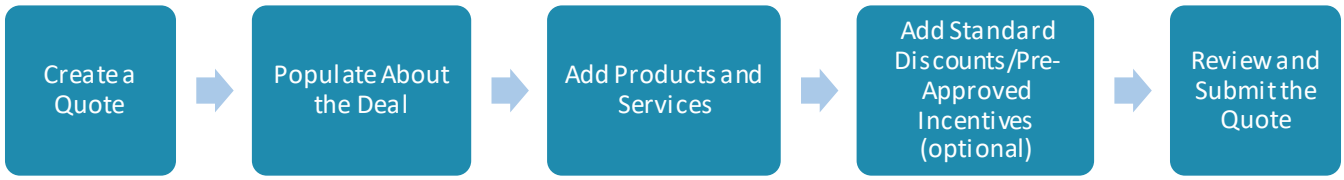
Cisco Commerce
Quotes Quick Reference Guide

Note: This document is no longer being actively updated as of August 2019. Please contact crc-training@cisco.com if an update is requested.

Overview

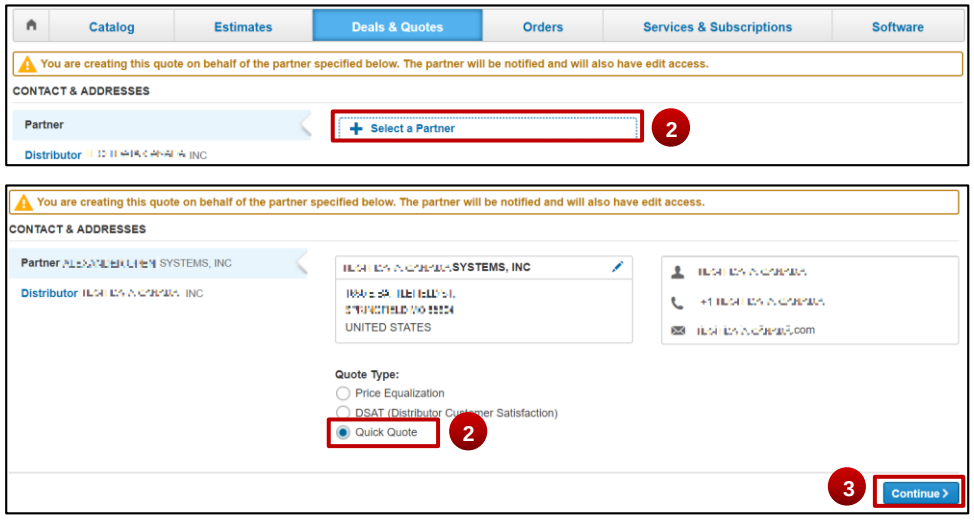
Create a Quote to use standard discounts or pre-approved incentives (programs and promotions). Create a deal (see additional references at end of document) when you need to apply incentives that require additional approval. After approval, both Deals and Quotes can be converted to orders.



Create a Quote

1. From the Deals & Quotes tab, click
2. **Create Quote**.
2. For Distributors only: Populate the partner details.

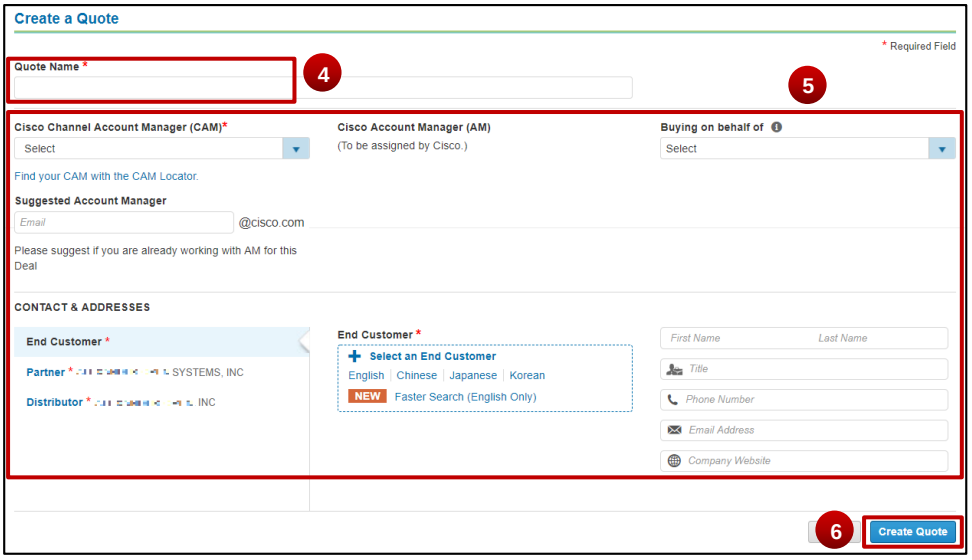
   After the partner has been identified, select the appropriate **Quote Type**. Refer to the Cisco Commerce Companion User Guide for Distributors for details on how to create these quote types.
3. For Distributors only: Verify the information and click **Continue**.



Note: The above screenshots are applicable to Distributors only.

Cisco Proprietary © 2020 Cisco and/or its affiliates. All rights reserved.

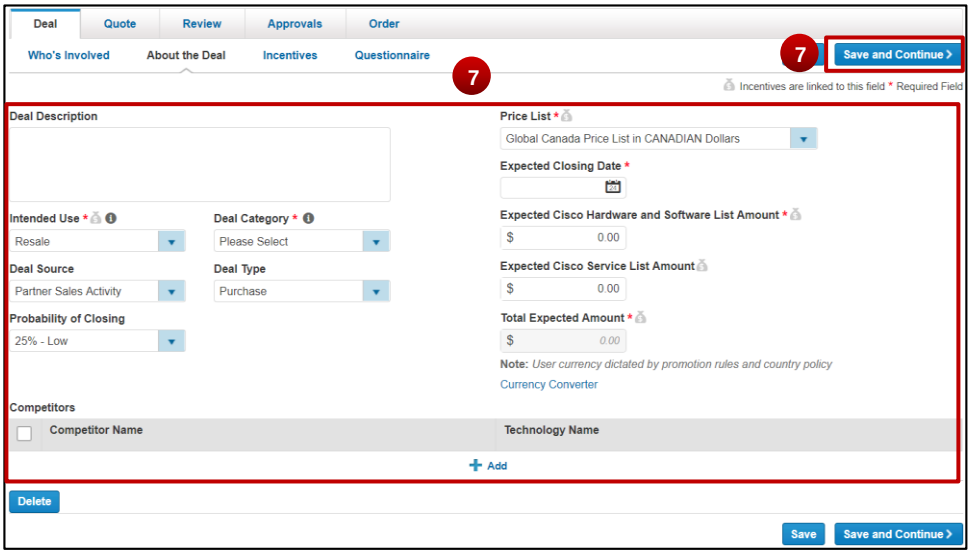
4. On the Create a Quote page, enter a quote name.
5. Populate the mandatory (*) information.
6. Click **Create Quote**.



Note: A Cisco Account Manager (AM) is auto assigned by the system after you populate the end customer section.

About the Deal

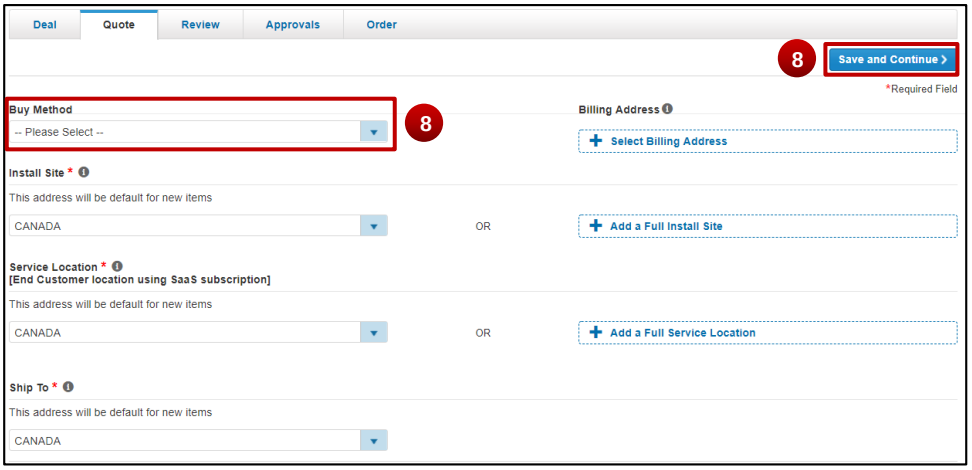
7. Populate the mandatory information (*) on this page, then click **Save and Continue**. The Quote tab displays.



Cisco Proprietary © 2020 Cisco and/or its affiliates. All rights reserved.

Quote

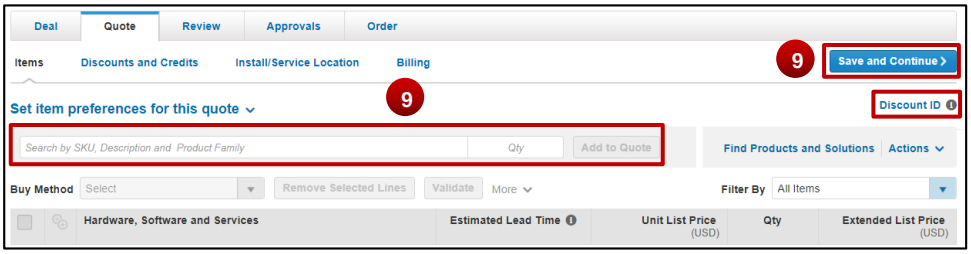
8 Select **Buy Method**. You can also change the billing information, then click **Save and Continue**.



Items

9 Add products and services, import a saved configuration, add trade in items, etc., then click **Save and Continue**.

If you have an RNSD ID, enter it in the **Discount ID** field.

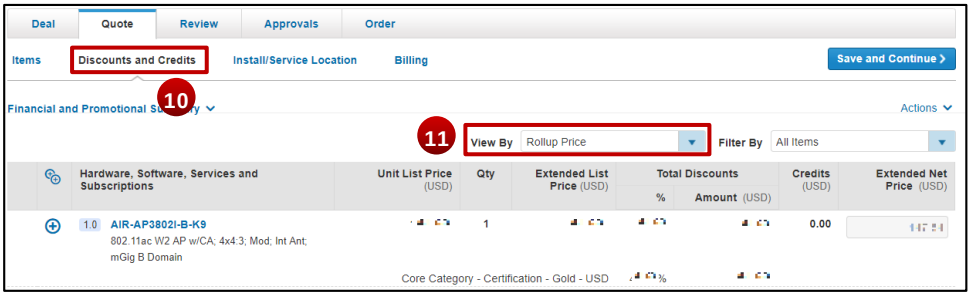


Note: Some tasks (e.g., Import a Saved Configuration, Add Trade In Items) previously displayed on the Items page are now found in the Actions drop-down menu.

Discounts & Credits

10 Click on the **Discounts & Credits** sub-tab to have the quote priced and all applicable discount applied.

11 Click the **View By drop-down** menu and select an appropriate option from the list to view the discount details.

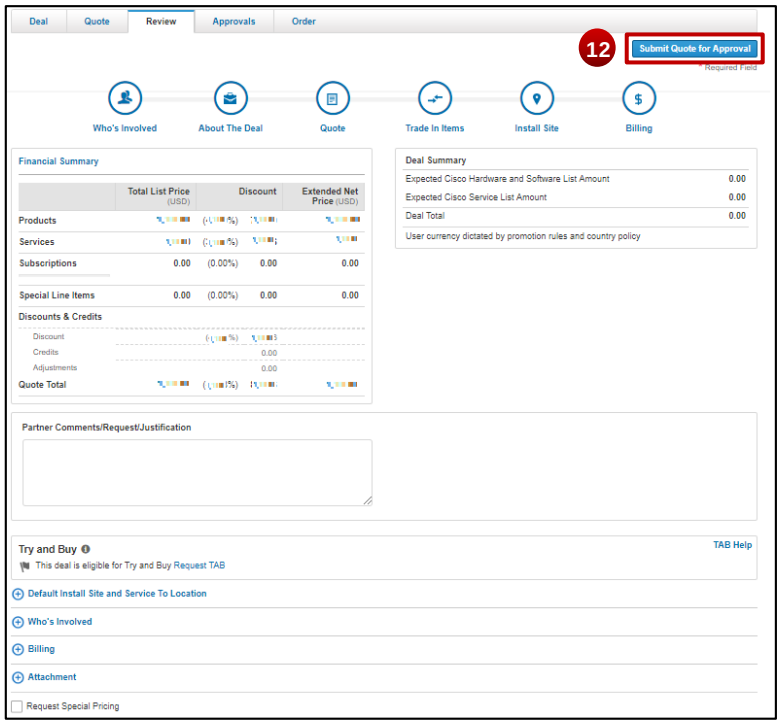


Note: You can update quote discounts and request for nonstandard discounts and/or service durations for your quote. Refer to the Cisco Commerce RNSD for Partner Quick Reference Guide, Cisco Commerce RNSD for Distributors Quick Reference Guide, or the Cisco Commerce Nonstandard Discounts Quick Reference Guide for more information.

Cisco Proprietary © 2020 Cisco and/or its affiliates. All rights reserved.

Review and Submit (for approval)

12 Items that still require attention will be highlighted in red. You can easily navigate to any section and make changes or corrections by clicking the appropriate section. If there are no errors or missing information, click the **Submit Quote for Approval** button.



See Cisco Commerce Deals and Quotes User Guide for more information. The user guides and additional resources for partners are available on our Operations Exchange page.

Cisco Proprietary © 2020 Cisco and/or its affiliates. All rights reserved.