



## Create Quote and Convert to an Existing Contract

**Objective:** This tip sheet will show you how to create a quote and convert it to an existing target contract. This would be used if you would like to add products to an existing contract while quoting, however the desired service level for the product will need to match the service level on the target contract.

### Steps to create a new Quote and convert it to an Existing Contract in CSCC:

1. From the Dashboard, roll over the 'Estimates/Quotes' tab and click 'Create New Quote' in the secondary menu.
2. The 'Create New Quote' screen appears.
3. Navigate to the 'Line Items and Pricing' screen by clicking 'Line Items and Pricing' in the tertiary menu.
4. Click the 'Action' drop down menu, select 'Add Line' and click 'GO'.

**Note:** You can also add multiple lines at once using the functionality available in the Import/Export tertiary menu. Reference the Quote Basics tip sheet for more information on this functionality.

Step 3: Navigate to the 'Line Items and Pricing' screen by clicking 'Line Items and Pricing' in the tertiary menu.

Step 4: Click the 'Action' drop down menu, select 'Add Line' and click 'GO'.

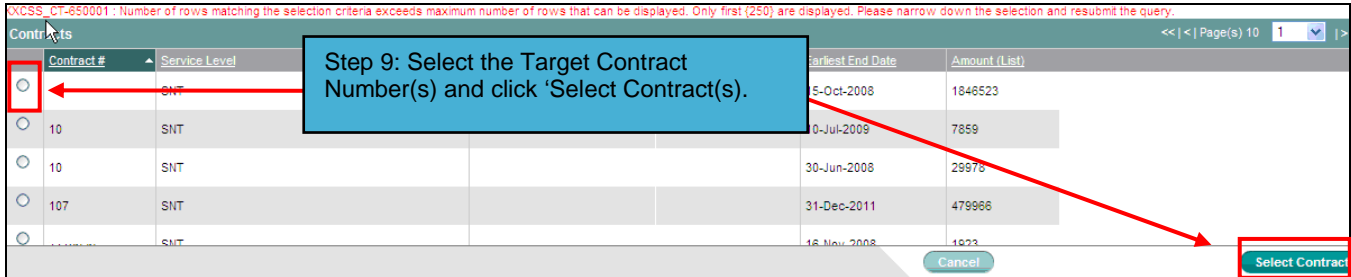
5. The 'Add Line' pop up window appears.
6. Enter the Serial Number of the product you wish to add to the contract.
7. Use the selector icon '+' next to the Target Contract number field to convert the quote to an existing target contract.

Step 6: Enter your 'Serial Number.'

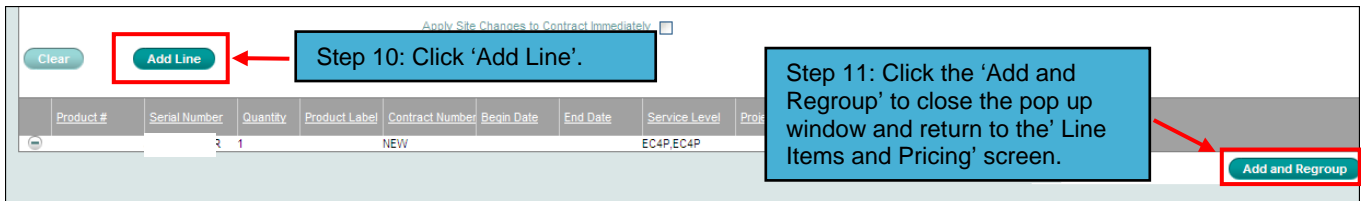
Step 7: Use the selector Picker icon '+' next to the 'Target Contract Number' field.

8. The 'Contract Selector' pop up window appears.
9. Select the target contract number(s) and click 'Select Contract(s)'.

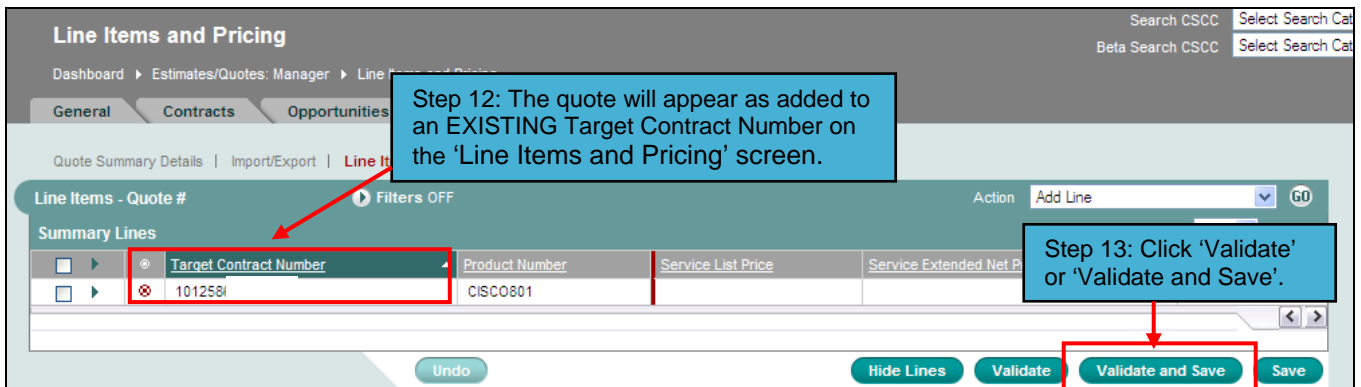
**Note:** In case you do not know the target contract number(s), click the 'Advanced Search' hyperlink located at the top right corner of every screen. Enter your search criteria into one of the following fields: Installed-at Customer Name, Installed-at Customer and Site ID, Bill To ID. Click the 'More Filters' and the 'Line Level Search Filters' expand/collapse arrows to access additional filter fields.



10. On the 'Add Line' pop up window click the 'Add Line' button.
11. Click 'Add and Regroup' to close the 'Add Line' pop up window and to return to the 'Line Items and Pricing' screen.



12. The quote will appear as added to an EXISTING Contract Number on the Line Items and Pricing screen.
13. After selecting 'Validate' or 'Validate and Save', you may encounter errors with your quote. Go to the 'Error Details' section to resolve all errors.



#### Related Links:

CSCC Training Website: [Click Here](#)  
 Create Quote and Convert to New Contract Tip Sheet: [Click Here](#)  
 Quote Basics Tip Sheet: [Click Here](#)