DISCOUNT REQUEST PROCESS
ON COMMERCE

User Guide
January 2024
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- **Discount History**
- **Frequently Asked Questions**
**DISCOUNT REQUEST PROCESS | OVERVIEW**

1. **SHOP**
   - Add products to the shopping cart
     - Page 10

2. **REQUEST**
   - Submit the electronic discount request form (eDRF) for approval
     - Pages 3-9 and 11-13

3. **MONITOR**
   - Receive discount request status updates
     - Pages 13-14

4. **BUY**
   - Purchase product using the approved discount
     - Pages 15-20

5. **TRACK**
   - Check order using the New! Order Status feature
     - Refer to Online User Guide
EDRF | 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.

**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.
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
3. **Discount Request** select the project type of the opportunity that the special pricing is for

4. **Pricing Request for** select what the special pricing will be used for

5. **Install Base** indicate whether the project site is Honeywell's install base or not

6. **Describe Reason** explain why the special pricing is needed

7. **Scope Description** describe Honeywell's scope in the project

8. **Key Decision-Making Criteria** select the criteria that the customer is considering to select a vendor

9. **Business Strategy/Sales Response** enter if there is any strategic value to support the special pricing
10. Other Commercial Impacting T&Cs enter any positive/negative T&C’s Honeywell needs to consider for this project

11. Competitive Discount indicate if the new pricing based on this special pricing will be competitive against the competitors’ prices or not

12. Advance Payment indicate 10% of advance payment is agreed 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 no, what support is need to make the customer accept the advance payment

14. Competitor Information explain competitive situation having advantage or disadvantage against competitors

15. Delivery/Quality Penalty Clause select whether the project has any clause related to either late delivery penalty or quality penalty
16. **Product Family** select the Product Family the items listed in the request belong to. Separate discount request 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.
# EDRF SECTION | SUMMARY FIELDS

The fields in this section are calculated and auto-populated

<p>| | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>21. <strong>Competitor Name</strong></td>
<td>listed in the Salesforce opportunity</td>
</tr>
<tr>
<td>22. <strong>Owner</strong></td>
<td>this is the current logged in user who submits the discount request</td>
</tr>
<tr>
<td>23. <strong>Total List Price</strong></td>
<td>is the total list price of the quote line items before discount</td>
</tr>
<tr>
<td>24. <strong>Requested Purchase Price</strong></td>
<td>is the total amount after discount - applying all requested discounts to all line items</td>
</tr>
<tr>
<td>25. <strong>Requested Discount %</strong></td>
<td>is the overall discount % determined from the percent values and/or target sell price entered in the quote line-item section</td>
</tr>
<tr>
<td>26. <strong>Discount on HON Sales Price</strong></td>
<td>is discounted dollar amount after applying the requested discounts</td>
</tr>
<tr>
<td>27. <strong>Currency</strong></td>
<td>is 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</td>
</tr>
</tbody>
</table>

Summary

<p>| | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>21. Competitor Name</td>
<td></td>
</tr>
<tr>
<td>22. Owner</td>
<td>Carl Channel Partner</td>
</tr>
<tr>
<td>23. Total List Price</td>
<td>USD 94,600.00</td>
</tr>
<tr>
<td>24. Requested Purchase Price</td>
<td>USD -</td>
</tr>
<tr>
<td>25. Requested Discount %</td>
<td>-</td>
</tr>
<tr>
<td>26. Discount On HON Sales Price</td>
<td>USD -</td>
</tr>
<tr>
<td>27. Currency</td>
<td>USD</td>
</tr>
</tbody>
</table>
EDRF SECTION | 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. **SAVE button** is available for use when the eDRF opens. The form will be saved as ‘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 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.
1. Fill shopping cart with products that need to be in your discount request.
2. Click ‘REQUEST DISCOUNT’ button to open the eDRF.
3. Complete all fields in the eDRF Opportunity and Justification sections.
4. Navigate to the Quote Line Items section at the bottom of 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 ‘SUBMIT’ button to send your discount request for approval.

---

**Quote Line Item Details**

<table>
<thead>
<tr>
<th>Product Family</th>
<th>Product Line</th>
<th>Discount Category</th>
<th>Discount% (Entire Form)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Fuel Delivery</td>
<td>Safety Shut-off Valves</td>
<td>Product</td>
<td>Product</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Product</th>
<th>Base Model</th>
<th>Quantity</th>
<th>Target Purchase Price</th>
<th>Extended Target Purchase Price</th>
</tr>
</thead>
<tbody>
<tr>
<td>2005MM11- AA11-BA&amp;2A0</td>
<td>INR 232,962.00</td>
<td>INR 2,329,620.00</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Discount%</th>
<th>Target Purchase Price</th>
</tr>
</thead>
<tbody>
<tr>
<td>30%</td>
<td>INR 1,630,734.00</td>
</tr>
</tbody>
</table>

**Summary**

- **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 688,886.00
- **Currency**: INR
8. Salesforce reference number will be displayed when request is submitted.
9. Go to Discount History to monitor progress of 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.

Discount History

Filter Results

<table>
<thead>
<tr>
<th>DISCOUNT REQUEST NUMBER</th>
<th>DISCOUNT REQUEST NAME</th>
<th>STATUS</th>
<th>SUBMITTED DATE</th>
<th>EXPIRATION DATE</th>
</tr>
</thead>
<tbody>
<tr>
<td>CTL-62498</td>
<td>9 Jan 24 Discount Request</td>
<td>Submitted</td>
<td>01/09/2024</td>
<td></td>
</tr>
<tr>
<td>CTL-62476</td>
<td>DR VC Product 09-Jan-2024</td>
<td>Approved</td>
<td>01/09/2024</td>
<td>04/08/2024</td>
</tr>
<tr>
<td>CTL-62475</td>
<td>9 Jan 23 PO Defect Test CCE...</td>
<td>Submitted</td>
<td>01/09/2024</td>
<td></td>
</tr>
<tr>
<td>CTL-62466</td>
<td>96 TCOE CCEPMT-28141</td>
<td>Submitted</td>
<td>01/08/2024</td>
<td></td>
</tr>
<tr>
<td>CTL-62461</td>
<td>Sanity Testing DR 08 Jan 20...</td>
<td>Ordered</td>
<td>01/08/2024</td>
<td>04/07/2024</td>
</tr>
<tr>
<td>CTL-62445</td>
<td>DND_Automation_Non VC_2...</td>
<td>Approved</td>
<td>01/02/2024</td>
<td>04/01/2024</td>
</tr>
<tr>
<td>CTL-62444</td>
<td>DND_Automation_Non VC_2...</td>
<td>Submitted</td>
<td>01/02/2024</td>
<td></td>
</tr>
<tr>
<td>CTL-57541</td>
<td>TCOE Automation Demo 14...</td>
<td>Submitted</td>
<td>12/14/2023</td>
<td></td>
</tr>
<tr>
<td>CTL-57540</td>
<td>TCOE Automation Demo 14...</td>
<td>Ordered</td>
<td>12/14/2023</td>
<td>03/12/2024</td>
</tr>
<tr>
<td>CTL-57539</td>
<td>TCOE Automation Demo 14...</td>
<td>Submitted</td>
<td>12/14/2023</td>
<td></td>
</tr>
</tbody>
</table>

1 - 10 / 12 rows (filtered from 216 total entries)
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. Confirmation message will display. View cart button will navigate to the shopping cart. Continue shopping will navigate to Discount History page.
13. In shopping cart, review your discounts and select ‘CHECKOUT’ to continue with the ordering process.

Cart ID: 0000148415

<table>
<thead>
<tr>
<th>Item</th>
<th>Part Number</th>
<th>Quantity</th>
<th>Price</th>
<th>Subtotal</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>50086423-505</td>
<td>4</td>
<td>List Price: INR 80,184.00</td>
<td>INR 100,230.00</td>
</tr>
<tr>
<td></td>
<td>FFB ELECTRONICS MODULE KIT</td>
<td></td>
<td>Discount: 75.0%</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Your Price: INR 20,046.00</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Discount Code: HPS23-AMER-50411</td>
<td></td>
</tr>
</tbody>
</table>

Your Order

Subtotal: INR 707,041.50
Total: INR 707,041.50

*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 checkout cart, 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 discounted order.

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

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

Discount History

Filter Results

- STATUS
  - DRAFT
  - APPROVED
  - ORDERED

- SUBMITTED DATE RANGE
  - LAST 30 DAYS
  - LAST 60 DAYS
  - LAST 90 DAYS

- EXPIRATION DATE RANGE
  - EXPIRES THIS WEEK
  - EXPIRES IN 30 DAYS
  - EXPIRES IN 60 DAYS
  - EXPIRES IN 90 DAYS

<table>
<thead>
<tr>
<th>DISCOUNT REQUEST NUMBER</th>
<th>DISCOUNT REQUEST NAME</th>
<th>STATUS</th>
<th>SUBMITTED DATE</th>
<th>EXPIRATION DATE</th>
</tr>
</thead>
<tbody>
<tr>
<td>CTL-62461</td>
<td>Sanity Testing DR 09-Jun 2023</td>
<td>Ordered</td>
<td>01/08/2024</td>
<td>04/07/2024</td>
</tr>
<tr>
<td>CTL-57150</td>
<td>TC0E Automation Demo 14-Jul-2023</td>
<td>Ordered</td>
<td>12/14/2023</td>
<td>03/12/2024</td>
</tr>
<tr>
<td>CTL-57483</td>
<td>Test VC DR Raw 1208x23 T...</td>
<td>Ordered</td>
<td>12/12/2023</td>
<td>03/11/2024</td>
</tr>
<tr>
<td>CTL-57311</td>
<td>JPK big order plus special ch...</td>
<td>Ordered</td>
<td>11/15/2023</td>
<td>02/15/2024</td>
</tr>
<tr>
<td>CTL-57310</td>
<td>JPK with capital O</td>
<td>Ordered</td>
<td>11/14/2023</td>
<td>02/12/2024</td>
</tr>
<tr>
<td>CTL-57303</td>
<td>JPK STD8120</td>
<td>Ordered</td>
<td>11/13/2023</td>
<td>02/11/2024</td>
</tr>
<tr>
<td>CTL-53286</td>
<td>INR_Sanity_12-Jul-2023</td>
<td>Ordered</td>
<td>07/12/2023</td>
<td>10/10/2023</td>
</tr>
<tr>
<td>CTL-52016</td>
<td>Sanity S1 INR DR Raw 14Jun...</td>
<td>Ordered</td>
<td>06/14/2023</td>
<td>09/12/2023</td>
</tr>
<tr>
<td>CTL-52867</td>
<td>PO validation PAM CNR Test...</td>
<td>Ordered</td>
<td>06/14/2023</td>
<td>09/12/2023</td>
</tr>
<tr>
<td>CTL-52867</td>
<td>PO Validation HON Offer Tes...</td>
<td>Ordered</td>
<td>05/13/2023</td>
<td>09/11/2023</td>
</tr>
</tbody>
</table>

Order Summary

THANK YOU FOR YOUR ORDER!

Thank you for placing an order on our website process.honeywell.com

Once the order is confirmed, you will receive an email with your order details.
If you don’t receive the order confirmation within 24 hrs, please contact your customer service representative.

If you entered a ControlNumber or Promotion Code on your order that detail will be reflected on the order acknowledgment email.

Transaction Summary

<table>
<thead>
<tr>
<th>Purchase Order Number</th>
<th>Legal Entity</th>
<th>Line Items</th>
<th>Ship Early</th>
<th>Ship Complete</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>334567</td>
<td>US HPS Sales Org</td>
<td>100</td>
<td>No</td>
<td>No</td>
<td>USD 439,309.95</td>
</tr>
</tbody>
</table>

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1. **Quick filter option** for discount request status, selecting one or all will display requests with status’ equal to draft, approved or ordered.

2. **Submitted date range** use to display a list of discount requests with a submitted date range of 30, 60 or 90 days.

3. **Expiration date** use to display a list of discount requests that will expire within 30 days or are already expired.

4. **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.

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**DISCOUNT HISTORY | LIST AND FILTER OPTIONS**

- **Quick filter option**: select status to display requests with draft, approved or ordered status.
- **Submitted date range**: filter requests by date range of 30, 60, or 90 days.
- **Expiration date**: filter requests by expiration date of this week or in 30, 60, or 90 days.
- **Discount request list view**: displays all submitted discount requests using the eDRF process. Control number requests via CHAMPS or Salesforce are excluded.
FREQUENTLY ASKED QUESTIONS

What is the eDRF?
eDRF is an abbreviation for electronic discount request form. 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 process.

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 contained 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 at the requested quantities must be purchased in the same order.

Why isn’t my discounted pricing displaying in my checkout cart when I enter a control number manually?
Discount codes created prior to 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.