



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.

[Logic for Identifying a Takeover – User Process Flow](#)

[End to End Takeover Quote Creation Process](#)

[Creating a Takeover Quote in CCW-Renewals](#)

[Search for Equipment List](#)

[Quote Initiation](#)

[Quote Details](#)

[Quote Header](#)

[Items Tab](#)

[Filtering for Takeover Line\(s\)](#)

[Add Line\(s\) to a Takeover Quote](#)

[Exporting Line\(s\) from a Takeover Quote](#)

[Discount Tab](#)

[Takeover Quote Billing Details](#)

[Submit Takeover Quote](#)

[Distributor Takeover Quotes Creation](#)

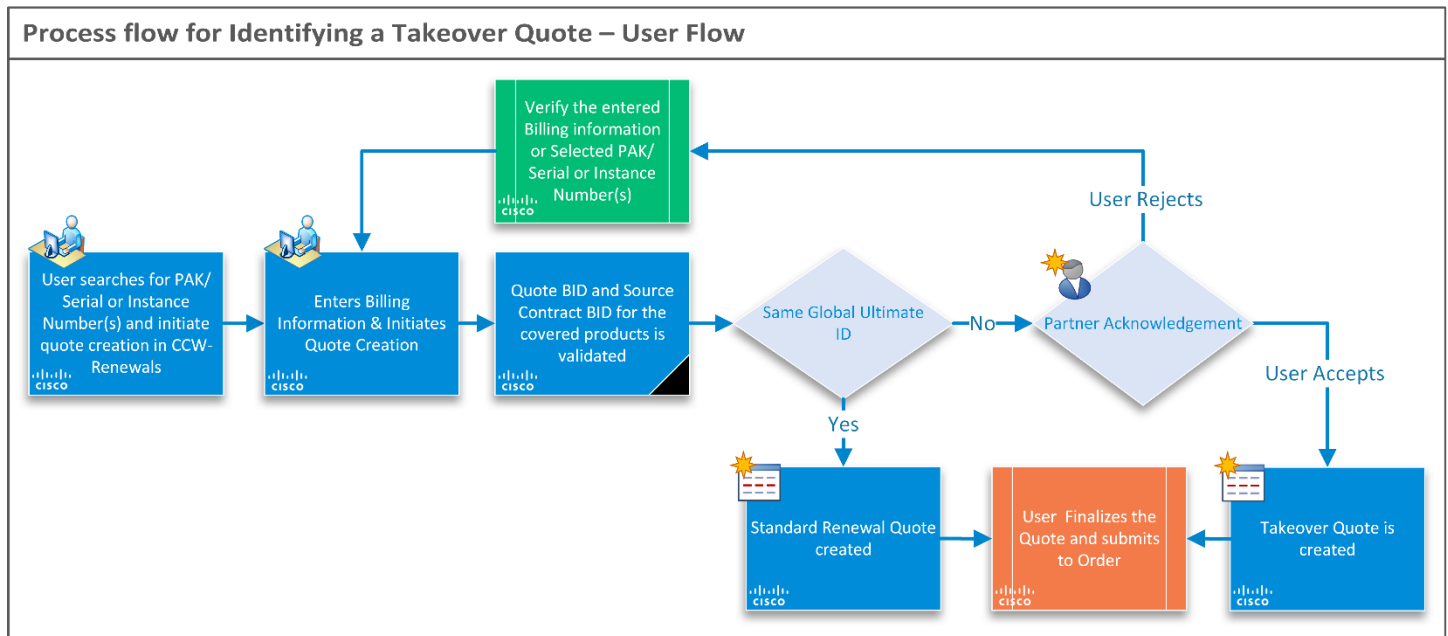
[View Takeover Quotes from Quote Manager](#)

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



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.



PAK/Serial Number 4 results 2a Show Charts

1 Your search results include one or more covered item(s) which either does not belong to your organization or you do not have the access to view its complete details.

Quoting Contract Administration

Export Print Email Tags Create Quote

<input type="checkbox"/>	Product Number/ End of Support	End Customer	Service/Offer Type	PAK/Serial Number	Start/ End Date	Contract Number
<input type="checkbox"/>	+ AIR-CAP3502I-A-K9 31-MAR-2021	SPORT (417826)	SNT SNTC 8X5XNBD CON-SNT-CAP352IA	FGL1641	17-NOV-2014 16-NOV-2021	ACTIVE
<input type="checkbox"/>	+ AIR-CAP3502I-A-K9 31-MAR-2021	GAL (4031454)	SNT SNTC 8X5XNBD CON-SNT-CAP352IA	FGL16	17-NOV-2014 16-NOV-2021	ACTIVE
2b <input type="checkbox"/>	+ CP-9971-C-CAM-K9= 31-JUL-2021	GAL (4031454)	SNT SNTC 8X5XNBD	FCH1551	-- 29-DEC-2016	
2c <input type="checkbox"/>	+ CP-9971-C-CAM-K9= 31-JUL-2021	GAL (4031454)	SNT SNTC 8X5XNBD	FCH1550	-- 29-DEC-2016	

25 Items Per Page FIRST Page 1 of 1 LAST

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.

1 Your search results include one or more covered item(s) which either does not belong to your organization or you do not have the access to view its complete details.

Quoting Contract Administration

Export Print Email Tags Move Products Do Not Renew

<input type="checkbox"/>	Product Number/ End of Support	End Customer	Service/Offer Type	PAK/Serial Number	Start/ End Date	Contract Number
<input type="checkbox"/>	+ AIR-CAP3502I-A-K9 31-MAR-2021	SPORT (417826)	SNT SNTC 8X5XNBD CON-SNT-CAP352IA	FGL1641	17-NOV-2014 16-NOV-2021	ACTIVE
-	+ CP-9971-C-CAM-K9= 31-JUL-2021	GAL (4031454)	SNT SNTC 8X5XNBD	FCH1551	-- 29-DEC-2016	
-	+ CP-9971-C-CAM-K9= 31-JUL-2021	GAL (4031454)	SNT SNTC 8X5XNBD	FCH1550	-- 29-DEC-2016	

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**.

i Your search results include one or more covered item(s) which either does not belong to your organization or you do not have the access to view its complete details. **x**

Quoting Contract Administration

Export Print Email Tags **2** **Create Quote**

1	Product Number/ End of Support	End Customer	Service/Offer Type	PAK/Serial Number	Start/ End Date	Contract Number
<input checked="" type="checkbox"/>	+ AIR-CAP3502I- A-K9 31-MAR-2021	SPORT (417826)	SNT SNTC 8X5XNBD CON-SNT-CAP352IA	FGL1641	17-NOV-2014 16-NOV-2021	ACTIVE
<input checked="" type="checkbox"/>	+ CP-9971-C- CAM-K9= 31-JUL-2021	GAL (4031454)	SNT SNTC 8X5XNBD	FCH1550	-- 29-DEC-2016	
<input checked="" type="checkbox"/>	+ CP-9971-C- CAM-K9= 31-JUL-2021	GAL (4031454)	SNT SNTC 8X5XNBD	FCH1551	-- 29-DEC-2016	

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

Billing Address* **3**

Enter or Search Bill To *e.g. 123456789, ABC Company..*

Intended Use **i**

Resale

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

Billing Address*

COMPANY

Customer Number	400508
Bill To ID 4	400859
Operating Unit	CISCO CANADA OPERATING UNIT
Address	ATTN AP DEPT SCARBOROUGH ONTARIO M1H 3J3 CA

5

Intended Use **i**

Resale

6

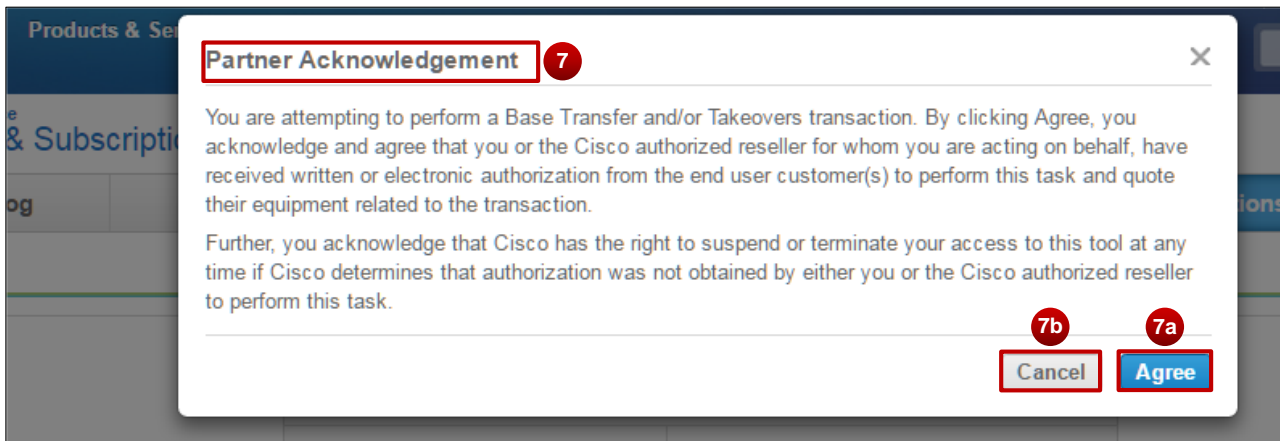
Cancel **Continue >**



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.

QUOTE NUMBER Q194651 Takeover	BUY METHOD Cisco	CREATED BY Cory@us.com On 01-Jul-2016
QUOTE NAME	STATUS Invalid	LAST UPDATED BY Cory@us.com On 01-Jul-2016

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**.

Expand All					
Filters All Takeovers					
<input type="checkbox"/>	Product Number	Service/ Offer Type	PAK/Serial Number	End Customer	Start/ End Date
<input type="checkbox"/>	+ CP-9971-C-CAM-K9=	CON-SNT-9971... SMARTnet 8x5x... Target Contract NEW	FCH1551	US (4055601)	30-DEC-2016 29-DEC-2017

25 Items Per Page << FIRST



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.

Items | Discounts | Billing | Review and Submit

Continue >

✓ Your Quote has been priced successfully.

Intended Use: Resale | Deal ID: | View By: Discount Details

Expand All

Hardware, Software and Services	PAK/Serial Number	Unit List Price	Date		Quantity	Prorated List Price	Total Discounts		Extended Net Price
			Begin	End			%	Amount	
CP-9971-C-CAM-K9=	FCH1550	39.6	30-Dec-2016	31-Jan-2017	1	3.58	15	0.54	3.04
1 Service Takeover - CAD							15	0.54	

25 Items Per Page | Page 1 of 1

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.

Items | Discounts | Billing | Review and Submit

Continue >

✓ Your Quote has been priced successfully.

Intended Use: Resale | Deal ID: | View By: Discount Details

Expand All

Hardware, Software and Services	PAK/Serial Number	Unit List Price	Date		Quantity	Prorated List Price	Total Discounts		Extended Net Price
			Begin	End			%	Amount	
CP-9971-C-CAM-K9=	FCH1550	39.6	30-Dec-2016	17-Jan-2020	1	120.86	26	31.36	89.5
Services Multi-Year - CAD							7	6.74	
Service Blended Takeover - CAD							20.37	24.62	

25 Items Per Page | Page 1 of 1

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

Items | Discounts | Billing | Review and Submit

2 Continue >

Intended Use: Resale | Deal ID: | View By: Discount Details

Expand All

Hardware, Software and Services	PAK/Serial Number	Unit List Price	Date		Quantity	Prorated List Price	Total Discounts		Extended Net Price
			Begin	End			%	Amount	
CP-9971-C-CAM-K9=	FCH1550	39.6	30-Dec-2016	31-Jan-2017	1	3.58	15	0.54	3.04
Service Takeover - CAD							15	0.54	

25 Items Per Page | Page 1 of 1



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**.

Items Discounts **Billing** Review and Submit

Warning: Changing information on this page may impact Tax and Pricing.

Tax Information *Required Field

Taxability * **Resale**

Your Tax Status **EXEMPT**

Billing Information

Billing Address * **TELUS COMMUNICATIONS COMPANY**

Customer Number	400508
Bill To ID	400859
Operating Unit	CISCO CANADA OPERATING UNIT
Address	ATTN AP DEPT SCARBOROUGH ONTARIO M1H 3J3 CA

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**.



Renewal Quote

Distributor
DATA

Billing Address*

DATA INC	
Customer Number	225
Bill To ID	806
Operating Unit	CISCO US OPERATING UNIT
Address	DATA DRIVE CLEARWATER FL 33760 US

Reseller Address and Contact

WORLD	
Customer Number	4043
Bill To ID	4106
Operating Unit	CISCO US OPERATING UNIT
Address	60 PKWY HEIGHTS MO 63043 US

Intended Use

Resale

Cancel **Continue >**

- 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**.

Partner Acknowledgement

You are attempting to perform a Base Transfer and/or Takeovers transaction. By clicking Agree, you acknowledge and agree that you or the Cisco authorized reseller for whom you are acting on behalf, have received written or electronic authorization from the end user customer(s) to perform this task and quote their equipment related to the transaction.

Further, you acknowledge that Cisco has the right to suspend or terminate your access to this tool at any time if Cisco determines that authorization was not obtained by either you or the Cisco authorized reseller to perform this task.

Cancel **Agree**

- 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

- To get to the Quote Manager Page, select **Software Subscriptions & Service Quotes** from the Software Services & Subscriptions landing page.
- 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.
- Click the **Quote Number** to open and view/edit.



Navigation: Catalog | Estimates | Deals & Quotes | Orders | **Services & Subscriptions** | Software

Quote Number 1

5 results

Export | Email | Share | Clone | Delete | Tags 2

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

5 Items Per Page | Page 1 of 1 | FIRST | LAST