channel exchange
a scansource company

PLATFORM
GUIDE

EXPERT PARTNER

FEATURES + FUNCTIONALITIES:

1 LICENSE CATALOG

2 SETTINGS OVERVIEW

3 ADDING NEW CUSTOMERS

4 ADDING NEW USERS

5 CREATING ORDERS

6 CREATING QUOTES

7 MANAGING LICENSES

8 FAQS + DEMO

9 SUPPORT CONTACTS

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1) LICENSE CATALOG

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Upon logging into Channel Exchange, partners will land on their catalog, where they can browse all available SKUs:

2) SETTINGS

Under the Settings Tab, partners have access to new features through Channel Exchange:

CATALOG   QUOTES   REPORTS   INVOICES   USERS   SETTINGS   ACTIVITY

SETTINGS

Theme & UI

Integrations

Currency & Payments

Authentication Management

Customers

T&C

Notification Settings

Organizations

Custom fields

Business Locations

- **Theme:** Partners can now white label with company logo, color theme, and customer HTML blocks

- **Integrations:** Partners can now integrate software applications into our platform

- **Terms and Conditions:** Partners can now upload their own T&C for their end customers.

- **Notifications:** Partners can customize notifications and set email alerts for actions on the platform.
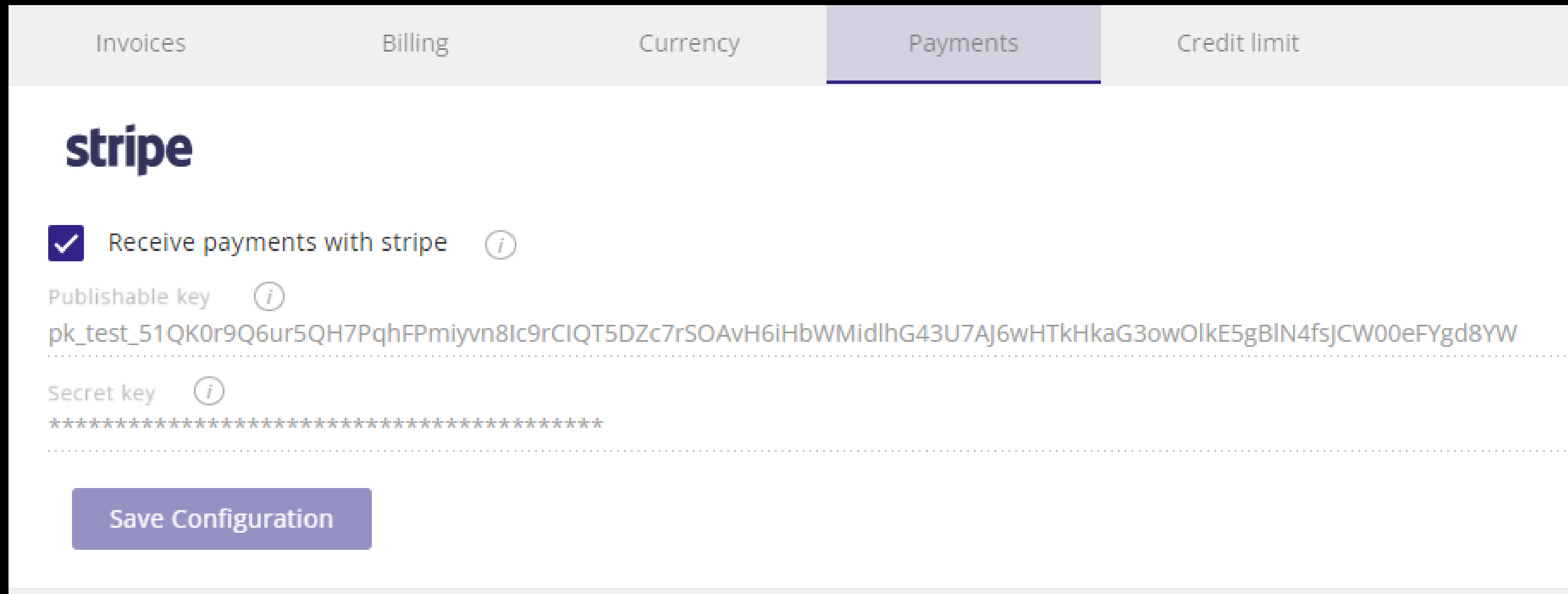
2) SETTINGS

- **Payments:** All partners will now require a **Stripe** account to make payments in Channel Exchange. All existing partners will automatically have a Stripe account created with their banking information. For new partners, a link to create a new Stripe account can be found underneath the **Currency & Payment tab** under **Settings**.

3) ADDING A NEW CUSTOMER

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- **To add a new customer,** navigate to the Select Organization tab in the top right corner and click.

☰ SELECT ORGANIZATION ⊛
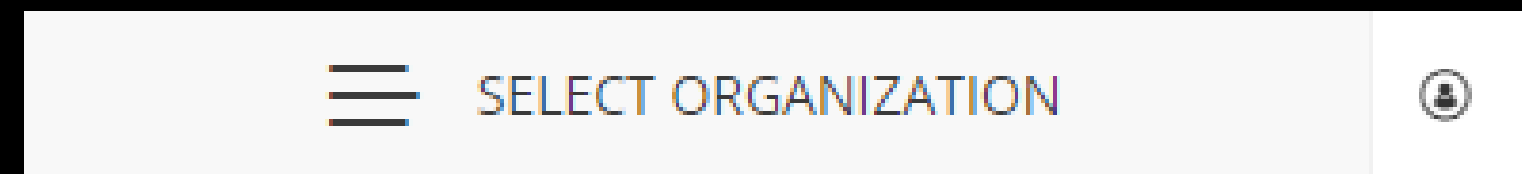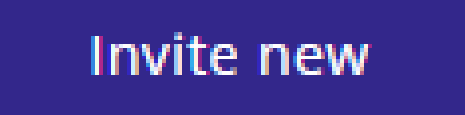
- Select **Create new** and follow the prompts:

  - Enter an unique **Registration Number** (we recommend inputting their phone number as it is unique to each end customer)
  - Once the form is complete, select the Create and Approve option

Create ▼

Create and approve
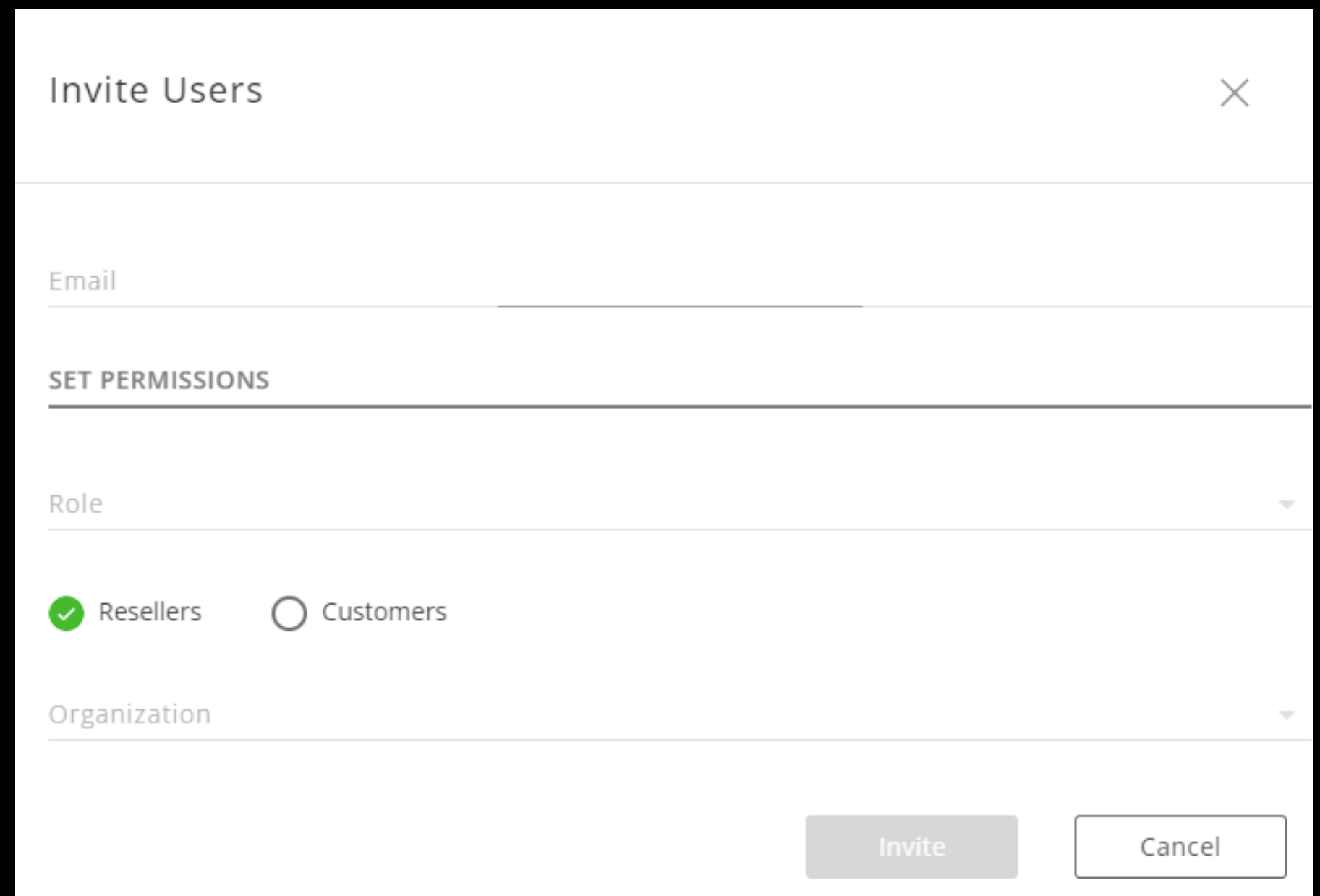
Create organization

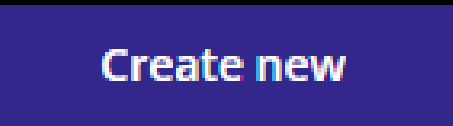| GENERAL	PRIMARY ADDRESS
	☑ Billing Address Same
Short Name	Country
Full Name	City
ERP ID	State/Province *(optional)*
Registration number	Address
Tax ID ⓘ	Secondary address *(optional)*
Currency USA Dollar (USD)	Zip/Postal code

Industry

☐ Government
☐ Education
☐ Non-profit

4) ADDING A NEW USER

- **To add a new user to your account,** select the Users tab and click Invite new

- Enter the required information and set permissions for the user. *Refer to the next slide to see a breakdown of each role and its permission levels.* When the new user receives the email to activate their account, they will complete the remaining steps to successfully become a user on Channel Exchange.

Invite Users   ✕

Email
_____

SET PERMISSIONS
_____

Role   ▾

✓ Resellers   ○ Customers

Organization   ▾

                        Invite   Cancel

ROLES AND PERMISSIONS BREAKDOWN

Section	CATALOG			QUOTES	ORDER	SUBSCRIPTION	REPORTS		INVOICES	USERS	SETTINGS										ACTIVITY
	Browse	Customer Segments	Customer Prices				Reseller Report	360 Report	Invoices		Theme & UI	Integrations	Currency & Payments	Authentication Management	Customers	T&C	Notification Settings	Organizations	Custom fields	Business Locations	
Seller Admin	V	V/E	V/E	V/E	V/E	V/E	V	V	V	V/E	V/E	V/E	V/E	V/E	V/E	V/E	V/E	V/E	V/E	V/E	V/E
Account Manager	V	-	V	V/E	V/E	V/E	V	-	V	V/E	V	-	-	-	-	-	-	-	-	-	-
Billing admin	V	-	-	-	-	-	-	-	V/E	-	-	-	-	-	-	-	-	-	-	-	-
Subscribtion Manager	V	-	-	-	-	V/E	V	-	-	-	-	-	-	-	-	-	-	-	-	-	V/E
Product Manager	V	-	-	-	-	V/E	-	-	V/E	-	-	-	-	-	-	-	-	-	-	-	V/E
Support Agent	V	-	V/E	-	V	V	-	-	V	V/E	-	-	-	-	-	-	-	-	-	-	V/E
Reseller Report	V	-	-	-	-	-	V	-	-	-	-	-	-	-	-	-	-	-	-	-	-
360° Report Viewer	V	-	-	-	-	-	-	V	-	-	-	-	-	-	-	-	-	-	-	-	-

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5) CREATING AN ORDER

- **To create an order,** select the customer for which you would like to place an order on the select organization tab.

- Using the **Catalog**, select the license to be ordered and follow the prompts to complete the transaction, including quantity and term duration. For all Microsoft licenses, the existing tenant domain must be entered or a new tenant must be created.

5) CREATING AN ORDER

- For the "invoiced by" option, select **"by me"**

- An option to edit price and view markup summary will appear before adding the licenses to the order

- Partners can add the license to their cart and continue to place the order, save it for later, or create a quote for the order and email it to the customer for approval.
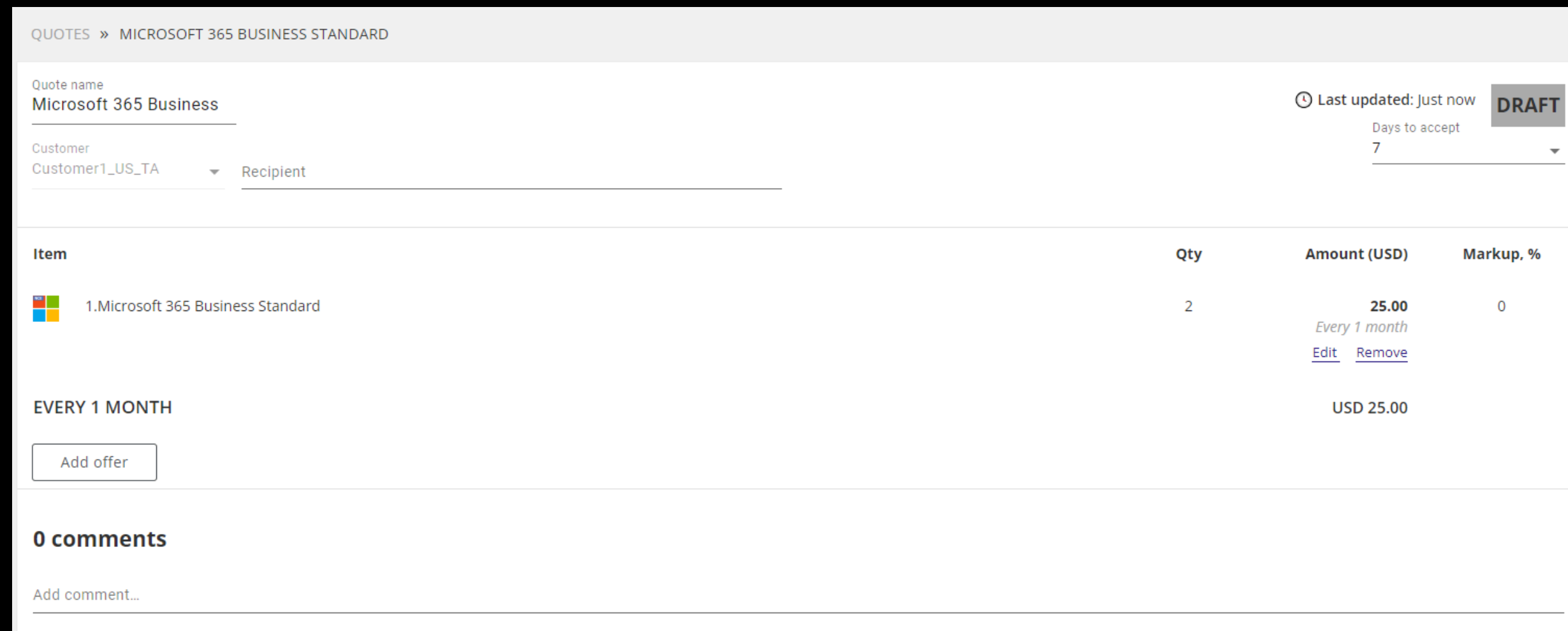
6) CREATING QUOTES

- Upon adding all licenses to the cart to be quoted, hover over the place order button, then click **Create Quote.**
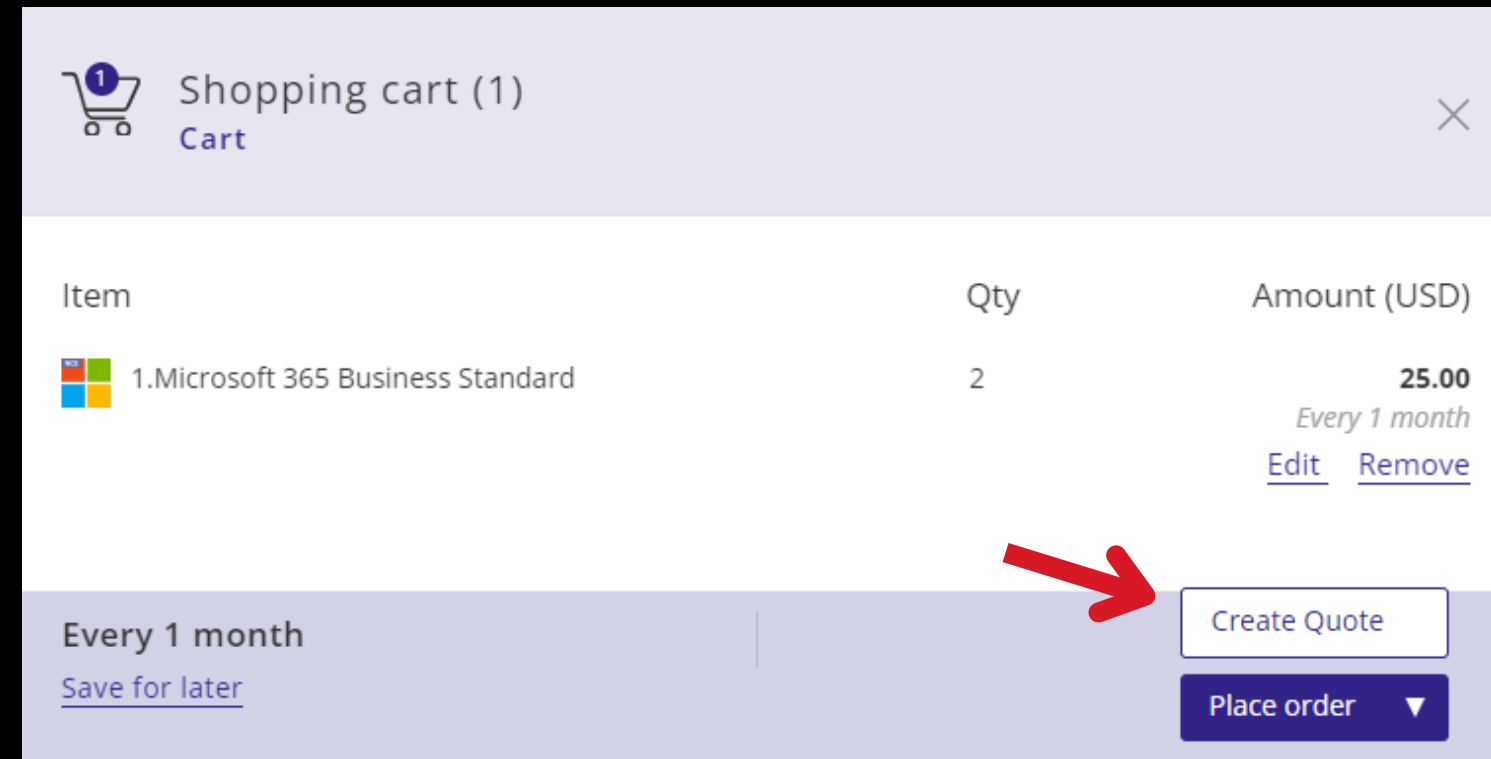
- You will now be able to edit the quote and send it to the end customer. Partners have the ability to edit the days the end customer has to accept the quote in the top right corner of the screen.

7) MANAGE LICENSES

- **To manage customer subscriptions,** navigate to the subscriptions tab at the end customer level. Select the license you'd like to manage to view options such as quantity change, upgrade options, and assigned the license to users. To edit, press the button in the bottom right corner.

8) FAQS + DEMO

For answers to frequently asked questions, please refer to the link below:

Channel Exchange FAQs Page
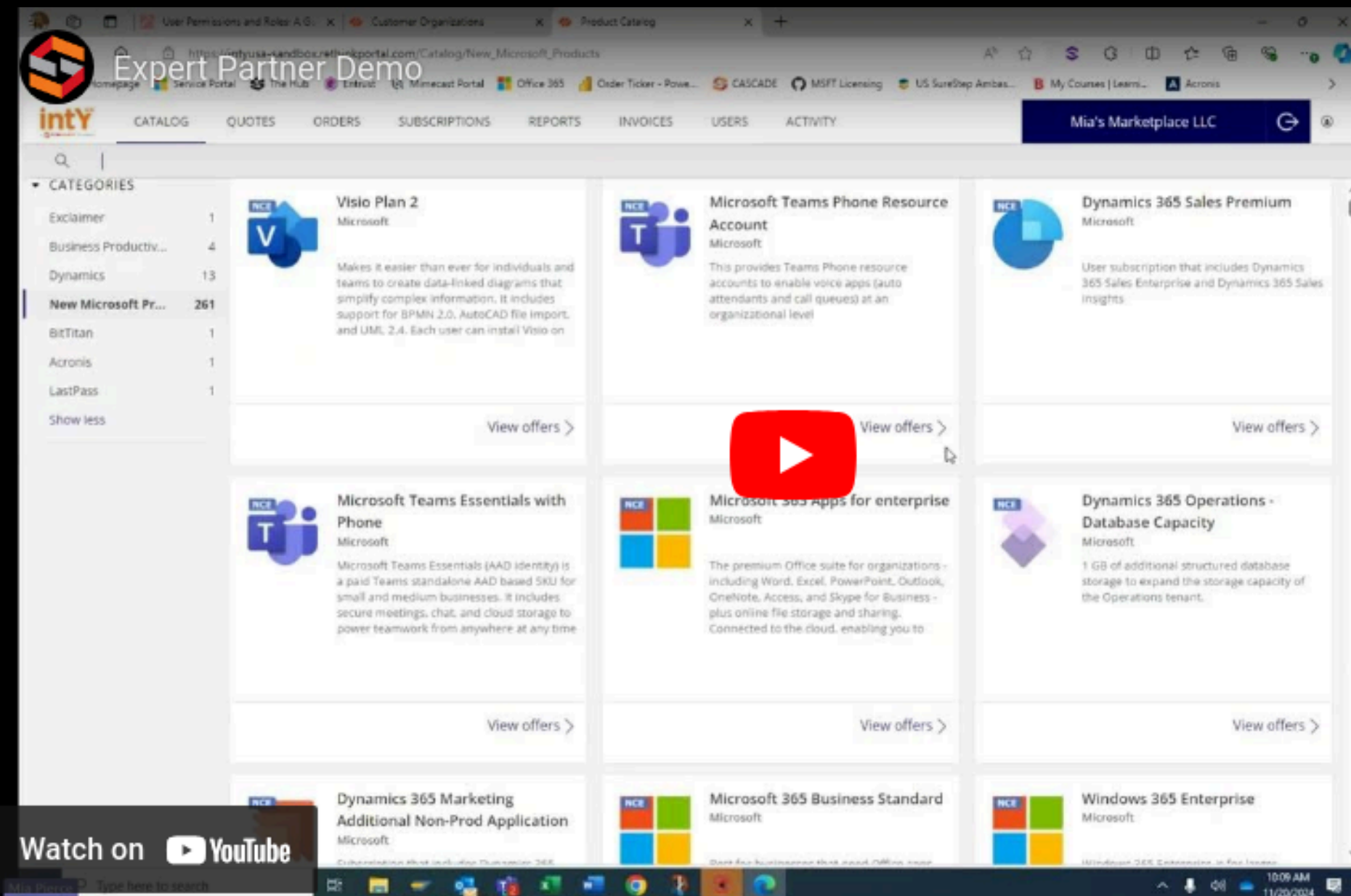
9) SUPPORT CONTACTS

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THANK YOU!

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