CCW-Renewals – Takeovers

Overview

A **takeover** occurs when an end customer makes a 'value based' choice to select a new Cisco Partner to provide services at the end of a service coverage period. This is known as an end-term or full-term takeover. Takeover quotes can be created intentionally, and can also result unexpectedly when quoting by using a list of equipment.

Note: CCW supports end-term takeovers only.

Disclaimer: All the data and screenshots in this document are captured for training purposes only, they might not correctly reflect the systems behavior for your case.

You must acknowledge that you have **received authorization** from the end customer to create a takeover quote for the equipment that is currently covered by another partner. This acknowledgement appears in the form of the Partner Acknowledgement pop-up window and **must be accepted** before you can create a takeover quote.

In an end-term takeover, the incumbent partner's contract will reach its natural end date. Takeover quotes will always be converted to a new contract unless they are added to an eligible existing contract of the new partner.

Logic for Identifying a Takeover – User Process Flow

Process flow for Identifying a Takeover Quote – User Flow
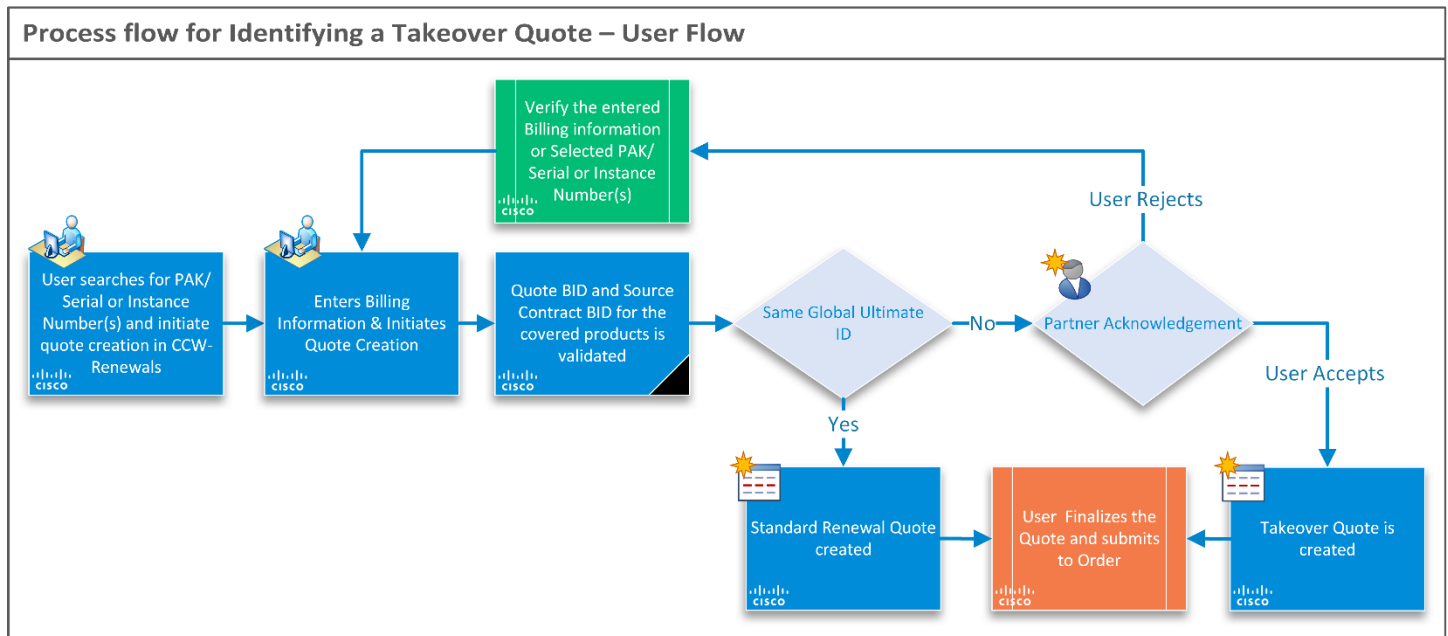
End-to-End Takeover Quote Creation Process

Creating a Takeover Quote in CCW-Renewals

Partners and customers with quoting access are able to create takeover quotes using CCW-Renewals. The end customer should provide you with the equipment list containing all the PAK/Serial numbers for the products they want transferred to your coverage.

Search for Equipment List

1. On the landing page, search for the equipment PAK/Serial Numbers or Instance Numbers.

Note: You will not be able to search for takeover equipment by any other method than PAK/Serial Numbers or Instance Numbers

2. If the products on the contracts displayed do not belong to your organization, and are eligible for end-term takeover:
   a. A banner is shown on top of the page.
   b. An informational icon is displayed next to the product number.
   c. You will only be able to view limited coverage information for the purpose of creating a takeover quote. For example, the incumbent partner and contract information are not displayed.

Note: In the case a takeover is triggered yet you are certain the equipment belongs to your company, please open a support case to clarify how the Global Ultimate ID rolls up into your company. Once finalized, the equipment in question will no longer generate a takeover.

Note: Performing Contract Administration activities (Move Product or Do Not Renew) for lines which do not belong to your organization is restricted.

Note: The exported .CSV format file for takeover-eligible lines will only display limited information for the contract lines not belonging to your organization.

Quote Initiation

1. Select the equipment lines.
2. Click on **Create Quote.**

3. On the Quote Initiation Page, enter your billing information if it is not defaulted from your workspace preferences settings.

4. Enter your **Bill-To** details.
5. Select the **Intended Use.**
6. Once done, click **Continue**.

7. If you selected lines that qualify as takeovers, a pop-up Partner Acknowledgement will be shown, prompting you to acknowledge that you have permission from the end customer to create a takeover quote with the list of PAK/Serial numbers.

    a. If you accept, click on **Agree.**

    b. If you unintentionally selected takeover lines, click on **Cancel**.

        You can then update the Bill-To or remove those lines and proceed with a regular renewal quote creation.
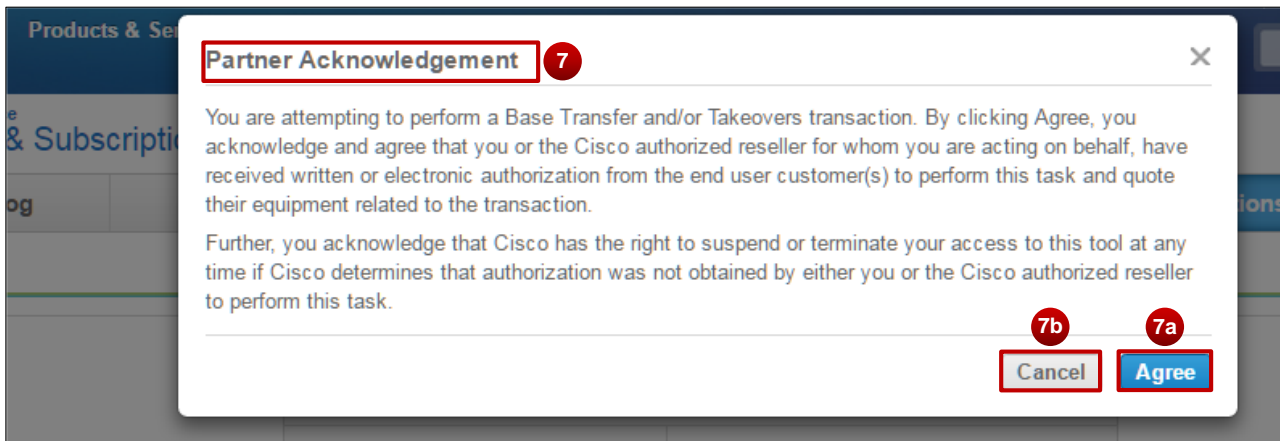
Note: If you have unexpectedly received the partner acknowledgment prompt, ensure you are using the proper Bill-To ID, or check the list of PAK/Serial numbers while initiating the quote.

Quote Details

Quote Header

The takeover quote is created and a Takeover flag, in orange, is displayed on the quote header indicating the quote has takeover lines.

Items Tab

Filtering for Takeover Line(s)

If you only want to view the takeover lines on your quote, use the filters functionality and select **All Takeovers**.

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Add Line(s) to a Takeover Quote

If you add a takeover line to a quote, the add line window will display the takeover banner. You will also be prompted to acknowledge that you have permission from the end customer. Select the line(s) you want to add to the quote and click **Add Line(s)**.

Exporting Line(s) From a Takeover Quote

1. To download quote details, click the Export icon at the top of the quote header.
2. A pop-up Export Options window will be displayed.
3. Click on **Export** to export the quote in .CSV format.

Correct all error(s) on the quote items tab and click on **Continue**.

Note: The exported .CSV format file for a takeover quote will display only limited information for the contract lines not belonging to your organization.

Discount Tab

The system will apply the Takeover Discount or Blended Takeover Discount to the takeover quote line as applicable.

1. The Service Takeover discount details are shown in the Discount Details view.

Note: A **Blended Takeover Discount** will display for multi-year takeover quote lines. The Takeover Discount is only applied for the first 12 months of the new contract duration. Your earned discount will be applied to all subsequent years of the quote duration.

2. Review the discounts and Click **Continue**.

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Last Updated: July 19, 2016
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Takeover Quote Billing Details

1. Check the **Billing Information** and **Tax Information** details.
2. If required, update the billing information by clicking on the pencil icon.
3. If you are done, click on **Continue.**

Submit Takeover Quote

Review the quote and resolve any errors, then submit the quote for the order creation process.

Distributor Takeover Quotes Creation

1. On the landing page, search for the equipment PAK/Serial Numbers or Instance Numbers, select the equipment lines, and click on **Create Quote.**
2. On the Quote Initiation Page, change the **Reseller Bill-To ID** to the reseller to whom you wish to transfer coverage.
3. Click on **Continue.**

4. A pop-up Partner Acknowledgement will be shown prompting you to acknowledge that you have permission to create a takeover quote. If you accept, click on **Agree** or if you unintentionally selected takeover lines, click on **Cancel**.

5. A quote will be created if you agree to the Partner Acknowledgement. Continue the normal quote completion process from here as detailed in Section 3.

View Takeover Quotes from Quote Manager

1. To get to the Quote Manager Page, select **Software Subscriptions & Service Quotes** from the Software Services & Subscriptions landing page.
2. The Takeover column is added to the Quote Manager Page. It has a Yes/No value field to show quotes that are flagged as takeover quotes.
3. Click the **Quote Number** to open and view/edit.

	Catalog	Estimates	Deals & Quotes	Orders	Services & Subscriptions	Software

5 results

Quote Number ▼

Search 🔍

1 📇 **Software Subscriptions & Service Quotes**

☰ All Quotes

🕐 **Recent Quotes**

[→ Export] [✉ Email] [< Share] [📋 Clone] [🗑 Delete] [+ Tags]

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	Quote Number	Bill To	Status	Quote Net Amount	Quote Name	Non Standard	Takeover
3	Q194651	COMPANY (4005859)	VALID	3.04		No	Yes
◉	Q25799972	COMPANY (4005859)	INVALID	4314.00		No	No
◉	Q25780422	COMPANY (4005859)	VALID	71.21		No	No
◉	Q94504046	COMPANY (4005859)	INVALID	4314.00		No	No
◉	Q94497239	COMPANY (4005859)	VALID	71.21		No	No

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