



Creating an Estimate (Quick Quote)

Introduction: This tip sheet will show you how to create a quick quote (also known as an Estimate in CSCC) for service on your product(s). This feature is very helpful when attempting to estimate the price of service for your end customers. A quick quote can be created with minimum amount of data, and without running validations or applying discounts. However, the price will be less accurate than an actual quote. Once an estimate has been created, you have the option to proceed directly to quote.

Quotes vs. Estimates

The following table illustrates the basic differences between Quotes and Estimates in CSCC in terms of four features: validations, pricing, next steps, and price protection.

Feature	Estimate	Quote
Validations	Allows you to control data validations for quicker, easier processing.	Runs all mandatory data validations to ensure data quality.
Pricing	Lets you compare preliminary pricing for different service levels	Provides complete and accurate pricing for a single service level
Next Steps	Can be converted into a quote when valid serial numbers are provided	Can be converted into an order when fully validated
Price Protection	Does not provide price protection	Once in 'Valid' status, guarantees price protection for 60 days

Steps to Set 'Estimates/Quotes' (Quick Quote) Preferences:

Settings from your user preferences are automatically applied to all estimates you create. Preferences affecting estimates are set in the 'Estimate Validations' section of the 'Estimates/Quotes' tab in the User Preferences pop-up window. For instructions on setting these preferences, see the [Setting Preferences Tip Sheet](#).

Steps to Create an Estimate (Quick Quote):

1. Rollover the 'Estimates/Quotes' tab and click 'Create New Estimate' in the secondary menu.
2. On the Quote Summary Details screen, enter a 'Bill To ID' if one did not default from your user preferences. Click the selector icon to update the 'Bill To ID' field.
3. Click the expand/collapse arrow in the 'Settings' or 'Preferences' section to adjust your estimate settings and preferences for this specific estimate.

Quote Summary Details

Customer Number 7128
 Bill To ID 10706
 Bill To Name CISCO SYSTEMS
 INC SERVICE OPERATIONS

Status
 Quote#
 Quote Name
 Net Quote Amount USD

Created By XXCSS_CSCC_INTF
 Created Date 23-Oct-2008
 Last Modified 23-Oct-2008
 Severe Errors 0
 Warnings 0

Settings

Channels 1T
 Intended Use Resale

Preferences

Hardware Service Level SNT - SMARTnet 8x5xNBD(8X5XNBD)
 Software Service Level SAS - Software Application Support(SAS)
 Install Site Country United States

Hardware Duration 12 Months
 Software Duration 12 Months

Validation Options:

- Perform Date Validation?
- Validate Serial Number?
- Check For Service Availability by Location?
- Validate Configuration?
- Show SP Service Levels?
- Display Partner Discount?

Note: The 'Estimate Validations' option is especially important when creating an estimate. To speed up the process of obtaining a quick quote, you can turn off all validations. If you have serial numbers for the products you are estimating, it is good practice to check the 'Validate Serial Number' checkbox. However, if you do this, and an incorrect serial number is entered, an error condition will occur, and the estimate will not be calculated. The table below provides detailed information on all of the options available in the 'Estimate Validations' section.

Settings and Validation Options	
Perform Date Validation	If checked, the system will verify coverage begin and end dates.
Validate Serial Number	<p>If checked, the system will verify the accuracy and completeness of the serial number entered.</p> <ul style="list-style-type: none"> If you are creating an estimate for product IDs, un-check this checkbox, since serial number validations will generate an error when no serial number is provided. If you are creating an estimate for serial numbers, checking this checkbox will allow you to more easily convert your estimate to a quote, since serial numbers will have been validated during estimate creation. These validations could, however, generate errors if your serial number data is invalid.
Check For Service Availability by Location	If checked, the system will verify the Service Availability for the product at the specified Installed-At location.
Validate Configuration	If checked, the system will verify the both major and minor lines based on the configuration rules. If this option is not selected, only major lines will be verified.
Show SP Service Levels	If checked, Service Provider Service Levels will be shown in addition to Customer Profile. Select this option if the Customer Profile does not contain SP Service Levels and you need to estimate or compare them.
Display Partner Discount	If checked, Partner Discount will be included in the calculations discount details, Line Items and Pricing screen, and downloadable reports. If unchecked, only multi-year discounts (pass-thru amounts) and credit adjustments are included.

4. Click the 'Import/Export' tab on the tertiary menu to add lines to your estimate using one of the three methods: Cut and Paste, Import from Contract/Quote/Product Purchase Order/Product Sales Order, or Upload from Excel Template. You can also add a line using the 'Add Line' function from the Line Item and Pricing screen. *Please reference the [Quote Basics Tip Sheet](#) for more information.*
5. Once lines are added, you can edit the line items by clicking on the 'Line Items and Pricing' tab on the tertiary menu, selecting the lines of interest and clicking 'Edit Lines' from the Action drop down. This can be used to edit the install-at site or service level data.
Note: You can customize your view of the Line Items and Pricing screen using the 'Column and Row Display' function. *Please reference the [Referencing Quote Line Level Information Tip Sheet](#) for more information.*
6. Select the following options at the bottom right corner of the screen:
 - § **Save** – Saves your quote information without running validations.
 - § **Validate** – Runs validation on the information you have inputted without saving the data in Cisco Service Contract Center.
 - § **Validate and Save** – Runs validation on the estimate data, as well as save it for future use.
7. If you encounter errors with your estimate, go to the 'Error Details' section to resolve all errors. Turning off validations will help prevent errors, however they will be encountered again when proceeding to Quote. Quoting validations can not be turned off.
8. View the estimated service prices on the 'Line Items and Pricing' screen.
Note: On the 'Quote Summary Details' screen, if the estimate is valid, the status field will display "Estimate".

The screenshot shows the 'Line Items and Pricing' interface. A blue box labeled 'Step 4: Click 'Import/Export' or 'Line Items and Pricing' to add line items' points to the 'Import/Export' and 'Line Items and Pricing' tabs. Another blue box labeled 'Step 6: Click 'Validate', 'Validate and Save', or 'Save'' points to the 'Validate', 'Validate and Save', and 'Save' buttons at the bottom. A third blue box labeled 'Step 8: View estimated service prices' points to the 'Service List Price' and 'Service Extended Net Price' columns in the table below.

Product Number	Service Level	Site Country	Service List Price	Service Extended Net Price	Price Status
CISCO2811-ADSL/K9	SNT	US	420.00	420.00	Validated
CISCO2811-ADSL/K9	SNT	US	420.00	420.00	Validated

Steps to Create a Quote Using an Estimate (Quick quote):

1. Rollover the 'Estimates/Quotes' tab and click 'Quote Manager' in the secondary menu.
2. Select 'Estimate' from the 'View' drop down. The list of estimates created will appear in the results table.
3. Select the estimate you want to proceed to quoting by clicking the 'Quote #' hyperlink.
4. Click 'Proceed to Quote' when you are ready to convert your estimate to a quote.
Note: When creating an estimate, items can be added using only the product number. However, in order to successfully create a quote from an estimate, all items must have a serial number. *Please reference the [CSCC User Guide](#) for more information.*

Related Links:

- § CSCC Training Website: <http://www.cisco.com/go/cscctraining/>
- § User Guide: [Click Here](#)