



## Contract Upgrade - All Lines on a Contract from OCM

**Objective:** This tip sheet will show you how to search for a contract and perform an upgrade for all products under that contract. In order to upgrade all products, you need to apply a new service level to all products/lines. If you do not upgrade the service level, you will only be able to renew the contract using the existing service level.  
**Note:** Only Contracts that have entitled status ('Active', 'Signed', 'Overdue', or 'QA hold') are eligible for upgrades.

### Steps to Upgrade All Lines on a Contract in CSCC:

1. Extend Service Coverage for all lines on an existing contract in Online Contract Manager.  
 Note: View the [Renewing All Lines on a Contract Using Online Contract Management \(OCM\) Tip Sheet](#) if you need basic navigation steps on how to extend service coverage within OCM.
2. Navigate to the Line Items and Pricing screen of your renewal quote by clicking 'Line Items and Pricing' in the tertiary menu.
3. Click the main checkbox on the Line Items table to ensure that all lines on the quote have been selected.
4. Select 'Edit Lines' from the Action drop down and click 'Go'. The Edit Line(s) pop-up window will appear.

Summary Lines	Target Contract Number	Product Number	Service List Price	Service Extended Net Price	Price Status
<input checked="" type="checkbox"/>	3837422	ASA5520-K8	1,319.00	1,319.00	Validated
<input checked="" type="checkbox"/>	3837422	ASA5520-K8	959.00	959.00	Validated
<input checked="" type="checkbox"/>	3837422	ASA5520-K8	959.00	959.00	Validated
<input checked="" type="checkbox"/>	3837422	ASA5520-K8	0.00		Error
<input checked="" type="checkbox"/>	3837422	ASA5520-K8	959.00	959.00	Validated
<input checked="" type="checkbox"/>	3837422	ASA5520-K8	959.00	959.00	Validated
<input checked="" type="checkbox"/>	3837422	ASA5520-K8	0.00		Error
<input checked="" type="checkbox"/>	3837422	ASA5520-K8	959.00	7,672.00	Validated

5. Select a 'Common Begin Date'.  
**Note:** This date must be entered in order to upgrade the service level.
6. Ensure that the appropriate Target Contract Number is applied. If you are upgrading all lines on that contract, you can keep the existing contract number. However, if you edited your dates so that you will have a gap in coverage between the existing contract end date and the new contract begin date, you can set the Target Contract Number to 'NEW'. This will prevent conversion issues.

<b>Product Info</b>	
Product Number CISCO801	Quantity <input type="text"/>
Description ISDN/Ethernet Router	Serial Number
Product Label <input type="text"/>	Begin Date 28-Oct-2008 <input type="text"/> End Date 28-Oct-2009 <input type="text"/>
<b>Contract Info</b>	
Target Contract Number 123456 <input type="text"/>	

Step 5-6: Select a common 'Begin Date' and verify the Target Contract Number is correct for the upgrade situation.

7. Select the desired 'Hardware Service Level' or 'Software Service Level' from the drop down menus.  
**Note:** You must select an upgraded service level in order to upgrade the service level.

<b>Service Level</b>	
* Hardware Service Level <input type="text" value="Select One"/>	* Software Service Level <input type="text" value="Select One"/>
Description	Description

Step 7: Select desired hardware and software service levels

8. Select 'Apply line Edits' at the bottom right portion of your screen to apply the changes you have made to the renewal quote lines.
9. Select 'Validate and Save' to validate your edits and save the changes you have made to your renewal quote.
10. Refer to the Resolving Validation Errors Tip Sheet for additional information on managing validation errors which you may encounter.

**Related Links:**  
 CSCC Training Website: [Click Here](#)  
 Renewing All Lines on a Contract Using OCM Tip Sheet: [Click Here](#)