Goal and Intent

- The goal of this update is to outline the changes to the commercial programs Toolkit order entry processes for SAP Migration.
- Some changes will be specific to Distributor order entry, while others will be generic Rockwell Automation SAP processes. The changes outlined will apply to USA and International Distributors and Rockwell Automation personnel.
- Questions on overall Commercial Programs processes & procedures should be directed to the Channel Programs team.
- Questions on general SAP order entry procedures and instructions should be directed to your Super Users and/or Customer Care.
- All Toolkit Service Contract Quote / Order Processing Status inquiries should be directed to Customer Care (Ext. #2 on Channel Phone Menu).
Commercial Programs Key Points

- **All Participant, Distributor, and Rockwell Automation office records transition to use of SAP Business Partner ID vs Passport ID for Channel Programs purposes**
  - “PPID” is an acronym representing “Program Participant ID” and will become the SAP Business Partner ID for a site location effective March 1, 2011.
  - Legacy ID (passport ID) will still be displayed on Partner Summary Reports

- **RS Extranet account authentication requires an ID value for Participants and Distributors**
  - Establishes view-access rights, display of Partner Summary Report, and online portal access for Participants
  - Establishes view-access rights and APR-based Partner Summary Reports results for Distributors, online application & renewals portals view-access, etc.

- **All Participant and Distributor Extranet accounts have been updated to use the equivalent SAP BP ID value in the PPID field, so extranet authentication will be seamless and transparent.**
  - Effective March 1, 2011 – Global Channels for all Channel Programs purposes
Commercial Programs Key Points

- **Application and Enrollment Process stays the same**
  - Online Application and Renewal Portals on RS Extranet

- **Toolkits become Service Contracts vs. “product orders” in passport or SAP**
  - **Effective March 1, 2011 - USA Channel Only**
  - International toolkit order entry remains in passport until R5B (July 2011)
  - Toolkit orders will begin as Service Contract Quotes (SCQ)
    - All SCQs must reference Toolkit Program SPA number in Description Field
    - Quotes will not be approved without active participation (Ref. SPA number)

- **Maintaining Spirit and intent of Programs – Approved Participants, ref. SPA**
  - Risks to revenue stream – eligibility verification = quote approval process
  - Passport agreements eliminated with SAP R5A Go-Live, will be disabled Mar 1, 2011

- **SAP Special Pricing Authorizations (SPAs), one SPA Per Program type**
  - All participants of that Program level will be on the same SPA / participant list
  - Eligibility for Toolkit purchase; RASI/MB SW Resale purchase deals; HW for EDU
  - US Distrib. tied w/ Participants on SPA by APR ID instead of single location ID
  - Programs SPAs/agreements are SFSAC, migration active date is 3/8/2011
Commercial Programs Key Points

- **Leveraging CSM Service Contracts Process**
  - Support Authorization Number will become BP location ID *(risk of ID variance)*
  - Leveraging the CSM renewal portal in future – after R5B when Internationals are in
    - Timeline is shorter due to qualifying POS & Incentives requirements, not 90 days

- **Training and communication of new systems & processes**
  - GPT/SAP training by role – Channel Programs does not own the training responsibility
  - Toolkit-specific process documentation will be updated post go-live
    - Several Processes/functionality specific to Toolkits

- **Quote Review/Approval is required for Eligibility and Program terms**
  - Contract Services review/approval of non-exception quotes, no incentives
  - Exception-based quotes require Channel Programs Team review/approval
    - Negotiated pricing (concessions) requires advance approval, channel must apply for SPA number from Negotiations team and must include the SPA number for the Negotiation in the Service Contract Quote Notes block
    - Incentives redemption must be referenced in SC Quote Notes block
Toolkit Upgrades; GoldMaster

- **Toolkit install upgrades are still manual transactions**
  - PO must be provided to Channel Programs Team for manual processing
  - Billing-Only Transaction (form submission by CPT) and installs upped in RSSS
    - Billing-Only invoicing will be done in SAP
  - Similar for Incremental Install Upgrades processing (form submission to CPT)
- **Toolkit Support Level Upgrades are still manual transactions**
  - PO must be provided to Channel Programs Team for manual processing
  - Billing-Only Transaction (form submission by CPT) and Contract upgraded by Contract Services
    - Billing-Only invoicing will be done in SAP

GoldMaster Program orders will continue to be processed as an Internal Transaction with Order Entry and Invoicing by Program Mgr., Latoya Otero. Enrollment/Renewal via Extranet Portal Submission, No Change for Channel.
• **Programs SPAs are for eligible product purchases and are SFSAC**
  – Participant List establishes basic Program Participation for various Programs eligibility.
  – Toolkits are no longer ordered “like a product” against agreement (SPA), and must be ordered via SAP CRM Service Contract Quote Process

• **RASI/Machine Builder Programs Resale Agreements (SPAs) product purchases will get entered directly into SAP (similar to passport) referencing the appropriate SPA number for the Program the Participant is in**
  – RASI-Integrator Level & Solution Provider Level SPA# is 3*505
  – Machine Builder-MachLevel & MB-CoLevel SPA# is 3*507
  – SI-Developer & MB-Developer Level SPA# is 3*501

• **EDU Hardware product purchases will get entered directly into SAP referencing the EDU Program SPA number 3*510 (similar to passport)**

---

Not all Programs offer Resale SW / Product Purchase Discount. Some Agreements (SPAs) exist solely for establishing participant list for Program eligibility such as Consultant, CorpEng., Mid-Range Machine Builder (CMS)
Channel Programs Agreements Migration 3/8/11

- Eligible Deals are on each single agreement / SPA

<table>
<thead>
<tr>
<th>Developer Level for SI &amp; MB Programs - 10% Resale Discount</th>
<th>SI-Integrator &amp; SI-SP Programs 15% Resale Discount</th>
<th>Machine Builder Programs CoLevel &amp; MachLevel 15% Resale Discount</th>
<th>Mid-Range MB (CMS) Program - all SPA ≠ 3*509</th>
</tr>
</thead>
<tbody>
<tr>
<td>SPA ≠ 3*505</td>
<td>SPA ≠ 3*505</td>
<td>SPA ≠ 3*507</td>
<td>PGC</td>
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<tr>
<td>PGC / Catalog</td>
<td>Distrib. Net Discount (%) (is inclusive of participant discount)</td>
<td>Distrib. Net Discount (%) (is inclusive of participant discount)</td>
<td>Distrib. Net Discount (%) (is inclusive of participant discount)</td>
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<td>47%</td>
</tr>
<tr>
<td>The following two Voucher catalogs must be entered via quote in Passport until after SAP R5B because Training catalogs haven’t migrated to SAP yet</td>
<td>The following two Voucher catalogs must be entered via quote in Passport until after SAP R5B because Training catalogs haven’t migrated to SAP yet</td>
<td></td>
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</tr>
<tr>
<td>CTKVOUCHER</td>
<td>23% (77)</td>
<td>CTKVOUCHER</td>
<td>28% (72)</td>
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<tr>
<td>ETPVOUCHER6</td>
<td>23% (77)</td>
<td>ETPVOUCHER6</td>
<td>28% (72)</td>
</tr>
</tbody>
</table>

Consultant Program (includes SPA ≠ 3*506)

- PGC
- Distrib. Net Discount (is inclusive of Participant List Only)
- No Resale Deals at this time
- Quote on a case by case basis

CorpEng Program

- PGC
- Distrib. Net Discount (is inclusive of Participant List Only)
- No Resale Deals at this time
Onesey-twosey (non-Toolkit) software product purchases for EDU Program must be entered via the standard product quote process.
New Channel Programs SPAs are SFSAC
  - See Slides 29 – 31 for basic procedures
USA SPA Orders and Rebates must be done in SAP effective 3/8/2011
Old Passport Agreements used a Net Multiplier.
New SAP SPAs use a Net Discount Percentage.
Distrib. Net equals List Price value less Participant Discount Percentage value less Standard Distrib. Discount for the particular PGC/Product line.
  - Example:
    - $100 List less 15% SI Discount = $85
    - $85 SI Net less 20% Distrib. Discount = $68 Distrib. Net
    - $68 / $100 = 32% Net Discount
    - Deals are on the SPA (agreement) at Net Discount Percentage

Orders placed in Passport until March 8, 2011 against agreements 30896 or 24100 must be Rebated in Passport.
### Key Global Change Impacts:
**Business Cutover**

#### Contract Services / Distributors / Channel Programs Team

<table>
<thead>
<tr>
<th>PROCESS:</th>
<th>‘Today’</th>
<th>‘USA SAP Migration March 2011’</th>
<th>WHO IS AFFECTED:</th>
</tr>
</thead>
</table>
| Quotes & Contracts | **Toolkits:**  
1. Existing online application process outside SAP  
2. Existing online renewal portal outside SAP (cust)  
3. Toolkit orders entered like “product orders” in passport – global  
4. Eligibility by agreement is systemic restriction  
5. Contract is set up following media shipment  
6. Customer receives media and contract entitlement info separately | **Toolkits:**  
1. Same  
2. Same  
3. Toolkit orders begin as Service Contract Quotes in SAP – Domestic only for R5A, March 1, 2011; Intl. at R5B  
4. Eligibility verification is manual, quote must reference SPA and SPA must be valid for quote approval  
5. Contract is live when media order flows through  
6. Customer receives contract entitlement info via email  
7. Toolkit Media Sales Order is Child of Service Contract, can only be ordered by Contract Services with Service Contract order processing. Toolkit Media NOT to be ordered in SAP “like a product.” | **US Contract Services, US Distributors, US Sales & Marketing, Channel Programs** |
| Agreements to SPAs | 1. Single agreement, multiple summaries and participant lists  
2. Separate agreement for Toolkit purchase and resale deals  
3. Distrib. Net via SFSAC rebate process  
4. SFSAC deals for resale | 1. One SPA per Program type, all participants on same list – Domestic only for R5A, Intl. at R5B  
2. SPA reference on quote required for approval Review/approval by Channel Programs, Contract Services  
3. Distrib. Net at TOE, applied by Quote Reviewer (Contract Services, Channel Programs)  
4. TOE Deals for resale | **Pricing & Negotiations team, Channel Programs, Sales & Marketing, US Distributors, US Contract Services** |
| Incentives Redemption on Toolkit purchase | 1. Quote in Passport, requires multiple approvals, verification  
2. Full redemptions require manual order entry by Channel Programs due to finance requirements  
3. Different process depending on full or partial | 1. Referenced In SAP Service Contract Quote, Notes block  
2. Referenced in SAP Service Contract Quote, Notes block  
3. Same process for full and partial redemptions toward toolkit purchase | **Channel Programs, Sales & Marketing, US Distributors** |
### Key Global Change Impacts: Business Cutover, Continued

**Contract Services / Distributors / Channel Programs Team**

<table>
<thead>
<tr>
<th>PROCESS:</th>
<th>‘Today’</th>
<th>‘USA SAP Migration March 2011’</th>
<th>WHO IS AFFECTED:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Negotiated pricing</td>
<td>2. Manual order entry by Channel Programs</td>
<td>2. Short-term SPA must be referenced in Notes block of Toolkit Service Contract Quote and will be verified by Quote Reviewer for approval</td>
<td>Channel Programs, US Sales &amp; Mktg.</td>
</tr>
<tr>
<td>requests / concessions</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Incentive Redemption</td>
<td>1. Redemption forms submitted to Channel Programs for order entry through passport</td>
<td>1. Redemption forms submitted to Channel Programs for order entry through passport (until R5B) or SAP (after R5B)</td>
<td>US Distributors, Channel Programs,</td>
</tr>
<tr>
<td>purchases for RASIs</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

- Today all orderable Toolkit Catalog Numbers begin with ‘9398-’ and are transacted in Passport “like a product order” with separate Contract processing after fulfillment **Effective Mar. 1, 2011 in USA and July 4, 2011 for Non-USA:**
- All Toolkit catalogs begin ‘9398C-’ and must be transacted in SAP CRM Service Process as a Service Contract Quote. Contract is live when released
  - Existing ‘legacy’ toolkit catalogs become a non-orderable “child” of the corresponding “9398C” catalog and represent Media Only.
  - The “non-C” catalogs will be orderable ONLY by RA Contract Services in conjunction with an approved Service Contract Order. Ex. 9398-TKIT5B becomes 9398C-TKIT5B for channel entry
1. Appendix - Procedures

- Leverage Process Flows, and other process/procedural material on GPT and SAP sites!!
- Attend all required and suggested SAP Training
- Review all GPT/SAP communications specific to Channel Programs and Contracts Processes
- Pay attention to Hypercare emails, look for “Channel Programs” content
- Use the Rockwell Automation Knowledgebase for FAQs

- The following slides contain Processes that are especially important to Channel Programs. The items highlighted in blue denote who handles when the process is specific to a toolkit.
Primary Navigation Screen (Distributor view): Where to Go

- **Toolkit Service Contract Part Numbers Note**
  - All Toolkit Service Contract Part Numbers begin with “9398C-” (add “C” after 9398)
  - The rest of the part number is the same as they are today
  - The Legacy toolkit part numbers (without the ‘C’) will be restricted from direct order in SAP because they represent Media Only and will ONLY be orderable by Contract Services as a “child” of an approved Toolkit Service Contract order.
  - The media order will automatically be generated by Contract Services when the Service Contract order status is set to Released and will be fulfilled normally (media shipment)
• **Toolkit Service Contract Part Numbers**
  
  - All Toolkit Service Contract Part Numbers begin with “9398C-” (add “C” after 9398)
    - The rest of the part number is the same as they are today
  - The Legacy toolkit part numbers (without the ‘C’) will be restricted from direct order in SAP because they represent Media Only and will ONLY be orderable by Contract Services as a “child” of an approved Toolkit Service Contract order.
    - The media order will automatically be generated by Contract Services when the Service Contract order status is set to Released and will be fulfilled normally (media shipment)

Note: Access to Navigation tabs & functions are role dependent
2. Build Toolkit SC Quote (Who handles)

- **Users Impacted:** Distributors, Customer Care, Technical Support, Sales, Channel Programs Team (certain exception-based like Direct Bill customers)

- **Create/Build Quote**
  - Include Service Products to be entitled (Toolkit “C” Part Number)
  - Discount process accomplished by Pricing Conditions on contract line items (Distrib. Multiplier is automatically applied when Distrib. Enters)
  - Some Eligibility and Discounts authorized through the SPA process (Toolkits, description line must say “Toolkit SPA #*###”)
    - Incentives, negotiated pricing (separate SPA number) must be entered in Notes block, will be applied by CPT
  - Software Registrations can be viewed/managed in CRM iBase
    - Note: Only Customer Care can maintain iBase
  - Software Registration maintenance accomplished in ECC
  - TRANSITION: Dual Maintenance with RSSS and SAP

- See the [ServiceContractQuotations_Toolkits-USA_ReferenceGuide.pdf](http://example.com) document posted on each Program web page on the RS Extranet for step by step instructions on Toolkit Service Contract Quote entry procedures
Create Toolkit Service Contract Quote

New Toolkit Programs SPA Numbers:
- Developer Level (SI & MB), SPA 3*501
- SI-Integrator Program, SPA 3*505
- Consultant Program, SPA 3*506
- Machine Builder (Mach & Co Levels), SPA 3*507
- Corporate Int. Program, SPA 3*508
- Mid-Range (CMS) Mach Builder, SPA 3*509
- EDU Program, SPA 3*510

Toolkit Service Contract Part Numbers:
- All Toolkit Service Contract Part Numbers begin with "993980C" (add "C" after 99398)
- The rest of the part number is the same as they are built.
- The Legacy toolkit part numbers (without the "C") will be restricted from direct order in SAP because they represent media only and can only be ordered by Contract Services as a "child" of the Service Contract Order.
- The media order will automatically be generated when the Service Contract Order is processed by Contract Services.

RA Contr. Quotation: 3800001234 Toolkit - Notes

**Use Notes block to reference any non-Distrib.-margin discounts to be applied, or any exceptions such as these:
- Incentives Redemption (Partial or Full)
- Short-term SPA number for commercial Negotiation or Concession (Partial or Full)

NOTE: Negotiations/Concessions require advance application/approval through your District Negotiations Specialist. Negotiations would provide you with a short-term SPA number to reference here. Discount requests will not approved if they are not accompanied by a valid short-term SPA number from Negotiations team.
Create Toolkit Service Contract Quote

New Toolkit Programs SPA (Agreement) Numbers:

- Developer Level (SI & MB): SPA # 3*501
  - * = 6 zeros, ex. 3000000501, enter as 3*501
- SI-Integrator Program, SPA # 3*505
- Consultant Program, SPA # 3*506
- Machine Builder (Machine & Co Levels), SPA # 3*507
- Corporate Eng. Program, SPA # 3*508
- Mid-Range Machine Builder (CMS) Program, .SPA # 3*509
- EDU Program, SPA # 3*510

- Passport Agreements Disabled on Mar 1, 2011
  - 30896 – EDU Program
  - 24101 – Toolkit purchase
    - Multiple summaries
  - 24100 – Toolkit Programs Resale Agreement
    - Multiple summaries
Create Toolkit Service Contract Quote

- Use Notes Block for all Toolkits with non-standard pricing (exception based)
  - Full or Partial Incentive Redemptions
  - Negotiated Pricing SPAs (concessions) must be accompanied by an approved Short Term SPA No. provided by your District/Country Negotiations Specialist
    - Requests for negotiated pricing (discount) on Toolkit orders without approved SPA will be denied
  - Toolkit Service Contracts will be transacted at Distributor Net Pricing TOE
    - Countries not selling Toolkits through Distribution will transact SCQs with Toolkit Customer as Sold-To
3. Review and Approval (Who handles)

- **Users Impacted:** Distributors, Sales
- **Customer Care (Contract Services) Only**
  - Normal Toolkit SC Quote with no exceptions, negotiations, or incentives
- **Channel Programs Team Only**
  - Toolkit SC Quote referencing negotiated pricing request, incentives, any exception in Notes block

- **Review and Approval**
  - Verify Customer Information and Eligibility
    - Distrib. (Sold To); Ship To (should be Participant); Register To (should be Participant, SW Lib.)
    - End Cust/Register To must be on SPA with Distributor – check SPA participant list and/or Channel DB
    - SPA Number must be referenced in Description field
  - Verify Service Products and Registrations
    - Verify Toolkit type is right for Program type
    - Verify Toolkit is in active Date Range for purchase
    - Verify Register To is valid SW Librarian
4. Convert Quote to Contract (who handles)

- **Users Impacted**: Distributors, Customer Care, Contract Services, Technical Support, Sales, Channel Programs

- **Accept Quote (Distributor)**
  - Final Review of Key Contract Items
  - Add Purchase Order Number & Date
  - Accept Quote
  - Save to Submit to RA – Quote status changes to “Won”

- **Convert Quote to Contract (RA – Contract Services)**
  - Final Review of Key Contract Items
  - Delegation of Authority as appropriate
  - Set Contract to Released
  - Billing
  - Fulfillment (services and/or software media)
    - Toolkit media sales order gets entered by Contract Services at this point. Contract is active when order is fulfilled
Routing and Approvals

- Routing Managed through Status
  - Only RA approved Quotes show up for Distributor to view
  - (example Status list)

- Approvals Managed through Administrative Controls
  - SPAs referred to for certain Program Eligibility
  - Text note comments for Decision Authority as required
    - User/Date time stamp

- Quote Document can be generated for Approved Quotes
  - Uses Quotation line items to create PDF
  - Distributor generates as required, delivers to customer
  - Not used for Toolkits

- Automated eMail reminders (to customer)
  - Quote document (pdf) e-mailed to customer
  - Not used for Toolkits
Navigation Screen (Distributor View): Search for Service Contract Quotes

Search Service Contracts, or Service Contract Quotations
Use the drop-down arrows on the Search page to pick the search criteria that you want to use. You can use single or multiple search criteria.
Search for Toolkit Service Contract Quotes (Distributor View)

Since Toolkit Service Contracts must reference “Toolkit SPA # 3*xxxx” in the Service Contract Quote Description Field, searching ‘Description / contains / Toolkit’ will be a fast way to search for your Toolkit Service Contract Quotes that are currently in-process.

• See the ServiceContractQuotations_Toolkits-USA_ReferenceGuide.pdf document posted on each Program web page for step by step instructions on Toolkit Service Contract Quote entry procedures.
All Toolkit Service Contracts must reference “Toolkit SPA # 3*xxx” in the Service Contract Quote Description Field so “Toolkit” will be fastest way to search for your Toolkit SC Quotes.
Service Contract Release Notification

- Bill-To Parties (Distributors) receive an automatic email notification containing Contract entitlement info when the Contract status is set to Released
  - So Distributors will be able to forward Auth.# info to customer immediately
  - Checking on plans to email customer directly right away after R5B when globals are in. This is currently done on the eWallet Cards email.

Example of Contract Conversion (Release) Notification

From: Customer Service [mailto:clarify@ra.rockwell.com]
Sent: Monday, February 14, 2011 8:25 AM
To: Sold-To Contact (Distributor)
Subject: Service Contract Conversion

02/14/2011 08:25:22
Rockwell Automation
Global Manufacturing Solutions
Contract Conversion Notification

Authorization #: 123456 (BP Site ID)
Covered Site Name: Toolkit Customer Company Inc.
Covered Site Address: 1234 Example Drive
City: Example City
State: WI
Zipcode: 12345
Passport SOE#: n/a – passport reference will go away
Start Date: 01/28/2011 (contract release effective date)
End Date: 12/31/2011 (indicative of applicable Toolkit expiration date)
Distributor PO#: Distrib. PO from Service Contract Quote in SAP

Notice: This transmission is for the sole use of the intended recipient(s) and may contain information that is confidential and/or privileged. If you are not the intended recipient, please delete this transmission and any attachments and notify the sender by return email immediately. Any unauthorized review, use, disclosure or distribution is prohibited.
See the ServiceContractQuotations_Toolkits-USA_ReferenceGuide.pdf document posted on each Program web page on the RS Extranet for step by step instructions on Toolkit Service Contract Quote entry procedures.
Participant Authorization Number is now their Site ID (Business Partner ID)
Some risk of ID variance initially between CRM system and Master Data
The Channel Programs agreements are SFSAC and work the same way as any other agreement/SPA.

- Complete Distributor training materials on SPAs are posted on the A-B Channel Extranet under Communications/Channel Management/GPT/ Customer Relationship Management Distributor Training/Special Price Authorization (SPA): Claims & Agreements.

24101 is now obsolete because all Toolkit orders in the USA must be processed via the SAP CRM / Pricing and Contracts / Service Contract Quote Process now.

- Since the Toolkit itself must now be processed via a Service Contract Quote, the actual Toolkit Service Contract is extended at Distrib Net TOE since all Toolkit Service Contract Quotes require Review and Approval.

24100 (Channel Programs Resale agreement) is now obsolete.

- See slide 8 for new SPA numbers that replace the legacy agreement/summaries.
Channel Programs Agreements Procedures

- EDU Program agreement 30896 has been replaced with SPA 3*510.
  - EDU Hardware is all on SPA 3*510 so Distributors need to place EDU hardware product orders referencing that agreement/SPA number.
  - All eligible EDU HW is on the SPA/agreement so needs to be ordered referencing the SPA directly in order for Distributors to be able to submit rebate for EDU pricing.

- Onesey-twosey software products for EDU need to be ordered via a standard product quote.
  - This is because it's supposed to be infrequent since the school gets about everything they should need in the Classroom Toolkit license.
  - A standard product quote is not the same thing as a Service Contract Quote.
Channel Programs Agreements Procedures

1. To see their avail. end pricing Distrib. should use SAP CRM / Orders / Create Quotation / Price&Avail (equivalent to PA/Agreement in legacy)
   - *A standard product quote is not the same thing as a Service Contract Quote*

2. Then you can either save that quote and create a Follow-Up sales order from that quote, or you can simply enter a sales order directly in SAP CRM / Orders without saving that quote.
   - Please enter the Program SPA number in the Agreement field at the time of order entry even though it doesn't affect up-front pricing since the SPA is SFSAC.

3. The sales order will go through at your normal Distrib. Net per your Distributorship Appointment level (Automation Appt. vs IAP Distributor, etc.) and the Discount Policy for the PGC/product line.
   - Distribbs. get their NORMAL net at TOE.

4. If the End Customer is a Participant on an SPA/Agreement, then you need to submit SFSAC rebate to get rebate of the difference between your normal margin and the Net Margin due per the Agreement/SPA deal.
Supplemental Learning
Support and Resources

• The **SAP Knowledge Center** contains:
  – Simulations
  – Job Aids
  – Business Process Flowcharts

• **The GPT website contains**:
  – Knowledge Transfer Sessions
  – Monthly At-a-Glance Newsletters
  – Process Walkthroughs and Super User Info

• **The Knowledgebase contains**:
  – GPT/SAP Q&A for RA and Distribs.
  – Links to training, procedures, forums

Become familiar with available resources! Know where to send people!
Locating Change Workshop Presentations - RA

- Process Walkthroughs
- Change Workshops
- Knowledge Transfer Sessions
- Demos & Simulations
- Work Instructions
- Reference Guides

- Training Materials
- Much training is self-directed
- On-Demand Resources
- Links to FAQs, Q&A
Training Material on A-B Channel Extranet

- Simulations
- Work Instructions
- Reference Guides
- Links to Q&A
- Links to Channel Programs-specific info on RS Extranet

- Distributor Use
- Not all Distrib. globally have access – no access in APAC
- Channel Programs specific info will be linked to RS Extranet
## Status Terms

<table>
<thead>
<tr>
<th>Current Terminology</th>
<th>SAP Terminology</th>
</tr>
</thead>
<tbody>
<tr>
<td>New Quote</td>
<td>Created</td>
</tr>
<tr>
<td>In Process</td>
<td>In Process by Partner</td>
</tr>
<tr>
<td>Awaiting Approval</td>
<td>Submitted for Review</td>
</tr>
<tr>
<td>Expired</td>
<td>Expired</td>
</tr>
<tr>
<td>Awaiting SpecPricRev</td>
<td>Review Required</td>
</tr>
<tr>
<td>Draft</td>
<td>Created</td>
</tr>
<tr>
<td>Approved</td>
<td>Approved</td>
</tr>
<tr>
<td>Denied</td>
<td>Denied</td>
</tr>
<tr>
<td>Billing Requested</td>
<td>Accepted</td>
</tr>
<tr>
<td>Converted</td>
<td>Won</td>
</tr>
<tr>
<td>CSM_SpecPricRev</td>
<td>Submitted for Review</td>
</tr>
<tr>
<td>CSM_BillingRequested</td>
<td>Accepted</td>
</tr>
</tbody>
</table>

### Additional SAP Status Terms
- In Process
- Further Information Required
- Submitted for DOA Review
- Lost
- Rejected
- Submit
- Distributor Review Required
- Sent to Customer
<table>
<thead>
<tr>
<th>Current Terminology</th>
<th>SAP Terminology</th>
<th>Definition</th>
</tr>
</thead>
<tbody>
<tr>
<td>Queue</td>
<td>Worklist</td>
<td>Customer Care worklist is the holding area for quotes that are awaiting review or billing</td>
</tr>
<tr>
<td>Covered Site</td>
<td>Ship To/Register To</td>
<td>The site/location that is covered for technical support under the contract. The contact calling in for support should be “based out of” this site to receive support under the contract.</td>
</tr>
<tr>
<td>Contract ID</td>
<td>Contract Number</td>
<td>Searchable number to locate a contract, sequentially assigned by SAP, starts with “8”</td>
</tr>
<tr>
<td>Quote ID</td>
<td>Quotation Number</td>
<td>Searchable number to locate a quote, sequentially assigned, starts with “38”</td>
</tr>
<tr>
<td>Authorization Number</td>
<td>Business Partner ID</td>
<td>Number used to entitle services</td>
</tr>
<tr>
<td>RSSS</td>
<td>iBase</td>
<td>Software Registration Database</td>
</tr>
<tr>
<td>Discount Request</td>
<td>Discount Request</td>
<td>Approved discounts added</td>
</tr>
<tr>
<td>Primary Contact/Site Coordinator</td>
<td>Ship To: Contact Person</td>
<td>Primary contact is the Ship To Contact Party. The Quotation/Contract will show a Sold To, Contact, Ship To/Service Recipient, Ship To Contact</td>
</tr>
<tr>
<td>Convert</td>
<td>Accepted</td>
<td>When a purchase order comes in the distributor enters PO#, date and accepts the quotation. The system then copies it a status of ready for review.</td>
</tr>
<tr>
<td>Activate contract</td>
<td>Set Contract to Released</td>
<td>RA reviews and releases contract.</td>
</tr>
</tbody>
</table>
Q & A (captured from live sessions)

• What is the correct number to call for assistance - TechConnect number or RS Channel number?
  – Questions on overall Commercial Programs info, enrollment & renewal processes & procedures, benefits, etc. should be directed to the Channel Programs team,
    • 414-382-8360
  – Questions on general SAP order entry procedures and instructions should be directed to your Super Users and/or Customer Care Contract Services
    • 440-646-7505
  – All Toolkit Service Contract Quote / Order Processing Status inquiries should be directed to Customer Care Contract Services (Ext. #2 on Channel Phone Menu)
    • 440-646-7505 (internal RA extension is 37505)

• Where can I find SAP CRM Service Contract process procedures & work instructions?
  – Contact your Super User(s) for job-specific info
  – Training material for SAP Contract Quotes and SPAs is on the Distributor Extranet (Communications>Channel Mgt> GPT)
  – On the A-B Channel Extranet (see slide 24) and the Knowledgebase (see slide 22)
Q & A (captured from live sessions)

• Is there going to be simulation of the procedure?
  – No, Training material for SAP Contract Quotes and SPAs is on the Distributor Extranet (Communications>Channel Mgt> GPT), or contact your Super User(s)
  – Reference Guide for Toolkit SCQ Process is posted on each Program web page
• Will the customer (Participant) still need to do the electronic renewal on the Rockwell Software Extranet?
  – Yes, the online renewal portal captures annual program terms & commercial information updates & acceptance from the Participant via the security logon protocol.
• If a Toolkit Service Contract Quote is denied, how will we be notified?
  – In the Quote Notes block.
• Where can I find this slide deck?
• Will shipping info be in SAP? Or will we contact someone at Rockwell with the contract number to get the tracking number?
  – The media sales order number will be linked inside the Contract number. Tracking on the media sales order number can be looked up in ECC.
Q & A (captured from live sessions)

- Will S/W activation codes be supplied this way as well?
  - No, Serial Number & Product Key (activation codes) are supplied on the Activation Certificate that the customer/Participant receives in the Toolkit media package.
  - Product key (activation code) is proprietary information available only to the license holder. That info is not intended to be posted for public or channel view.

- How long after the contract is entered will customer get media?
  - Media fulfillment turnaround is typically 5-7 business days (same as today)

- Will we have the Service process tab available and be able to see "Service Contract Questions" and the Service Contract Details Screen?
  - No, those are Rockwell Automation administrator view-screens, see the additional Distributor-view screenshots added earlier in this slide deck.

- If we do not currently have access to Services in SAP, do we need to get a new sign on?
  - No, Distributor access is under "Pricing and Contracts" on the left side navigation of the CRM Partner Portal, under My Workplace.
  - See the additional Distributor-view screenshots added earlier in this slide-deck.
Q & A (captured from live sessions)

- Can we add the SPA number to the Partner Summary Report page with the customer information and PPID (SAP ID) number?
  - We’ll investigate if we can display that number.
  - The SPA number applies to the particular Program type, which applies to all Participants of that program, and not that Participant individually, however, we’ll still look into if we can find a way to simply display the number as text dependent on the program type.

- Can we search for contracts specifically by Company name?
  - Yes, from the Pricing and Contracts menu, select Search / Service Contracts, then use the drop-down arrows on the resulting Search page to pick the search parameters that you want to use.

- Will our customer service PODS that we chat with be able to help us with the entry process?
  - Not sure what “PODS” represents, in general, customer care should be able to point you in the right direction to find procedures, work instructions, and simulations already posted, and help with trouble-shooting. See your Super User(s) first.
Q & A (captured from live sessions)

• We still do not have the ability to edit or add contacts for Tech-Connect. Are we going to have to wait for a Partner Summary edit to go through the Channel Group and then wait for Contract Services to update the site in SAP?
  – The contact must be available in SAP CRM in order to select in the Service Contract Quote.
  – Contact add or edit requests can be submitted inside SAP CRM directly, or contact Customer Care if a needed contact is not already in the system.

• Will the renewal notification and process still work as it has in the past?
  – Yes. Participants will still receive an Annual Renewal Notice and be directed to use the Online Renewal Portal on the Rockwell Software Extranet to re-up annual Program terms acceptance, refresh commercial info, and select Toolkit installs, support level, indicate any incentives redemption, include PO (if needed), and submit.
  – Distributor “place order” email will auto-generate when Participant submits through the portal, for ultimate order entry by Distributor through the SAP CRM Service Contract Quote process.
Q & A (captured from live sessions)

• How is this going to work with the new "renewal seasons" that are coming out?
  – With 3Q and 2Q become new full-year license term periods, we will effectively have three annual renewal periods.
  – Renewal notices will be specific to Participants for the applicable license term period:
    • Participants who enroll and purchase the toolkit in term period Q1 (Jan-Mar) will renew annually in December
    • Participants who enroll and purchase the toolkit in term period 3Q (Apr-June) will renew annually in March.
    • Participants who enroll and purchase the toolkit in term period 2Q (July-Sep) will renew annually in June.
  – Over time the renewal cycles will become staggered
    • Audience and the burden of amounts of customers to renew at the same time will get smaller
    • We are currently evaluating feasibility to selectively migrate some existing Participants from Q1 to a later term period, and will provide more info as available.
Questions?
Visit the Extranet

or Contact:
Channel Development Team
rschannel@ra.rockwell.com
414-382-8360

(Confidential – For Internal Use Only)