

Initiate a Service Type Migration

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Overview

This article covers how to initiate a service type migration.

There are two methods available.

- Initiate via the bulk import
- Initiate in Cumulus

Initiate via Bulk Import

This method is more appropriate when performing a mass migration of services. Up to 500 services at a time can be processed through this import. If there are more services to migrate, create multiple import files.

[Download an import template.](#)

Initiate via Cumulus

To imitate a service type migration, start at the originating (source) package subscription.

Customer > Package Subscriptions

Open the package subscription that is to be migrated by clicking on the Package Sub ID on the right-hand side of the table.

Press the **Initiate Service Type Migrate** button to commence the process.

The screenshot shows the 'Package Subscription Overview' page for subscription #1704169. The page has a top navigation bar with various tabs like Dashboard, Summary, Detail, Organisation, etc. The main content area displays details for the subscription, including its status (Active), start date (9 Feb 2017), end date, current billing period, and package plan. Below this, there is a 'Package Subscription Action' section with buttons for 'Migrate Package Subscription', 'Initiate Service Type Migrate' (highlighted with a red box), and 'Cancel Package Subscription'. At the bottom, there are buttons for 'Upgrade' and 'Change of Ownership'.

The user will be taken to the **Services > Service Type Migration > Initiation** page.

Under the *General Information* section:

1. Choose from the list of migration pathways that this migration is for.



Pathways are not bidirectional. If you allow migrations between service types in both directions, these will be list separately in the drop down.

The *Current Package Information* section shows users what plan the customer is migrating from.

The Initiation Screen for a Service Type Migration

The screenshot shows the 'Service Type Migration' initiation screen. It has a top navigation bar and a main content area. The 'General Information' section shows the migration pathway. The 'Current Package Information' section shows details about the current package, including its name, start date, end date, and package plan. The 'Migration Configuration' section contains several checkboxes for configuring the migration, such as 'Proceeded Package Plan', 'Enable this flag if you are migrating to another package plan', and 'Enable this flag to ensure all current package upgrades, downgrades or cross grades that result from changing packages'. At the bottom, there is a 'Process' section with a 'Next' button.

Under the *Migration Information* section, users can:

1. Preselect the package plan the customer will migrate to. [Default settings](#) determine how the system will behave in terms of allowing the the customer to select a different plan prior to activating the service and completing the migration.
2. Follow the on-screen help and check each flag as required.
3. Below this is a *Process Overview* section, explaining how the process will work (assumes end users will activate services via the activation portal).
4. When you are done, press **Submit**.

While the process has been initiated, no migration will take place. Migrations will adopt one of the following statuses.

- **Fulfillment Required** - Used if the activation portal is not in play.
- **Waiting on End User** - Used if the activation portal is in play.



Service type migrations can be *withdrawn* after submitting a migration request. *Withdrawing* a service type migration is the equivalent of *aborting* a package subscription migration.

The next step is to finalise the migration.

If the status of the migration is **Waiting on End User**, the customer must activate the service via the activation portal themselves. There is no support for overriding this step in Cumulus.

If the status of the migration is **Fulfillment Required**:

- A Cumulus users must finalise it.
- Finalising involves checking the information and making any last minute changes.
- Once finalised, the status is updated to **Pending Activation** stage.

Related Pages

- [Service Type Migrations](#)
- [Plans and Subscriptions](#)
- [Migrations](#)
- [Initiate a Service Type Migration](#)
- [Withdraw a Service Type Migration](#)