



DISCOUNT REQUEST PROCESS ON COMMERCE

User Guide

January 2024

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Discount Request Process: An Overview



Electronic Discount Request Form (eDRF): Section and Field Descriptions



Discount Request Process: Screen to Screen Instruction Guide

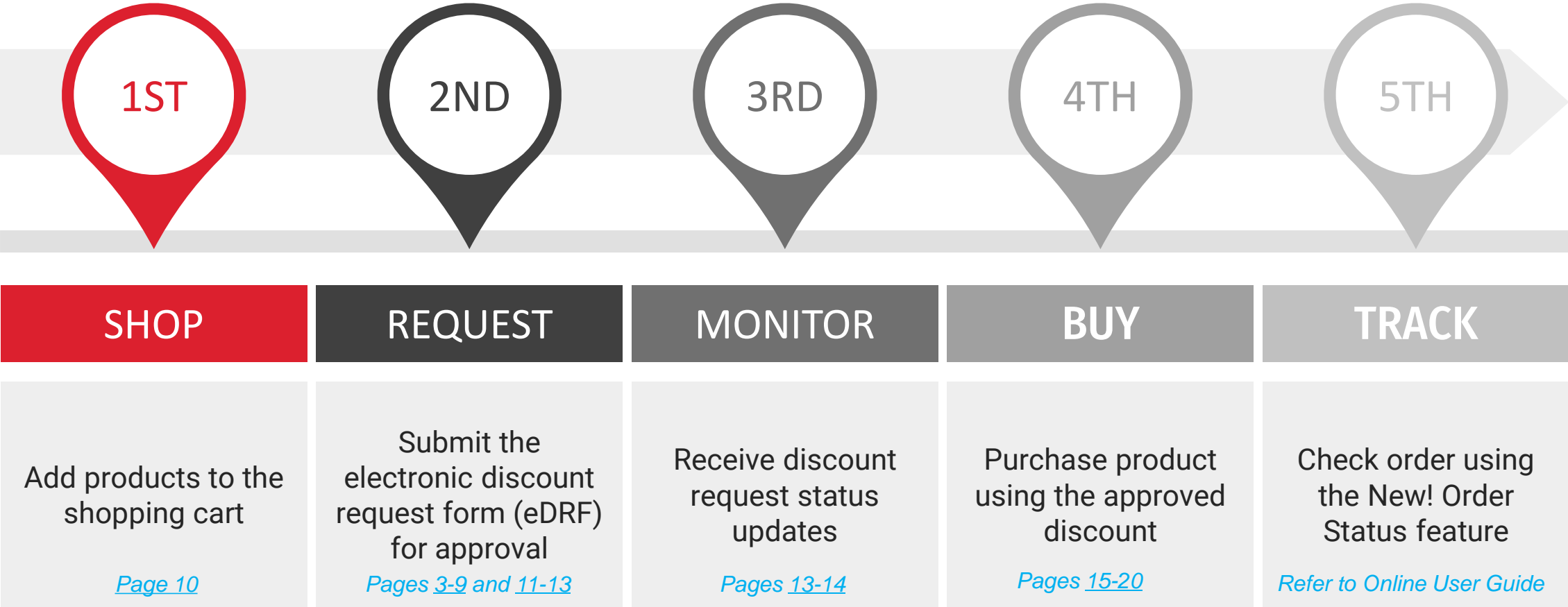


Discount History



Frequently Asked Questions

DISCOUNT REQUEST PROCESS | OVERVIEW



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.

Discount Request

Opportunity Details

* Opportunity Number	* Discount Request Name		
<input type="text"/>	<input type="text"/>		
Opportunity Name	Customer	Channel Name	
Opportunity Role	Opportunity Region		

Justification

* Discount Request	* Pricing Request For	* Install Base
<input type="text"/>	<input type="text"/>	<input type="text"/>
* Describe Reason	* Scope Description	
<input type="text"/>	<input type="text"/>	
2000/2000		1000/1000
* Key Decision Making Criteria	* Business Strategy/ Sales Response	
<input type="text"/>	<input type="text"/>	
* Other Commercial Impacting T&Cs		
<input type="text"/>		
1000/1000		
* Competitive Discount	* Advance Payment	* Payment Details
<input type="text"/>	<input type="text"/>	<input type="text"/>
* Competitor Information		
<input type="text"/>		
1000/1000		
* Delivery/Quality Penalty Clause		
<input type="text"/>		

Quote Line Item Details

* Product Family	* Product Line	* Discount Category	Discount%(Entire Row)
<input type="text"/>	<input type="text"/>	<input type="text"/> Product <input type="text"/> Spares	<input type="text"/>

Product	Base Model	Quantity	Target Purchase Price App Price	Extended Target Purchase Price Extended List Price	Discount%
Bloomberg veeva DC120L- 000004	DC120L-11- 000000G	5	EUR 43,164.00	EUR 340,312.00	<input type="text"/>
					* Target Purchase Price <input type="text"/>

Showing 1-1 of 1

Rows per page: 10

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.

EDRF SECTION | 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

EDRF SECTION | JUSTIFICATION PART 1

The screenshot shows a web form titled "EDRF SECTION | JUSTIFICATION PART 1". The form is divided into several sections, each with a red circular callout number. Callout 3 points to the "Discount Request" dropdown menu. Callout 4 points to the "Pricing Request For" dropdown menu. Callout 5 points to the "Install Base" dropdown menu. Callout 6 points to the "Describe Reason" text area. Callout 7 points to the "Scope Description" text area. Callout 8 points to the "Key Decision Making Criteria" dropdown menu. Callout 9 points to the "Business Strategy/ Sales Response" dropdown menu. The form also includes character counts: "2000/2000" for the "Describe Reason" field and "1000/1000" for the "Scope Description" field.

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

2000/2000

1000/1000

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

EDRF SECTION | JUSTIFICATION PART 2

The screenshot displays a web form titled "EDRF SECTION | JUSTIFICATION PART 2". The form is divided into several sections, each with a red circular callout number:


- 10. Other Commercial Impacting T&Cs**: A large text area for entering any positive/negative T&Cs Honeywell needs to consider for this project.
- 11. Competitive Discount**: A dropdown menu with "Select" as the current option.
- 12. Advance Payment**: A dropdown menu with "Select" as the current option.
- 13. Payment Details**: A text area for indicating if there is any advance payment agreed or scheduled, explaining the details.
- 14. Competitor Information**: A text area for explaining the competitive situation, whether having advantage or disadvantage against competitors.
- 15. Delivery/Quality Penalty Clause**: A dropdown menu with "Select" as the current option.

Each section is preceded by an asterisk (*) indicating it is a required field. The form also includes character counts (1000/1000) for the text areas.

- 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

EDRF SECTION | QUOTE LINE ITEMS

16 * Product Family Select
17 * Product Line Select
18 * Discount Category ☐ Product ☐ Spares
19 Discount% (Entire Form)

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

20 * Discount%
* Target Purchase Price

Showing 1-1 of 1 < 1 > Rows per page 10

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

Summary

21

Competitor Name

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

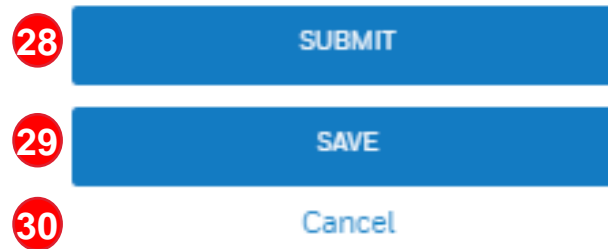
Currency
USD

- 21. **Competitor Name** listed in the Salesforce opportunity
- 22. **Owner** this is the current logged in user who submits the discount request
- 23. **Total List Price** is the total list price of the quote line items before discount
- 24. **Requested Purchase Price** is the total amount after discount - applying all requested discounts to all line items
- 25. **Requested Discount %** is the overall discount % determined from the percent 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 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.

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.

Cart ID: 0000104264


ADD PARTS

ATTACHMENTS

EXPORT CSV

SAVE CART

CLEAR CART

Item	Part Number	Quantity	Price	Subtotal
10	 200SMM11 200SMM11-AA11-BA&2AO	<input type="text" value="1"/>	List Price: INR 232,962.00 Your Price: INR 232,962.00	INR 232,962.00

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

[Edit Configuration](#)

Failed to load

[Attachments](#)

Shipping Instructions

Note: Shipping Instructions are only valid for an order

Manufacturing Notes

Note: Manufacturing Notes are only valid for an order

Additional Notes

Note: Additional 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 form.

[< Continue Shopping](#)

Discount Request

Opportunity Details

* Opportunity Number	* Discount Request Name	
<input type="text"/>	<input type="text"/>	
Opportunity Name	Customer	Channel Name
Opportunity Pole	Opportunity Region	

Justification

* Discount Request	* Pricing Request For	* Install Base
<input type="text" value="Select"/>	<input type="text" value="Select"/>	<input type="text" value="Select"/>
* Describe Reason	* Scope Description	
<input type="text"/>	<input type="text"/>	

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 ‘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	
<div><div><div>200SMM11</div></div></div>	200SMM11-AA11-BA&2AO	10	INR 163,073.40 INR 232,962.00	INR 1,630,734.00 INR 2,329,620.00	<div>* Discount%<div>30</div><div>* Target Purchase Price<div></div></div></div>

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

[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 698,886.00

Currency

INR

SUBMIT

SAVE

Cancel

8. **Salesforce reference number will be displayed when request is submitted.**
9. **Go to Discount History to monitor progress of request.**

CURRENCY: INRACCT: 84498FTCPNONBUYER23

QUICK ORDER

HoneywellPROCESS SOLUTIONSINDUSTRIESPRODUCTSNEWS & EVENTS

SuccessDiscount Request has been successfully submitted

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

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

^ 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

Clear

DISCOUNT REQUEST NUMBER	DISCOUNT REQUEST NAME	STATUS	SUBMITTED DATE	EXPIRATION DATE
CTL-62498	9 Jan 24 Discount Request	Submitted	01/09/2024	
CTL-62476	DR VC Product 09-Jan-2024	Approved	01/09/2024	04/08/2024
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)		< 1 2 >		Rows Per Page 10



11. 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?](#)

ADD TO CART

Status	Control Number	Expiration Date	Submitted Date
Approved	HPS24-AMER-62476	04/08/2024	01/09/2024
Control Number Request			
CTL-62476			
Discount Request Name	Owner	Total List Price	Requested Purchase Price
DR VC Product 09-Jan-2024	FTCPNonBuyer23 FT	INR 7,181,662.00	INR 7,038,028.76
Requested Discount %	Currency		
2.0	INR		

OPPORTUNITY DETAILS

***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: INRACCT: 844988FTCPNONBUYER23

QUICK ORDER

Honeywell

PROCESS SOLUTIONS

INDUSTRIES

PRODUCTS

SERVICES

SOLUTIONS

SUPPORT

NEWS & EVENTS

> Discount History

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

0000058454

Draft

0000058918

Draft

0000059045

Draft

0000059147

HONQA Sanitycheck May 8

Draft

EXPANSION DATE

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

VIEW CART

CONTINUE SHOPPING

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


ADD PARTS

ATTACHMENTS

EXPORT CSV

SAVE CART

CLEAR CART

Item	Part Number	Quantity	Price	Subtotal
10	<div><div></div><div><div>50086423-505</div><div>FFB ELECTRONICS MODULE KIT</div></div></div>	<div><div>-</div><div>5</div><div>+</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:</div><div>HPS23-AMER-50411</div></div>	<div><div>INR 100,230.00</div></div>

Product manufactured on demand

Attachments

Shipping Instructions

Enter special instructions for our shipping department.

Note: Shipping Instructions are only valid for an order

Manufacturing Notes

Add information specific to this product for the factory.

Additional Notes

Add any special information for your order.

Note: Additional Notes are only valid for an order

Quote Number

Your Order

Subtotal:

INR 707,041.50

Total:

INR 707,041.50

CHECK OUT

CREATE QUOTE

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

*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.

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.

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

*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.

Grand Total USD 439,309.95

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

CALCULATE ORDER TOTAL

PLACE MY ORDER

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

Clear

☐ EXPIRES THIS WEEK

☐ EXPIRES IN 30 DAYS

☐ EXPIRES IN 60 DAYS

☐ EXPIRES IN 90 DAYS

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-57540	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	JPK big order plus special ch...	Ordered	11/15/2023	02/13/2024
CTL-57310	JPK with capital O	Ordered	11/14/2023	02/12/2024
CTL-57303	JPK STD820	Ordered	11/13/2023	02/11/2024
CTL-53286	INR_Sanity_12-July-2023	Ordered	07/12/2023	10/10/2023
CTL-52916	Sanity S1 INR DR flow 14Jun...	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 Page 10

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 acknowledgement email.

Transaction Summary

Purchase Order Number	Legal Entity	Line Items	Ship Early	Ship Complete	Amount
334567	US HPS Sales Org	160	No	No	USD 439,309.95

DISCOUNT HISTORY| LIST AND FILTER OPTIONS

Discount History

Filter Results

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

Clear

4

DISCOUNT REQUEST NUMBER	DISCOUNT REQUEST NAME	STATUS	SUBMITTED DATE	EXPIRATION DATE
CTL-50411	A Mar PROD PI1 5 Test FI S...	Approved	03/17/2023	06/15/2024
CTL-50412	B Mar PROD PI 1 5 Test BMS...	Approved	03/17/2023	06/15/2024
CTL-50413	C Mar PROD PI 1 5 Test Ter...	Approved	03/17/2023	06/15/2024

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

< 1 >

Rows Per Page 10

- 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.

EDRF | 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.