



Estimate Tips and Tricks Quick Reference Guide

Overview

Cisco has fully transitioned to Estimates for creating and managing configurations. As of May 22, 2016, you no longer have access to legacy Configsets and will have to manually recreate the configuration as an Estimate. While Estimate and Configset are very similar, you should review your preferences to ensure desired defaults are properly set.

Verify your Default Preferences

Before you get started, verify all your default preferences.

- **Price List:** You must have a default price list selected before you can create new estimates.

The screenshot shows the 'General' preferences page. The 'Pricing Information' section is expanded, and the 'Preferred Price List' dropdown menu is highlighted with a red box, showing 'NIHON Price List in Japanese Yen' selected. The 'Intended Use' dropdown menu is also visible, set to 'Resale'.

- **Estimate Preferences:** These can also be set at the individual estimate level.
 - **Discounts:** Populate these fields when you want the values to automatically be applied to new estimates. You would use these for price modeling purposes only. These are not your approved discounts, and will not be carried into a quote or order.
 - **Validity Period:** This feature is used for pre-sales price modeling and providing quotations to end customers with a set expiration time period. After expiration, you will not be able to perform further processing of the estimate such as share, import, etc. We recommend that you keep this validity period blank.

The screenshot shows the 'Estimates' preferences page. The 'Discounts' section is highlighted with a red box, showing 'Product (%)' set to 45.99 and 'Service (%)' set to 23.99. The 'Validity Period (days)' field is also highlighted with a red box and is currently blank. A 'Save' button is visible at the bottom right.

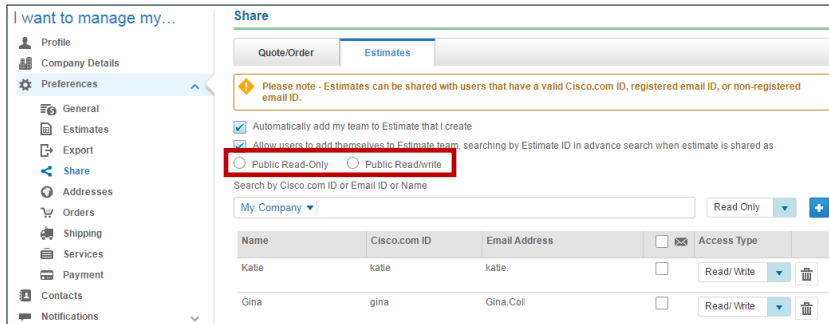
Set Your Share Preferences

These have not carried over from the Configset interface. You must set specific Estimate share preferences.

- **Public Share:** Selecting the Allow users to add themselves to Estimate team checkbox allows users – who know only the estimate ID – to access the estimate by using the Advance Search functionality. Use this feature carefully as it is extremely difficult to revoke access to any user who was provided the estimate ID.

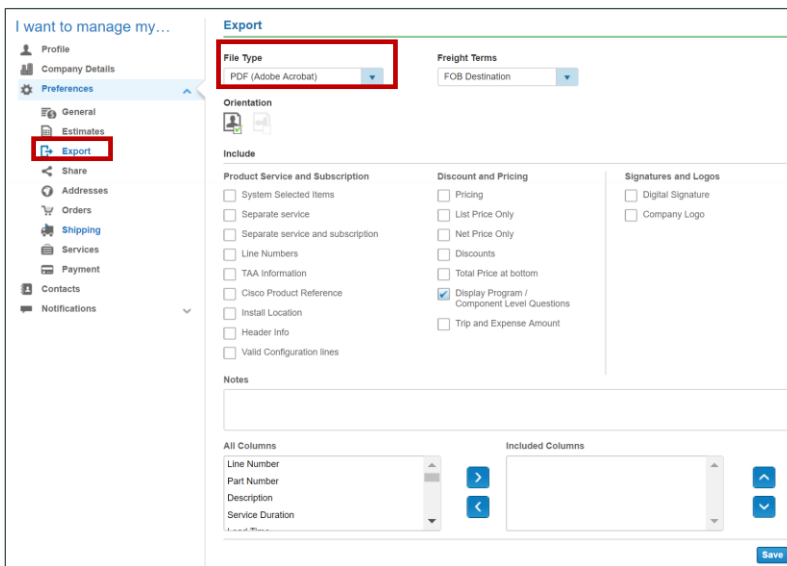


- **Read-Only vs. Read/Write:** Providing Read/Write access allows the sharee to make changes to your source record. It is highly recommended that you make a copy of your estimate prior to sharing with Read/Write access, giving you an original copy to revert to if needed.



Export Options

If you require the exact file format previously used in a Configset (XML or excel), select **CCW Standard XML** or **CCW Standard Excel** from the File Type drop-down menu. You can access the Export Estimate page by clicking Export from the common utilities on the Estimate Cart page.



Note: See the [Cisco Commerce Estimates and Configurations User Guide](#) for more information. Additional user guides are available on the [Cisco Commerce Operations Exchange](#).