

PLATFORM
GUIDE

TRUSTED ADVISOR



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1) LICENSE CATALOG

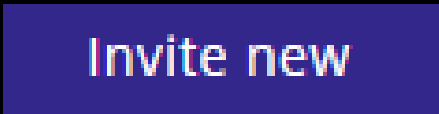
Upon logging into Channel Exchange, partners will land on their catalog, where they can browse all available SKUs:

The screenshot displays a search interface for a license catalog. On the left, a 'CATEGORIES' sidebar lists: Exclaimer (1), Business Productiv... (4), Dynamics (13), **New Microsoft Pr...** (261), BitTitan (1), and a 'View all' link. The main content area features six product cards, each with an NCE icon, a title, a provider name, a description, and a 'View offers >' button.

Product Name	Provider	Description
Visio Plan 2	Microsoft	Makes it easier than ever for individuals and teams to create data-linked diagrams that simplify complex information. It includes support for BPMN 2.0, AutoCAD file
Microsoft Teams Phone Resource Account	Microsoft	This provides Teams Phone resource accounts to enable voice apps (auto attendants and call queues) at an organizational level
Dynamics 365 Sales Premium	Microsoft	User subscription that includes Dynamics 365 Sales Enterprise and Dynamics 365 Sales Insights
Microsoft Teams Essentials with Phone	Microsoft	Microsoft Teams Essentials (AAD identity) is a paid Teams standalone AAD based SKU for small and medium businesses. It includes secure meetings, chat, and cloud
Microsoft 365 Apps for enterprise	Microsoft	The premium Office suite for organizations - including Word, Excel, PowerPoint, Outlook, OneNote, Access, and Skype for Business - plus online file storage
Dynamics 365 Operations - Database Capacity	Microsoft	1 GB of additional structured database storage to expand the storage capacity of the Operations tenant.

2) ADDING NEW USERS



- To add a new user to your account, select the Users tab from the navigation bar and click 
- 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.

A screenshot of the 'Invite Users' form. The form is titled 'Invite Users' and has a close button (X) in the top right corner. It contains the following fields and options:

- Email**: A text input field.
- SET PERMISSIONS**: A section header with a horizontal line below it.
- Role**: A dropdown menu.
- Resellers**: A radio button with a green checkmark next to it.
- Customers**: A radio button.
- Organization**: A dropdown menu.
- Invite**: A button at the bottom right.
- Cancel**: A button at the bottom right.

3) MANAGING END CUSTOMERS



- To navigate between the partner and end customer level, click on **Select Organization** in the top right corner.
- You will now be on the “Customer Organizations” page, where you can view and select an end customer’s account.
- *If you need to create a NEW end customer, you must contact your Channel Exchange account manager and they will get the customer added for you. This is a temporary action, and you will be able to add new end customers utilizing the portal on **February 1st**.*



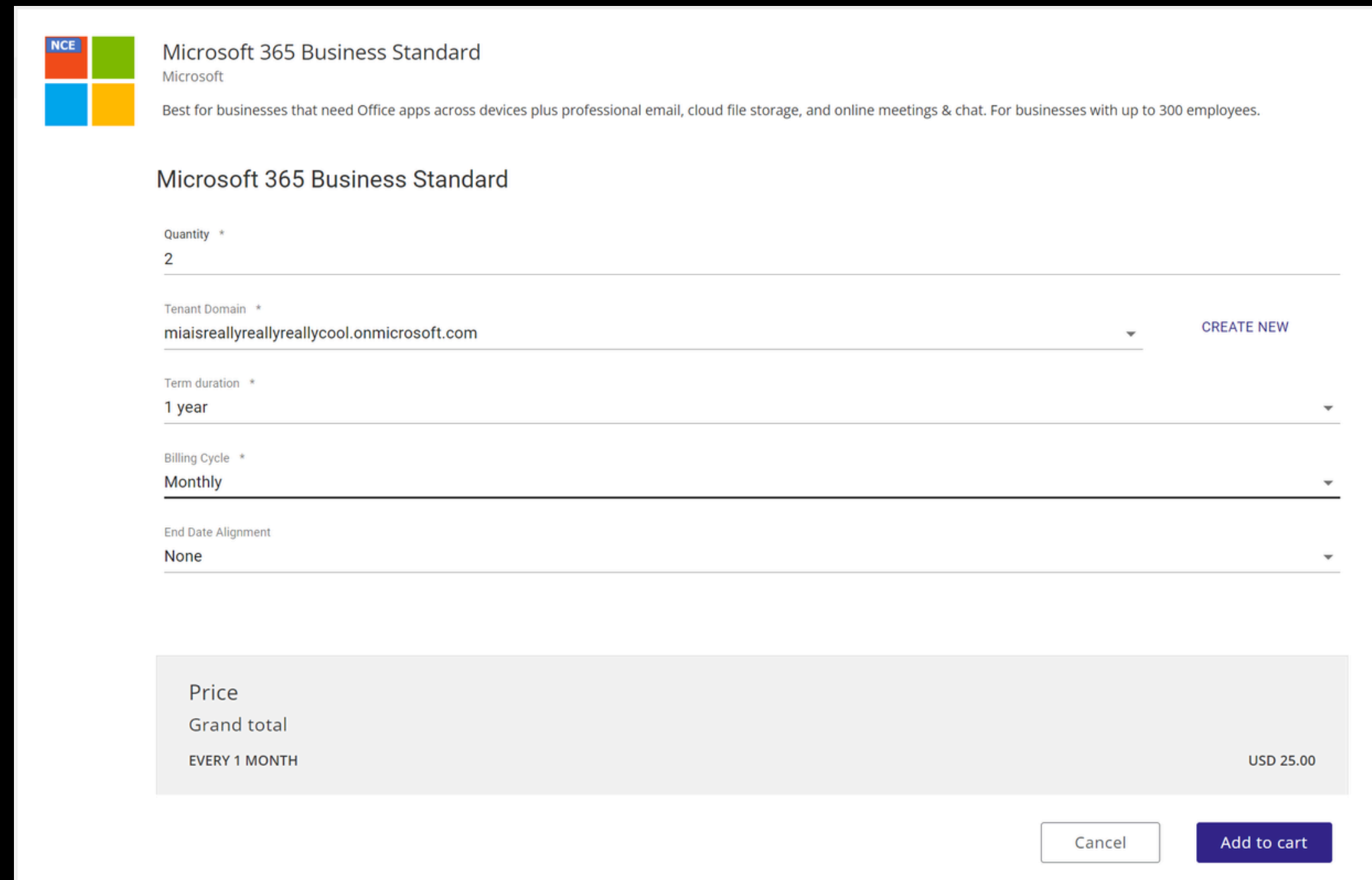
Advanced organizations view

Customer Organizations

ERP ID	NAME	SUBSCRIPTIONS	INDUSTRY	COUNTRY
	Emma Schmidt	0	Government Education Private Business Nonprofit Price	United States
12554...	Example	0	Government Education Private Business Nonprofit Price	United States
	Olympics cust 1 ltd TA US	0	Private Business	United States
	Olympics cust 2 ltd TA US	0	Private Business	United States
	pr 01 cust ta us 27 apr	0	Private Business	United States
	pr 02 us ta 08 feb	0	Private Business	United States
	PR EP US top cust sprint 36	0	Private Business	United States
	pr ltd customer ta us 2210 i	0	Private Business	United States

4) 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.




The screenshot shows the Microsoft 365 Business Standard order form. At the top left is the NCE logo. The product name is "Microsoft 365 Business Standard" by Microsoft. A description states: "Best for businesses that need Office apps across devices plus professional email, cloud file storage, and online meetings & chat. For businesses with up to 300 employees." The form fields are: Quantity (2), Tenant Domain (miaisreallyreallyreallycool.onmicrosoft.com with a "CREATE NEW" link), Term duration (1 year), Billing Cycle (Monthly), and End Date Alignment (None). A price summary box at the bottom shows "Price Grand total EVERY 1 MONTH USD 25.00". At the bottom right are "Cancel" and "Add to cart" buttons.

4) CREATING AN 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. The quoting feature will not be available until **February 1st**.

Shopping cart (1)
Cart

Item	Qty	Amount (USD)
 1. Microsoft 365 Business Standard	2	25.00 <i>Every 1 month</i> Edit Remove

Every 1 month
[Save for later](#)

USD 25.00
[Place order](#)





5) MANAGING 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.

[Edit](#)

SUBSCRIPTIONS Advanced subscription grid

Customer1_US_TA

Subscription type: All

Show costs

STATUS	SUBSCRIPTION	VENDOR	EXPIRES ON	QUANTITY	ADDONS	BILLING CYCLE	PRICE	SCHEDULED CHANGES
Active	Exchange Online (Plan 1) NCE	Microsoft miaisreallyr...	01/04/2025	12	0	Every 1 month	57.60 USD	
Active	Visio Plan 2 NCE	Microsoft miaisreallyr...	01/03/2025	25	0	Trial	0.00 USD	
Active	Visio Plan 2 NCE	Microsoft uscustomer...	12/20/2024	25	0	Trial	0.00 USD	
Active	Power BI Premium Per User NCE	Microsoft miaisreallyr...	01/04/2025	5	0	Every 1 month	120.00 USD	
Active	Microsoft 365 Business Standard NCE	Microsoft uscustomer...	12/12/2024	10	0	Every 1 month	150.00 USD	Scheduled
Active	Microsoft 365 Business Standard NCE	Microsoft uscustomer...	12/05/2025	2	0	Every 1 month	25.00 USD	

[Details](#) [History](#)

Exchange Online (Plan 1) Info Warning Status ✓

Purchased on: 12/04/2024 Renews On: 01/04/2025

Cancellation policy

Exchange Online (Plan 1)

Quantity *
12

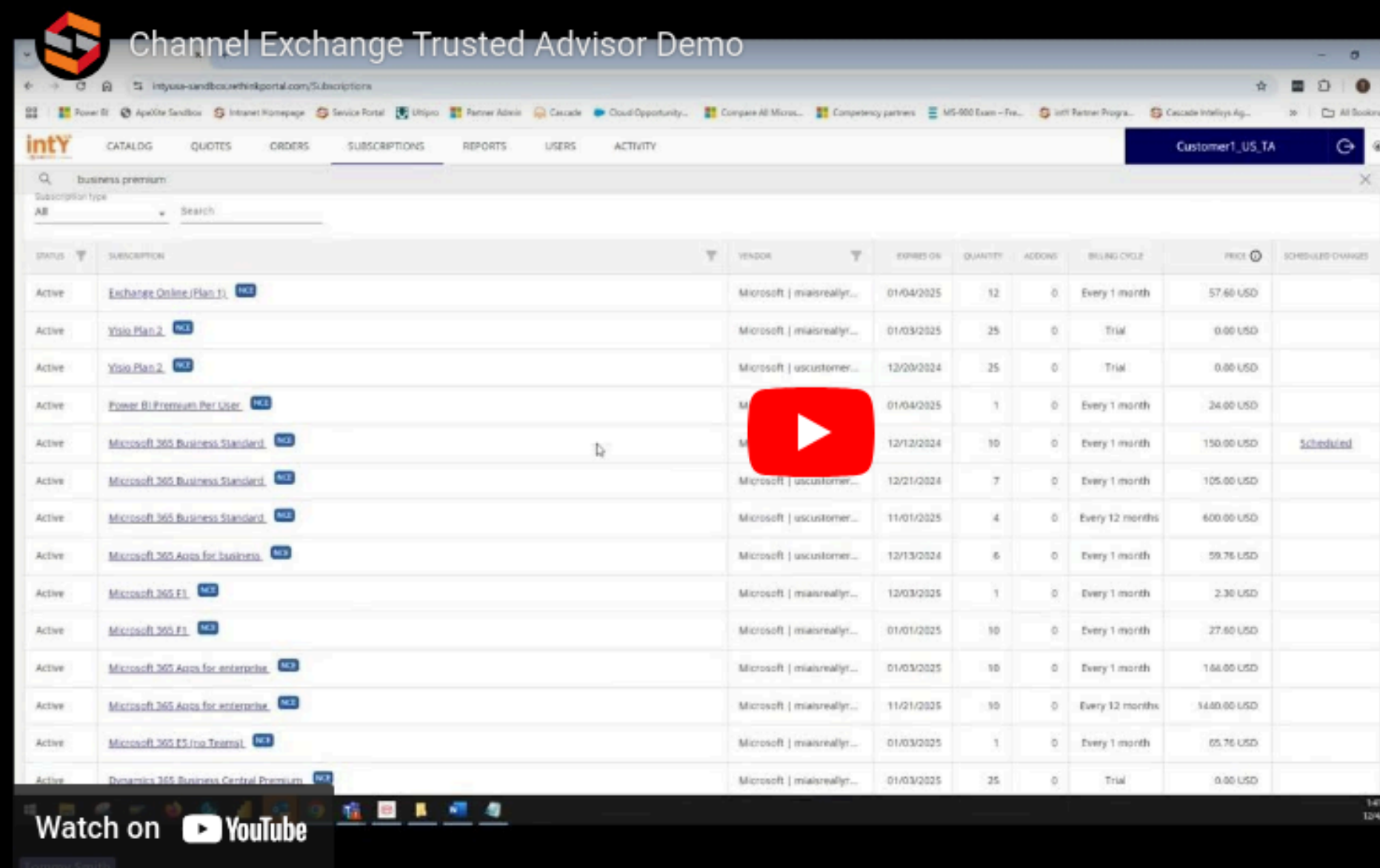
Tenant Domain *
miaisreallyreallyreallycool.onmicrosoft.com

Term duration *
1 month

6) FAQs AND DEMO

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

[Channel Exchange FAQs Page](#)



The screenshot displays the 'Channel Exchange Trusted Advisor Demo' interface. The browser address bar shows 'intyusa-sandbox.uat.hinkportal.com/Subscriptions'. The page title is 'Channel Exchange Trusted Advisor Demo'. The navigation menu includes 'CATALOG', 'QUOTES', 'ORDERS', 'SUBSCRIPTIONS', 'REPORTS', 'USERS', and 'ACTIVITY'. A search bar contains 'business premium'. Below the search bar is a table of subscriptions with columns: STATUS, SUBSCRIPTION, VENDOR, EXPIRES ON, QUANTITY, ACCORD, BILLING CYCLE, PRICE, and SCHEDULED CHANGES. A red YouTube play button is overlaid on the table. The table contains the following data:

STATUS	SUBSCRIPTION	VENDOR	EXPIRES ON	QUANTITY	ACCORD	BILLING CYCLE	PRICE	SCHEDULED CHANGES
Active	Exchange Online / Plan 1	Microsoft miairealr...	01/04/2025	12	0	Every 1 month	57.60 USD	
Active	Ysis Plan 2	Microsoft miairealr...	01/03/2025	25	0	Trial	0.00 USD	
Active	Ysis Plan 2	Microsoft uscustomer...	12/20/2024	25	0	Trial	0.00 USD	
Active	Power BI Premium Per User	Microsoft miairealr...	01/04/2025	1	0	Every 1 month	24.00 USD	
Active	Microsoft 365 Business Standard	Microsoft uscustomer...	12/12/2024	10	0	Every 1 month	150.00 USD	Scheduled
Active	Microsoft 365 Business Standard	Microsoft uscustomer...	12/21/2024	7	0	Every 1 month	105.00 USD	
Active	Microsoft 365 Business Standard	Microsoft uscustomer...	11/01/2025	4	0	Every 12 months	600.00 USD	
Active	Microsoft 365 Apps for business	Microsoft uscustomer...	12/13/2024	6	0	Every 1 month	59.76 USD	
Active	Microsoft 365 F1	Microsoft miairealr...	12/03/2025	1	0	Every 1 month	2.30 USD	
Active	Microsoft 365 F1	Microsoft miairealr...	01/01/2025	10	0	Every 1 month	27.00 USD	
Active	Microsoft 365 Apps for enterprise	Microsoft miairealr...	01/03/2025	10	0	Every 1 month	166.00 USD	
Active	Microsoft 365 Apps for enterprise	Microsoft miairealr...	11/21/2025	10	0	Every 12 months	1680.00 USD	
Active	Microsoft 365 E5 / no Teams	Microsoft miairealr...	01/03/2025	1	0	Every 1 month	65.76 USD	
Active	Dynamics 365 Business Central Premium	Microsoft miairealr...	01/03/2025	25	0	Trial	0.00 USD	

Share



Tommy Smith

Watch on YouTube



7) SUPPORT CONTACTS



**EAST COAST:
ACCOUNT MANAGER
EMMA SCHMIDT
864-286-4518**

EMMA.SCHMIDT@SCANSOURCE.COM

**CENTRAL:
ACCOUNT MANAGER
MIA PIERCE
864-286-4617**

MIA.PIERCE@SCANSOURCE.COM

**BUSINESS MANAGER
MARK SACCO
864-286-4797**

MARK.SACCO@SCANSOURCE.COM

**BUSINESS MANAGER
ARIANA WILLS
PHONE:864-286-2524**

ARIANA.WILLS@SCANSOURCE.COM

**WEST COAST:
ACCOUNT MANAGER
AMBER SHAHID
864-286-4288**

AMBER.SHAHID@SCANSOURCE.COM

**GENERAL CONTACTS:
ENABLEMENT SPECIALIST
TOMMY SMITH
864-286-4314**


TOMMY.SMITH@SCANSOURCE.COM

**BUSINESS MANAGER
ARIANA WILLS
864-286-2524**

ARIANA.WILLS@SCANSOURCE.COM

**GENERAL SALES INBOX:
CHANNELEXCHANGESALES@SCANSOURCE.COM**

**TECHNICAL SUPPORT INBOX:
EXCSUPPORT@SCANSOURCE.COM**



THANK YOU!



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