

# Cisco Service Contract Center

## The Next Generation of Service Management

### Adding Uncovered Products Using Online Contract Manager Tip Sheet

**Introduction:** This tip sheet will show you how to add uncovered products to new and existing installed-at sites on a contract using Online Contract Manager (OCM). Adding uncovered products using OCM allows you to effectively manage your products on an existing contract and is very useful when you need to make additions without renewing the entire contract.

#### Basic Navigation Steps for Adding Uncovered Products using OCM:

1. Roll over the 'Contracts' tab and click on 'Contract Manager' in the secondary menu.
2. Use the Contract Manager filters (if needed) to search for your contract of interest. Click 'Set Filters'.
3. Click the 'Contract #' hyperlink in the Contract Table for the contract you want to view. The Contract Summary Details screen appears.
4. You can select a site (only one) at the bottom of the screen that you wish to add products to. To add uncovered products to a new site on the contract, do not select any existing sites. Next, go to the 'Action' drop down and select 'Add Uncovered Product(s) to Contract', and click 'GO'. The same action is used to add uncovered products to an existing or a new site. However, the steps to add for both processes are slightly different.
  - If you need to add uncovered products to a new site, please reference the [Steps to Add Uncovered Product\(s\) to a New Site](#) for more information.
  - If you need to add uncovered products to an existing (selected) site, please reference the [Steps to Add Uncovered Product\(s\) to a Selected Site](#) for more information.

**Note:** In order for you to add a product to a specific contract, that contract has to meet certain specifications. The contract must have entitled status ('Active', 'Signed', 'Overdue', 'QA Hold'), must not have a network service type, and the new product(s) must have the same customer as the existing contract customer.

**Contract Summary Details**

Search CSCC  Select Search Category

Beta Search CSCC  Select Search Category

Dashboard > Contract Manager > Contract Summary Details

General Contracts Opportunities Estimates/Quotes Administration

Contract Summary Details | Global Actions | Line Items | History

**Contract Summary Details - Contract #: 90909090** Action

Bill To ID 18181818 Service Level CBOP-COLL 24x7x4 OS (24X7X4OS)  
 Bill To Name DATAION LTD Contract Status ACTIVE  
 Bill To Address ATTN:ACCOUNTS Contract Earliest End Date 30-Nov-2010  
 PAYABLE GPO BOX Account SSR USA SCC  
 400000 NY Total Number of Sites 2  
 001 AU Open Quotes No Open Quotes  
 Bill To Contact Name Co-Term Date  
 Bill To Contact Email  
 Bill To Contact Phone  
 Contract List Amount 44340

**Additional Contract Information**

**Site Information** |<<|<| Page(s)1 1 |>|>>|

<input type="checkbox"/>	Installed-At Site ID	Installed-At Site Name	Site Address	Site Begin Date	Site Earliest End Date	Site Label
<input type="checkbox"/>	2959595	University	28 THORNMITCH VIC 3112 AU	19-Feb-2010	30-Nov-2010	
<input type="checkbox"/>	402020202	THE UNIVERSITY	LEVEL 3 STREET VIC 3000 AU	19-Feb-2010	30-Nov-2010	

**Steps to Add Uncovered Product(s) to a New Site:**

1. On the 'Add Uncovered Products to Contract' pop-up window, click the 'Address Management' link to select a new site or create a new site to which the uncovered product(s) need to be added.
2. The Address Management screen appears. You will have the option to select an installed-at site from your address book, search for installed-at sites and select the site from the search results, or create a new installed-at site. When you have selected or created a site to add products to, you will return to the 'Add Uncovered Products to Contract' pop-up window with the address information displayed as the 'Target Site Selected'.

**Note:** To create a new installed-at site, you first have to search for the installed-at site to confirm that the site does not exist. If the installed-at site does not exist, you will then be able to create a new installed-at site by clicking the 'Create New' button on the Address Book.

3. View the [Steps to Add Uncovered Product\(s\) to a Selected Site](#) to continue adding products to the new site selected.

**Add Uncovered Products to Contract: 1490359**

**Add Products**  
 To select a new address that is not on the Contract or create a new address, please use [Address Management](#).  
 To select a site from the contract, close the window and select a site on the Contract Summary Details page.

Target Site Selected \_\_\_\_\_ Contract Number 1490359

Select Service Level SBAR3

SO Number(s) \_\_\_\_\_  
 (Enter up to 5 values separated by comma)

PO Number(s) \_\_\_\_\_  
 (Enter up to 5 values separated by comma)

Serial Number(s) / PAK Number(s) \_\_\_\_\_  
 (Enter up to 20 values separated by comma)

Instance Number(s) \_\_\_\_\_  
 (Enter up to 20 values separated by comma)

Select Start Date  
 Start service at the end of the warranty period  
 Select a common start date \_\_\_\_\_

Select End Date  
 Select a standard service duration 1 Yr(s)  
 Select a common end date \_\_\_\_\_

Step 1: Click the 'Address Management' link.

Enter filters to search for products to add. You can enter up to five sales orders, five purchase orders, twenty serial numbers / PAK numbers, and twenty instance numbers.

Select a Start Date and End Date for the service by either manually typing into the text box or by clicking on the calendar icon.

**Steps to Add Uncovered Product(s) to a Selected Site:**

1. On the 'Add Uncovered Products to Contract' pop-up window, enter filters to search for product(s) to add. You can enter up to five sales orders, five purchase orders, 20 serial numbers / PAK numbers, and 20 instance numbers. Note that you cannot add software subscription products to a new or selected site on a contract by using the 'Add Uncovered Products to Contract' action.
2. Select a 'Start Date' and 'End Date' for the service by either manually typing into the textbox or by clicking the calendar icon. Click 'Search'.
3. If results have been found, select the products that you wish to add to the contract and click 'Validate'.
4. On clicking the 'Validate' button, if the selected uncovered product(s) are associated with a software Technical Services (TS) service level (such as ESW), the system will perform Service Product Mapping (SPM) validations on the minor lines and will allow only those minor lines on the uncovered major product(s) to be added that pass these validations. Any non-eligible minors in the configuration will not be added. In case of uncovered products associated with hardware TS service levels (such as SNT), the SPM validations will not be performed on the minor lines, and adding a major line will also add all the corresponding minor lines in the configuration.
5. Once validation is complete, the 'Add Uncovered Products to Contract' pop-up window appears with the following sections listed:
  - **Severe Errors** - The products listed here have generated errors and have not been added to the contract. Click the red triangle icon to review the error details and determine what action you can take to fix the errors.
  - **Warning Messages** - Click the yellow circle icon to view the warning details. By default, all the listed products are checked and will auto correct the error based on the warning details. If you do not want to correct the warning, uncheck the box and the product will not be added to the contract.
  - **Successful Validation** - These products have been successfully validated and will be added to the contract.

**Add Uncovered Products to Contract: 1490359 Site: 100002200**

Validation Results

**Severe Errors**

The following line items have severe errors and cannot be added. Please click the ▲ icon for error details.

Serial Number / PAK Number	Qty	Product ID	Begin Date	End Date	Status	
1234	1	NM-1HSSI	15-Sep-2010	14-Sep-2011	Latest-INSTALLED	▲
1234	1	WS-C3560-48PS-S	15-Sep-2010	14-Sep-2011	Latest-INSTALLED	▲
1234	1	WS-G5484=	15-Sep-2010	14-Sep-2011	Latest-INSTALLED	▲
1234	1	UBR-RFSW	15-Sep-2010	14-Sep-2011	Latest-INSTALLED	▲
1234	1	CRS-FLASH-DISK-4G=	15-Sep-2010	14-Sep-2011	Latest-INSTALLED	▲

**Warning Messages**

The following line items have warning messages. Please click the ● icon for warning details and the suggested fix. Uncheck the box if you do not wish to accept the auto corrected data. Please click the " Submit" button to continue adding the selected products

<input type="checkbox"/>	Serial Number / PAK Number	Qty	Product ID	Begin Date	End Date	Status	
<input checked="" type="checkbox"/>	12344	1	WS-C3560-48PS-S	15-Sep-2010	14-Sep-2011	Latest-INSTALLED	●
<input checked="" type="checkbox"/>	12345	1	WS-G5484=	15-Sep-2010	14-Sep-2011	Latest-INSTALLED	●
<input checked="" type="checkbox"/>	123456	1	UBR-RFSW	15-Sep-2010	14-Sep-2011	Latest-INSTALLED	●

**Successful Validation**

The following line items have been validated. Please click the " Submit" button to continue adding these products.

Serial Number / PAK Number	Qty	Product ID	Begin Date	End Date	Status
1234	1	UBR-RFSW	15-Sep-2010	14-Sep-2011	Latest-INSTALLED
1234	1	CRS-FLASH-DISK-4G=	15-Sep-2010	14-Sep-2011	Latest-INSTALLED

View the 'Severe Errors' section.

View the 'Warning Messages' section. Click the yellow circle icon to view the warning details.

These products have been successfully validated and will be added to the contract.

6. Click 'Submit' to send selected products to pricing. Note that the 'Submit' will be enabled only when at least one of the product(s) displayed in the 'Warning Messages' section has been selected, or when at least one product is displayed in the 'Successful Validation' section.
7. You will receive an email upon completion of the product addition process.
 

**Note:** The 'Add Uncovered Products to Contract' pop-up window will refresh with the list of items that will be sent to quoting (products with a value greater than \$0) and the \$0 items that will be added automatically.

**Related Links:**

- CSCC Training Website: [Click Here](#)
- CSCC User Guide: [Click Here](#)
- Contract Management Job Aid: [Click Here](#)