

Contract Management for Contract End Users

Introduction: This tip sheet will show you how to perform the basic Contract Management functionalities in Cisco Service Contract Center. Understanding these CSCC fundamentals will allow you to leverage the tool's capabilities to manage your service contracts most effectively.

Note: It is recommended that you reference the 'Viewing Contract Information' tip sheet to ensure you understand the basics of navigating within a contract.

Contract Management from the Contract Summary Details (CSD) Screen

From the Contract Summary Details screen, you can perform various contract management actions. To initiate a contract management action, navigate to the Action drop down to view the available options. To perform an action, select the action of choice and click 'GO'.

Note: Some actions will require that you select a site from the Site Information table prior to performing the action. When this is necessary, you will receive an error message if no site is selected.

The screenshot shows the 'Contract Summary Details' page for Contract # 2599369. The 'Action' dropdown menu is open, displaying the following options:

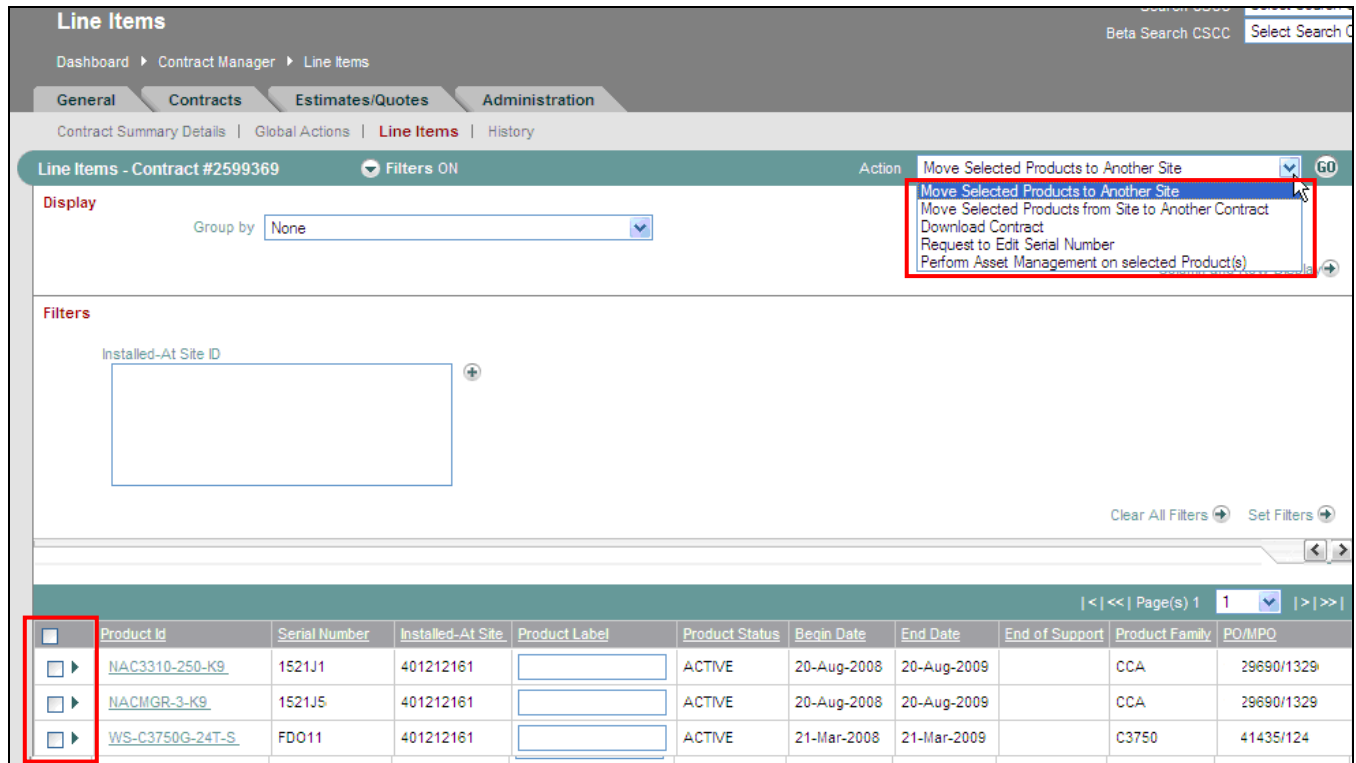
- Move all Products from Selected Site(s) to Another Site
- Move all Products from Selected Site to Another Contract
- Merge entire Contract into Another Contract
- View Line Items for Selected Sites
- Download Contract
- Download Selected Site(s)
- Request to Edit Install Site Contact & Address
- Edit Co-Term date
- Request to Edit Bill -To Contact & Address

Available Contract Management Options from the CSD Screen

- Move All Products from Selected Site(s) to Another Site – Select a site checkbox from the Site Information table and choose to perform this action to move all the products associated to the site to another selected site on the contract.
- Move all Products from Selected Site to Another Contract – Select a site checkbox from the Site Information table and choose this action to move all products within the site to another selected contract of the **SAME** service level.
- Merge Entire Contract Into Another Contract – Allows you to combine and consolidate the contract you are viewing into another existing contract of the same service level.
- View Line Items for Selected Sites – Select a site checkbox from the site information table and select this option to view all line items (products) that are covered at that location.
- Download Contract – Select this action to download the contract you are viewing to an excel spreadsheet.
- Download Selected Site(s) – Select this action to download the product information for the products installed at a selected location.
- Request to Edit Install Site Contact & Address – Select a site checkbox from the Site Information table and choose this action to request an edit to the displayed values for the Install Site Name and Address.

Contract Management from the Line Items Screen

The actions that can be performed directly from the Line Items screen are different than the available actions from the Contract Summary Details screen. Line Item actions will be focused on managing the specific products on your contract.



The screenshot shows the 'Line Items' screen for Contract #2599369. The 'Action' dropdown menu is open, showing the following options: 'Move Selected Products to Another Site', 'Move Selected Products from Site to Another Contract', 'Download Contract', 'Request to Edit Serial Number', and 'Perform Asset Management on selected Product(s)'. The first three options are highlighted in blue. The table below shows three product entries with checkboxes in the first column, which are also highlighted in red.

<input type="checkbox"/>	Product Id	Serial Number	Installed-At Site	Product Label	Product Status	Begin Date	End Date	End of Support	Product Family	PO/MPO
<input type="checkbox"/>	NAC3310-250-K9	1521J1	401212161		ACTIVE	20-Aug-2008	20-Aug-2009		CCA	29690/1329
<input type="checkbox"/>	NACMGR-3-K9	1521J5	401212161		ACTIVE	20-Aug-2008	20-Aug-2009		CCA	29690/1329
<input type="checkbox"/>	WS-C3750G-24T-S	FDO11	401212161		ACTIVE	21-Mar-2008	21-Mar-2009		C3750	41435/124

Available Contract Management Options from the Line Items Screen

- Move Selected Products to Another Site – Select a product checkbox and perform this action to move the product to another site within the contract.
- Move Selected Products from Site to Another Contract – Select a product checkbox and perform this action to move the product to another contract.
- Download Contract – Select this action to download the contract you are viewing to an excel spreadsheet.
- Request to Edit Serial Number – Select a product checkbox and perform this action if you need to swap out a serial number or notice an incorrect serial number on your contract.
- Perform Asset Management on Selected Product(s) – Select a product checkbox and perform this action to add minor lines to the major product line to ensure the contract reflects the proper configuration.

Note: Please reference the [External Asset Management Job Aid](#) for more details on adding minor products to a major product line.

Related Links

Moving and Adding Products Web-Based Training: [Click Here](#)

External Asset Management Job Aid: [Click Here](#)

CSCC Training Website: [Click Here](#)