



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

**Objective:** This tip sheet will show you how to search for a contract and perform an upgrade for some of the products under that contract. **In order to upgrade some products, you need to apply a new service level to those specific products/lines. If you do not upgrade the service level, you will only be able to renew the existing contract lines.**

**Note:** Only Contracts that have entitled status ('Active', 'Signed', 'Overdue', 'QA hold') are eligible to Upgrade Service Contracts.

### Steps to upgrade some lines on a contract in CSCC:

1. Extend service coverage for selected lines on an existing contract in Online Contract Manager.  
Note: View the [Renewing Selected 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 by clicking Line Items and Pricing in the tertiary menu.
3. Within the Line Items table, select the lines on the quote that you would like to upgrade.
4. Select 'Edit Lines' from the Action drop down and click 'Go'. The Edit Line(s) pop-up window will appear.

Quote Summary Details | Import/Export | **Line Items and Pricing** | Error Details | History

Line Items - Quote #327457

Step 3: Select specific line items to upgrade

Step 4: Select 'Edit Lines' and click 'Go'

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

Undo Hide Lines Validate Validate and Save Save

5. Select your 'Begin Date' and 'End Date'.  
**Note:** These dates must be entered in order to upgrade the service level.
6. Ensure that the Target Contract Number is set to 'NEW'. If you keep the existing contract number you will run into issues during quote conversion because the target contract is established using the pre-existing service level. Since you are upgrading, 'NEW' or an eligible target contract of the upgraded service level must be entered.

**Product Info**

Product Number CISC0801      Quantity

Description ISDN/Ethernet Router      Serial Number

Product Label       Begin Date 28-Oct-2008       End Date 28-Oct-2009

---

**Contract Info**

Target Contract Number NEW

Step 6: Ensure that the Target Contract Number is set to 'NEW' or an existing eligible contract of the upgraded service level.

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.

**Service Level**

\* Hardware Service Level       \* Software Service Level

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](#)