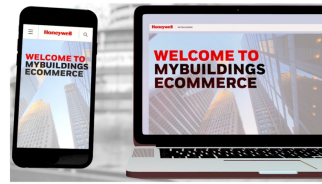


Honeywell E-Commerce Software



Honeywell E-Commerce Software User Guide

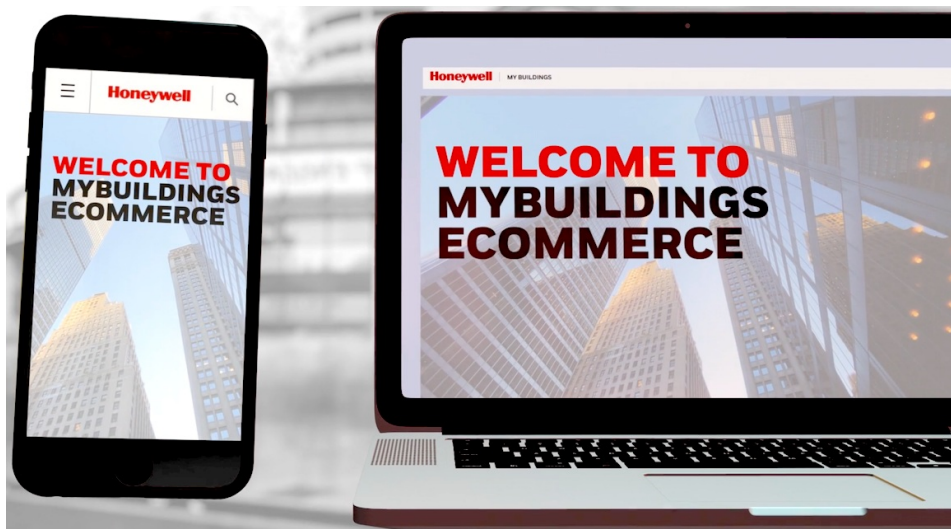
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Honeywell

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?**

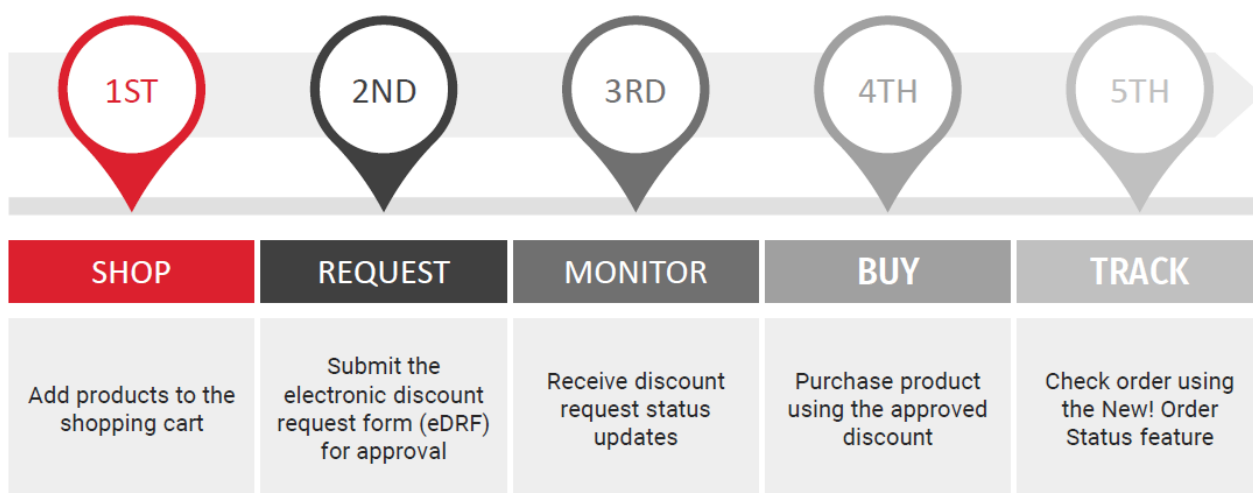
A: You can track your discount request status on Pages 13-14 of the user manual.

- **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 section

Partner Sales opportunity number is entered and high-level details from the opportunity are displayed.

Justification section

Requestor is required to explain the purpose and reason for requesting a discount in this section.

The screenshot shows the 'Discount Request' form. Red boxes highlight the following sections:

- Opportunity details section:** Includes fields for Opportunity Number, Product Name, and other opportunity details.
- Justification section:** Includes a large text area for the requestor to explain the purpose and reason for requesting a discount.
- Summary section:** Includes fields for Competitor Name, Request Owner Name, Requested Purchase Price, Requested Discount %, and Currency.
- Quote Line Items section:** Includes a table for listing products, quantities, and prices.

Summary section

This area of the form contains the Competitor's Name, Request Owner Name and the calculated values for Requested Purchase Price, Requested Discount % and Currency. These calculated fields are based on the data found in quote line items in the form.

Quote Line Items section

Products from the shopping cart are copied into this section of the form. Lines cannot be added or deleted in the form.

OPPORTUNITY DETAILS

Opportunity Details

1 * Opportunity Number

2 * Discount Request Name

Opportunity Name

Customer

Channel Name

Opportunity Pole

Opportunity Region

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

3 * Discount Request

4 * Pricing Request For

5 * Install Base

6 * Describe Reason

7 * Scope Description

8 * Key Decision Making Criteria

9 * Business Strategy/ Sales Response

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

10 * Other Commercial Impacting T&Cs

11 * Competitive Discount

12 * Advance Payment

13 * Payment Details

14 * Competitor Information

15 * Delivery/Quality Penalty Clause

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.

16 * Product Family

17 * Product Line

18 * Discount Category

19 Discount% (Entire Form)

Product	Base Model	Quantity	Target Purchase Price List Price	Extended Target Purchase Price Extended List Price
Honeywell DC120L-000004	DC120L-1-1-0-0-2-0-0-0	8	INR 43,164.00	INR 345,312.00

20 * Discount%
* Target Purchase Price

Showing 1-1 of 1

Rows per page 10

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 logged-in user's account.

The screenshot shows a 'Summary' section of a form. It contains the following fields with corresponding numbered callouts in red circles:

- 21: Competitor Name (empty field)
- 22: Owner (Cari Channel Partner)
- 23: Total List Price (USD 94,600.00)
- 24: Requested Purchase Price (USD -)
- 25: Requested Discount % (-)
- 26: Discount On HON Sales Price (USD -)
- 27: Currency (USD)

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.

The screenshot shows three buttons stacked vertically:

- 28: SUBMIT (blue button)
- 29: SAVE (blue button)
- 30: Cancel (light blue text)

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.

Cart ID: 0000104264


ADD PARTS

ATTACHMENTS

EXPORT CSV

SAVE CART

CLEAR CART

Item	Part Number	Quantity	Price	Subtotal
10	 200SMM11 200SMM11-AA11-BA&2AD	<div>-1+</div>	List Price: INR 232,962.00 Your Price: INR 232,962.00	INR 232,962.00

Full Model Number: 200SMM11-AA11-BA&2AD

Edit Configuration

Failed to load

Attachments

Shipping Instructions

Enter special instructions for our shipping department.

Note: Shipping Instructions are only valid for an order

Additional Notes

Add any special information for your order.

Note: Additional Notes are only valid for an order

Manufacturing Notes

Add information specific to this product for the factory.

Note: Manufacturing Notes are only valid for an order

Quote Number

Your Order

Subtotal: INR 232,962.00

Total: INR 232,962.00

CHECK OUT

CREATE QUOTE

REQUEST DISCOUNT

Note: All promotions, tax, and freight costs will be calculated in the checkout page

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.

< Continue Shopping

Discount Request

Opportunity Details

* Opportunity Number

* Discount Request Name

Opportunity Name

Customer

Channel Name

Opportunity Pole

Opportunity Region

Justification

* Discount Request

Select

* Pricing Request For

Select

* Install Base

Select

* Describe Reason

* Scope Description

Summary

Competitor Name

Owner

FTCPNonBuyer23 FT

Total List Price

INR 2,329,620.00

Requested Purchase Price

INR -

Requested Discount %

-

Discount On HON Sales Price

INR -

Currency

INR

SUBMIT

SAVE

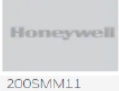
Cancel

****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.

Quote Line Item Details

* Product Family: Fuel Delivery
 * Product Line: Safety Shut-off Valves
 * Discount Category: ☒ Product ☐ Spares
 Discount%(Entire Form):

Product	Base Model	Quantity	Target Purchase Price List Price	Extended Target Purchase Price Extended List Price
 200SMM11	200SMM11-AA11-BA&2A0	10	INR 163,073.40 INR 232,962.00	INR 1,630,734.00 INR 2,329,620.00

* Discount%: 30
 * Target Purchase Price:

Full Model Number: 200SMM11-AA11-BA&2A0 [View Configuration](#)

Showing 1 to 1 of 1 entries

Summary

Competitor Name

Owner: FTCPNonBuyer23 FT

Total List Price: INR 2,329,620.00

Requested Purchase Price: INR 1,630,734.00

Requested Discount %: 30.00

Discount On HON Sales Price: INR 696,886.00

Currency: INR

[SUBMIT](#)

[SAVE](#)

[Cancel](#)

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

CURRENCY: INR ACCT: 84498 FTCPNONBUYER23 QUICK ORDER

Honeywell PROCESS SOLUTIONS INDUSTRIES PRODUCTS

Success
Discount Request has been successfully submitted

Success
Discount Request Number CTL-62498
Please track request status in Discount History

SUMMARY

Discount Request Name 9 Jan 24 Discount Request	Owner FTCPNonBuyer23 FT	Total List Price INR 2,329,620.00
Requested Discount % 30.0	Currency INR	

OPPORTUNITY DETAILS

Opportunity Name Smoke Test - PMC Project Oppty 3	Opportunity Number O-771917	Customer Honeywell Global Generic Employee Contacts Account	Channel Name Micro Instruments & Control Systems
			Opportunity Pole AMER

Welcome FTCPNonBuyer23

- MyHPS Home
- My Account
- Favorites
- Saved Cart
- Address Book
- Order Status
- Quote History
- Discount History**
- SIGN OUT

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

Discount History

Filter Results

STATUS	DISCOUNT REQUEST NUMBER	DISCOUNT REQUEST NAME	STATUS	SUBMITTED DATE	EXPIRATION DATE
<input type="checkbox"/> DRAFT	CTL-62498	9 Jan 24 Discount Request	Submitted	01/09/2024	
<input type="checkbox"/> APPROVED	CTL-62476	DR VC Product 09-Jan-2024	Approved	01/09/2024	04/08/2024
<input type="checkbox"/> ORDERED	CTL-62475	9 Jan 23 PO Defect Test CCE...	Submitted	01/09/2024	
	CTL-62466	S6 TCOE CCEXPMT-28141	Submitted	01/08/2024	
	CTL-62461	Sanity Testing DR 08 Jan 20...	Ordered	01/08/2024	04/07/2024
	CTL-62445	DND_Automation_Non VC_2...	Approved	01/02/2024	04/01/2024
	CTL-62444	DND_Automation_Non VC_2...	Submitted	01/02/2024	
	CTL-57541	TCOE Automation Demo 14...	Submitted	12/14/2023	
	CTL-57540	TCOE Automation Demo 14...	Ordered	12/14/2023	03/12/2024
	CTL-57539	TCOE Automation Demo 14...	Submitted	12/14/2023	

1 - 10 / 12 rows (filtered from 216 total entries)

Rows Per Page: 10

- When the discount request status is Approved, open the request and select the 'ADD TO CART' button to start

the ordering process.

[Back to Discount History](#)

Electronic Discount Request Form

DR VC Product 09-Jan-2024

[Need Help?](#)

Status

Approved

Control Number

HPS24-AMER-62476

Expiration Date

04/08/2024

Submitted Date

01/09/2024

Control Number Request

CTL-62476

Discount Request Name

DR VC Product 09-Jan-2024

Owner

FTCPNonBuyer23 FT

Total List Price

INR 7,181,662.00

Requested Purchase Price

INR 7,038,028.76

Requested Discount %

2.0

Currency

INR

OPPORTUNITY DETAILS

ADD TO CART

- 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.

CURRENCY: INR ACCT: 84498 FTCPNONBUYER23 QUICK ORDER

Honeywell

PROCESS SOLUTIONS

INDUSTRIES PRODUCTS SERVICES SOLUTIONS SUPPORT NEWS & EVENTS

Discount History

Filter Results

STATUS

☐ DRAFT

☐ APPROVED

☐ ORDERED

SUBMITTED DATE RANGE

☐ LAST 30 DAYS

☐ LAST 60 DAYS

☐ LAST 90 DAYS

EXPIRATION DATE RANGE

Clear

☐ EXPIRES THIS WEEK

CTL-62476 discounted item(s) have been added to your cart.

VIEW CART

CONTINUE SHOPPING

0000050454 Draft

0000058918 Draft

0000059045 Draft

0000059147 HONQA Sanitycheck May 8 Draft

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.

Cart ID: 0000148415

ADD PARTS

ATTACHMENTS

EXPORT CSV

SAVE CART

CLEAR CART

Item	Part Number	Quantity	Price	Subtotal
10	<div><div>Honeywell</div><div>50086423-505</div><div>FFB ELECTRONICS MODULE KIT</div></div>	<div>-</div> <div>5</div> <div>+</div>	<div>List Price: INR 80,184.00</div> <div>Discount: 75.0%</div> <div>Your Price: INR 20,046.00</div> <div>Discount Code: HPS23-AMER-50411</div>	INR 100,230.00

Product manufactured on demand

Attachments

Shipping Instructions

Enter special instructions for our shipping department.

Note: Shipping Instructions are only valid for an order

Additional Notes

Add any special information for your order.

Note: Additional Notes are only valid for an order

Manufacturing Notes

Add information specific to this product for the factory.

Quote Number

Your Order

Subtotal: INR 707,041.50

Total: INR 707,041.50

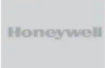

CHECK OUT

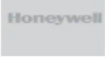

REVIEW ORDER

Note: All promotions, tax, and freight costs will be calculated in the checkout page

- 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.

Part Number	Quantity	Price	Subtotal
 08347704-RP RCVR ASSY TRANSMISSION IR MOIST SNSR 3	1	List Price: USD 36,194.00 Discount: 60.0% Your Price: USD 14,477.60	USD 14,477.60
<input checked="" type="checkbox"/> 1 Expected 10-JAN-2023 <input type="checkbox"/> Ship Early Attachments			
Shipping Instructions	Additional Notes	Requested Delivery Date	
		Best Possible Date 	
Quote Number	Manufacturing Notes	Control Number	
		HPS22-AMER-44351	

 69QMRA01-RP I/O MOD BASE PKG LPS XPR W/COMP CONN CRD	1	List Price: USD 18,630.00 Discount: 60.0% Your Price: USD 7,452.00	USD 7,452.00
<input checked="" type="checkbox"/> 1 Expected 10-JAN-2023 <input type="checkbox"/> Ship Early Attachments			
Shipping Instructions	Additional Notes	Requested Delivery Date	
		Best Possible Date 	
Quote Number	Manufacturing Notes	Control Number	
		HPS22-AMER-44351	

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.

Shipping Instructions

Notes for the Honeywell Order Processing Team

Order Total

Subtotal	USD 439,309.95
Total	USD 439,309.95**

**Calculate Order Total to see additional charges

Notes:

If you have changed your ship to location please click 'CALCULATE ORDER TOTAL' to enable the 'PLACE MY ORDER' button.

Click 'CALCULATE ORDER TOTAL' if you want to see tax, shipping and other costs before placing your order, otherwise those will be shown on your order acknowledgement.

For large orders the order calculation process can take a long time.

Grand Total **USD 439,309.95**

☒ *I agree to all of the [Terms and Conditions](#)

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.

Filter Results

DISCOUNT REQUEST NUMBER	DISCOUNT REQUEST NAME	STATUS	SUBMITTED DATE	EXPIRATION DATE
CTL-62461	Sanity Testing DR 08 Jan 20...	Ordered	01/08/2024	04/07/2024
CTL-87540	TCOE Automation Demo 14...	Ordered	12/14/2023	03/12/2024
CTL-57483	Test VC DR Flow 12Dec23 T...	Ordered	12/12/2023	03/11/2024
CTL-57311	JKP big order plus special ch...	Ordered	11/15/2023	02/13/2024
CTL-57310	JKP with capital O	Ordered	11/14/2023	02/12/2024
CTL-57303	JKP STDB20	Ordered	11/13/2023	02/11/2024
CTL-53286	INR_Sanity_12-July-2023	Ordered	07/12/2023	10/10/2023
CTL-52916	Sanity SL INR DR Row 14 Jun...	Ordered	06/14/2023	09/12/2023
CTL-52867	PO validation PMC CNR Test...	Ordered	06/14/2023	09/12/2023
CTL-52862	PO Validation HON Offer Tes...	Ordered	06/13/2023	09/11/2023

1 - 10 / 22 rows (Filtered from 216 total entries)

<

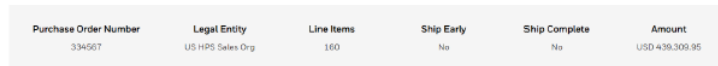
1

2

3

>

Rows Per Page10



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.

Filter Results

1

Filter Results

2

3

4

1

STATUS

☐ DRAFT

☒ APPROVED

☐ ORDERED

2

SUBMITTED DATE RANGE

☐ LAST 30 DAYS

☐ LAST 60 DAYS

☐ LAST 90 DAYS

3

EXPIRATION DATE RANGE

☐ EXPIRES THIS WEEK

☐ EXPIRES IN 30 DAYS

☐ EXPIRES IN 60 DAYS

☐ EXPIRES IN 90 DAYS

4

DISCOUNT REQUEST NUMBER

DISCOUNT REQUEST NAME

STATUS

SUBMITTED DATE

EXPIRATION DATE

DISCOUNT REQUEST NUMBER	DISCOUNT REQUEST NAME	STATUS	SUBMITTED DATE	EXPIRATION DATE
CTL-50411	A Mar PROD P11 5 Test R S...	Approved	03/17/2023	06/15/2024
CTL-50412	B Mar PROD P11 5 Test BMS...	Approved	03/17/2023	06/15/2024
CTL-50413	C Mar PROD P11 5 Test Ter...	Approved	03/17/2023	06/15/2024

1 - 3 / 3 rows (filtered from 37 total entries)

Rows Per Page 10

- 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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