channel exchange
a scansource® company

PLATFORM GUIDE

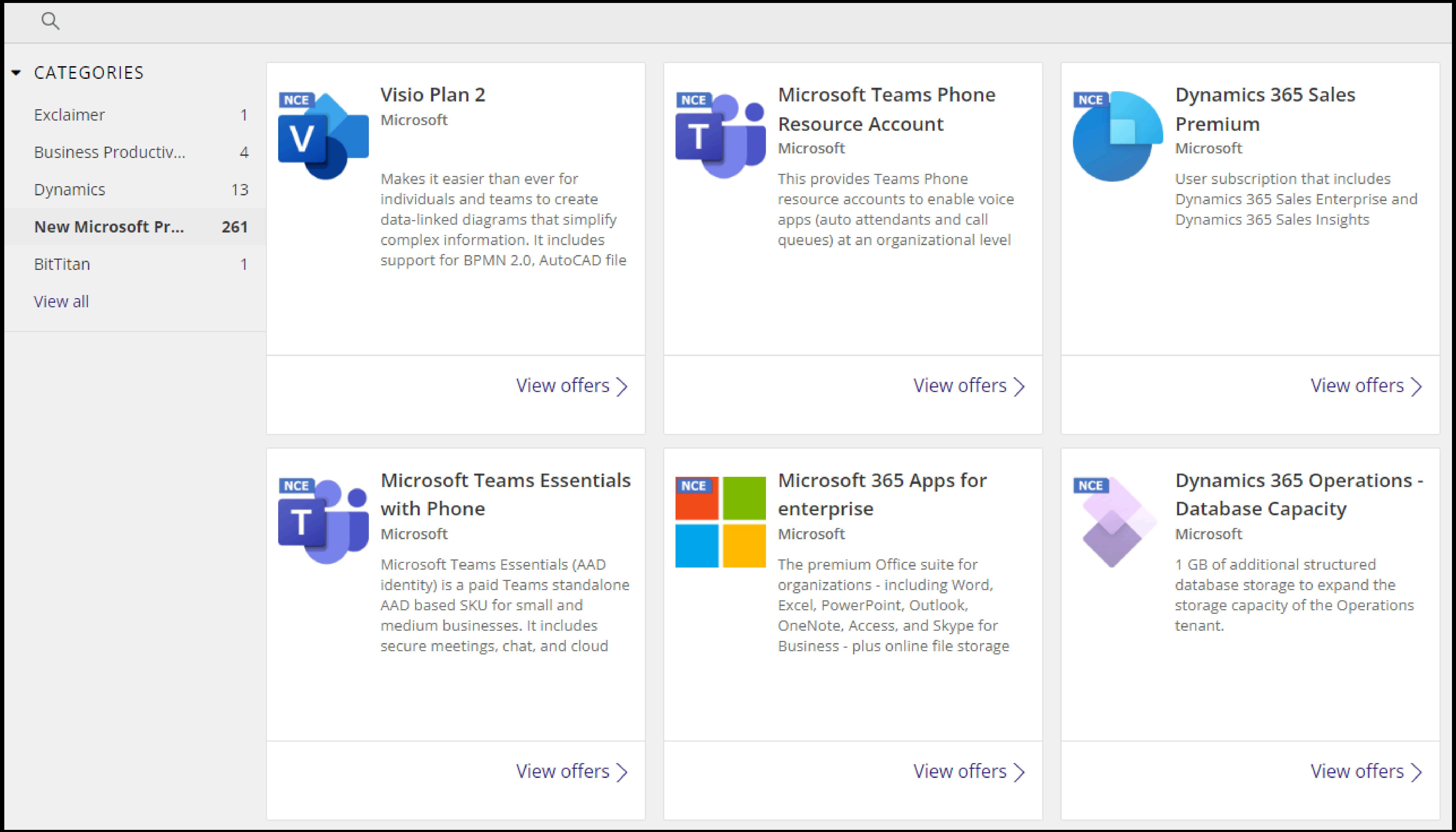
TRUSTED ADVISOR

FEATURES + FUNCTIONALITIES:

1. LICENSE CATALOG
2. ADDING NEW USERS
3. MANAGING END CUSTOMERS
4. CREATING ORDERS
5. MANAGING LICENSES
6. FAQS + DEMO
7. SUPPORT CONTACTS

1) LICENSE CATALOG

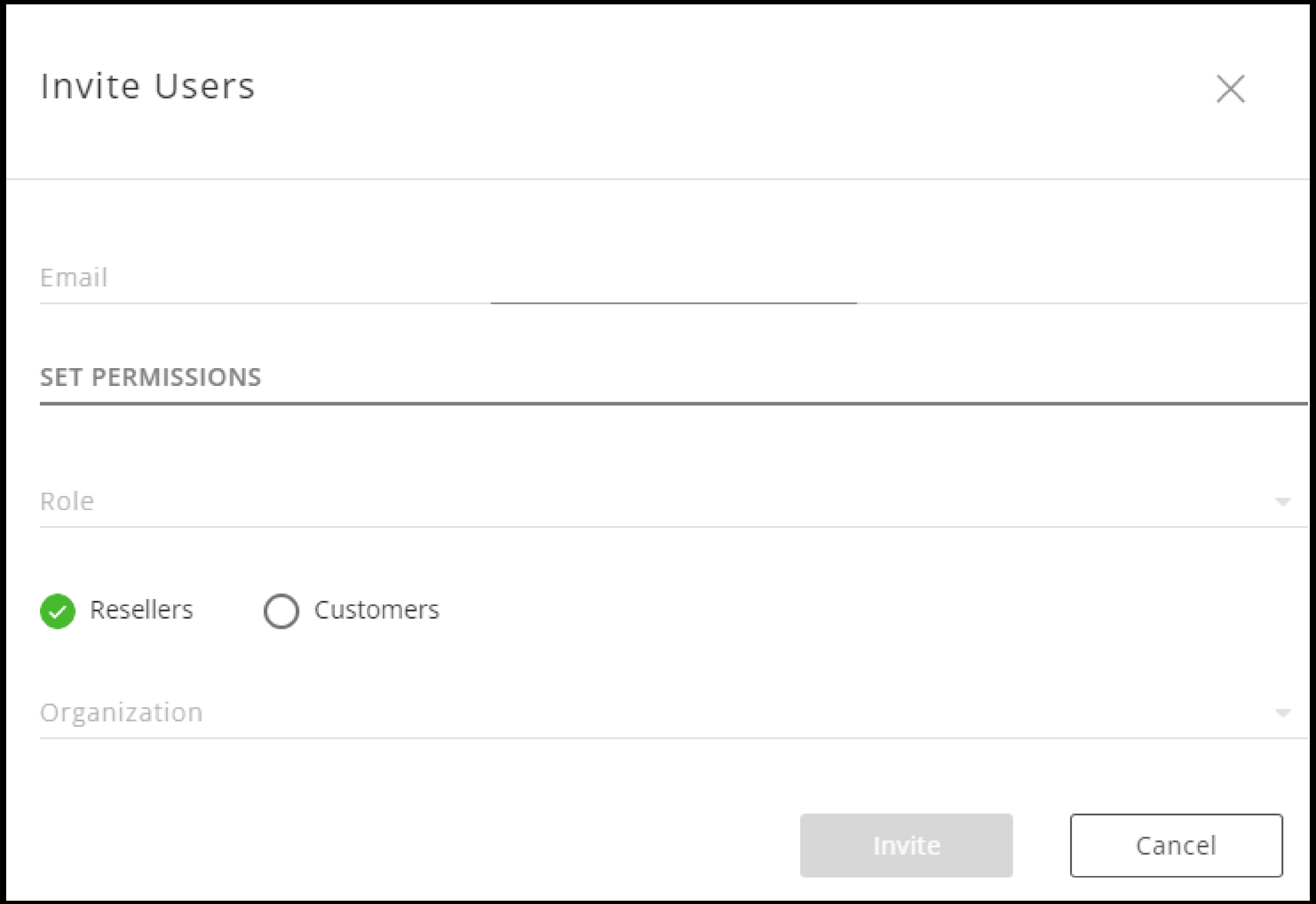
Upon logging into Channel Exchange, partners will land on their catalog, where they can browse all available SKUs:



2) ADDING NEW USERS

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



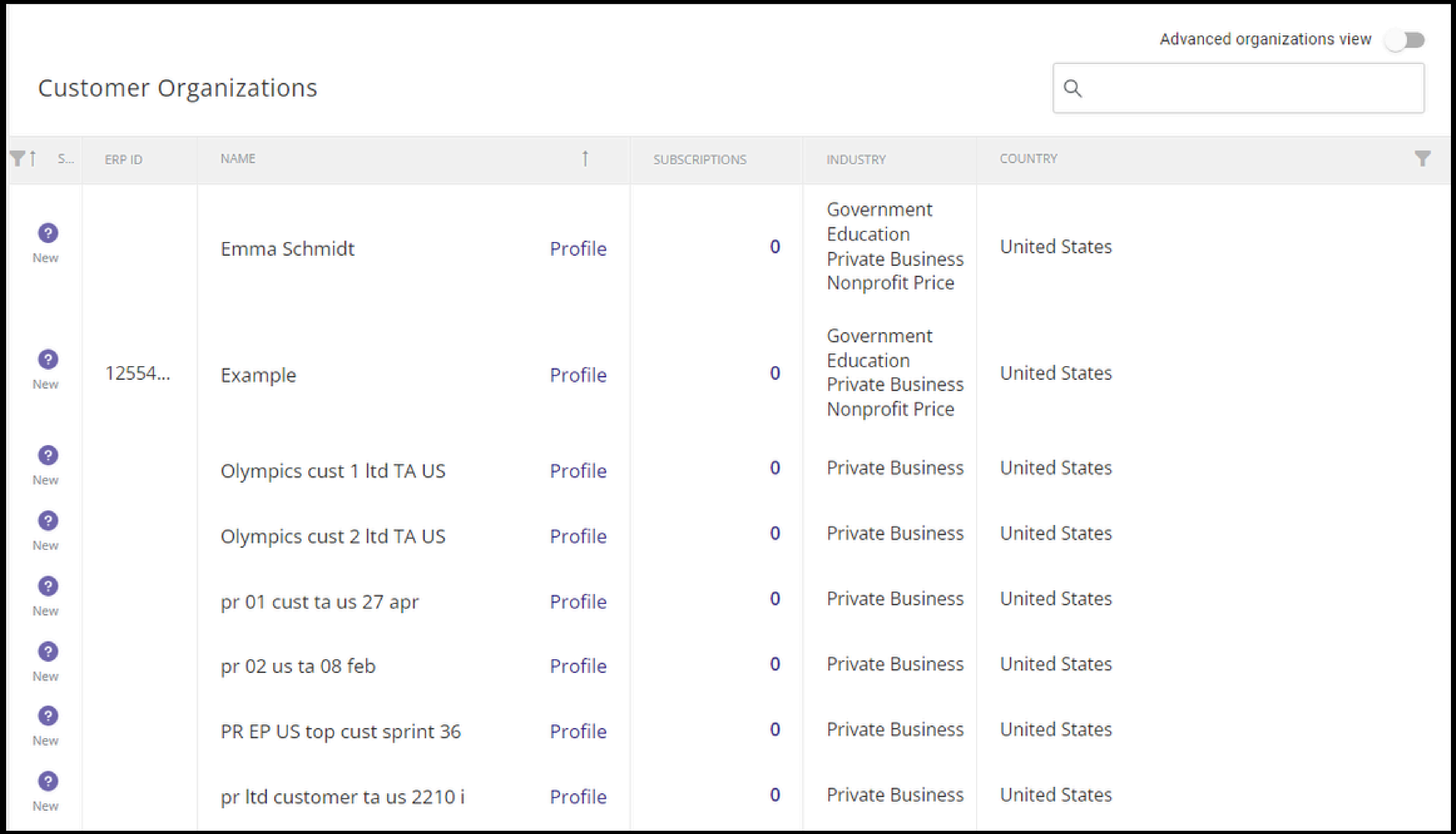
ROLES AND PERMISSIONS BREAKDOWN

Section	CATALOG			QUOTES	ORDERS	SUBSCRIPTIONS	REPORTS	INVOICES	USERS
	Browse	Customer segments	Customer prices					Invoices	
Customer	V	-	-	V	V/E	V/E	V	-	-
Customer admin	V	-	-	V	V/E	V/E	V	-	V/E
Customer billing Admin	V	-	-	-	-	-	-	V/E	-

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.



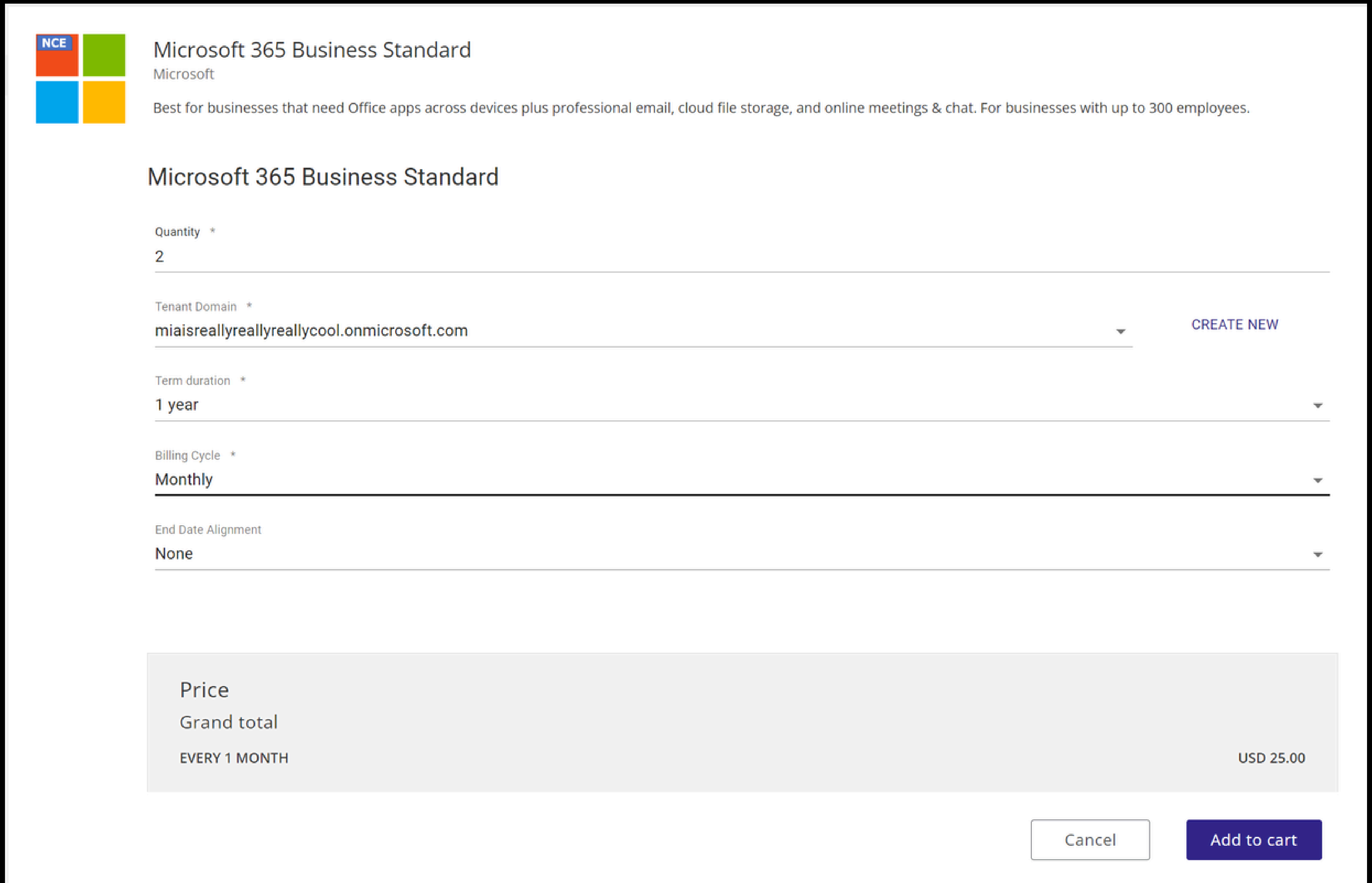
S...	ERP ID	NAME		SUBSCRIPTIONS	INDUSTRY	COUNTRY
New		Emma Schmidt	Profile	0	Government Education Private Business Nonprofit Price	United States
New	12554...	Example	Profile	0	Government Education Private Business Nonprofit Price	United States
New		Olympics cust 1 ltd TA US	Profile	0	Private Business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

- *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**.

4) CREATING AN ORDER

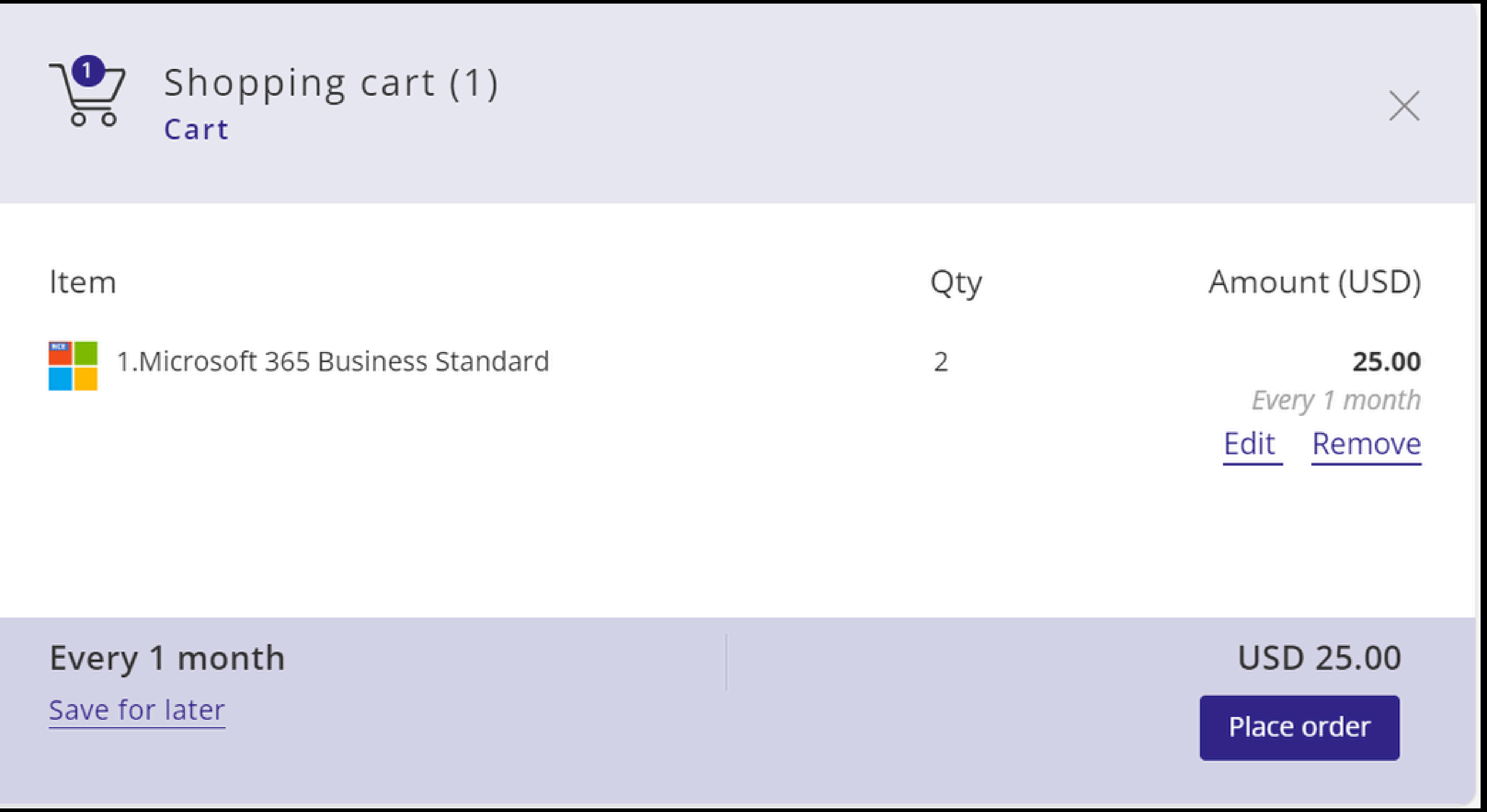
- **To create an order,** select the customer for which you would like to place an order on the **Select Organization** tab.

- Using the **Catalog**, select the license to be ordered and follow the prompts to complete the transaction, including quantity and term duration.



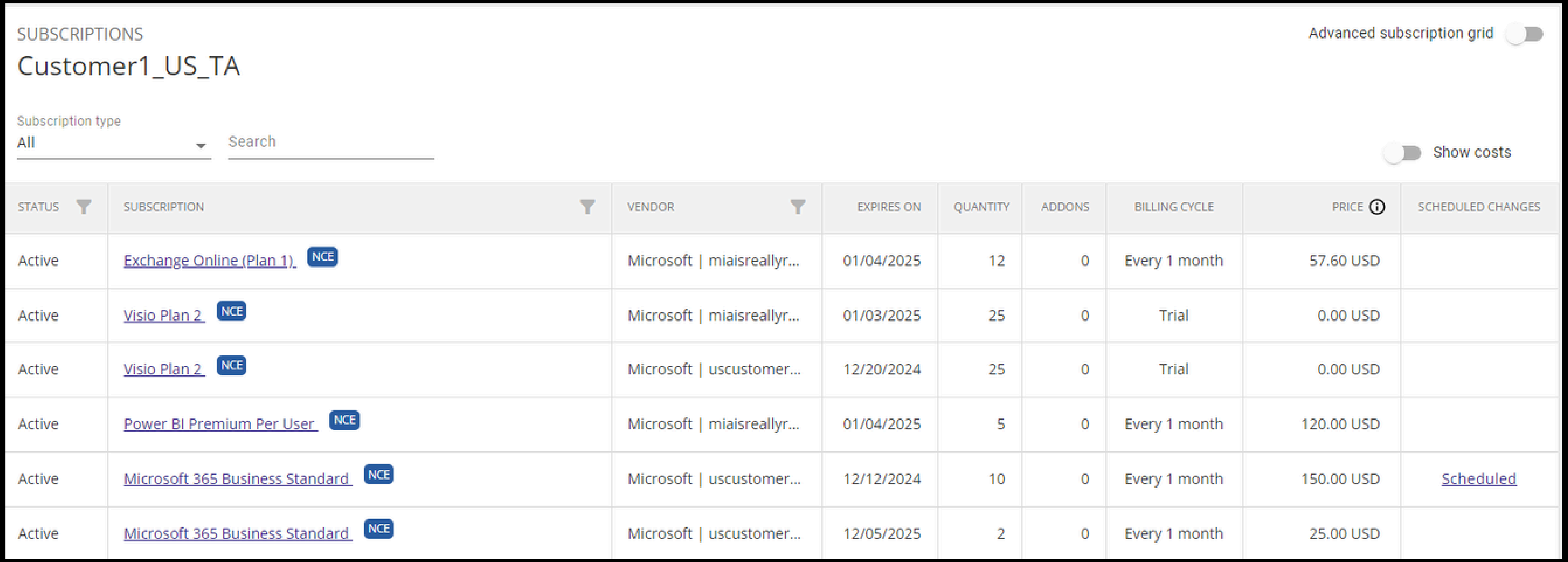
4) CREATING AN ORDER

- 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**.



5) MANAGING LICENSES

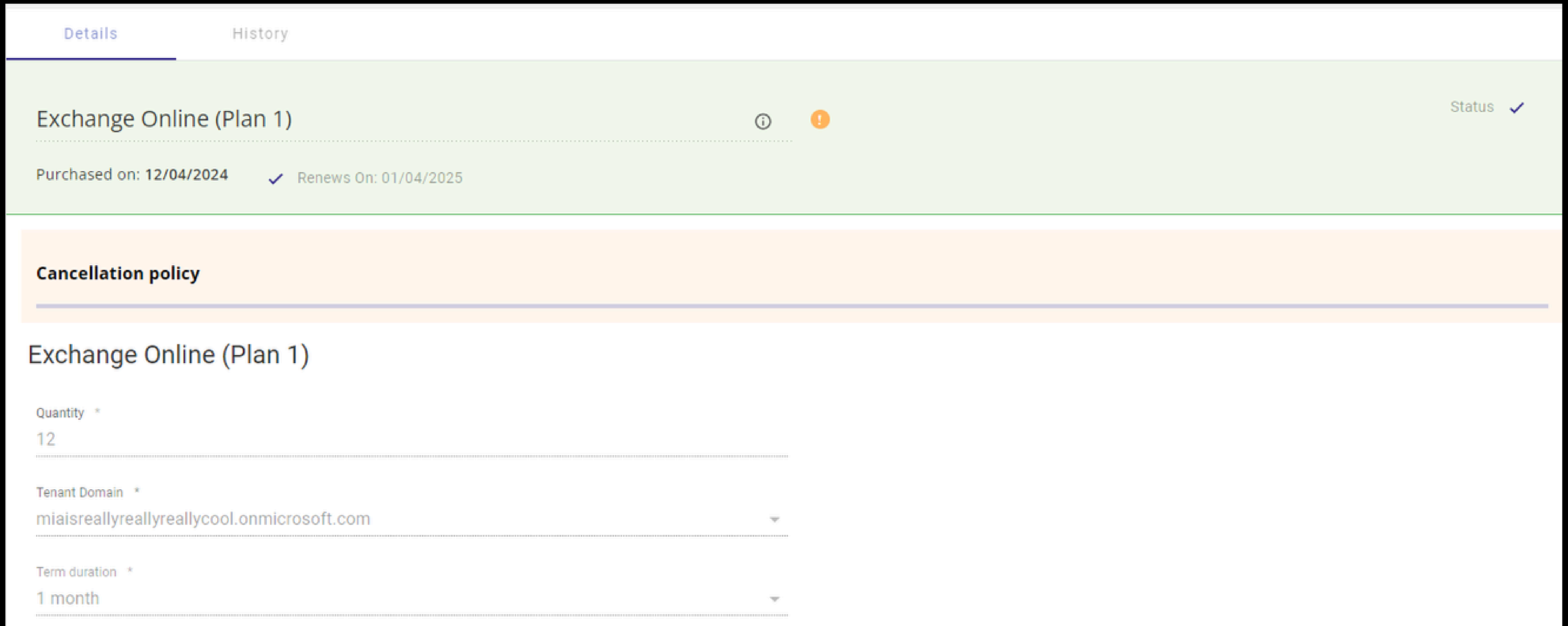
- **To manage customer subscriptions,** navigate to the subscriptions tab at the end customer level. Select the license you'd like to manage to view options such as quantity change, upgrade options, and assigned the license to users. To edit, press the button in the bottom right corner. Edit


SUBSCRIPTIONS
Customer1_US_TA

Advanced subscription grid

Subscription type: All | Search | Show costs

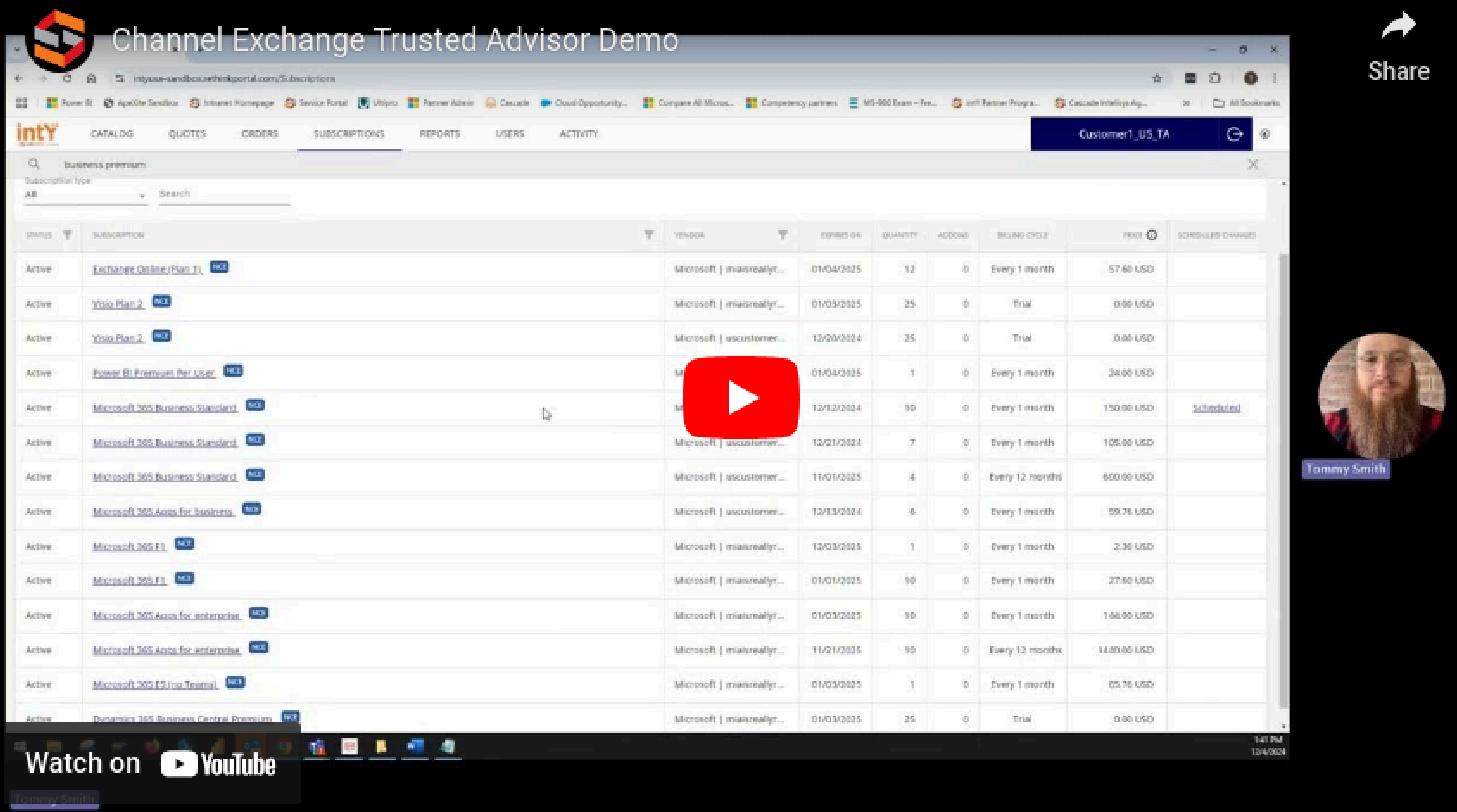
STATUS	SUBSCRIPTION	VENDOR	EXPIRES ON	QUANTITY	ADDONS	BILLING CYCLE	PRICE	SCHEDULED CHANGES
Active	Exchange Online (Plan 1) NCE	Microsoft | miaisreallyr...	01/04/2025	12	0	Every 1 month	57.60 USD	
Active	Visio Plan 2 NCE	Microsoft | miaisreallyr...	01/03/2025	25	0	Trial	0.00 USD	
Active	Visio Plan 2 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	



6) FAQS AND DEMO

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

Channel Exchange FAQs Page



7) SUPPORT CONTACTS

EAST COAST:

ACCOUNT MANAGER
EMMA SCHMIDT
864-286-4518
EMMA.SCHMIDT@SCANSOURCE.COM

BUSINESS MANAGER
MARK SACCO
864-286-4797
MARK.SACCO@SCANSOURCE.COM

CENTRAL:

ACCOUNT MANAGER
MIA PIERCE
864-286-4617
MIA.PIERCE@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

BUSINESS MANAGER
ARIANA WILLS
864-286-2524
ARIANA.WILLS@SCANSOURCE.COM

GENERAL CONTACTS:

ENABLEMENT SPECIALIST
TOMMY SMITH
864-286-4314
TOMMY.SMITH@SCANSOURCE.COM

GENERAL SALES INBOX:

CHANNELEXCHANGESALES@SCANSOURCE.COM

TECHNICAL SUPPORT INBOX:

EXCSUPPORT@SCANSOURCE.COM

THANK YOU!

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