Quoting Basics Tip Sheet

> **Introduction:** This Tip Sheet covers the basics of creating and working with quotes in CSCC. It provides step-by-step instructions for creating a new quote, adding lines to the quote, validating the data and saving the quote.

Overview

You can create a quote in CSCC by quoting an estimate, renewing an existing service contract, importing information from an existing source (contract, estimate, quote, etc.), or creating the quote from scratch. This Tip Sheet covers, at a high level, quote creation from scratch (without existing contract information).

To create a new quote, you need, at minimum, four pieces of valid information: **Bill To ID**, **Site ID(s)**, **Service Level**, and **Serial Number(s).** CSCC pulls the Bill To ID, Site ID(s), and Service Level(s) from either your Preferences or the source contract (if the item is covered). This is important to understand because these parameters can impact pricing and lead to errors if they aren't verified. You always have the option to modify all of these parameters as you create the quote, but the defaults established in your Preferences may be applied if no modifications are made. **Setting your preferences is critical before proceeding to quote.**
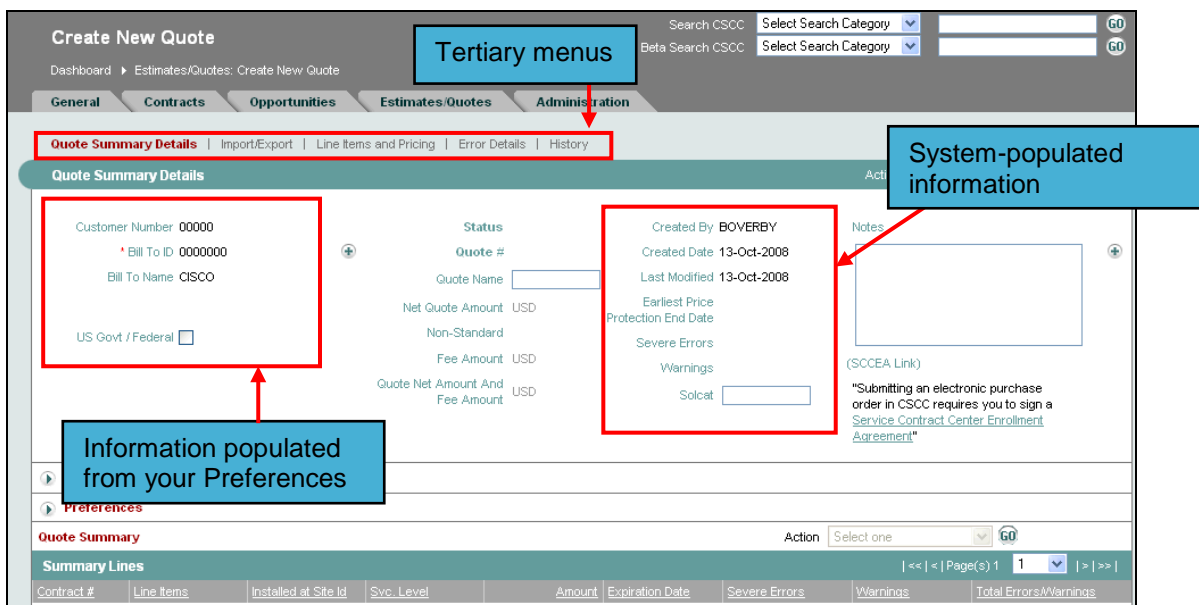
Creating a Quote in CSCC

To create a quote from scratch, follow these steps:

> **Note:** If you want to create or open more than one quote simultaneously, use a different browser session for each quote. From your Internet Explorer browser, select the File menu→New Session option and open the quote in this new session. Open a new session for each quote in the set of multiple quotes you wish to work on.

From the main CSCC window, roll over the Estimates/Quotes tab and click Create New Quote.

A Create New Quote screen appears, with the Quote Summary Details page displayed.

The Customer Number, Bill To ID, and Bill To Name fields are pre-populated from your 'Preferences'. If you have multiple Bill To Addresses, you can change this field by clicking the selector next to the field and searching for an alternate Bill To. (See the CSCC User Guide for details.)

You can use the tertiary menu to add products to your quote. You can import information from existing sources using the 'Import/Export' hyperlink or add items individually from the 'Line Items and Pricing' hyperlink. The import functions are very useful when adding multiple lines or importing lines from an existing contract.

There are three main import methods you can execute from the Import/Export screen :

- Cut-and-Paste: Allows you to cut and paste a list of serial numbers or product numbers to add to the quote. All entries must be separated by commas.

- Upload Excel from Template: Allows you to download an Excel template, populate it with key quote information, and upload it into the system. (For details, see the Upload Template Tip Sheet.)

- Import from Contract / Quote / PO / SO/Carton ID: Allows you to import lines from an existing document by entering a valid Quote, Contract, Product PO, Product SO number or Carton ID.
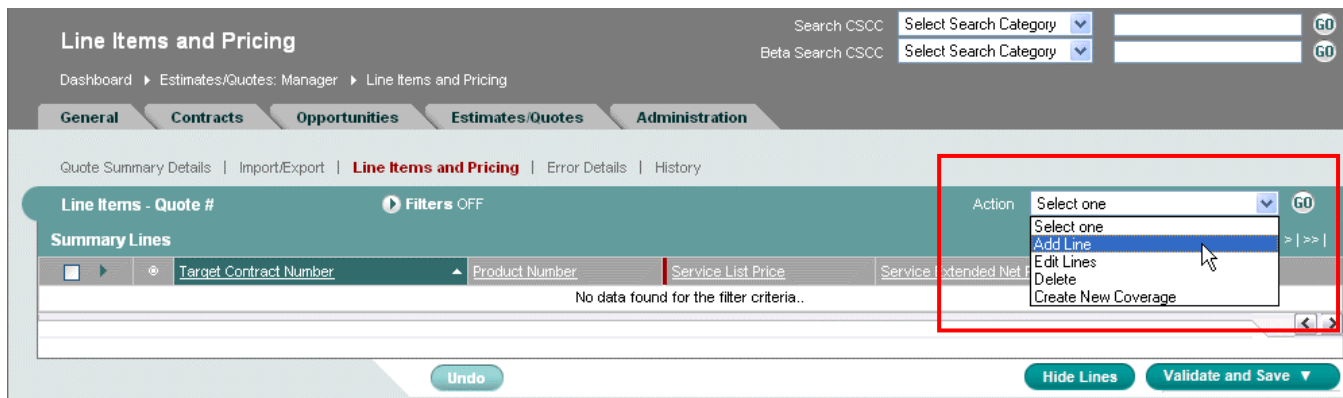
For the following steps, we will use the simple Add Line functionality.

1. Click 'Line Items and Pricing' from the tertiary menu.
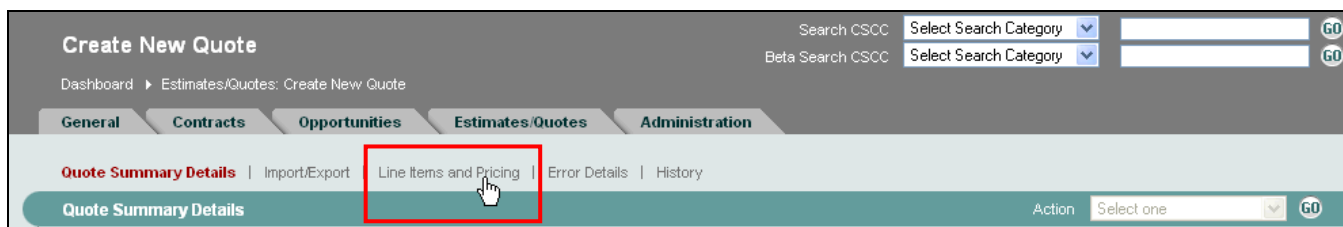
The Line Items and Pricing screen appears.

2. Select 'Add Line' from the Action drop-down at the right and click 'Go'.

The Add Line pop-up window appears.

3. Enter either a Product Number or Serial Number:

- If you enter a Serial Number, there is no need to enter a Product Number.

- Serial Numbers must be entered before you order the quote. You can get a price using product numbers, but your quote will not successfully validate unless a serial number is provided (for most service levels).

- If you enter a Product Number, you must also specify an Install Site.

- For Product Numbers, you must have all or a portion of a valid Cisco Product ID. Use the selector to the right of the field to search for and select a complete Product ID.

- For Serial Numbers, you must have a complete valid Cisco Serial Number to enter into the field. Invalid serial numbers will result in errors.

4. If desired, specify the following additional information:

- Coverage Begin and End dates

- Service Levels (If you enter a Serial Number for a product that is already covered, and you want to maintain the existing Service Level, there is no need to enter a Service Level.)

- Install Site location. (Install sites can be added or changed using the associated selector icon. To change an Install Site after you have added the line, use the Edit Line function on the Action drop-down.)

5. If desired, update the Target Contract. New quotes created from scratch will default to a 'New' target contract.

   Note: For uncovered products, the hardware and software service levels in the Uncovered Products section will be used. For covered products, you can choose 'Keep Existing Service Levels' or 'Apply These Service Levels' to upgrade or downgrade the service for that line.

6. Click 'Add Line' at the bottom of the screen.

7. If the entered Install Site ID is in either "Inactive" or "On-Hold" status, CSCC will present the following pop-up window. Click "OK" to allow CSCC to search for a replacement "Active" Install Site ID.
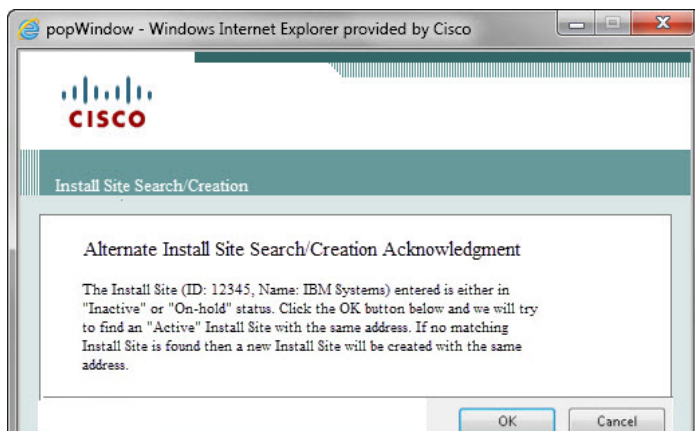
8. If desired, follow steps 4-7 to add more products to the quote.

9. Click 'Add and Regroup' once you have added the necessary lines. You are returned to the Line Items and Pricing screen.

10. From Line Items and Pricing, click 'Validate' to run all data validations without saving the data, 'Validate and Save' to run all data validations and save the data to the CSCC database, or 'Save' to save the data to the CSCC database without running data validations. "Save" is a good option if you just want to quickly get a price for the services you entered. A quote number is generated once the quote has been saved.

11. If you click 'Validate and Save', the Processing Options drop-down menu appears. This gives you the option to save your quote online or offline. If you are saving/validating a large number of lines (more than 100) you should validate your quote 'Offline'.

12. If you choose online processing, click the Refresh button when the processing is complete. If you selected offline, a Request ID is generated and you will receive an email once the request has completed.

13. Check the status of your quote by returning to the Quote Summary Details screen.

14. If errors are present on your quote and it is in an 'Invalid' status, navigate to the Error Details screen from the tertiary menu. Your quote cannot be ordered until all errors are resolved. Lines can be edited from the Error Details screen by selecting the line checkboxes and clicking 'Edit Line' from the Action drop-down or by clicking on the Error Icon and correcting the errors within the Error Correction pop-up window.

> **Note:** If you select more than 500 lines, the system launches a pop-up informing you that you'll only be able to save the changes offline. Click 'OK' to dismiss the popup

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Related Links:

CSCC Training Website: Click Here
CSCC User Guide: Click Here