



# 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 [1 Tier Partner](#), [Distributor](#), or [Reseller](#) 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.

## In this Document

[Assigning a Federal Quote as a 1-Tier Partner or Internal User](#)

[Assigning a Federal Quote as a Distributor User](#)

[Assigning a Federal Quote as a Reseller User](#)

[Assigning Taxability Options in Federal Quoting](#)

## 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**.

**Renewal Quote**

Billing Address \*

Customer Number

Bill To ID

Operating Unit

Address

Intended Use ⓘ

Resale

US Federal Government

Yes  No

Cancel **Continue >**

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

QUOTE NUMBER		BUY METHOD	CREATED BY
Federal		Cisco	On 18-Nov-2016
QUOTE NAME	STATUS	LAST UPDATED BY	
	Invalid	On 18-Nov-2016	

Items | Discounts | Billing | Review and Submit



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

Intended Use: Resale | Deal ID: [Blank] | View By: **Discount Details**

Hardware, Software and Services	PAK/Serial Number	Unit List Price	Begin	End	Quantity	Prorated List Price	%	Amount	Net Price	
+	CTE-1188-4	1158	31-Dec-2016	30-Dec-2017	1	1158	23	266.34	891.66	
<b>Service Federal - USD</b>								23	266.34	

Summary: Total List Price: 1158, Total Effective Discount: (23%) 266.34, Net Quote Amount: 891.66

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.

Tax Information: Taxability: Resale | Your Tax Status: NON-EXEMPT

Billing Information: Billing Address: DOW LOGISTICS INC

Customer Number: 40000004  
 Bill To ID: 40000004  
 Operating Unit: CISC-US OPERATING UNIT  
 Address: 200 WEST 10th AVENUE SUITE 1000  
 DENVER CO 80202

**US Federal Government**  
 Yes  No



## Assigning a Federal Quote as a Distributor User

1. Your steps are similar to a [1-Tier or Internal user](#). 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.

**Renewal Quote**

Distributor: [Dropdown]

**Billing Address \***

[Address Card] INC

Customer Number: [Field]  
Bill To ID: [Field]  
Operating Unit: [Field] OPERATING UNIT  
Address: 3550 [Field] [Field] [Field]  
US

**Reseller Address and Contact**

[Address Card] INC

Customer Number: [Field]  
Bill To ID: [Field]  
Operating Unit: [Field] OPERATING UNIT  
Address: [Field] AVENUE [Field] [Field] [Field]  
US

**Intended Use** ⓘ

Resale [Dropdown]

**US Federal Government**

Yes  No

Cancel Continue >

## Assigning a Federal Quote as a Reseller User

1. Your steps are similar to those for [1-Tier Partners](#) or [Distributors](#). 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.

**Renewal Quote**

**Reseller Address and Contact**

[Address Card] INC

Customer Number: [Field]  
Bill To ID: [Field]  
Operating Unit: [Field] OPERATING UNIT  
Address: [Field] DRIVE [Field] [Field] [Field] [Field] [Field]  
US

**Distributor**

[Dropdown]

**Intended Use** ⓘ

Resale [Dropdown]

**US Federal Government**

Yes  No

Cancel Continue >



## Setting Taxability Options in Federal Quoting

- 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.

The screenshot shows the 'Billing' tab in a software interface. At the top, there are tabs for 'Items', 'Discounts', 'Billing', and 'Review and Submit'. A 'Continue >' button is in the top right. The main content area is divided into two columns. The left column is titled 'Tax Information' and contains a dropdown menu for 'Taxability \*'. The dropdown is currently set to 'Resale' and is highlighted with a red border. Other options in the dropdown are 'Internal Use', 'Resale', and 'State/Federal or Direct Pay Permit Exemptions'. To the right of the dropdown is a 'Your Tax Status \*' field with a value of 'NON-EXEMPT'. Below this is a customer information section with fields for 'Customer Number', 'Bill To ID', 'Operating Unit', and 'Address'. At the bottom, there is a 'US Federal Government' section with radio buttons for 'Yes' (selected) and 'No'. A second 'Continue >' button is at the bottom right.