Quote Status and Special Quote Types

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

Your quote passes through various statuses in its life. Understanding these helps you know if you have to take action or ask for help by opening a case. This document explains the quote statuses and types, and actions you may want to (or have to) take.

Quote Status

The quote status appears in the middle of your quote header. The various statuses are shown below in the order we expect you to see them.

Invalid

Your quote may appear as "Invalid" for a number of reasons. In most cases, you can fix this status on your own.

- **All quotes are initially invalid, even if there are no errors.** All you have to do is navigate through the tabs on your quote to the Review and Submit tab to validate your quote. If you have uploaded your quote, it may appear valid initially if there are no errors in the uploaded data.
- You may have an error on a particular line. Edit or delete that line, depending on the explanation of the error, to resolve the error. Learn how to edit lines in your user guide (1-Tier, Distributor, Reseller).
- Changes to your quote may trigger an invalid status. These include line-level changes like the contract, dates, service updates, and header-level changes like Bill-To ID, Invoicing SKU, or Buy Method. Navigate to the Review and Submit tab to check again. (Changes to quote name, Partner Reference, and PO Number do not apply here.
- When you request a Deal ID, the quote status will change to invalid (and it will be read-only) until the Deal is approved.
- You may have a billing or shipping error. For example, you could have subscription lines missing Shipping Information.

Valid

If your quote is valid, then there are no errors and you can proceed to order your quote. We will validate again when you click **submit order,** so it may change to invalid at that time if there was any change to the underlying source data. For example, if the contract you are renewing was terminated or expired while you set up your quote, the status will change to invalid when you click **submit order.** If that happens, you will see error information on the Review and Submit tab, with information on how to correct the error.

Order in Progress

This should only appear momentarily during an automated check after your order is submitted. If you see this status for longer than an hour, you may need to open a CCW-R support case to understand what is delaying the submission process.

Order Submitted

This status appears shortly after you click **submit order,** but before the Cisco sales order is generated and before the order is booked. If your order is subject to hold (such as a credit check, export compliance, etc), the order will remain in this status until the hold is released.

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Order Booked

All holds have been released on your order, and you should not need to take any action. Your order has been generated and is waiting for entitlement and conversion to a contract.

Conversion in Progress

This status should only appear momentarily while your contract is being generated automatically.

If you see this status for longer than an hour, you may need to open a CCW-R support case to understand what is delaying the conversion process.

Conversion Failed

This status can appear for a number of reasons. Some or all lines on your quote may not have been converted to a contract. If you would like to understand the issue with your quote or learn the next steps you will need to raise a support case. In most situations, a case will be raised on your behalf.

Order Complete

Your lines have been renewed or added to a contract. Your ordering invoice may not be generated yet. When it is generated, you will see it in Cisco Commerce Order (not in CCW-R). Click here to learn more about Orders in Cisco Commerce.

Cancelled

Your order will show this status automatically if the corresponding sales order was cancelled after it was successfully booked. To cancel an order before the booking process is initiated, raise a CCW-R support case.

To cancel an order, you or Cisco Support can cancel the order in Cisco Commerce Order.

Conversion Revalidated

If your quote had a status of Conversion Failed, and we resolved the errors, you may see this status. You do not have to take any action at this point. If anything is needed, we will contact the user who submitted the quote.

Conversion Resubmitted

If your quote had a status of Conversion Failed, and we submitted the quote for reprocessing on your behalf, you may see this status instead of Order Submitted.

Special Quote Types

Special Quote types are noted in the Quote Header under the quote number. See your user guide to learn more (1-Tier, Distributor, Reseller).

Federal

This will appear if your quote is assigned to a U.S. Federal Bill-To ID or has been marked explicitly as “Federal.” Learn more in the Federal Quoting Quick Reference Guide (QRG).

Takeover

This will appear if any renewal line (subscription or service) on your quote is changing the partner (1-Tier or Distributor) Bill-To ID from the incumbent partner to the partner being quoted. Learn more in the Takeovers QRG.

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Non-Standard

The definition of Non-Standard in CCW-R is different from what you may have seen in other Cisco purchasing tools. A quote will be marked as Non-Standard, and will require a Deal ID, if it meets any of these criteria.

- If the list price of your quote exceeds $3,000,000 USD.
- If Combined Services are applied to any line.
- If the e-Rate service level is applied to any line (uncommon).
- Flexible Invoicing
- Non-Standard duration
- Cisco Capital
- MSS

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