

# Cisco Service Contract Center

## The Next Generation of Service Management

### Adding Lines to a Quote using the Upload Template Tip Sheet

**Introduction:** This Tip Sheet covers the basics of creating and modifying quotes in CSCC using the MS Excel-based Quote Template file. This is the recommended best practice for adding large lists of equipment to a quote.

#### Overview

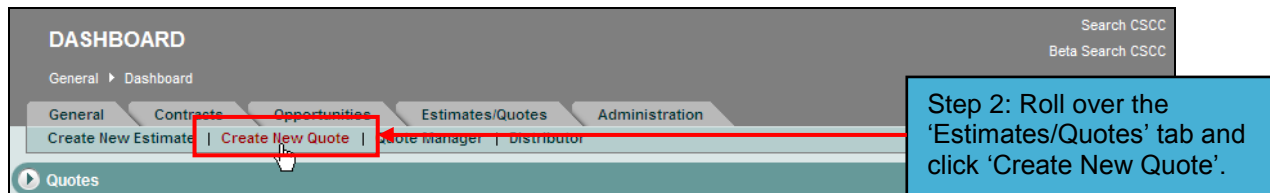
'Import Excel from Template' is one of three methods available for importing large amounts of data into a CSCC quote. As of January 2009, this functionality has been enhanced to enable imports of a broad range of quote data in quantities up to tens of thousands of lines. (For exact size limitations, see the [Large Quotes Job Aid](#).)

To use the 'Import Excel from Template' functionality, you need an accurate and valid list of equipment. Obtain this information from sources such as internal systems, a customer inventory list, Online Contract Management (OCM), Partner Opportunity Manager (POM), or Performance Metrics Central (PMC). This list of equipment should contain all the products you want to add to the quote.

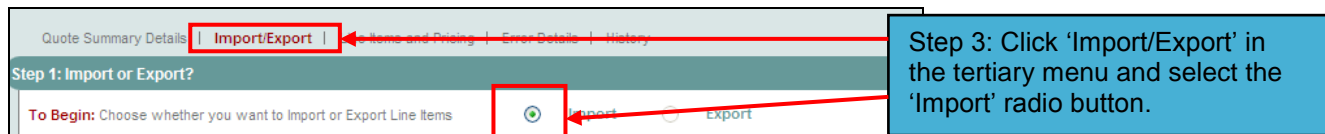
Use the following procedure to create a template-compliant quote upload file and upload the file into CSCC.

#### Download the Template and Create the Upload File

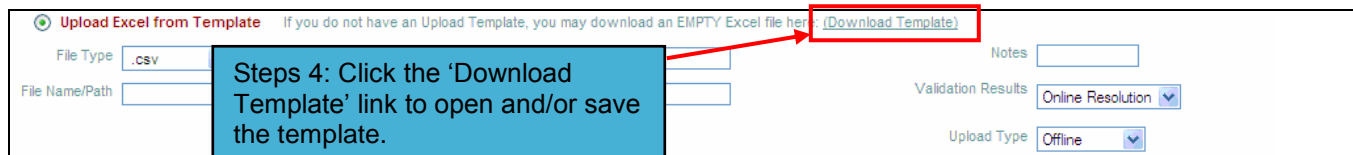
1. Within CSCC, roll over the 'Estimates/Quotes' tab and click 'Create New Quote' in the secondary menu. The 'Quote Summary Details' screen appears.



2. Click 'Import/Export' in the tertiary menu and select 'Import'.



3. If you are creating a quote for new service coverage and need a blank Quote Template file, you can download one from this screen. Click the 'Download Template' hyperlink. A pop-up will appear with the choice to 'Open' or 'Save' the file. Make the desired choice and ensure the template is open so you can populate it with data.



If you are using 'Import Excel from Template' to modify an existing quote, you can also use any of the following files as the basis for your upload file, since they fully conform to the quote template format:

- Quote Validation Report – This file is sent as an attachment to the File Upload Processing Results e-mail you receive after you upload a quote file (see Step 10 below).

- Quote Line Export File – To obtain this file, choose ‘Download’ from the Action drop-down menu on the Quote Summary Details screen for the existing quote and click Go.
- Error Details Report – To obtain this file, choose ‘Download’ from the Action drop-down menu on the Error Details screen for the existing quote and click Go.

You can modify the quote by editing any of these files and re-uploading them into CSCC, since all conform to the quote template format. For detailed information, see the [Large Quotes Job Aid](#).

4. Populate the upload file with the desired quote data. For detailed information on the fields in the quote template, including field definitions and required and optional fields, see the [Large Quotes Job Aid](#).

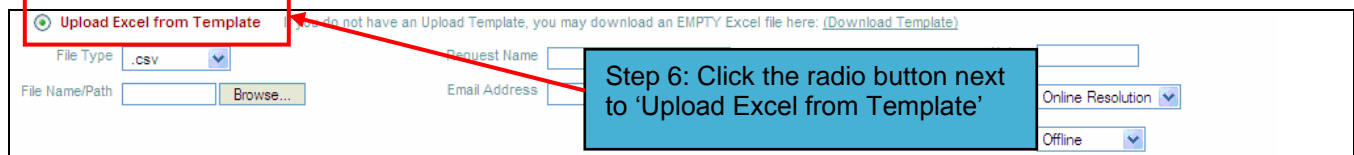
### Populating the upload file:

- At a minimum, you will need to include Serial Numbers or Product Names (Product ID) for every line that you are adding. For uncovered lines with no coverage history, values will be pulled from your preferences if additional fields are not entered.
  - If you do not have a Site ID and you would like to have a specific address applied to the quote line, you must provide at least the Install Site Name, Address 1, City and Country fields for the system to search for a match. However, using a Site ID is always the easiest method of adding an address to a quote line.
  - Country fields need to be entered using official ISO acronyms. Click here for a link to [ISO country listings](#).
  - For information on adding minor lines to major lines using the upload file, please reference the [Add Minor to Major Job Aid](#).
5. Once the upload file has been populated, save it to disk. If the file contains 10,000 lines or more, save it as a comma-separated value (CSV) file before uploading it. Because CSV files are not binary files, CSV uploads take less time than Excel file uploads.

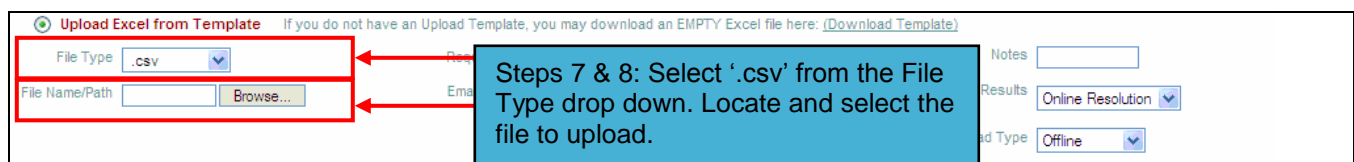
To save the upload file in CSV format, within MS Excel, select ‘File’ → ‘Save As’. In the File Type drop-down, select ‘CSV (Comma-delimited) (\*.csv)’. See the MS Excel online help for more information on CSV files.

### Upload the Quote File

6. Navigate to the ‘Import/Export’ screen (see above) and click the ‘Upload Excel from Template’ radio button.



7. Select the correct File Type, .xls or .csv, depending on the format of your upload file. CSV is recommended for all uploads and must be used for upload files containing 10,000 or more lines.



8. Click ‘Browse’ to locate and select the saved upload file.
9. If desired, enter a unique ‘Request Name’ and ‘Notes’ to help you track and identify your quote later.
10. When your upload is finished processing, CSCC sends an e-mail that tells you whether your upload was successful and provides detailed information on any errors that occur. In addition, the Quote Validation Report will be attached with this email which you can use to make further edits to quote lines. The file can then be saved and re-uploaded to CSCC following the previously mentioned process. In the ‘Email Address’ field, enter the address you want CSCC to send this e-mail to. By default, the ‘Email Address’ field contains the e-mail address of the current user.
11. Under ‘Quote Validation Report’, select an option to specify the content of the Quote Validation Report:
  - ‘Report should include Invalid Lines only’ – Includes only the successfully validated lines in the report. Using this option will reduce the report file size and accelerate the process.

- 'Report should include the entire Quote (Invalid and Valid lines)' – Includes all lines in the report, both valid and invalid. Using this option will increase report file size and slow the process, but will include more information in the report.

Quote Validation Report:  Report should include Invalid Lines only  
 Report should include the entire Quote (Valid and Invalid lines)

12. Under 'Validation Approach', select an option to specify how you want the system to validate the upload data:

- 'Validate and save changed and/or Invalid Lines' – Executes a 'Validate and Save' operation once the data is uploaded to the quote.
- 'Make and save changes to the Quote, without further Validation' – Executes a 'Save' operation once the data is uploaded to the quote. With this option, no validations occur

The second option (Make and save changes) should be used when you are managing errors and are uploading multiple updates to the quote. It accelerates the process by foregoing the validation step.

Validation Approach:  Validate and save changed and/or Invalid Lines  
 Make and save changes to the Quote, without further Validation

13. Click 'Continue' to process the upload.

File Type: Select One File #:

Step 13: Click 'Continue'.

Clear

A Request ID is generated, allowing you to check the status of the upload later on the Request Status screen. The following message appears at the top of the Import/Export screen.

General Contracts Opportunities Estimates/Quotes Administration

Quote Summary Details | **Import/Export** | Line Items and Pricing | Error Details | History

Your request Quote Upload and request ID 1483835 has been submitted successfully.



**Note:** Access to the quote is set to read-only until the upload process has finished. During this time, you are not able to upload another quote file or edit the quote. The Error Description shown below appears on the Quote Summary Details screen header, and all Action menu options are disabled except 'Copy', 'Email', 'Download', and 'Grant/Revoke Access'.

Quote Summary Details | Import/Export | Line Items and Pricing | Error Details | History

Quote Summary Details-Quote #474896 Action: Select one

Error(s)

**Error Description**  
 1 ) An offline request has been submitted for this quote which is in the process of making changes to the quote data. To prevent further changes made to the data from being reverted, the quote has been made read-only until the offline process completes. Once the offline process is completed this message will be removed upon refreshing your screen. Submitted Request: 1486325 initiated on 19 JAN 2009 12:26:42 AM GMT.

**Recommended Action**  
 ) You can still view and download this quote, but you cannot make changes once the offline process completes.

Action menu options: Select one, Copy, Email, Download, Grant/Revoke Access



**Note:** You should receive the File Processing Results email once your upload has completed. Attached with that email is the Quote Validation Report which can be used to reference error information and make further line updates. Once updates have been made, repeat steps 5-13 to re-upload the file and make changes to the existing quote lines.

**Related Links:**

- [CSCC Training Website](#)
- [CSCC User Guide](#)
- [CSCC Large Quotes Job Aid](#)