



## Granting and Revoking Access to Estimates/Quotes

**Objective:** This tip sheet shows you how to grant and revoke access to estimates and/or quotes in Cisco Service Contract Center. By controlling those who have access to estimates/quotes, you can ensure updates to specific estimates/quotes are made by selected users, and any sensitive information is not viewable by those who should not have access. If you search for estimates/quotes that you do not have access to, you will receive an error message. Since many different users may need to touch a quote before it is ordered, understanding this functionality is crucial for quoting and ordering teams.

### Steps to Grant or Revoke Estimate/Quote Access:

1. Rollover the 'Estimates/Quotes' tab and click 'Quote Manager' in the secondary menu.
2. Set your filters to search for specific quotes.  
**Note:** You can also use the 'Search CSCC' function, located on the top right corner of the CSCC dashboard, to find a single estimate/quote. Select 'Quote/Estimate Number' from the drop down, type the number in the text field, and click 'GO'.
3. To select multiple estimates/quotes, click the associated checkboxes under the 'Quote #' column on the Quote Manager screen. To select a single estimate/quote, click the Quote # hyperlink, and you will be directed to the Quote Summary Details screen.
4. Select 'Grant Access' from the 'Actions' drop down, and click 'GO'. This can also be done from the Quote Summary Details screen when updating the access for a single estimate/quote.

**Step 3: Click the estimates/quotes checkboxes or a Quote # hyperlink**

**Step 4: Select 'Grant Access' and Click 'GO'**

Quote #	Partner Ref	Quote Amount	Quote Net Total and Fee Amount	Date Quoted	Last Modified	Non-Stnd	Status
<input checked="" type="checkbox"/> <a href="#">328921</a>	CISCO SYSTEMS INC SERVICE OPERATIONS	10706	0.00	21-Oct-08	22-Oct-08	N	Invalid
<input checked="" type="checkbox"/> <a href="#">328919</a>	CISCO SYSTEMS INC SERVICE OPERATIONS	10706	0.00	21-Oct-08	21-Oct-08	N	Invalid

5. The Grant/Revoke Access pop-up window will appear with the following two sections:
  - **Grant/Revoke Access Section** – You must update these fields to edit access to the estimate/quote.
  - **Access List Section** – Only available when updating a single estimate/quote. It displays the list of users currently with access to the estimate/quote.
6. Enter a valid user id in the 'CCO User Id' field.

7. Select the appropriate permission level you wish to grant to the user. The available permission levels are:
    - **View Only** – User can only view the estimate/quote. No edits can be performed nor can the user order the quote.
    - **View / Modify** – User can view and update the estimate/quote.
    - **View Only / Order** – User can view estimate/quote and can proceed to order the quote.
    - **Revoke** – User can no longer access the estimate/quote.
  8. Update the 'Begin Date' and 'End Date' fields. This feature is used to set the time period of the user's access to the estimate/quote.
    - **Begin Date** – User's access start date. Enter today's date or any future date. If the begin date is not provided, it will default to today's date.
    - **End Date** – User's access end date. Enter today's date or any future date. If the end date is not provided, it will default to 180 days (around 6 months) after today's date.
  9. Click 'Submit'.
  10. A message will appear on the top of the Grant/Revoke Access pop-up window stating if the access update was successful or not. If successful, an email will be sent to the user who has been granted access to the estimate/quote. If not successful, you will need to edit the Grant/Revoke Access field information, or open a case with Service Support Center.
- Note:** Once access is granted, the user name will be listed under the Access List section of the Grant/Revoke Access pop-up window. The Access List information will only be available when viewing the Grant/Revoke Access pop-up window of a single estimate/quote.

Grant / Revoke Access to Quote # Q - 328900

Grant/Revoke Access

CCO User Id

Permission Level Select one

Begin Date

End Date

Access List for Quote # - 328900

CCO User Id	Permission Level	Order Capability	Grant By	Access Begin Date	Access End Date
ALEXHOWITZ	View / Modify	Yes	ALEXHOWITZ	21-Oct-08	19-Apr-09

Cancel

#### Related Links:

CSCC Training Website: <http://www.cisco.com/go/cscctraining>  
 Service Support Center Website: <http://www.cisco.com/go/ssc>