

Transitions

Intro:

This process explains how to transition a customer's plan and apply any available promotional transition discounts for existing customers.

(i.e. Exede5-10 to Exede5-15).

In this training we will show to transition a customer's plan to a new plan and how to apply promotional discounts, if available.

Promotional transition discounts for existing customers are available in the CRM Package/Transition form based on beam to help resolve customer concerns over promotional offers available only for new customers.

These discounts will be available in the CRM package/transition form. These are based on beam, to help resolve customer concerns, and are not promotional offers for new customers.

Business Rules

1. The account must be **active** and have no past due balances.
2. Prorated amounts will exist on the next invoice. There will be a prorated amount for the current package, and one for the new package.

Plan Availability

1. Current plan availability varies by beam; see the **Support Portal > Orders Tab > Order Management** for specific plan information.

2. To ensure customers continue to have a positive experience on our network, do not offer Bronze packages to customers on SB2 or SB2+ equipment if they are not already on an unlimited plan.
3. Grandfathered plans are not available for transitions; customers are unable to transition back to those plans.
 - See the [Transition Disclosure Matrix](#) [ENGLISH] or [Transition Disclosure Matrix](#) [SPANISH] for specific details.

Usage

1. The customer's current usage will carry over to the new plan in most cases.
 - See the [Transition Disclosure Matrix](#) [ENGLISH] or [Transition Disclosure Matrix](#) [SPANISH] for specific details.
1. The customer's service may be immediately subject to the new plan's Data Allowance Policy when the customer has used more data than is included in the new plan.
 - See the [Transition Disclosure Matrix](#) [ENGLISH] or [Transition Disclosure Matrix](#) [SPANISH] for specific details.

Discounts & Credits

1. Liberty discounts included in the customer's current plan will not transfer to the new plan.
 2. If issuing a dispute (credit) at the same time as a transition, complete the transition first and then issue the dispute.
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1. See [KB 1325](#) for quick reference matrix on returning equipment.