a view of the entire LCI journey. LifecycleXpert enables a rapid ROI with automatic analysis of comprehensive data and actionable insights that show the potential rewards—all on a single pane of glass.

### ***Your Cisco Data Views in ChannelXpert***

ChannelXpert helps Cisco Partners manage their Cisco business once deals have been closed by providing data and insights in a number of areas that can be accessed in ChannelXpert.

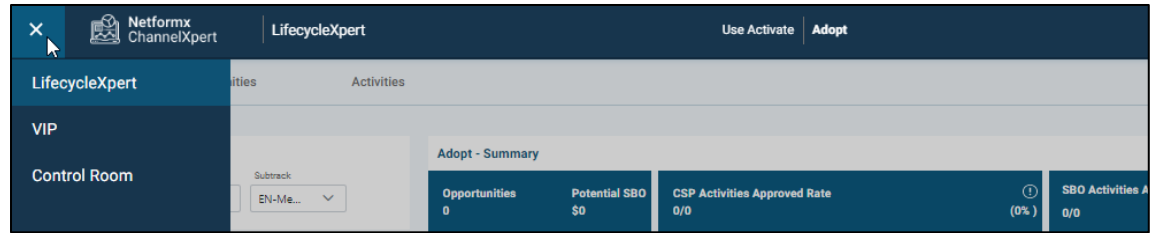
These areas include:

- LifecycleXpert (for managing Lifecycle Incentives)
- VIP (for managing various VIP periods)
- Control Room to manage
  - Additional VIP views
  - CSPP
  - Refresh 2 Accelerate opportunities
  - Deal status
  - Certification Partner status
  - Cisco purchases to date (Direct and through Distribution)
  - Additional analytic reports

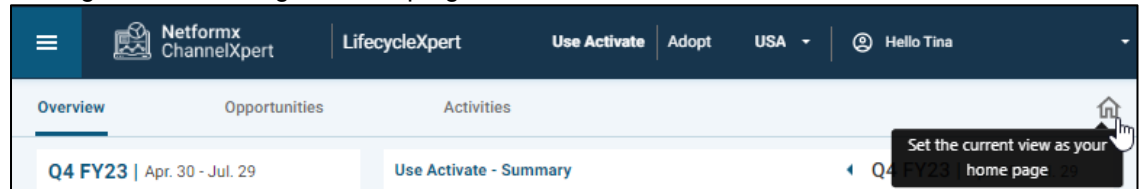
This Guide focuses on LifecycleXpert.

## Navigating Through LifecycleXpert

- Log in to ChannelXpert - <https://channelxpert.netformx.com/>
  - There are multiple tools accessible in ChannelXpert to help you manage your Cisco business.
- Access LifecycleXpert
  - Pull down the menu icon (3 stacked bars; “hamburger”) in the blue section to the left of the dark blue ribbon.
  - Click on LifecycleXpert.



- If desired, you can set the LifecycleXpert page as your home page when you login by clicking the House image in the top right corner below the dark blue bar.



### LifecycleXpert Home Page

LifecycleXpert provides simplified, action-oriented dashboards so you can manage your LCI rewards to maximize payouts.

LifecycleXpert helps you—at a glance:

- Prioritize LCI opportunities
- Determine where to take action on activities
- See what's needed to meet milestones and due dates
- Track payments to ensure you get paid.

It gives you a view of the entire LCI journey for Use (Activate) and Adopt opportunities—all on a single pane of glass. LifecycleXpert does this by automatically analyzing comprehensive Cisco and distributor data and mapping against Cisco LCI rules.

Navigating the top level of the Home Page:

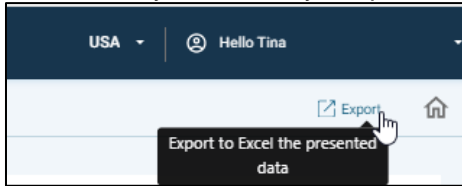
- In the dark blue ribbon at the top of the page,
  - Select Use (Activate) or Adopt depending on which LCI phase you want to manage.



- Choose the country being managed.



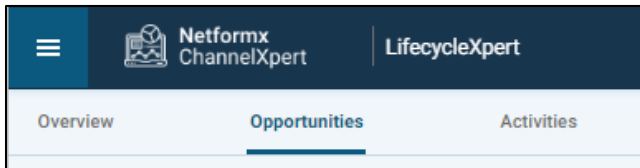
- At the right, below the dark blue ribbon, you can click on Export to create a report of the filtered data from any of the LifecycleXpert dashboards. The data will export to an Excel Worksheet.



## LifecycleXpert Use (Activate) Home Page

The Use (Activate) home page provides access to an overview of your LCI business and priorities, deal opportunities, and status of activities as they progress toward payout.

- Below the dark blue ribbon, select one of these dashboards which can also be considered report areas:



- Overview:** A high-level “flash report” view of your LCI business and priorities
  - Opportunities:** A “working desk” status of every deal and what needs to be done to submit a PoP plan
  - Activities:** A “to-do” view of the status of submitted deals as they progress to payout approval; a link to create Cisco cases.
- The table below outlines the role each of these dashboards play.

LifecycleXpert Use (Activate) Home Page		
Overview Dashboard “Flash Report”	Opportunities Dashboard “Working Desk”	Activities Dashboard “To Do List”
<ul style="list-style-type: none"> <li>Tasks and deadlines summary</li> <li>Opportunities, activities, Reward progress summaries</li> </ul>	<ul style="list-style-type: none"> <li>Summary of opportunities</li> <li>Opportunity list, details and status</li> <li>Identify eligible deals</li> </ul>	<ul style="list-style-type: none"> <li>Status of every submitted deal's activities</li> <li>Activity progress toward payout</li> </ul>

## Overview Dashboard

The **Overview dashboard** keeps you up to date at a high level about everything you need to know to ensure you get your rewards and payments. It is a flash report, where you can see all your important Use (Activate) data, insights, and tasks in one place. Using this dashboard you can see at a glance your deadlines and needed actions, as well as the summary status of your Use (Activate) LCI opportunities, activities, and reward progress.

**Tasks & Insights (Left section):** At the left of the Use (Activate) Overview dashboard is a chronological statement of tasks and insights—a summary of your LCI business status and the things you need to do to receive Use (Activate) reward payments. *For example, you may need certifications or track specializations or there are activity or case submission deadlines coming due.*

- The quarter being viewed is selected at the far right; click the arrow to select the quarter.
- Below the selected quarter, select the subtrack(s) you want to manage (All, Enterprise Networking, Data Center, Security, Collaboration).
- Select S W Use Case desired (e.g., for Enterprise Networking the use cases are ACI, DCNM, Intersight, etc.).
- The timeline will show you which LCI quarterly period you are working in (on a VIP calendar) and the Week Number (WN).
  - LCI is paid in quarters, but LCI aligns with the 6-month VIP periods, which align with Cisco's fiscal periods.
- The Tasks & Insights list shows at a glance where you are in your business.
  - Choose the desired submission due dates (e.g., 1-10, 11-30, 31-90, 91-180 due dates).
  - Click the arrow down to see the details of what's due within the due date period. *For example, you may have 29 PoP opportunities and have 18 days to submit cases.* The potential payouts are indicated.
  - Click on the PoP link to see more details on those specific opportunities.

**Use (Activate) Summary (Main section):** The main section of the Use (Activate) Overview dashboard summarizes your Use (Activate) opportunities, their potential rewards, and the status of activities and payouts. You can quickly see where you have been applying for cases and where there has been activity.

- At the far right, above the Total Expected Payment pale blue box, is the quarter being reviewed, with the dates.
  - You can review data from another quarter by clicking on the arrow.
- The summaries at the top, in the dark blue boxes, are the current expected payments for each Use (Activate) subtrack (Data Center, Enterprise Networking, etc.); the grand total is in the light blue box at the far right.

- Below the dark blue boxes are details for each subtrack (Data Center, Enterprise Networking, etc.), shown horizontally. Summary data is provided for each subtrack use case (as specified by Cisco, e.g., ACI, DCNM).
  - The Opportunities area shows, for each use case, the number of opportunities you have applied for that met the \$10K NBV. The Total for the subtrack is the total number of opportunities applied for or, if zero, shows zero/the total number of potential opportunities.
    - The Potential Reward is provided only for opportunities where you have applied for LCI.
  - For each use case, the subtrack Activities area provides a quick view of the status of all reward activities.
    - Total activities for the subtrack and use case.
    - The number of activities for each status:
      - Not submitted,
      - Denied by Cisco,
      - Submitted but waiting for Cisco's status disposition, or
      - Cisco needs more information.
    - Payment status:
      - Number of opportunities approved for payment,
      - Potential payments (for opportunities that have been submitted but aren't approved yet),
      - Expected payments (for opportunities that Cisco has approved; this is what you've earned so far in the quarter).

## Opportunities Dashboard

Use the **Opportunities tab**, just below the dark blue ribbon, to get more detail about all your opportunities, whether you have applied for rewards or not. This is a “working desk” view of everything you have sold.

This dashboard enables you to:

- Identify your opportunities, sort them, and archive them
- See which of your opportunities are eligible for LCI rewards, so you can focus on them and not miss any.
- Prioritize your opportunities by potential payout value so you can target those that maximize your rewards.
- Research specific situations or gather backup information to potentially contest a Cisco decision.
- Quickly filter the opportunities data to zero in on what you want to know.



#	Customer	P.O. Date	Deal ID	P.O.	S.W. Use Case	Potential Payout	Subtrack	# of lines	Deal Size LCI Eligible	Days Left to Apply PoP	Last Date to Apply PoP	Plan
1	FEDERAL AVIATION ADMINISTRATION	2022-02-03	0	30163626	Assurance & ...	Up to \$25,000.00	Enterprise Networking	1/5	\$22,950.00	18 days	2023-04-10	Create
2	PERSPECTA, INC.	2022-02-10	44876867	30164963	Select Use Case	No S.W. Use Case	Enterprise Networking	22/48	\$380,776.70	18 days	2023-04-10	Create
3	PERSPECTA, INC.	2022-02-10	44876867	30164963	Security	\$5,000.00	Security	3/7	\$330,827.40	18 days	2023-04-10	Create
4	NAVY FEDERAL CREDIT UNION	2022-02-14	53637988	30165041	Select Use Case	No S.W. Use Case	Enterprise Networking	1/1	\$70,233.20	18 days	2023-04-10	Create
5	GEORGE WASHINGTON UNIVERSITY T...	2022-02-15	53563320	30165064	Select Use Case	No S.W. Use Case	Enterprise Networking	1/1	\$26,004.96	18 days	2023-04-10	Create
6	PEO STR	2022-02-22	53825484	30165407	Select Use Case	No S.W. Use Case	Enterprise Networking	1/1	\$16,961.40	18 days	2023-04-10	Create
7	FEDERAL AVIATION ADMINISTRATION	2022-02-24	53712920	30165441	Select Use Case	No S.W. Use Case	Enterprise Networking	1/1	\$13,790.10	18 days	2023-04-10	Create
8	DOD AUTOMATED BIOMETRIC INFOR...	2022-02-24	0	30165516	Security	\$500.00	Security	1/2	\$23,490.00	18 days	2023-04-10	Create
9	US ARMY AVIATION AND MISSILE CO...	2022-03-01	0	30165481	DCHM	\$10,000.00	Data Center	1/2	\$19,345.87	18 days	2023-04-10	Create
10	U S AIR FORCE GENERAL ATOMICS A...	2022-03-03	53834373	30165541	Select Use Case	No S.W. Use Case	Enterprise Networking	1/1	\$115,946.35	18 days	2023-04-10	Create

At the top right corner you will see two options:

- Export Opportunities report
- Filter the quarter and date being viewed by using the arrow.

The blue boxes across the page summarize the number of potential payouts and the value of the payouts for each subtrack (Data Center, Enterprise Networks, etc.). The pale blue box is the Total Potential Payout.

Data Center Potential Payout 15 \$100,000	Enterprise Networks Potential Payout 26 \$0	Security Potential Payout 30 \$57,500	Collaboration Potential Payout 18 \$0	Total Potential Payout \$157,500
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The dashboard lists all the opportunities you have closed in the quarter and the details about each.

- Opportunity Source: The color-coded bar at the left of each deal indicates whether the data came from Cisco, Distributor, or Netformx Annuity.
- For each deal, you can see the Customer, P.O. Date, Deal ID, P.O. number, S.W. Use Case, Potential Payout, Subtrack, # of lines in the P.O., Deal Size if LCI Eligible, Days Left to Apply for PoP, Last Date to Apply for PoP, and Plan.
- You can sort on any column by clicking on the column header; then control the sorting direction by clicking the arrow.
- Clear any filters with Clear, which is next to Show, below the blue boxes.

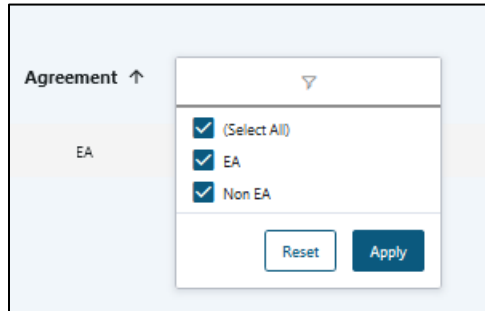
**Show:** A large-scale filter of all the opportunities in the dashboard.

Max. SBO Applications 0		SBO Potential Payout \$0	
Show	Visible Opportunities	<input type="checkbox"/> Hide Renewed Annuity	<input type="checkbox"/> Hide Expired
		LCI Eligible Yes	
Deal Size LCI Eligible	Activation Prerequisite	Days Left to Apply CSP	Last Date to Apply CSP
		SBO Potential Payout	Plan

- Clear (clear any prior filters)

- Visible Opportunities or Archived Opportunities
- Hide Renewed Annuity (check or uncheck)
- Hide Expired (check or uncheck)
- LCI Eligible (Yes=only LCI Eligible, or All opportunities)

**Filter:** Tune the filters based on your needs by clicking on the hamburger to the right of each column header; use the arrow to control the sorting direction or input a specific relevant filter for each column (e.g., Select All, EA, or Non-EA, in the Agreement column).



- **Customer:** Search for a specific customer.
- **P.O. Date:** Search within a date range.
- **Deal ID:** Search for a specific deal.
- **P.O.:** Search for a specific P.O.
- **S. W. Use Case:** Select the use cases to be filtered. The use case needs to be selected to determine the potential payout.
- **Potential Payout:** Choose the payout ranges of interest, such as only deals with larger payouts.
- **Subtrack:** Choose all or select the subtracks of interest.
- **Deal Size LCI Eligible:** Choose the LCI deal size ranges of interest and click Apply; this information is redundant with Potential Payout when LCI Eligible is selected in Show.
- **Days Left to Apply PoP:** Choose day ranges of interest, e.g., identify Points of Presence opportunities that need to be handled with priority, before they expire.
- **Last Date to Apply PoP:** Choose a PoP application due date from the pop-up calendar to see any opportunity applications outstanding.
- **Plan:** Go directly to the Cisco CSP planning application.

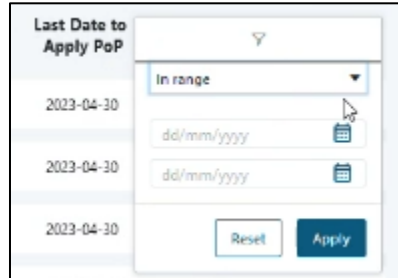
### ***Example uses of the Opportunities Dashboard:***

1. **Don't miss eligible LCI opportunities.** See which opportunities meet the LCI rules, are eligible for LCI rewards, and you still have time to apply for them. Doing this search enables you to see what needs to be worked on first.
  - a. **Identify LCI eligible opportunities** by choosing LCI Eligible: Yes (instead of All) in the Show area under the pale blue box. Then the dashboard only shows deals that satisfy Cisco's LCI eligibility rules.

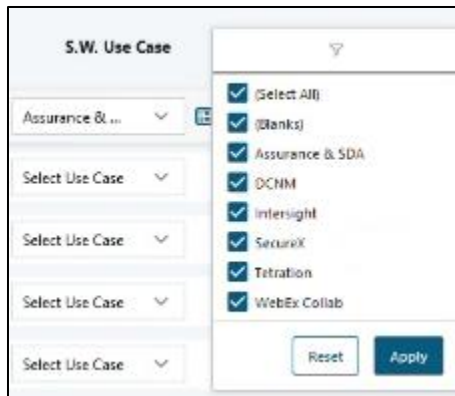
- b. **Hide Expired deals** by checking the Hide Expired box in the Show area under the pale blue box.



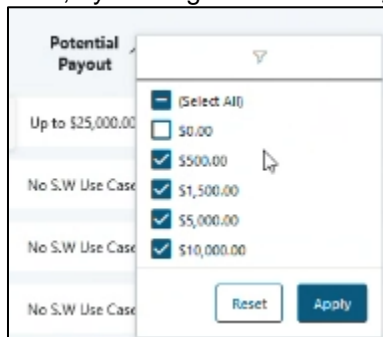
- c. **Do you have time to apply?** Sort by Days Left to Apply PoP (right click on the hamburger to change the dates in the pop-up calendars) or enter the Last Date to Apply PoP.



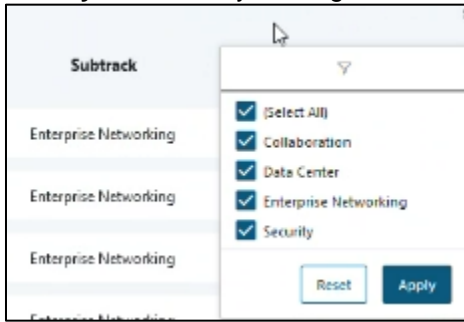
2. **Track customer, P.O., dates, etc.** For example, search for a customer by clicking the hamburger to right of the Customer column.
3. **Filter on specific use cases for a deal.** Want to only see specific use cases for a deal? Click the down arrow in the deal's row to select the use cases of interest.



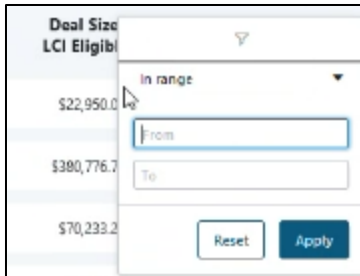
4. **Sort by potential payout.** You can select the payout ranges of interest, maybe just the large ones, by clicking on the hamburger next to the Potential Payout header.



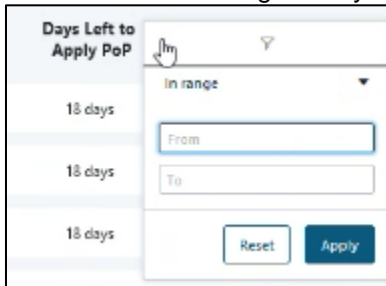
5. **Sort by subtrack** by clicking on the hamburger next to the Subtrack header.



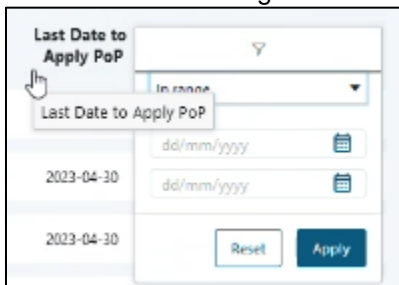
6. **Sort by size of LCI Eligible deals.** Click on the hamburger next to the Deal Size LCI Eligible header to insert a deal size range.



7. **Sort by Days Left to Apply for PoP.** Click on the hamburger next to the Days Left to Apply PoP header to insert a range of days.

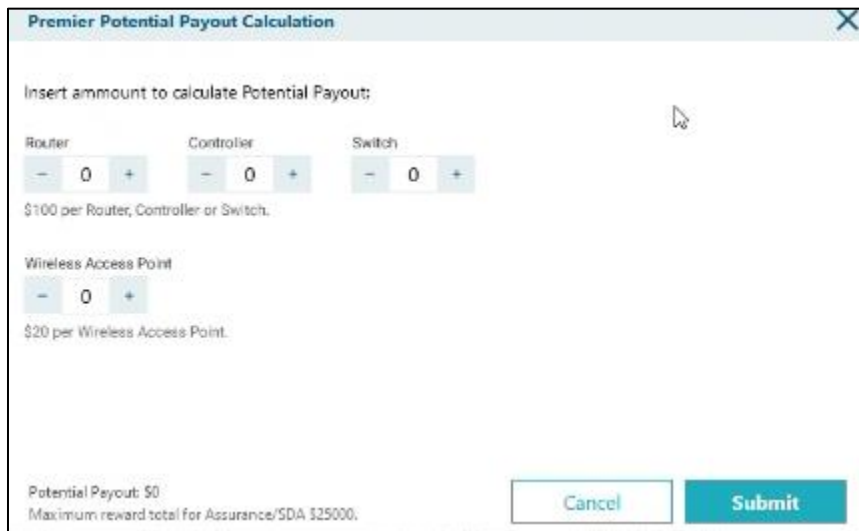


8. **Sort by Last Date to Apply for PoP.** Click on the hamburger next to the Last Date to Apply PoP header to insert a range of dates.



9. **Determine the specific payout when there is a range.** Some opportunities have a range of potential payouts indicated, e.g., “up to \$25K”. Partial payments can exist for use cases such as Assurance & SDAs or SWIM PnP, but you need to provide more specifics, such as the number of routers, to calculate the actual potential payout. A SW Use Case that requires additional information will have an icon to the right of the line. Click on the icon to open the Potential Payout Calculation window. Once you complete and submit the calculation form the dashboard will be updated in real time with the accurate Payout Potential.





**Premier Potential Payout Calculation**

Insert amount to calculate Potential Payout:

Router: - 0 +      Controller: - 0 +      Switch: - 0 +

\$100 per Router, Controller or Switch.

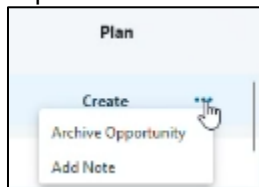
Wireless Access Point: - 0 +

\$20 per Wireless Access Point.

Potential Payout: \$0  
Maximum reward total for Assurance/SDA \$25000.

Cancel Submit

10. **Associate a Deal ID with a P.O.** Sometimes Cisco doesn't associate the Deal ID with the P.O. This may happen, for example, when the deal has multiple lines (products). In those situations, you can look up the Deal ID in CCW Deal ID and manually enter it in the dashboard. That way all the details are available to you in your working desktop.
11. **Archive opportunities or add notes.** You can hide or archive opportunities from the working desktop, for example if the potential payout is too low or not worth your time. By clicking the 3 dots (ellipsis) at the right of the deal line a window opens where you can choose to archive the opportunity. You can always retrieve archived opportunities and bring them back to your working desktop by selecting Show: Archived Opportunities. In the window you can also select Add Note to provide more details about an opportunity, such as why you are archiving it.



12. **Costs for deals placed through a distributor.** For deals placed through distributors (shown with a green vertical line at the left of the opportunity line), the deal costs are sent directly from the distributor or reseller (typically weekly) to Netformx and then automatically incorporated into the dashboard. However, there may be a lag between when Cisco receives the order and Netformx receives the distributor cost information. When Netformx has not received the distributor data, a bell icon is shown next to the Deal Size LCI Eligible line. When you hover over the bell you get a note that indicates this is an estimated cost. When there is no cost information Netformx automatically incorporates an estimated cost based on the discount from the distributor to you and temporarily uses that as the cost basis. That estimate will be replaced with the actual cost once it is received from the distributor. The alternative to using an estimated cost is to have a zero in that field. By having the estimate, you can at least make managerial decisions until the actual cost is available.

Deal Size LCI Eligible	Days Left to Apply PoP	Last Date to Apply PoP
\$19,345.87	18 days	2023-04-30
\$105,668.42		
\$201,510.00	200 days	2023-10-29

Netformx couldn't find the deal cost for this distributor opportunity. This is an estimated cost.

13. **Go straight to PoP planning.** Once you have identified the opportunity and submitted the estimate, you can click on the Plan column to create your Point of Presence plan to apply for rewards for that opportunity. The link takes you directly to Cisco Workspace where you can submit the PoP plan to Cisco. Then you can start working on any required LCI activities.

## Activities Dashboard

Use the **Activities tab**, just below the dark blue ribbon, to see the status of all the activities related to your LCI opportunities and whether they have been approved for payment. You can quickly sort by status, e.g., activity submitted, and apply detailed filtering to zero in on what you want to review. Your end goal is to accomplish the required activities so that you have a Cisco-approved payout.

<div> <div> Netformx ChannelXpert LifecycleXpert </div> <div> Use Activate Adopt </div> <div> USA Hello Super User </div> </div>											
<div> Overview Opportunities Activities </div>											
<div> <div> Data Center Potential Payout 0/0 \$0 </div> <div> Enterprise Networks Potential Payout 0/18 \$0 </div> <div> Security Potential Payout 0/0 \$0 </div> <div> Collaboration Potential Payout 0/0 \$0 </div> <div> Total Potential Payout 0/18 \$0 </div> </div>											
<div> All Not Submitted Denied Submitted Need more info Approved for Payment </div>											
#	Deal ID	Customer	Subtrack	S.W. Use Case	Activity Due Date	Activity Submitted Date	Activity Status	Cisco Status	Activity Approval/ Rejection Date	Potential Payout	Approved for Payment
1	0	DCAA	Enterprise Networking	Assurance & SD-WAN	2023-10-19	2023-02-15	Submitted	Activity Approved		\$25,000.00	0
2	0	DCAA	Enterprise Networking	SD-WAN & PoP	2023-10-19	2023-02-15	Submitted	Activity Approved		\$12,500.00	0
3	0	DCAA	Enterprise Networking	Assurance & SD-WAN	2023-10-19	2023-02-15	Submitted	Activity Approved		\$25,000.00	0
4	0	DCAA	Enterprise Networking	Stealthwatch	2023-10-19	2023-02-15	Submitted	Activity Approved		\$5,000.00	0
5	0	DCAA	Enterprise Networking	Assurance & SD-WAN	2023-10-19	2023-02-15	Submitted	Activity Approved		\$25,000.00	0
6	0	DCAA	Enterprise Networking	ISE	2023-10-19	2023-02-15	Submitted	Activity Approved		\$5,000.00	0
7	0	DCAA	Enterprise Networking	Assurance & SD-WAN	2023-10-19	2023-02-15	Submitted	Activity Approved		\$25,000.00	0
8	0	DCAA	Enterprise Networking	SD-WAN & PoP	2023-10-19	2023-02-15	Submitted	Activity Approved		\$12,500.00	0
9	0	DCAA	Enterprise Networking	SD-WAN & PoP	2023-10-19	2023-02-15	Submitted	Activity Approved		\$12,500.00	0
10	0	DCAA	Enterprise Networking	SD-WAN & PoP	2023-10-19	2023-02-15	Submitted	Activity Approved		\$12,500.00	0

Similar to the Opportunities Dashboard, in the top right corner of the Activities Dashboard you will see two options:

- Export Activities report
- Filter the quarter and date being viewed by using the arrows to change quarters.

#	Deal ID	Customer	Subtrack	S.W. Use Case	Activity Due Date	Activity Submitted Date	Activity Status	Cisco Status	Activity Approval/Rejection Date	Potential Payout	Approved for Payment
1	0	DCAA	Enterprise Networking	Assurance & SD-WAN	2023-10-19	2023-02-16	Submitted	Activity Approved		\$25,000.00	0
2	0	DCAA	Enterprise Networking	SD-WAN & PoP	2023-10-19	2023-02-16	Submitted	Activity Approved		\$12,500.00	0
3	0	DCAA	Enterprise Networking	Assurance & SD-WAN	2023-10-19	2023-02-16	Submitted	Activity Approved		\$25,000.00	0
4	0	DCAA	Enterprise Networking	Stealthwatch	2023-10-19	2023-02-16	Submitted	Activity Approved		\$5,000.00	0
5	0	DCAA	Enterprise Networking	Assurance & SD-WAN	2023-10-19	2023-02-16	Submitted	Activity Approved		\$25,000.00	0
6	0	DCAA	Enterprise Networking	ISE	2023-10-19	2023-02-16	Submitted	Activity Approved		\$5,000.00	0
7	0	DCAA	Enterprise Networking	Assurance & SD-WAN	2023-10-19	2023-02-16	Submitted	Activity Approved		\$25,000.00	0
8	0	DCAA	Enterprise Networking	SD-WAN & PoP	2023-10-19	2023-02-16	Submitted	Activity Approved		\$12,500.00	0
9	0	DCAA	Enterprise Networking	SD-WAN & PoP	2023-10-19	2023-02-16	Submitted	Activity Approved		\$12,500.00	0
10	0	DCAA	Enterprise Networking	SD-WAN & PoP	2023-10-19	2023-02-16	Submitted	Activity Approved		\$12,500.00	0

**Blue boxes:** The blue boxes summarize the potential payouts for each subtrack and how many opportunities have been approved/the total number submitted. The pale blue box provides the totals for all the Use (Activate) subtracks.

**Status tabs:** Select a tab, below the blue boxes, to view the status of your LCI opportunities activities. Select from All, Not Submitted, Denied (by Cisco), Submitted, Need more info (Cisco has requested additional information), or Approved for payment, to see only the opportunities in that category.

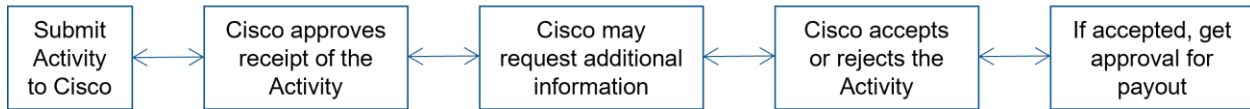
**Opportunity line:** Each shows the:

- Deal ID. If not available, you can add it manually from a Cisco CCW Deal ID lookup.
- Customer name
- Subtrack
- S.W. Use Case
- Activity Due Date
- Activity Submitted Date
- Activity Status (e.g., Submitted)
- Cisco Status (e.g., Activity Approved, More Info Needed) Note that if the Cisco Status is Activity Approved it means Cisco has accepted your activity but has not yet approved it for payment. They may require additional information from you before approving payment. That status will be indicated in the Cisco Status column.
- Activity Approval/Rejection Date. This date is important since it is when the support plans begin.
- Potential Payout
- Approved for Payment

As with the Opportunities tab, the columns can be filtered and managed by clicking on the column header and controlling the sorting direction by clicking the arrow.



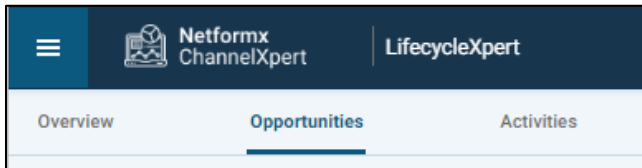
## Activity Timeline



## LifecycleXpert Adopt Home Page

The Adopt home page provides access to an overview of your LCI business and priorities, deal opportunities, and status of activities as they progress toward payout.

- Below the dark blue ribbon, select one of these dashboards which can also be considered report areas:



- Overview:** A high-level “flash report” view of your LCI business and priorities
  - Opportunities:** A “working desk” status of every deal and what needs to be done to submit a CSP plan
  - Activities:** A “to-do” view of the status of submitted deals as they progress to payout approval
- The table below outlines the role each of these dashboards play.

LifecycleXpert Adopt Home Page		
Overview Dashboard “Flash Report”	Opportunities Dashboard “Working Desk”	Activities Dashboard “To Do List”
<ul style="list-style-type: none"> <li>Tasks and deadlines summary</li> <li>Opportunities, activities, Reward progress summaries</li> </ul>	<ul style="list-style-type: none"> <li>Summary of opportunities</li> <li>Opportunity list, details and status</li> <li>Identify eligible deals</li> </ul>	<ul style="list-style-type: none"> <li>Status of every submitted deal's activities</li> <li>Activity progress toward payout</li> </ul>

## Overview Dashboard

The **Overview dashboard** keeps you up to date at a high level about everything you need to know to ensure you get your rewards and payments. It is a flash report, where you can see all your important Adopt data, insights, and tasks in one place. Using this dashboard you can see at a glance your deadlines and needed actions, as well as the summary status of your Adopt LCI opportunities, activities, and reward progress.



Netformx ChannelXpert

LifecycleXpert

Use Activate

Adopt

AUSTRALIA

⌵

Hello Daniel

Overview

Opportunities

Activities

Q4 FY23 | Apr 30 - Jul 29

Type: Non EA

Subtrack: EA

CSP SBL: Non EA

Q4

40414243444546474849505152

Tasks & Insights

1-10 days to submit

11-30 days to submit

31-90 days to submit

91-180 days to submit

Adopt - Summary

Opportunities

153

Potential SBO

\$1,713,000

CSP Activities Approved Rate

5/19

(50%)

SBO Activities Approved Rate

1/6

(14%)

SBO Expected Reward

\$30,000

Opportunities\* - EA

Subtrack	Total Deals	Potential SBO
EA & EA Adv	0	
Collaboration	0	
Data Center	0	
EN Meraki	1	\$25,000
Security	0	
Total	1	\$25,000

Activities - EA

Customer Success Plan (CSP)							Successful Business Outcome (SBO)						
Total Activities	Not Submitted	Denied	Submitted	Need info	Approved		Total Activities	Not Submitted	Denied	Submitted	Need info	Approved	Expected Payment
3					1	4	3			2		1	\$30,000

Opportunities\* - Non-EA

Subtrack	Total Deals	Potential SBO
Collaboration	0	
Data Center	19	\$200,000
EN Meraki	117	\$1,310,000
Security	16	\$180,000
Total	152	\$1,690,000

Activities - Non-EA

Customer Success Plan (CSP)							Successful Business Outcome (SBO)						
Total Activities	Not Submitted	Denied	Submitted	Need info	Approved		Total Activities	Not Submitted	Denied	Submitted	Need info	Approved	Expected Payment
1					1		1			1			\$0
3			3				1			1			\$0
1					1		1			1			\$0
3			3		1	1	3			3			\$0

**Tasks & Insights (Left section):** At the left of the Adopt Overview dashboard is a chronological statement of tasks and insights—a summary of your LCI business status and the things you need to do to receive Adopt reward payments. *For example, Customer Success Plan (CSP) or Successful Business Outcomes (SBO) submission deadlines are coming up.*

- The quarter being viewed is selected at the far right of the dashboard; click the arrow to select the quarter.
- Below the selected quarter, select the Type (e.g., CSP, SBO), whether EA or Non EA, and the subtrack (For EA: EA & EA Adv, Collaboration, Data Center, EN Meraki, Security; for Non-EA: Collaboration, Data Center, EN-Meraki, Security)
- The timeline will show you which LCI quarterly period you are working in (on a VIP calendar) and the Week Number (WN).
  - LCI is paid in quarters, but LCI aligns with the 6-month VIP periods, which align with Cisco's fiscal periods.
- Tasks & Insights list shows at a glance where you are in your business.
  - Choose desired submission due dates (e.g., 1-10, 11-30, 31-90, 91-180 due dates).
  - Click the arrow down to see the details of what's due within the due date period. *For example, you may have 2 CSP EA opportunities and have 15 days to submit the plans.*
  - Click on the CSP link to see more details on those specific opportunities.

Tasks & Insights	
> 1-10 days to submit	
> 11-30 days to submit	
CSP	1 CSP Opportunities Non EA 14 days to submit 04/26/2023
CSP	2 CSP Opportunities EA 15 days to submit 04/27/2023
> 31-90 days to submit	
> 91-180 days to submit	

**Adopt Summary (Main section):** The main section of the Adopt Overview dashboard summarizes your Adopt opportunities, their potential rewards, and the status of activities and payouts. You can quickly see where you have been applying for opportunities and where there has been activity.

- At the far right, above the Total Expected Payment pale blue box, is the quarter being reviewed, with the dates.
  - You can review data from another quarter by clicking on the arrow.
- The dark blue box at the far left summarizes your total number of potential opportunities and their potential SBO rewards.
  - Below the Opportunities box are the breakdowns by EA / Non-EA opportunities and subtracks, showing the number of deals and potential SBO rewards for each subtrack, as well as the EA and Non-EA total deals and potential SBO rewards.
- To the right of the Opportunities dark blue box are summaries of your CSP and SBO Activities Approval Rates, showing the approved/the potential opportunities as well as the percentage approval rates.
- Below the Activities Approval Rates boxes are details for EA / Non-EA CSP and SBO activities.
  - The CSP Activities area provides a quick view of the status of all CSP activities by subtrack.
    - Total activities for the subtrack.
    - The status of those activities: the number of activities that are:
      - Not submitted,
      - Denied by Cisco,
      - Submitted but waiting for Cisco's status disposition,
      - Cisco needs more information, or
      - CSP has been approved by Cisco.
  - The SBO Activities area provides a quick view of the status of all SBO activities by subtrack.
    - Total activities for the subtrack.
    - The status of those activities: the number of activities that are:
      - Not submitted,
      - Denied by Cisco,
      - Submitted but waiting for Cisco's status disposition,
      - Cisco needs more information, or
      - Have been approved for payment by Cisco, as well as the expected payment amount.
- The light blue box at the far right summarizes the total SBO expected reward payment amount.

## Opportunities Dashboard

Use the **Opportunities tab**, just below the dark blue ribbon, to get more detail about all your Adopt opportunities, whether you have applied for rewards for them or not. This is a “working desk” view of everything you have sold.

This view enables you to:

- Identify your opportunities, sort them, and archive them.
- Focus on the opportunities that are eligible for LCI rewards to ensure you don't miss any.
- Prioritize your opportunities by potential payout and target those that maximize your rewards.
- Research specific situations or for gathering backup information to potentially contest a Cisco decision.
- Filter the opportunities data to quickly zero in on what you want to know.

#	Deal ID	Last Date to Apply CSP	Customer	P.O.	P.O. Date	Deal Size LCI Eligible	Subtrack	Activation Prerequisite	Agreement	# of lines	SBO Potential Payout	Days Left to Apply CSP	Plan
1	0	2023-02-02	NATIONAL INSTITUTE OF HEALTH	30169680	2022-11-04	\$93,428.00	Data Center	Yes	Non EA	0/2	\$10,000.00	Days Left to Apply CSP Expires	
2	0	2023-02-21	USAGM	30114544	2022-11-23	\$83,299.00	EN-Meraki	No	Non EA	0/1	\$10,000.00	Expired	
3	0	2023-02-26	FAA WM J HUGHES TECHNICAL	30180317	2022-11-28	\$331,650.00	Security	Yes	Non EA	0/3	\$20,000.00	Expired	
4	0	2023-02-28	USAF	30180944	2022-11-30	\$100,464.00	Collaboration	Yes	Non EA	0/2	\$10,000.00	Expired	
5	0	2023-03-02	LOCKHEED MARTIN CORPORATION	30118261	2022-12-02	\$263,336.00	Data Center	Yes	Non EA	0/2	\$20,000.00	Expired	
6	0	2023-03-02	FCA	30147697/201788F	2022-12-02	\$172,935.00	Collaboration	Yes	EA	0/2	\$15,000.00	Expired	
7	55512574	2023-03-09	US DEPT OF LABOR	30181502	2022-12-09	\$563,700.00	Security	Yes	Non EA	0/12	\$20,000.00	Expired	
8	66246164	2023-03-12	SAIC	30181570	2022-12-12	\$51,606.00	Data Center	Yes	Non EA	0/4	\$10,000.00	Expired	
9	56024022	2023-03-13	MEDSTAR HEALTH INC	30181554	2022-12-13	\$135,900.00	Security	No	Non EA	0/2	\$10,000.00	Expired	
10	65393188	2023-04-04	SECDEF COMMUNICATIONS	30182180	2023-01-04	\$105,478.00	Collaboration	Yes	EA	0/4	\$15,000.00	Expired	

Top right:

- Export opportunities report
- Quarter and date being viewed. You can change the quarter by using the arrow.

**Blue boxes:** The dark blue boxes summarize the number of Non-EA and EA CSP opportunities, the total CSP opportunities, and the maximum number of SBO opportunities. The pale blue box is the Total SBO Potential Payout amount.

Non-EA CSP Opportunities 11	EA CSP Opportunities 4	Total CSP Opportunities 15	Max. SBO Applications 15	SBO Potential Payout \$235,000
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The dashboard **lists** all the opportunities you have closed in the quarter and the details about each.

- Opportunity Source: The color-coded bar at the left of each deal indicates whether the data came from Cisco, Distributor, or Netformx Annuity.
- For each deal, you can see the Deal ID, Last Date to Apply for the CSP, the Customer, P.O. number, P.O. Date, Deal Size if LCI Eligible, Subtrack, whether the Activation Prerequisite has been made, whether EA or Non-EA agreement, the number of lines in the P.O., the potential SBO payout amount, the days left to apply for the CSP, and Plan.
- You can sort on any column by clicking on the column header; then control the sorting direction by clicking the arrow.
- Clear any filters with Clear, which is next to Show, below the blue boxes.

**Show:** A large-scale filter of all the opportunities in the dashboard

- Clear (clear any prior filters)
- Visible Opportunities or Archived Opportunities
- Hide Expired (check or uncheck)
- LCI Eligible (Yes=only LCI Eligible, or All opportunities)

**Filter:** Tune the filters based on your needs by right-clicking on the column or clicking on the hamburger to the right of each column header; use the arrow to control the sorting direction. Filter your deals to identify the most important opportunities to work on.

- Deal ID: Search for a specific deal.
- Last Date to Apply CSP: Choose a CSP due date from the pop-up calendar to see any CSP applications outstanding.
- Customer: Search for a specific customer.
- P.O.: Search for a specific P.O.
- P.O. Date: Search within a date range.
- Deal Size LCI Eligible: Choose the LCI deal size ranges of interest and click Apply; this information is redundant with Potential Payout when LCI Eligible is selected in Show.
- Subtrack: Choose all or select the subtracks of interest.
- Activation Prerequisite: Identify any missing activations.
- Agreement: Filter by EA or Non-EA opportunities.
- Potential Payout: Choose the payout ranges of interest, such as only deals with larger payouts.
- Days Left to Apply CSP: Choose day ranges of interest, e.g., identify CSP opportunities that need to be handled with priority, before they expire.
- Plan: Go directly to the Cisco CSP planning application.

### Example uses of the Opportunities Dashboard:

1. **Don't miss eligible LCI opportunities.** See which opportunities meet the LCI rules, are eligible for LCI rewards, and you still have time to apply for them. Doing this search enables you to see what needs to be worked on first.
  - a. **Identify LCI eligible opportunities** by choosing LCI Eligible: Yes (instead of All) in the Show area under the pale blue box. Then the dashboard only shows deals that satisfy Cisco's LCI eligibility rules.
  - b. **Hide Expired deals** by checking the Hide Expired box in the Show area under the pale blue box.



- c. **Do you have time to apply?** Sort by Days Left to Apply PoP (right click on the hamburger to change the dates in the pop-up calendars) or enter the Last Date to Apply PoP.

The screenshot shows a filter dropdown menu for the 'Hide Expired' filter. The menu is open, showing the 'In range' option selected. Below this, there are two date input fields: '2023-08-01' and '2023-09-29'. At the bottom of the menu are 'Reset' and 'Apply' buttons.

2. **Track customer, P.O., dates, etc.** For example, search for a customer by clicking the hamburger to right of the Customer column.
3. **Sort by potential payout.** You can select the payout ranges of interest, maybe just the large ones, by clicking on the hamburger next to the Potential Payout header.

The screenshot shows a filter dropdown menu for the 'SBO Potential Payout' filter. The menu is open, showing a list of payout ranges with checkboxes: '\$0.00', '\$10,000.00', '\$15,000.00', '\$20,000.00', and '\$25,000.00'. The '(Select All)' option is also checked. At the bottom of the menu are 'Reset' and 'Apply' buttons.

4. **Sort by subtrack** by clicking on the hamburger next to the Subtrack header.

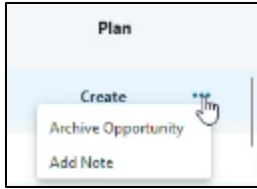
The screenshot shows a filter dropdown menu for the 'Subtrack' filter. The menu is open, showing a list of subtrack categories with checkboxes: 'Collaboration', 'EN-Meraki', 'Not Selected', and 'Security'. The '(Select All)' option is also checked. At the bottom of the menu are 'Reset' and 'Apply' buttons.

5. **Sort by size of LCI Eligible deals.** Click on the hamburger next to the Deal Size LCI Eligible header to insert a deal size range.

6. **Sort by Days Left to Apply for CSP.** Click on the hamburger next to the Days Left to Apply CSP header to insert a range of days.

7. **Sort by Last Date to Apply for CSP.** Click on the hamburger next to the Last Date to Apply CSP header to insert a range of dates.

8. **Associate a Deal ID with a P.O.** Sometimes Cisco doesn't associate the Deal ID with the P.O. This may happen, for example, when the deal has multiple lines (products). In those situations, you can look up the Deal ID in CCW Deal ID and manually enter it in the dashboard. That way all the details are available to you in your working desktop.
9. **Archive opportunities or add notes.** You can hide or archive opportunities from the working desktop, for example if the potential payout is too low or not worth your time. By clicking the 3 dots (ellipsis) at the right of the deal line a window opens where you can choose to archive the opportunity. You can always retrieve archived opportunities and bring them back to your working desktop by selecting Show: Archived Opportunities. In the window you can also select Add Note to provide more details about an opportunity, such as why you are archiving it.



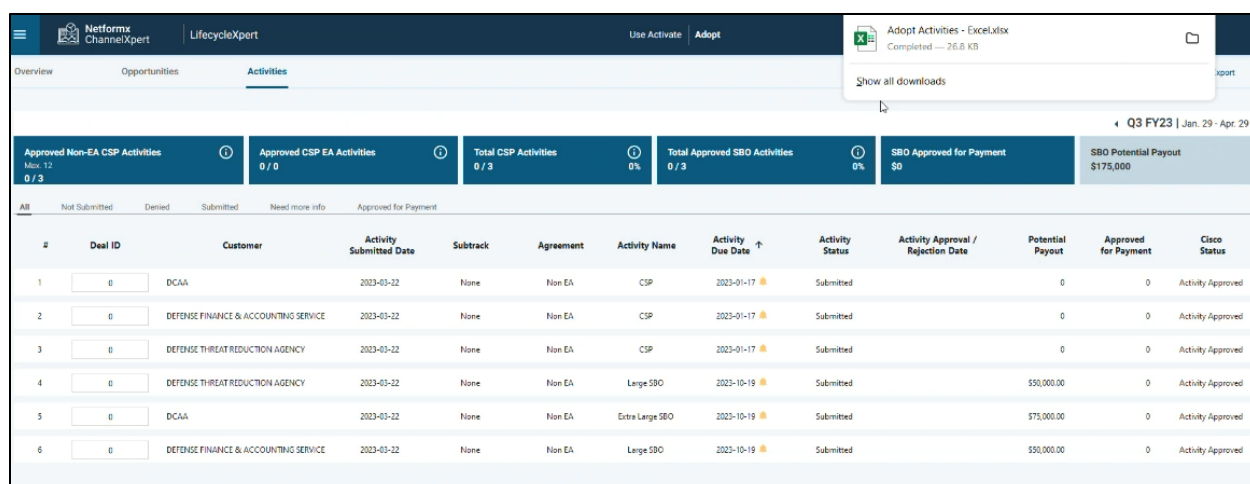
10. **Costs for deals placed through a distributor.** For deals placed through distributors (shown with a green vertical line at the left of the opportunity line), the deal costs are sent directly from the distributor or reseller (typically weekly) to Netformx and then automatically incorporated into the dashboard. However, there may be a lag between when Cisco receives the order and Netformx receives the distributor cost information. When Netformx has not received the distributor data, a bell icon is shown next to the Deal Size LCI Eligible line. When you hover over the bell you get a note that indicates this is an estimated cost. When there is no cost information Netformx automatically incorporates an estimated cost based on the discount from the distributor to you and temporarily uses that as the cost basis. That estimate will be replaced with the actual cost once it is received from the distributor. The alternative to using an estimated cost is to have a zero in that field. By having the estimate, you can at least make managerial decisions until the actual cost is available.

Deal Size LCI Eligi...	Activation Prerequisite	Days Left to Apply CSP
\$51,712.95	Expired	2023-04-30
\$37,376.68	Netformx couldn't find the deal cost for this distributor opportunity. This is an estimated cost.	
\$33,321.18	Expired	2023-04-30

11. **Go straight to CSP planning.** Once you have identified the opportunity and submitted the estimate, you can click on the Plan column to create your Customer Success Plan to apply for rewards for that opportunity. The link takes you directly to Cisco Workspace where you can submit the CSP plan to Cisco. Then you can start working on any required LCI activities.

## Activities Dashboard

Use the **Activities tab**, just below the dark blue ribbon, to see the status of all the activities related to your LCI Adopt opportunities and whether they have been approved for payment. You can quickly sort by status, e.g., activity submitted, and apply detailed filtering to zero in on what you want to review. Your end goal is to accomplish the required activities so that you have a Cisco-approved payout.



#	Deal ID	Customer	Activity Submitted Date	Subtrack	Agreement	Activity Name	Activity Due Date	Activity Status	Activity Approval / Rejection Date	Potential Payout	Approved for Payment	Cisco Status
1	6	DCAA	2023-03-22	None	Non EA	CSP	2023-01-17	Submitted		0	0	Activity Approved
2	6	DEFENSE FINANCE & ACCOUNTING SERVICE	2023-03-22	None	Non EA	CSP	2023-01-17	Submitted		0	0	Activity Approved
3	6	DEFENSE THREAT REDUCTION AGENCY	2023-03-22	None	Non EA	CSP	2023-01-17	Submitted		0	0	Activity Approved
4	6	DEFENSE THREAT REDUCTION AGENCY	2023-03-22	None	Non EA	Large SBO	2023-10-19	Submitted		\$50,000.00	0	Activity Approved
5	6	DCAA	2023-03-22	None	Non EA	Extra Large SBO	2023-10-19	Submitted		\$75,000.00	0	Activity Approved
6	6	DEFENSE FINANCE & ACCOUNTING SERVICE	2023-03-22	None	Non EA	Large SBO	2023-10-19	Submitted		\$50,000.00	0	Activity Approved

## Top right:

- Export opportunities report
- Quarter and date being viewed. You can change the quarter by using the arrow.

## Blue boxes:

- The approved CSP activities for Non-EA agreements, showing how many opportunities have been approved/the total number submitted, and the maximum number of opportunities allowed to be submitted per the Adopt program.
- The approved CSP activities for EA agreements, showing how many opportunities have been approved/the total number submitted.
- The total number of approved CSP activities, showing the number approved/the total number submitted
- The total number of approved SBO activities, showing the number approved/the total number submitted
- The approved SBO payments.
- The pale blue box provides the total potential SBO payouts.

**Status tabs:** Select a tab, below the blue boxes, to view the status of your LCI opportunities activities. Select from All, Not Submitted, Denied (by Cisco), Submitted, Need more info (Cisco has requested additional information), or Approved for payment, to see only the opportunities in that category.

## Opportunity line: Each line shows the

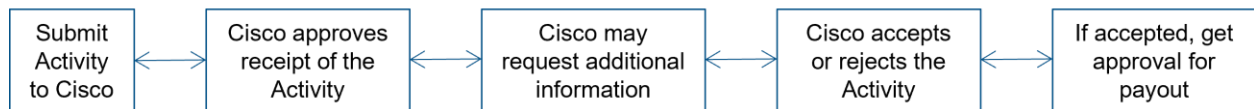
- Deal ID. If not available, you can add it manually from a Cisco CCW Deal ID lookup.
- Customer name
- Activity Submitted Date
- Subtrack
- Agreement (Non-EA or EA)
- Activity Name (CSP, Large SBO, Extra Large SBO)



- Activity Due Date
- Activity Status (Not Submitted, Submitted, Denied, Need More Information)
- Activity Approval/Rejection Date. This date is important since it is when the support plans begin.
- Potential Payout
- Approved for Payment
- Cisco Status (e.g., Activity Approved, More Info Needed) Note that if the Cisco Status is Activity Approved it means Cisco has accepted your activity but has not yet approved it for payment. They may require additional information from you before approving payment. That status will be indicated in the Cisco Status column.

As with the Opportunities tab, the columns can be filtered and managed by clicking on the column header and controlling the sorting direction by clicking the arrow.

### Activity Timeline



### Additional Online Resources

We encourage you to take advantage of the additional online resources listed on the [Get Support](#) page. There you will find information such as

- [Hot Topics](#) (up-to-date information on changes, interruptions, and workarounds)
- [Product Updates](#)
- [FAQs](#)
- [Newsletters](#)
- [Contact Support](#)
- [Feature Requests](#)