

# Cisco Service Contract Center

## The Next Generation of Service Management

### Moving Products Using Online Contract Manager Tip Sheet

**Introduction:** This tip sheet will show you how to move products from a selected site to another contract, as well as how to move products to a different installed-at site within the same contract using Online Contract Manager (OCM). These steps should be followed if you need to move products to different contracts to organize your products or if you need to move products to a different installed-at site if the product has physically moved to a different location.

#### Basic Navigation Steps:

The basic navigation steps listed below will show you how to move all products from one or more site(s) to another site on a contract or another contract (with the same Bill-To, service level, and end customer) from the Contract Summary Details screen. You will also be able to perform the same actions from the Line Items screen.

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 for the contract you want to view. The Contract Summary Details screen appears.
4. Select the site(s) that you wish to move the products from. Go to the 'Action' drop down and select either:
  - 'Move All Products from Selected Grouping to Another Site', and click 'GO'. Go to the [Steps to Move All Products from Selected Grouping to Another Site](#) section for more information.
  - Or, 'Move All Products from Selected Grouping to Another Contract', and click 'GO'. Go to the [Steps to Move All Products from Selected Grouping to Another Contract](#) section for more information.

**Note:** In order to move products from a contract, the contract must meet a series of requirements. the source contract must have an entitled status ('Active', 'Signed', 'Overdue', 'QA Hold') and must pass eligibility to move products. Once these requirements are met, Contract Manager will determine the eligible target contracts where the products can be moved to.

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

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

Action: Add Uncovered Product(s) to Contract  
 Add Uncovered Product(s) to Contract  
 Move All Products from Selected Grouping to Another Site  
 Move All Products from Selected Grouping to Another Contract  
 View Line Items for Selected Grouping  
 Download Contract or Selected Data  
 Extend Service Coverage  
 Merge entire Contract into Another Contract  
 Do Not Renew  
 Request to Edit Install Site Contact & Address  
 Edit Co-Term date  
 Request to Edit Bill - To Contact & Address  
 Export Data to Upload-Compatible File

Additional Contract Information

Site Information

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 Move All Products from Selected Grouping to Another Site:

1. Eligible target sites on the contract will be listed in the 'Site to Site Move: Select Target Site' pop-up screen.
2. Select the target site that you want to move the products to by selecting the corresponding radio button. If you wish to add a new site, click the 'Add a New Site to the Contract' link located above the site list. The Address Management screen will appear, and 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.
3. Click 'Continue'.
4. The 'Site to Site Move: Submit Request Form' pop-up window appears.
5. By default, the email address field is populated with the email address from your profile. If necessary, you can override the email address or add an additional email address in the 'CC:' field.
6. Click 'Submit'.
7. A confirmation message appears in the 'Site to Site Move: Submit Request Form' screen. The confirmation message includes a request ID and informs you that a message will be sent to the email address(s) specified.

Site to Site Move: Submit Request Form

**The move will be validated and processed offline. You will receive an email message once the move is processed. Request ID is : 28536**

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Please verify the Recipient's email address. This is the address the confirmation and results will be sent to. Once you press the submit button, your move request will be submitted for offline processing. All quotes associated with the products that you wish to move will be cancelled during the move process.

Recipients Email:

CC:

Notes:

Cancel Submit

Step 7: A confirmation message appears informing you that a message will be sent to the email address(s) specified

8. If all, or parts of the move, are not successful, you will receive an email explaining which products did not move successfully. You will also receive a link to open a case with the Service Support Center. Partial success is possible if some source sites and some configurations were moved and some failed. If

products from the source site were not moved because of a failed price list validation, you will be informed of the reason and the recommended action. If any configurations were not moved due to errors, the error details are sent in a .CSV report as an attachment in the email confirmation.

### Steps to Move All Products from Selected Grouping to Another Contract:

1. From the 'Contract to Contract Move: Submit Request Form' pop-up window, you will have three options:
  - a) Enter your target contract number in the 'Target Contract' field and click 'Submit'.
  - b) Enter 'NEW' in the 'Target Contract' field to create a new contract and click 'Submit'.

**Note:** If an existing target contract is found, your request will be processed offline and you will receive an email with an attachment containing a list of eligible contracts. A new contract is created only if there are no existing eligible target contracts.

- c) Click 'Retrieve Target Contracts' to retrieve a list of eligible contracts.
  - If the amount of eligible contracts does not exceed the threshold amount, a list of eligible contracts will be generated. Select the target contract from the 'Contract to Contract Move: Submit Request Form' pop-up window and click 'Continue'.
  - If the amount of eligible contracts exceeds the threshold amount, a message will appear notifying you that 'The Target Contract Request you are about to perform has exceeded the maximum contract threshold.' You can either continue your search offline or cancel the contract list request. If you click 'Cancel', the message will close and you can enter a contract number or 'NEW' in the 'Target Contract' field or exit out. If you click 'OK', the system will retrieve the list of eligible contracts offline and email the list as an attachment in .CSV format. The offline request can be tracked from the Request Status screen.

Contract to Contract Move : Submit Request Form

Type in the target contract number you wish to merge with the source contract or type in 'New' to merge your source contract with a new contract. Note: New contracts are only created if there are no existing eligible target contracts. You can also click on 'Retrieve Target Contracts' to request a list of eligible contracts.

All Products on Service Level SNT at Site(s) 1313131313 will be moved to the entered Target Contract

Target Contract field

Retrieve Target Contracts

Continue

Click 'Retrieve Target Contracts' to retrieve a list of eligible contracts

2. From the 'Contract to Contract Move: Submit Request Form' pop-up window, you can specify an email address where the confirmation message and results message will be sent and click 'Submit'.

**Note:** If all, or parts of the move, are not successful, the email notification will explain which products did not move successfully.

#### Related Links:

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