# **US Federal Quote**



#### Overview

Creating a quote for a US Federal End Customer is almost the same as it is for any other customer. This QRG helps you with the differences.

Basic quote creation can be found in the <u>1 Tier Partner</u>, <u>Distributor</u>, or <u>Reseller</u> User Guides. After you choose the lines you are renewing and click **Create Quote**, use the following steps.

**Note:** Features such as performing overrides, and manually applying pricing and discounting are not available in federal quoting. You can set up sites with APO and FPO addresses.

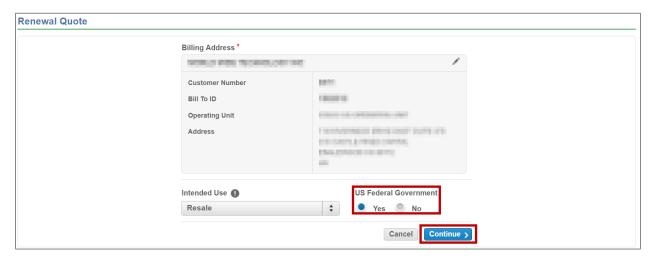
**Note:** You can backdate expired and terminated service lines for U.S. Federal End Customers only up to 180 days. Renewals are fixed to a start date of [(previous end date) +1]. Products which were never covered before (i.e. uncovered lines), can be backdated up to 90 days in the past.

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#### Assigning a Federal Quote as a 1-Tier Partner or Internal User

1. If you know you are quoting for a Federal End Customer, check that **Yes** is selected in the box below, after initiating your quote and before clicking **Continue.** 

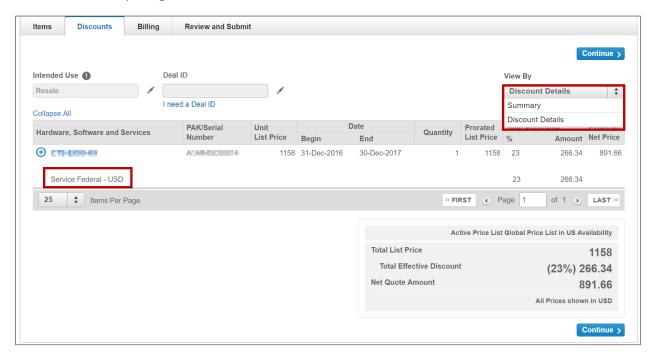


2. Check that the quote header shows the quote is for a federal customer.

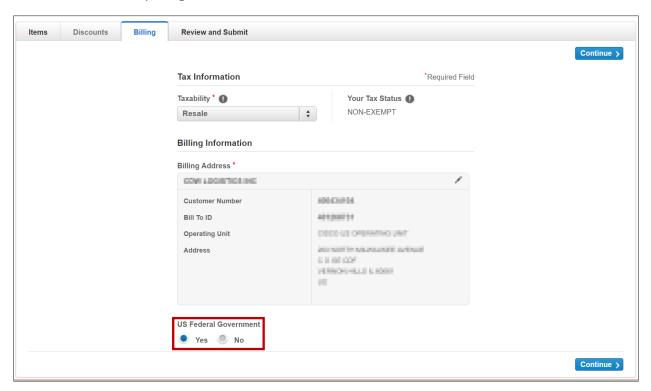




3. To see federal pricing and discounts, select **Discount Details**, on the Discounts tab.



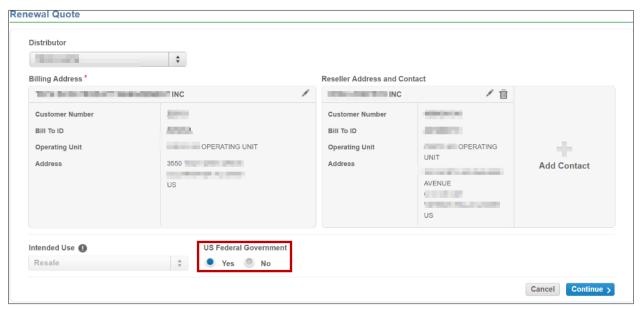
4. You can also select federal quoting under the Billing tab. If you select **federal quoting** here, check the discounts tab to see revised pricing.





### Assigning a Federal Quote as a Distributor User

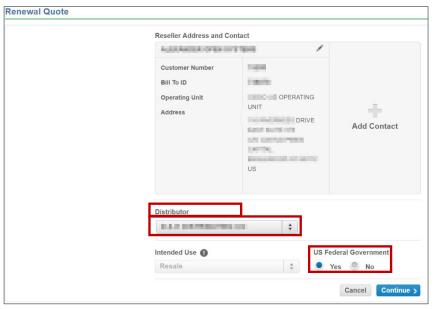
1. Your steps are similar to a <u>1-Tier or Internal user</u>. You can set up a federal quote on the quote initiation page, observe the federal quote status on the Quote Header, and see the pricing and discounts applied on the Discount tab. You can also change the status of the quote on the Billing tab of your quote.



### Assigning a Federal Quote as a Reseller User

 Your steps are similar to those for 1-<u>Tier Partners</u> or <u>Distributors</u>. Check that your quote has been marked as federal when initiating your quote. You will also see the same information on the quote header.

**Note**: Resellers cannot view discounts and net pricing. Contact your selected distributor for pricing information.





## **Setting Taxability Options in Federal Quoting**

1. 1-Tier Partners, Distributors, and Internal users will see an additional option under **Taxability** when editing a federal quote. Resellers cannot view taxability, so contact your selected distributor for taxation options.

