

How to import a complete set price quote for a distribution box



Article Overview

You can import a complete price quote by preparing a structured spreadsheet with product IDs, quantities, and prices, then using your CRM or CPQ system's import functionality to map and upload the data accurately.

Step 1: Prepare Your Spreadsheet

- Include all necessary fields: Product ID (SKU), quantity, unit price, and any additional attributes like product description or discount codes .
- Use a consistent template: Ensure column order matches the system's import template to avoid mapping errors .
- Unique identifiers: Each product should have a unique SKU or line item ID to link correctly to the quote .

Step 2: Choose the Import Method

- Clipboard import: Some systems, like Pricefx, allow you to copy spreadsheet content and paste it directly into the quote items tab .
- CSV/Excel file upload: Most CRMs, including Dynamics 365 and Salesforce, support importing products via CSV or Excel files. Use the system's "Import Products" or "Import Quote Line Items" feature .

Step 3: Map Data Correctly...

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Line Item Import - Quoter Help Center

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Overview

Overview The Build & Price tool enables you to Browse and Learn about Cisco products and services and to Create an Estimate for

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CPQ — configure, price, quote — is software that helps sales teams configure products,

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If you try to specify a price for any quantity besides zero for an item with a pricing schedule, the import fails. For more details,

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How to Import Parts

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Contact Us

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