Honeywell E-Commerce Software User Guide

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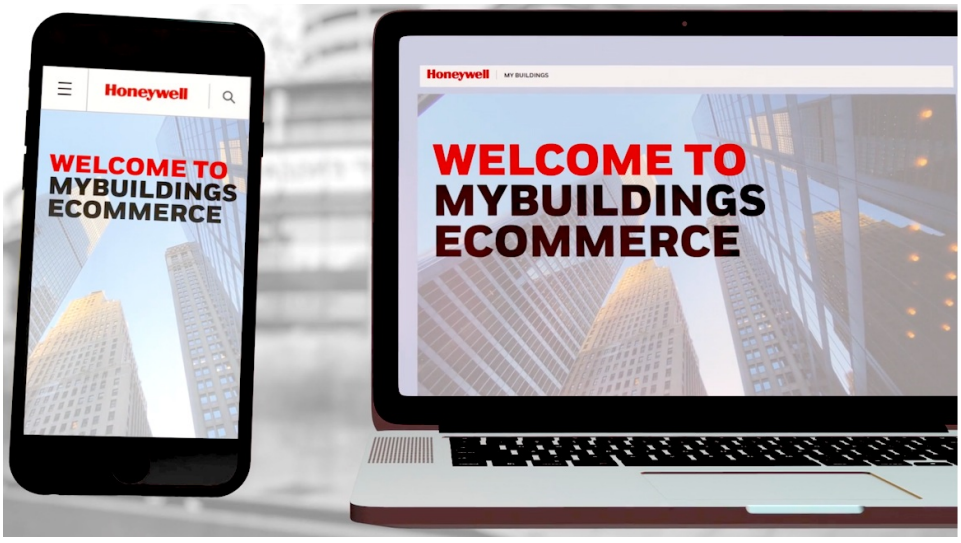
Honeywell

Honeywell E-Commerce Software



Product Information

Specifications

- **Product Name:** Discount Request Process on Commerce
- **User Guide:** January 2024

Product Usage Instructions

Discount Request Process Overview
Follow these steps to complete the discount request process:

1. Add products to the shopping cart (Refer to Page 10)
2. Submit the electronic discount request form (eDRF) for approval (Refer to Pages 3-9 and 11-13)
3. Receive discount request status updates (Refer to Pages 13-14)
4. Purchase product using the approved discount (Refer to Pages 15-20)
5. Check your order using the New! Order Status feature (Refer to Online User Guide)

eDRF | Discount Request Form Section Overview
Key sections of the electronic Discount Request Form (eDRF) include:

- Opportunity details section
- Justification section
- Summary section
- Quote Line Items section

EDRF Section | Opportunity Details
Important fields in this section:

1. Opportunity Number: Enter the unique 8-digit identifier in the specified format.
2. Discount Request Name: Enter the customer-specified name for your discount request.

EDRF Section | Justification Part 1
Details required in this section:

1. Discount Request: Select the project type of the opportunity.
2. Pricing Request: Select the purpose of the special pricing.
3. Install Base: Indicate whether the project site is Honeywell’s install base.
4. Describe Reason: Explain why the special pricing is needed.
5. Scope Description: Describe Honeywell’s scope in the project.
6. Key Decision-Making Criteria: Select criteria considered by the customer.
7. Business Strategy/Sales Response: Enter any strategic value supporting the special pricing.

EDRF Section | Justification Part 2
Additional details needed in this section:

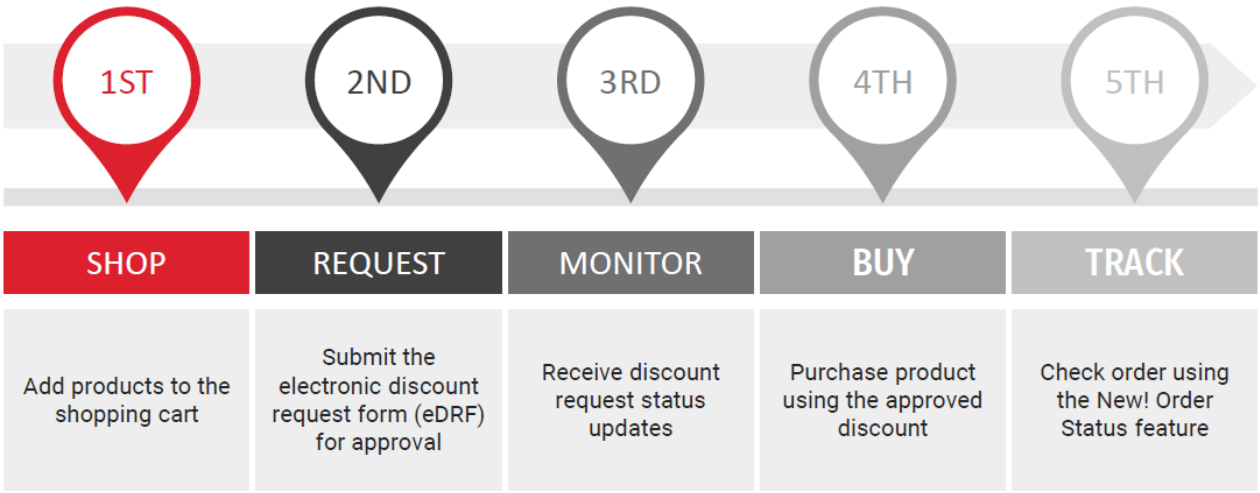
1. Other Commercial Impacting T&Cs: Enter any positive/negative terms and conditions relevant to the project.
2. Competitive Discount: Indicate competitiveness against competitors' prices.
3. Advance Payment: Specify if an advance payment is agreed upon or applied to the project.
4. Payment Details: Provide advance payment details or support needed for acceptance.

Frequently Asked Questions (FAQ)

- **Q: How can I track my discount request status?**
  A: You can track your discount request status on Pages 13-14 of the user manual.
- **Q: Can I add or delete quote line items in the eDRF form?**
  A: No, quote line items cannot be added or deleted in the form as per the instructions.

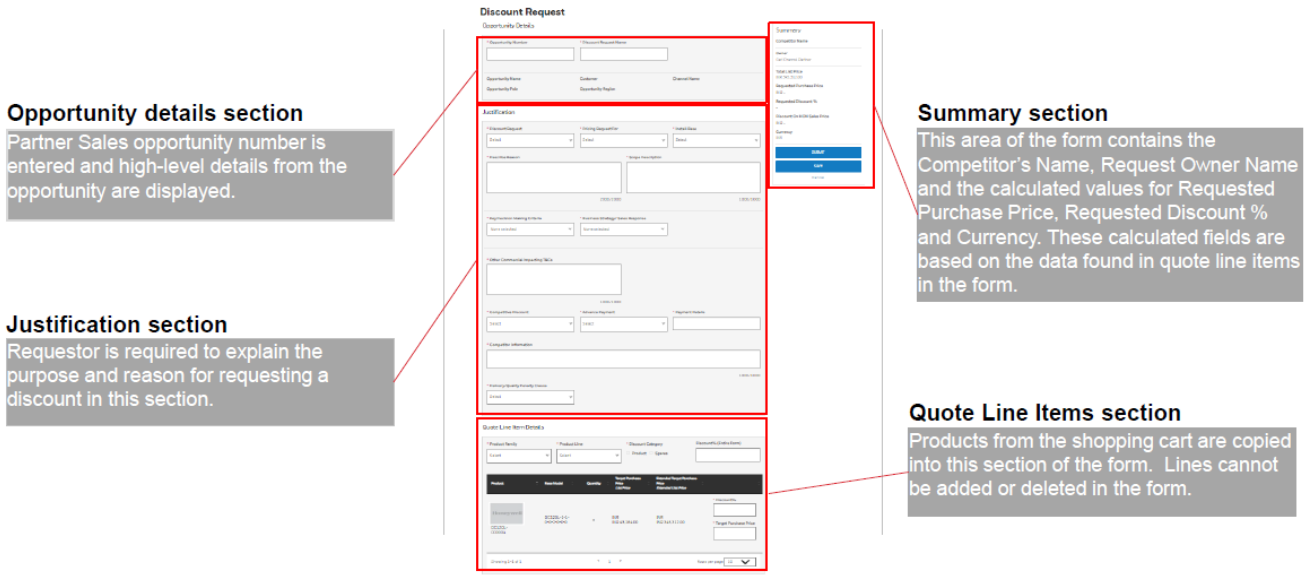
DISCOUNT REQUEST PROCESS

OVERVIEW

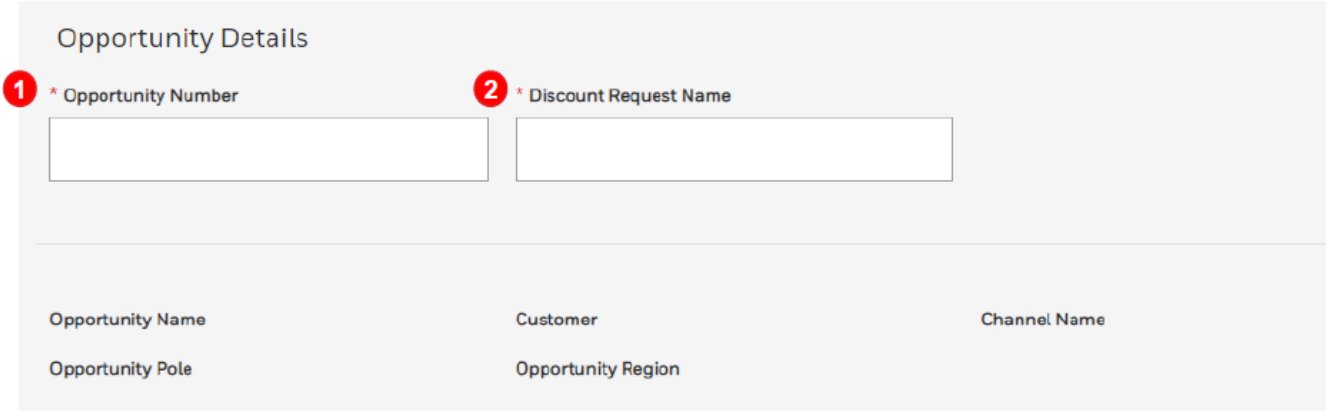


DISCOUNT REQUEST FORM SECTION OVERVIEW

Channel Partners can submit their requests for discounts from the commerce platform using the electronic Discount Request Form (eDRF)



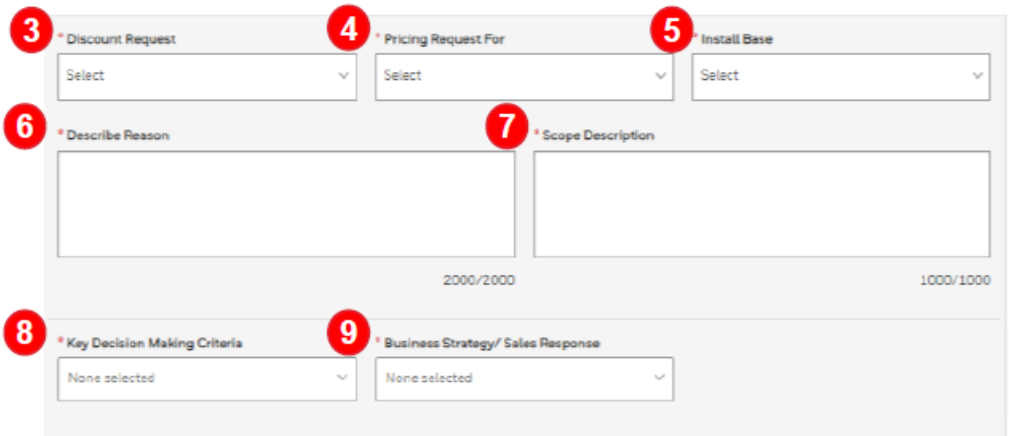
OPPORTUNITY DETAILS



1. Opportunity Number enter the unique 8-digit identifier in this format O-######. A valid opportunity is required which is not lost, abandoned or booked.
2. Discount Request Name enter the customer-specified name for your discount request
   The following are display fields used to show opportunity details: Opportunity Name, Customer, Channel Name, Opportunity Pole, Opportunity Region

JUSTIFICATION PART 1

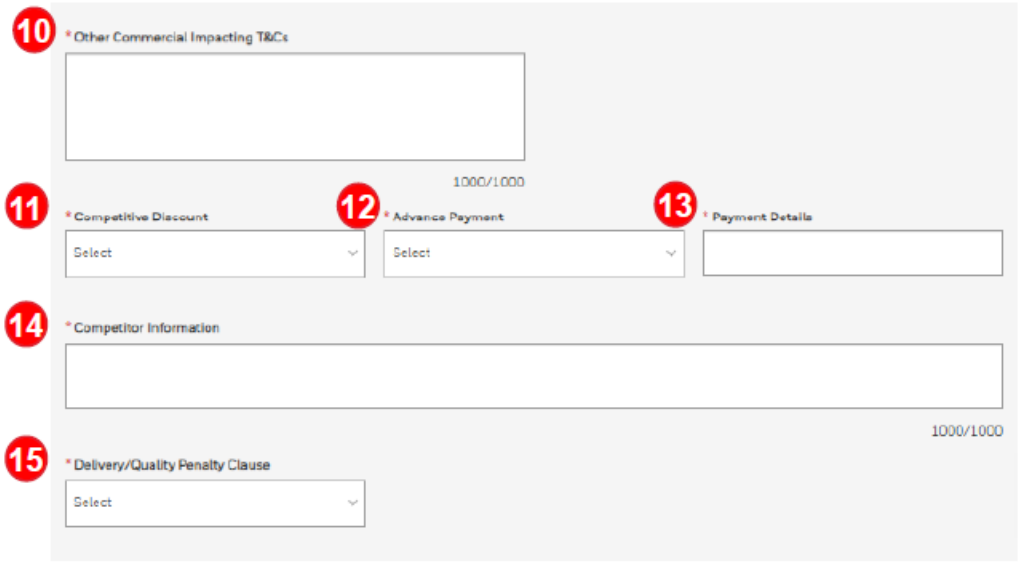
3. Discount Request select the project type of the opportunity that the special pricing is for
4. Pricing Request for selecting what the special pricing will be used for
5. Install Base indicates whether the project site is Honeywell's install base or not
6. Describe the Reason why the special pricing is needed
7. Scope Description describes Honeywell's scope in the project
8. Key Decision-Making Criteria Select the criteria that the customer is considering to selecting a vendor
9. Business Strategy/Sales Response Enter if there is any strategic value to support the special pricing



JUSTIFICATION PART 2

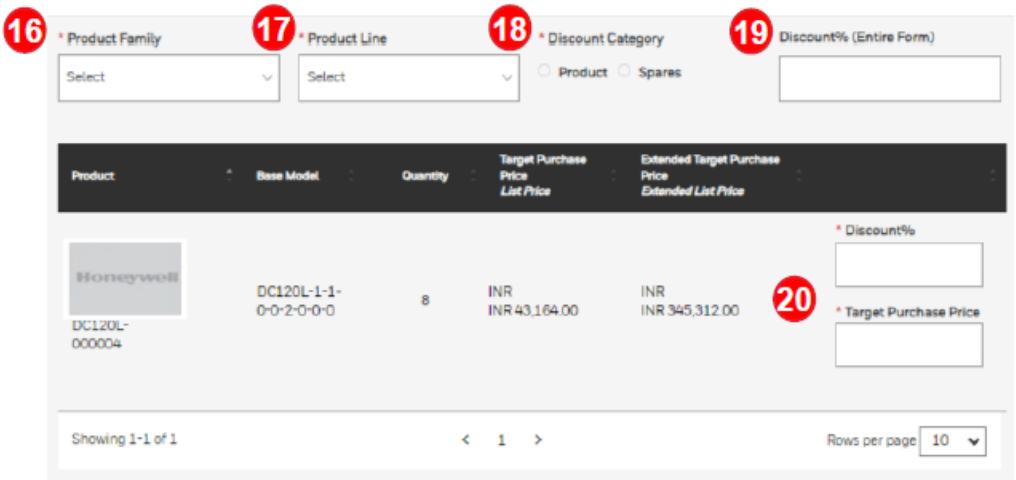
10. Other Commercial Impacting T&Cs enter any positive/negative T&Cs Honeywell needs to consider for this project
11. Competitive Discount indicates if the new pricing based on this special pricing will be competitive against the competitors' prices or not
12. Advance Payment indicates 10% of advance payment is agreed upon or will be applied to this project or not
13. Payment Details indicate if there is any advance payment agreed or scheduled, explain the details. If not, what support is needed to make the customer accept the advance payment
14. Competitor Information explains competitive situation having advantages or disadvantages against competitors

15. Delivery/Quality Penalty Clause Select whether the project has any clause related to either a late delivery penalty or quality penalty



QUOTE LINE ITEMS

16. Product Family Select the Product Family the items listed in the request belong to. Separate discount requests must be submitted for different product families, respectively.
17. Product Line select the Product Line the items listed in the request belong to.
18. Discount Category select what line items are listed in the quote. The spares category is available for PMC products only.
19. Discount % (Entire Form) enter the overall average discount % to meet the “Requested Purchase Price” targeted (against Total List Price). This value will cascade to all line items in the request. When a value is entered in this field all Discount %/Target Sell Price fields are locked. To remove the lock, clear this field and proceed to enter values at the line-item level
20. Discount %/Target Sell Price use these fields when different values need to be specified at the line level. These fields are linked, so when one contains a value the other is locked. To remove the lock, delete the value to use the other field.

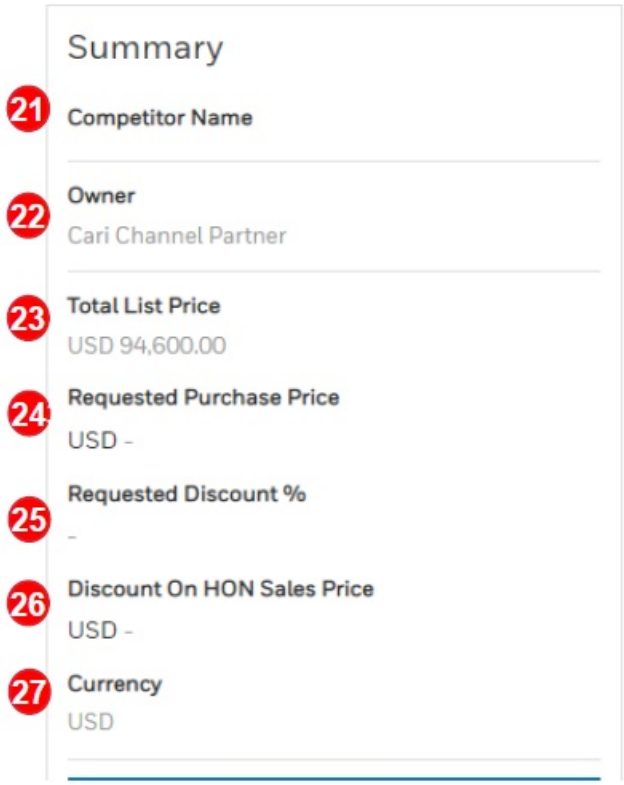


SUMMARY FIELDS

The fields in this section are calculated and auto-populated

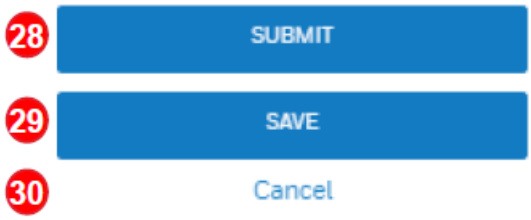
21. Competitor Name listed in the Salesforce opportunity
22. Owner this is the current logged-in user who submitted the discount request
23. Total List Price is the total list price of the quote line items before the discount
24. Requested Purchase Price is the total amount after discount – applying all requested discounts to all line items

25. The requested Discount % is the overall discount %determined from the per cent values and/or target sell price entered in the quote line-item section.
26. Discount on HON Sales Price is discounted dollar amount after applying the requested discounts.
27. Currency is the currency of the price amounts – Total List Price, Requested Purchase Price and Discount on Hon Sales Price. This is taken from the logglogged-inr's account.



SUMMARY BUTTONS

28. SUBMIT button is available when all fields are not blank. This button will submit the discount request for approval and close the eDRF form. The submitted version of the form will be saved as 'submitted' in the Discount History area.
29. The SAVE button is available for use when the eDRF opens. The form will be saved as a 'draft'. It is recommended to enter a Discount Request Name to locate the draft later.



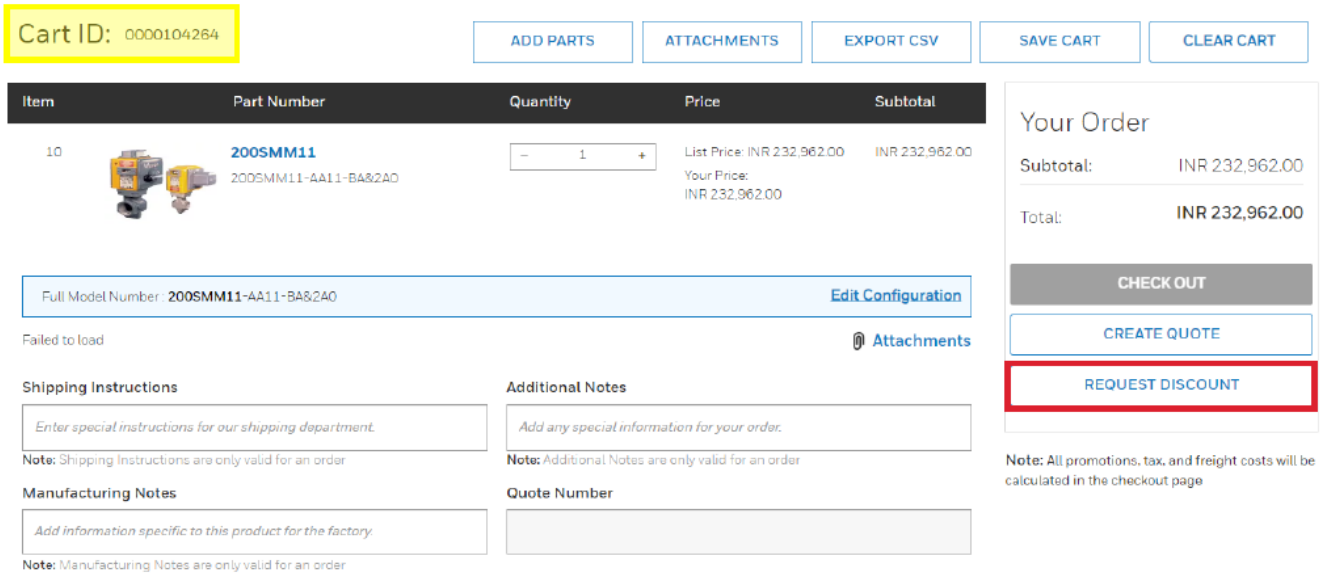
30. CANCEL is available for use when the eDRF opens. This option deletes the eDRF and returns it to the shopping cart.

Note:
Opening the eDRF with the current cart will copy the products in the cart to the quote line items section. Quote line items cannot be added or removed in the eDRF. If changes to the quote line items are required, use the Cancel button to change line items and return to a new blank eDRF.

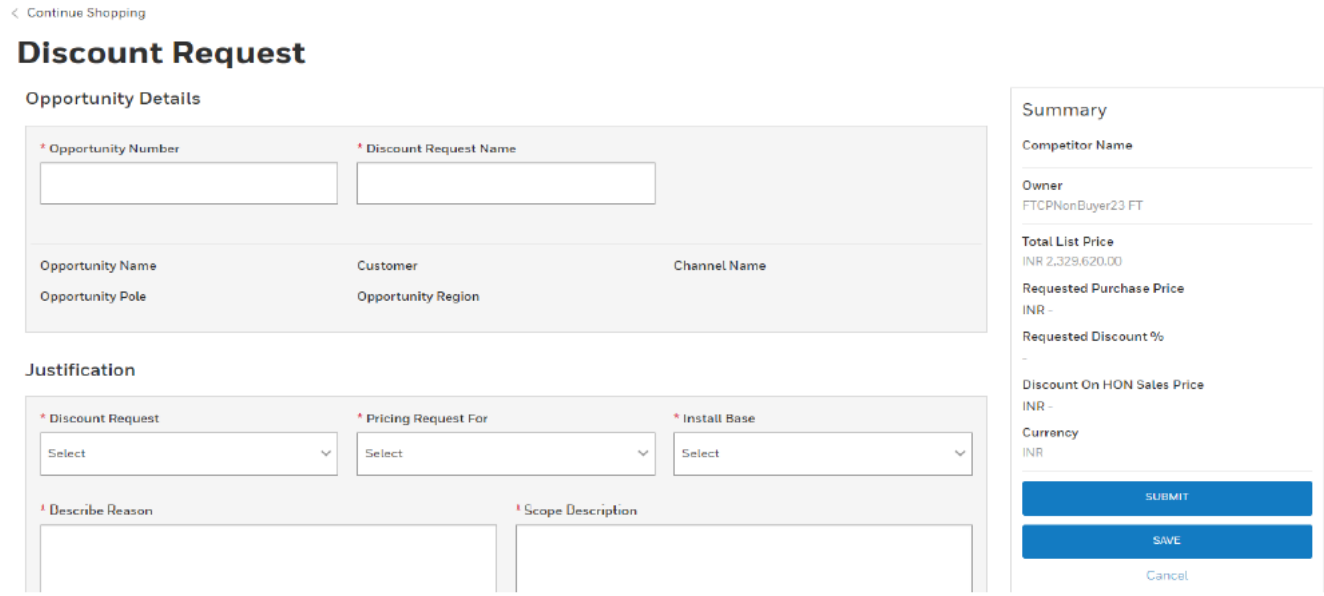
Screen-to-Screen Instruction Guide

1. Fill the shopping cart with products that need to be in your discount request.

2. Click the ‘REQUEST DISCOUNT’ button to open the DRF.

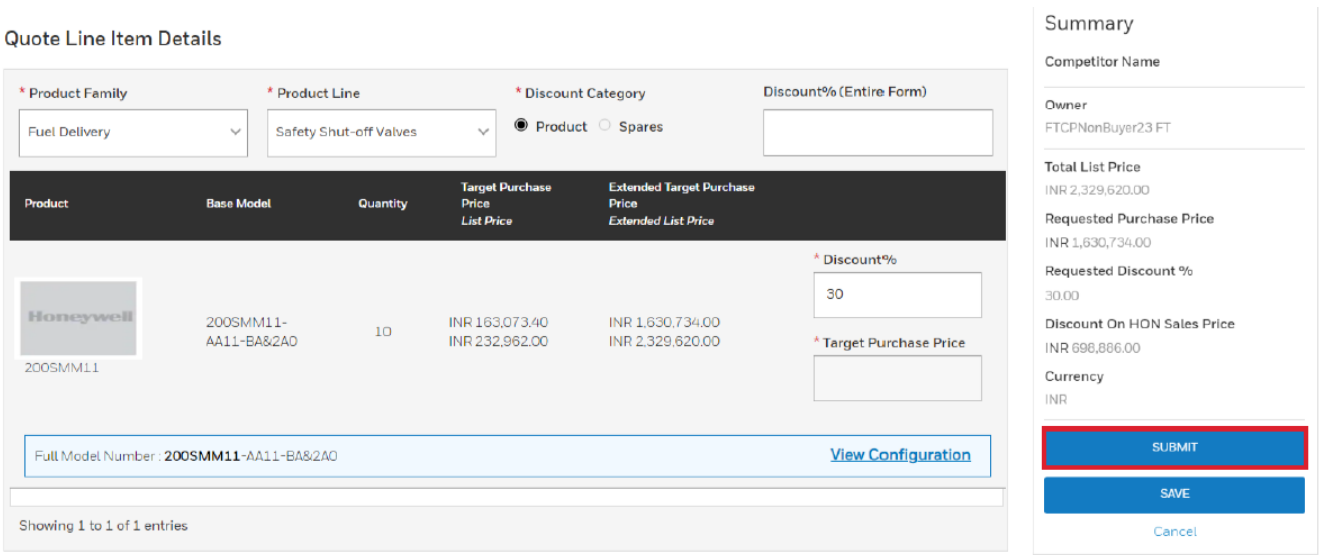


3. Complete all fields in the eDRF Opportunity and Justification sections.
4. Navigate to the Quote Line Items section at the bottom of the form.

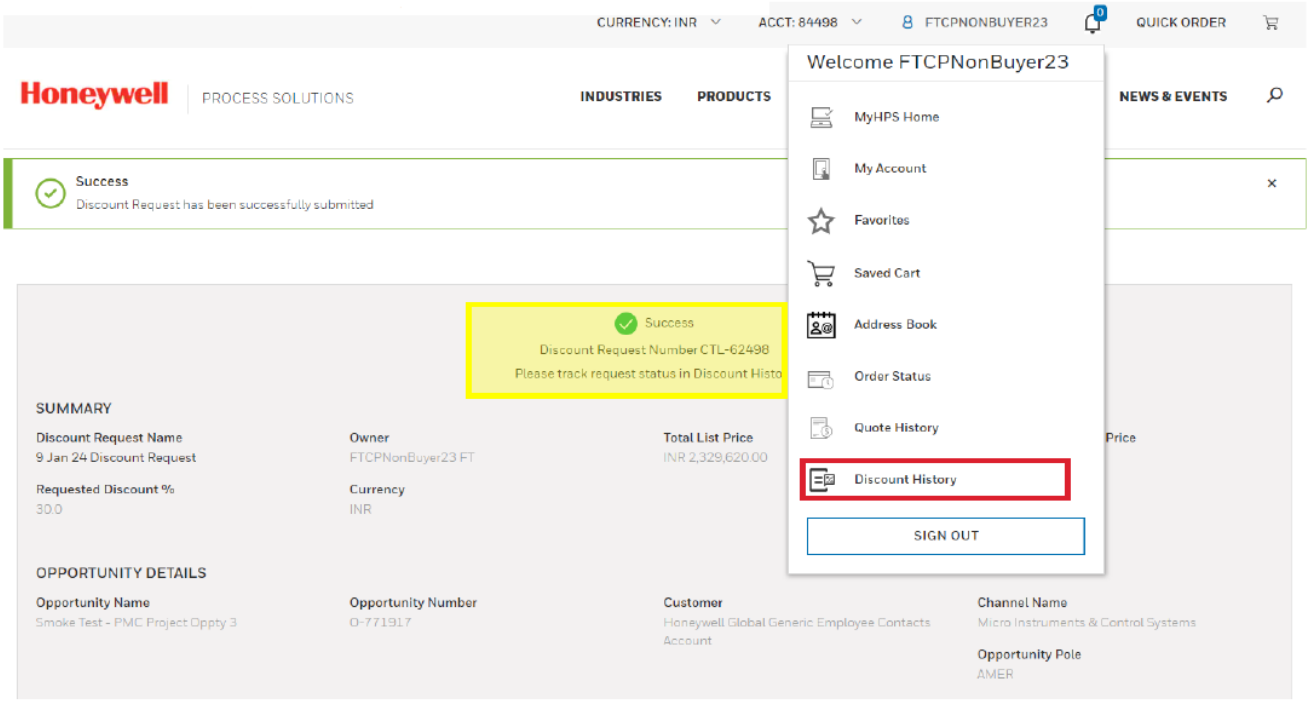


Refer to slides 4 – 9 for eDRF field and button descriptions.

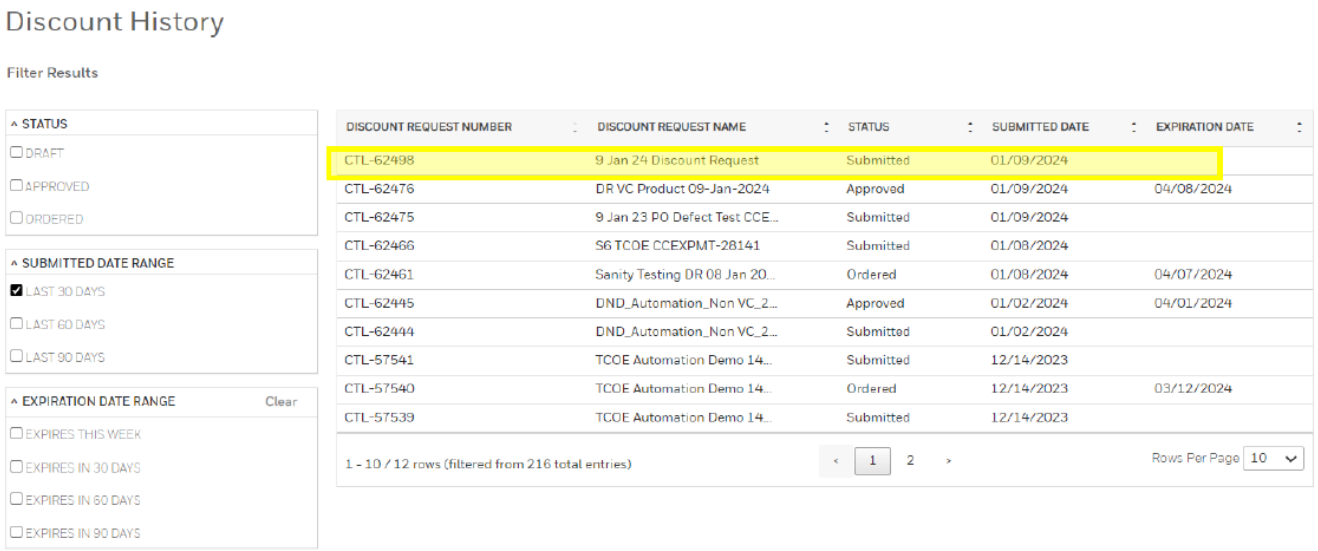
5. Select product family, product line and discount category that represents most of the line items in the request.
6. If you have multiple lines and want to request the same discount level across all of them, use the Discount% (Entire Form) field. For each line item, you may also set a Discount% or Target Sell Price.
7. Select the ‘SUBMIT’ button to send your discount request for approval.



8. A salesforce reference number will be displayed when the request is submitted.
9. Go to Discount History to monitor the progress of the request.

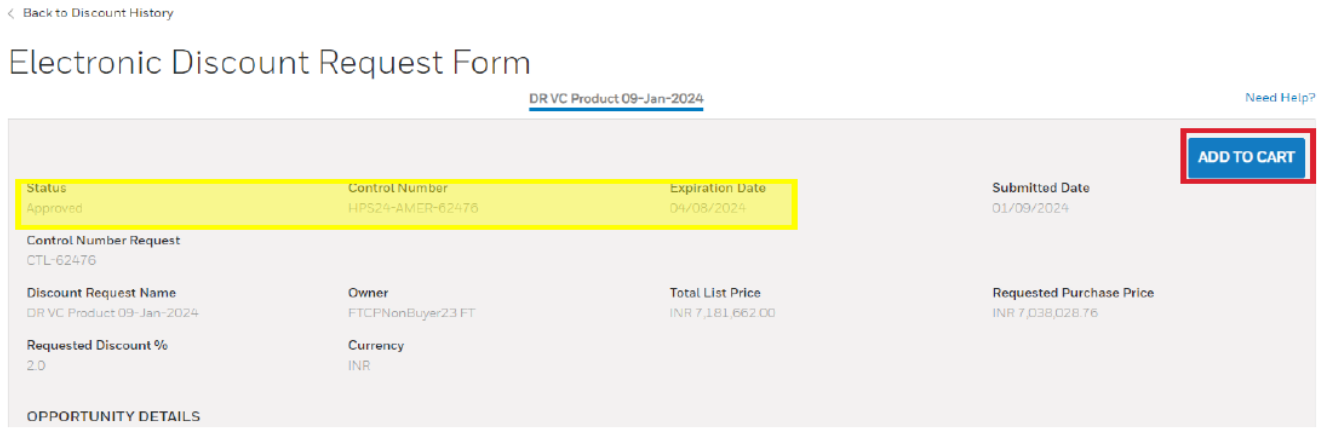


10. Locate the discount request number you wish to monitor and review the status. When the status is Approved, you can begin the ordering process.

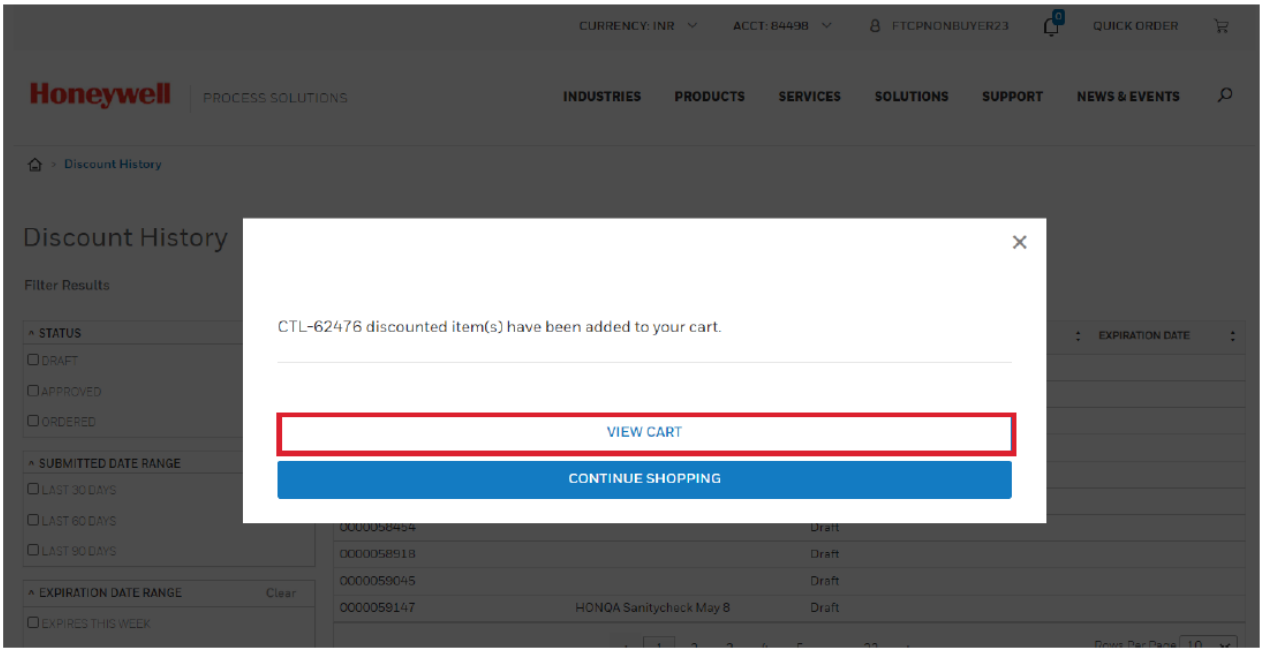


11. When the discount request status is Approved, open the request and select the ‘ADD TO CART’ button to start

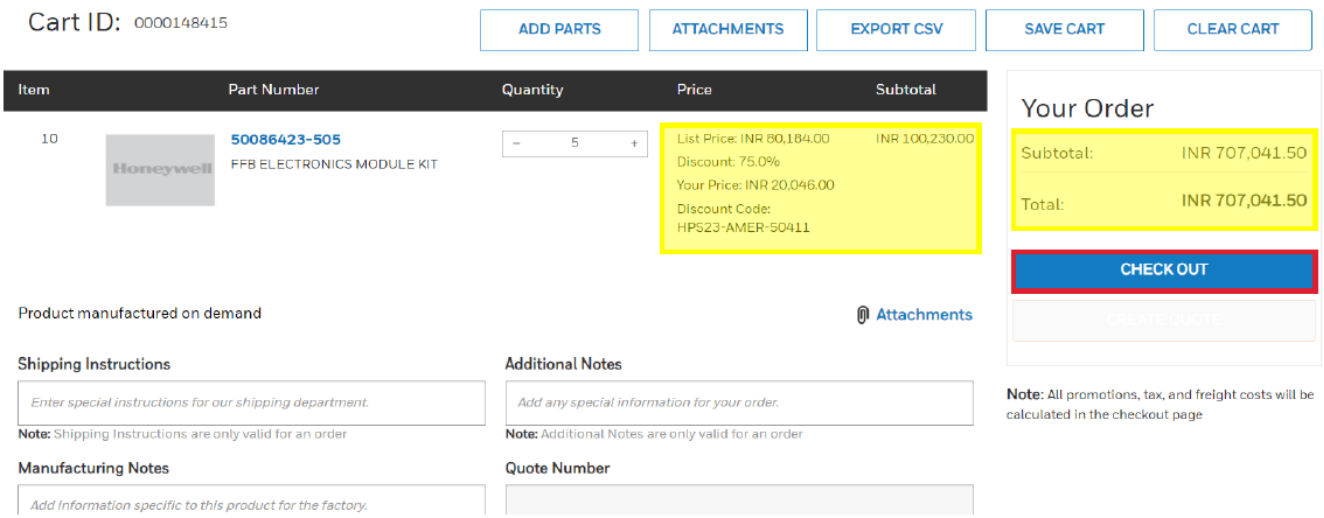
the ordering process.



- An approved discount request will contain a discount code or control number and an expiration date. When the status of the request is expired the control number cannot be used.

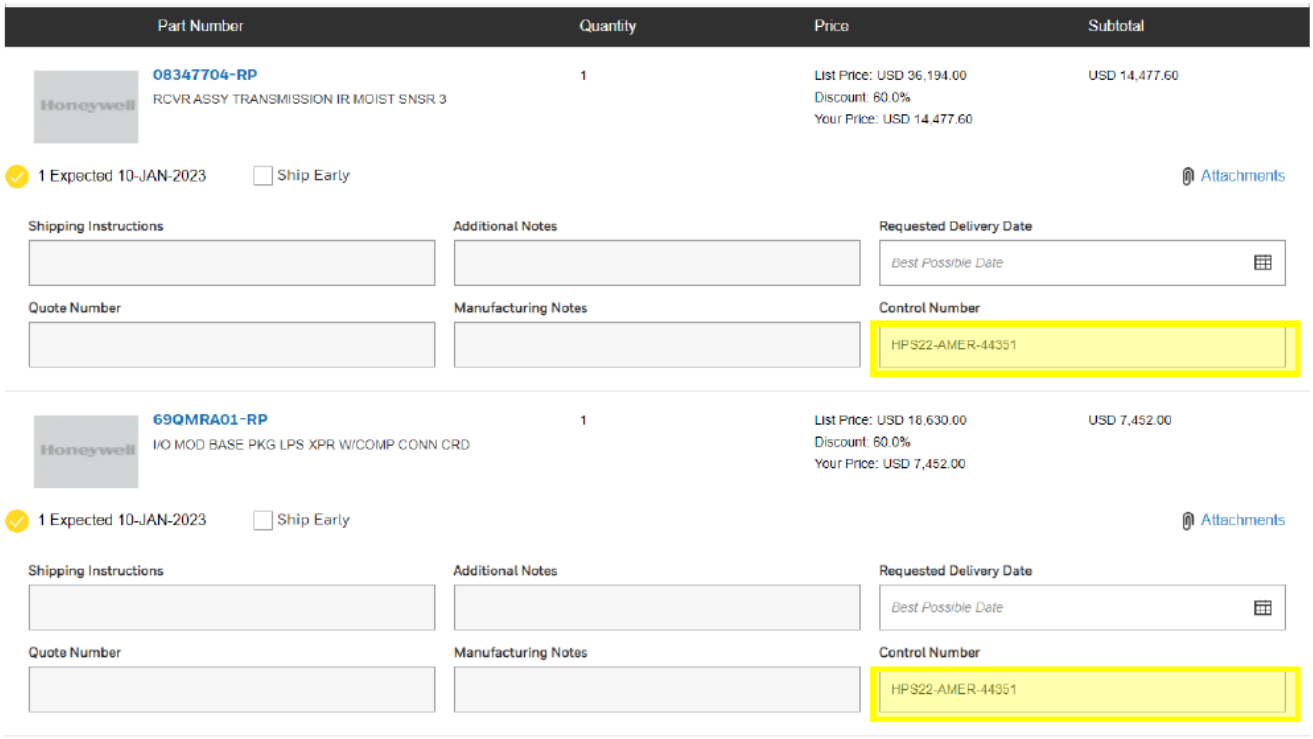


12. A confirmation message will display. The view cart button will navigate to the shopping cart. Continue shopping will navigate to the Discount History page.
13. In the shopping cart, review your discounts and select ‘CHECKOUT’ to continue with the ordering process.



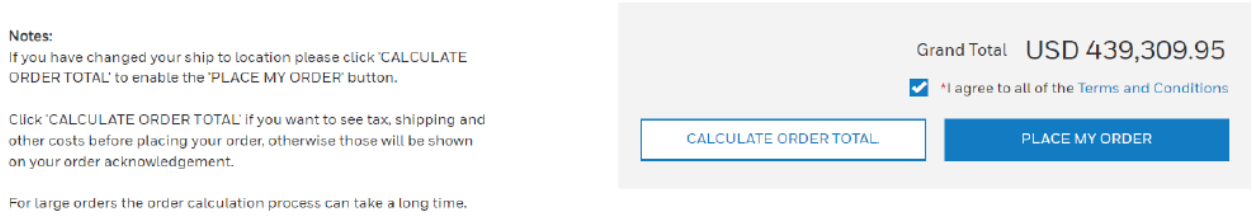
- The shopping cart will display the current list price and the discounted price for each line item. The subtotal and total will match the requested purchase price on the approved discount request. Line items cannot be changed or removed.

14. In the checkout cart, the discount code will be displayed in the Control Number field for each line item.

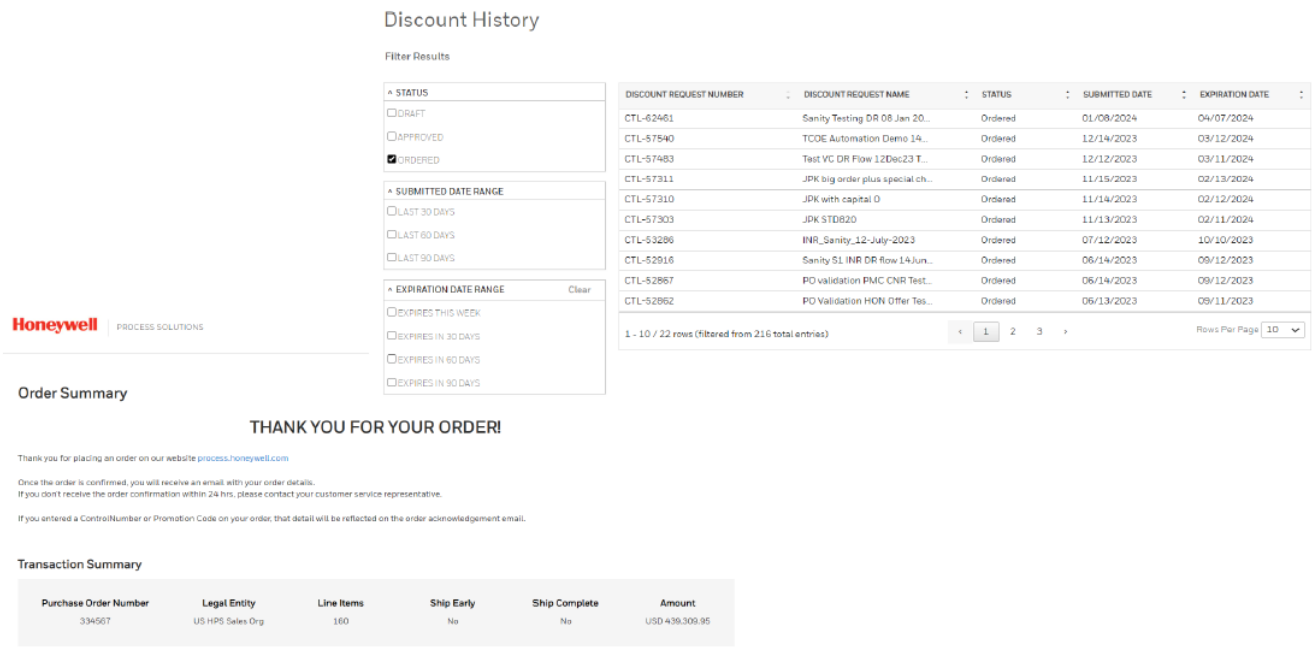


15. In the checkout cart, the subtotal will match the subtotal in the shopping cart until additional values are added for shipping, taxes and other costs. Select ‘PLACE MY ORDER’ to submit a discounted order.

- Additional charges will be applied to the checkout cart after the ‘CALCULATE ORDER TOTAL’ button is clicked.



16. After the order is placed, the confirmation page will display. The status of the approved discount request will change from ‘approved’ to ‘ordered’ on the Discount History page.



DISCOUNT HISTORY

LIST AND FILTER OPTIONS

1. Quick filter option for discount request status, selecting one or all will display requests with status' equal to draft, approved or ordered.
2. The submitted date range is used to display a list of discount requests with a submitted date range of 30, 60 or 90 days.
3. The expiration date is used to display a list of discount requests that will expire within 30 days or has already expired.
4. The discount request list view displays all discount requests submitted on the account using the eDRF process. Control number requests submitted directly via CHAMPS or Salesforce will not be displayed in this list.

FREQUENTLY ASKED QUESTIONS

- **What is the eDRF?**
  eDRF is an abbreviation for electronic discount request forms. The form is used to include all of the information

required for Honeywell to review a discount request.

- **Can I use the eDRF for all types of discount requests?**
  Requests for Annual, Engineer to Order (ETO), or Y Special discounts are not currently supported by the eDRF. For these kinds of discount requests, please use the existing Salesforce Control Number
- **When will I know the status of my eDRF after I submit it for approval?**
  You may keep track of the status of your eDRF after submitting it for approval on the Discount History page. You will be notified through email as your discount request progresses through the approval process in Salesforce.
- **Can I modify or cancel my eDRF after I submit it?**
  An eDRF submitted for approval cannot be modified or cancelled. If you need to cancel the request, please contact the Channel Excellence team for support. A new eDRF needs to be submitted if the original eDRF contains incorrect information. When my
- **eDRF is approved, can I change the products and quantities when I place my order?**
  The quote in the approved eDRF cannot be modified when the eDRF is added to your shopping cart. All line items in the requested quantities must be purchased in the same order.
- **Why isn't my discounted pricing displayed in my checkout cart when I enter a control number manually?**
  Discount codes created before the release of the eDRF feature cannot be validated automatically in the checkout cart. Discount codes that cannot be validated automatically will continue to be processed manually by the factory and pricing will be adjusted after discount codes are confirmed for products in the order.

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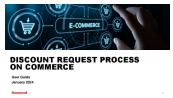
Documents / Resources

	Honeywell E-Commerce Software [pdf] User Guide E-Commerce Software, Software

References

- User Manual

Manuals+, Privacy Policy

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