

## CHANGE OF SERVICE OWNERSHIP AND/OR PASSWORD RESET PROCESS

### CHANGE OF SERVICE OWNERSHIP PROCESS

Mitel authorized PARTNERS who are in good standing with Mitel and who are requesting a permanent transfer of an end user customer record(s) and/or system password resets may do so by providing the following documents via electronic signature:

1. A completed Request Form “CHANGE OF SERVICE OWNERSHIP AND PASSWORD RESET REQUEST” from the requesting authorized PARTNER executed by a signing officer for the authorized PARTNER.
2. A signed request from the end user executed by a signing officer for the end user that the new authorized PARTNER is authorized to take over service ownership of their system(s); and
3. A reference number in order for Mitel to process the required administration fee for processing the request. The reference number may be a purchase order for the administration fee, or a tracking number you will use for your records.

The Link to the Docusign Form:

<https://na3.docusign.net/Member/PowerFormSigning.aspx?PowerFormId=17b7466d-148e-443f-8706-6e10d65381a9>

Once the document has been completed electronically by both parties, the document will need to be sent to Mitel’s Licensing Support team by emailing [license.support@mitel.com](mailto:license.support@mitel.com). Processing of such requests normally require a minimum of seven calendar days, after Mitel has acknowledged receipt of ALL of the required information before moving the end user records. For example, a request made and acknowledged on Monday will be processed by end of day the following Monday at a minimum. Mitel strongly recommends that you allow at least seven calendar days for processing, and that you refrain from engaging the end user customer, e.g., for technical support, until such time as you have received confirmation from Mitel that your request has been accepted and completed. See last page for step by step instructions on how to complete the request.

However, if the request is for a Customer who is under a TotalSolution Program Lease Agreement and/or a Customer who is tagged as a Mitel VIP Customer, a minimum of Ten (10) business days will be required to process the request after Mitel has acknowledged receipt of ALL of the required information.

If you are the “Current” authorized PARTNER who currently manages the end user customer’s account, Mitel will inform you via email of any such request by another authorized PARTNER immediately upon receipt of all of the information above. If the end user being moved is from a Gold or Platinum partner and has been with that partner for three years or less, the end user will not be allowed to move. Unless otherwise specified, emails will be sent to the designated administrator for the account. If the Customer to be transferred is a Mitel Direct customer, Mitel will inform the Mitel Regional Sales Directors.

Unless Mitel receives a signed letter from an authorized representative of the end user customer that rescinds the request for transfer within the seven calendar day period from the time you are informed of the request, Mitel will proceed to complete the request. The letter must be on end user customer letterhead or from the email domain of said end user, and must be emailed to [license.support@mitel.com](mailto:license.support@mitel.com) prior to the expiry of the time period.

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The form link is available on Mitel MiAccess. Click on Infochannel/Mitel-Worldwide/Licensing/AMC/General Information or Infochannel/Mitel-Worldwide/Services and Support/Support Services/Technical Support/System Password Resets. Click on the document “CHANGE OF SERVICE OWNERSHIP AND PASSWORD RESET PROCESS”.

If the system(s) being moved are not under Software Assurance, please be sure to request and purchase the renewal coverage in a timely manner in order to obtain the ability to upgrade the system or contact Tech Support for assistance. The Software Assurance coverage will move with the records if it is still active.

### **PASSWORD RESET ONLY PROCESS**

If you are requesting a Password Reset only, the same document will need to be completed by the Mitel authorized PARTNER who currently manages the end user account in order to begin the process. A Tech Support ticket will be provided back to the Technician listed on the form so they may contact the appropriate Tech Support team to request the completion of the Password Reset.

The Link to the Docusign Form:

<https://na3.docusign.net/Member/PowerFormSigning.aspx?PowerFormId=17b7466d-148e-443f-8706-6e10d65381a9>

Effective October 15, 2018, requests submitted for only a Password Reset without processing a Change of Service Ownership will be charged a fee of \$150 USD (per system) if the system does not have active Software Assurance on the record at the time the request was submitted. In order to avoid this fee, please check to see if the record has active Software Assurance prior to submitting the Password Reset request. Systems not under the SWA program are charged \$150 USD (per system).

If you have questions, please email [license.support@mitel.com](mailto:license.support@mitel.com) or by phone at 800-722-1301, Option 7.

## HOW TO COMPLETE AND SUBMIT THE DOCUMENT

1. An authorized PARTNER will click on the Change of Service Ownership and Password Reset Docusign link located in the process document. To get to the process document, log into MiAccess, click on Infochannel/Mitel-Worldwide/Licensing/AMC/General Information or Infochannel/Mitel-Worldwide/Services and Support/Support Services/Technical Support/System Password Resets (this is the same link on page 1).
2. The authorizedPARTNER must complete the three signers of the Document to start the process.
  - a. Signer 1 – A person who can complete the form with all end user and system details that are required.
  - b. Signer 2 – The signing officer for the end user that can approve to change the servicing office for their system(s).
  - c. Signer 3 – The signing officer for the partner that can approve and indemnify Mitel on this move and authorize the transfer fee that will be charged by Mitel.
3. Signer 1 completes the CHANGE OF SERVICE OWNERSHIP AND PASSWORD RESET REQUEST with all required information and will check the required boxes. If a Password Reset is needed for the records being moved, the box for Password Reset will need to be checked and all fields will need to be completed in order to set up the ticket with Tech Support for the **certified** Technician listed. The form will then be submitted to the end user for a signature – Signer 2.
4. Signer 2 will sign authorizing the move from current partner to new servicing partner and review form to make sure all information is complete.
5. Once Signer 2 signs and approves, the form is sent to the authorizedPARTNER's signing officer (Signer 3).
6. The authorizedPARTNER's signing officer (Signer 3) will enter the final signature to approve the document. Click Finish at bottom of form.
7. A completed document will be sent to original person that started the electronic signature process. (Signer 1)
8. The completed docusign form will need to be submitted to the Licensing Team by emailing [license.support@mitel.com](mailto:license.support@mitel.com) to have the request processed.
9. The authorized PARTNER will be debited once the records are moved. There is an additional fee if the Password Reset was requested at the same time and the system does not have an active Software Assurance contract.
10. If the request is for a Password Reset only and the system has active Software Assurance, a fee will not be charged.
11. If you have questions, please email [license.support@mitel.com](mailto:license.support@mitel.com) or by phone at 800-722-1301, Option 7.

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