



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





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 logo, a product icon, title, provider, 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) SETTINGS

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

CATALOG QUOTES REPORTS INVOICES USERS SETTINGS ACTIVITY

- **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.

SETTINGS

Theme & UI

Integrations

Currency & Payments

Authentication Management

Customers

T&C

Notification Settings

Organizations

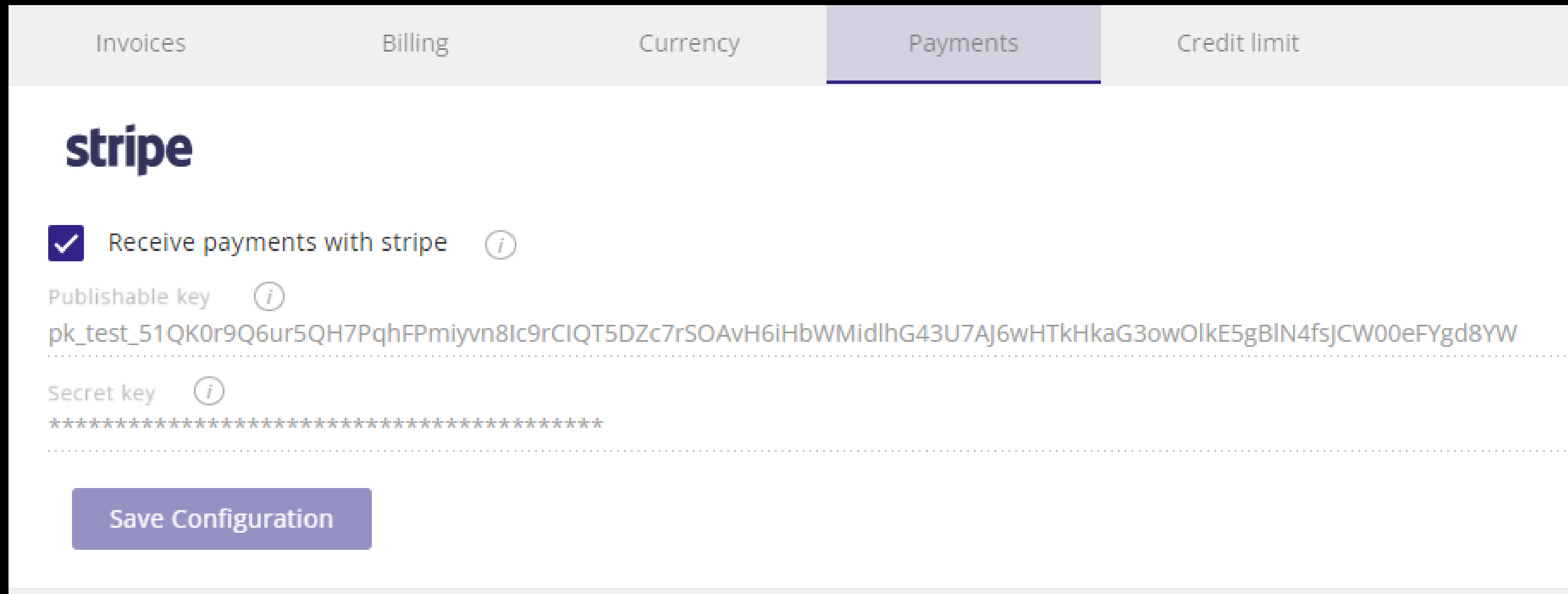
Custom fields

Business Locations



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**.



The screenshot shows the 'Payments' tab selected in the settings menu. The 'stripe' section is active, with a checked box for 'Receive payments with stripe'. Below this, the 'Publishable key' is displayed as 'pk_test_51QK0r9Q6ur5QH7PqhFPmiyvn8Ic9rCIQT5DZc7rSOAvH6iHbWMidlhG43U7AJ6wHTkHkaG3owOlkE5gBIN4fsjCW00eFYgd8YW'. The 'Secret key' is masked with asterisks. A 'Save Configuration' button is located at the bottom of the form.

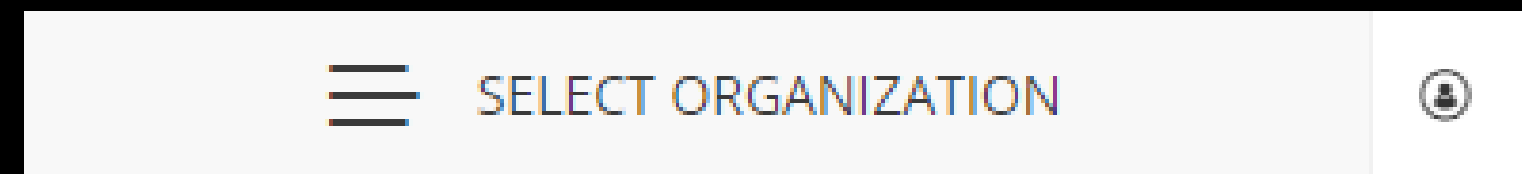
Invoices	Billing	Currency	Payments	Credit limit
stripe				
<input checked="" type="checkbox"/> Receive payments with stripe ⓘ				
Publishable key ⓘ				
pk_test_51QK0r9Q6ur5QH7PqhFPmiyvn8Ic9rCIQT5DZc7rSOAvH6iHbWMidlhG43U7AJ6wHTkHkaG3owOlkE5gBIN4fsjCW00eFYgd8YW				
Secret key ⓘ				

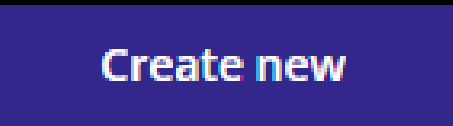
<button>Save Configuration</button>				



3) ADDING A NEW CUSTOMER


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



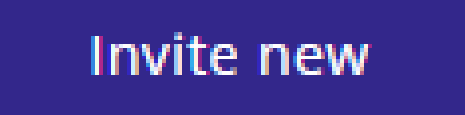
- Select  and follow the prompts:
 - Enter an unique **Registration Number** (we recommend inputting their phone number as it is unique to each end customer)
 - Once the form is complete, select the Create and Approve option

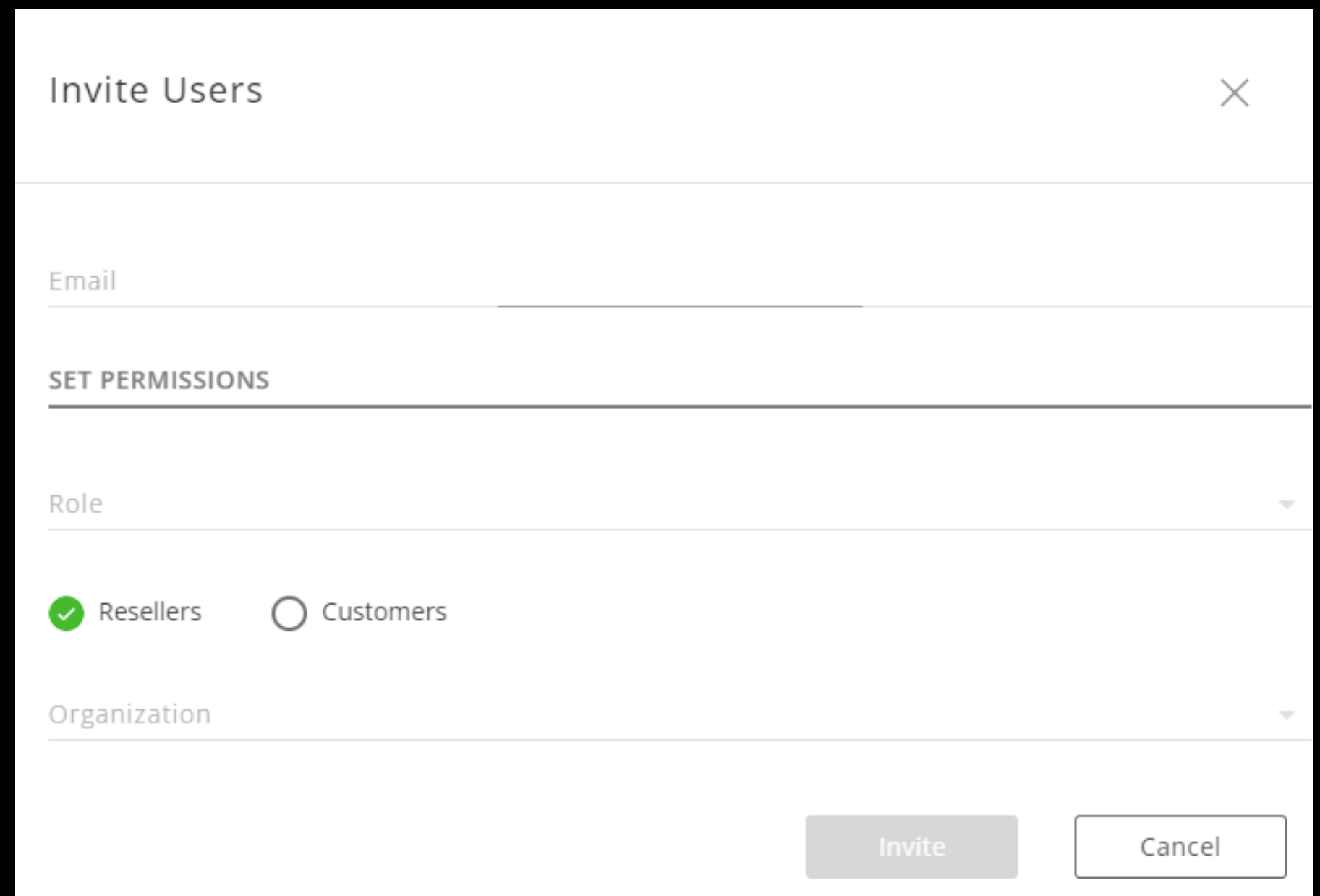


Create organization

GENERAL	PRIMARY ADDRESS
<input type="text"/>	<input checked="" type="checkbox"/> 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	
<input type="checkbox"/> Government	
<input type="checkbox"/> Education	
<input type="checkbox"/> Non-profit	

4) ADDING A NEW USER

- To add a new user to your account, select the Users tab 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.




The screenshot shows a modal window titled "Invite Users" with a close button (X) in the top right corner. The form contains the following fields and options:

- Email:** A text input field.
- SET PERMISSIONS:** A section header.
- Role:** A dropdown menu.
- Role Selection:** Two radio button options: "Resellers" (which is selected with a green checkmark) and "Customers".
- Organization:** A dropdown menu.
- Buttons:** "Invite" and "Cancel" buttons at the bottom right.

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.

PRODUCT CATALOG » MICROSOFT 365 BUSINESS STANDARD » MICROSOFT 365 BUSINESS STANDARD



Microsoft 365 Business Standard

Microsoft

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.

Microsoft 365 Business Standard

Quantity *
1

Tenant Domain *
uscustomerpts.onmicrosoft.com [CREATE NEW](#)

Term duration *
1 year

Billing Cycle *
Monthly

End Date Alignment
None

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.

Invoiced by

Me (intY USA Inc.) My distributor

Price

Grand total
EVERY 1 MONTH USD 25.00

Edit price for this offer
Apply markup for this order. Subscription level markup is constant after each renewal. Catalog level markup on renewal will be updated based on effective markup configuration at the date of renewal.

Markup/discount from seller, %
0 Markup Renew

Customer target price (You sell for)
25

Price table

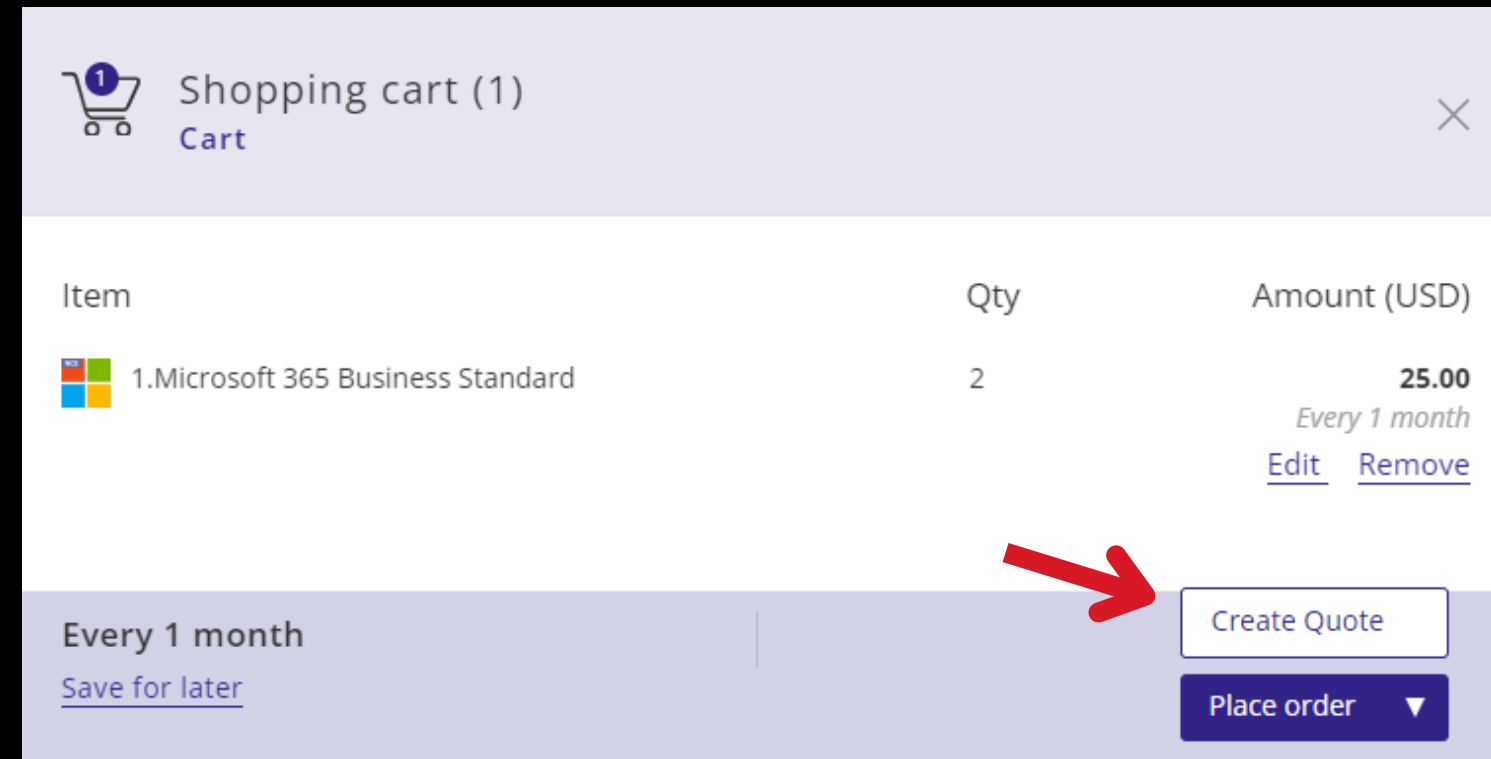
Details			Markup Summary		Profitability		Price		
Partner Tier	Billing cycle	Price Source	Catalog Markup (%)	Subscription Markup (%) ⓘ	Total Markup (%) ⓘ	Margin (%) ⓘ	You buy for ⓘ	You sell for ⓘ	Retail price
Seller	Every 1 month	Retail Price	0 ⓘ	0	0.00	20.00	20.00	25.00	25.00



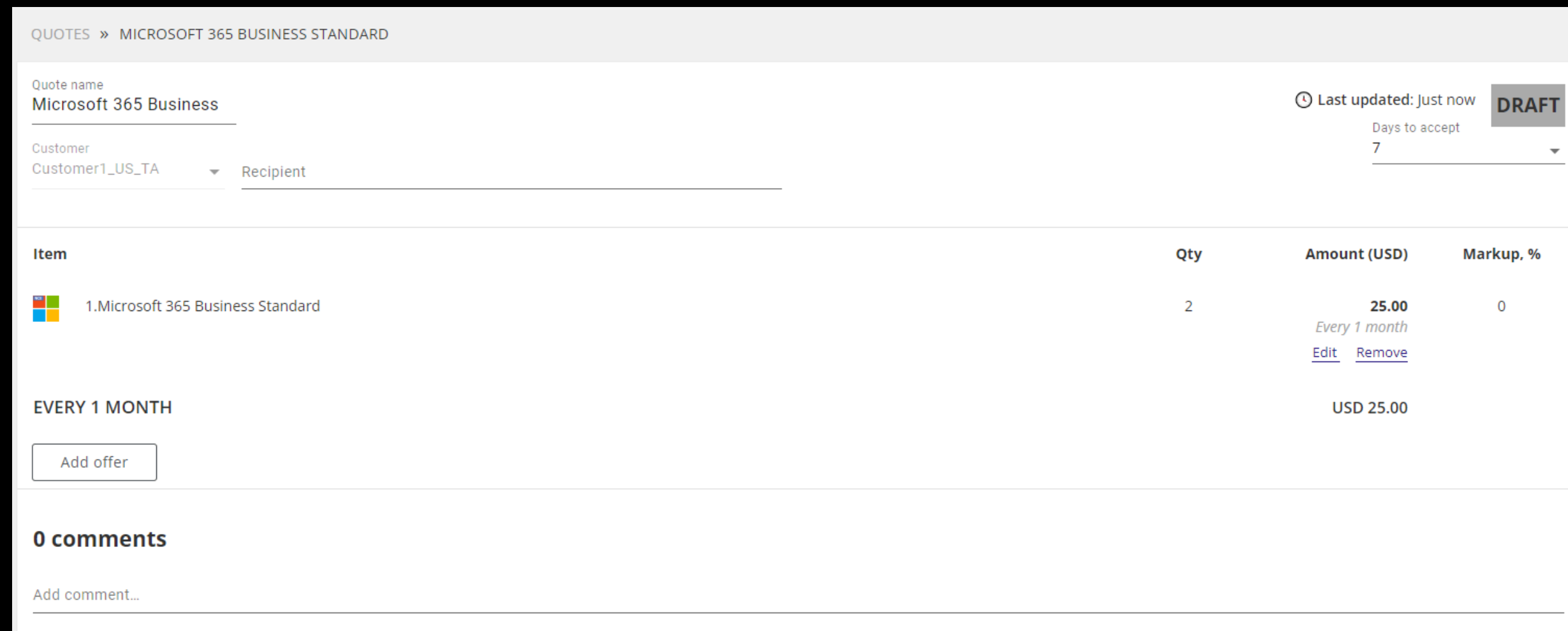
6) CREATING QUOTES



- 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.

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

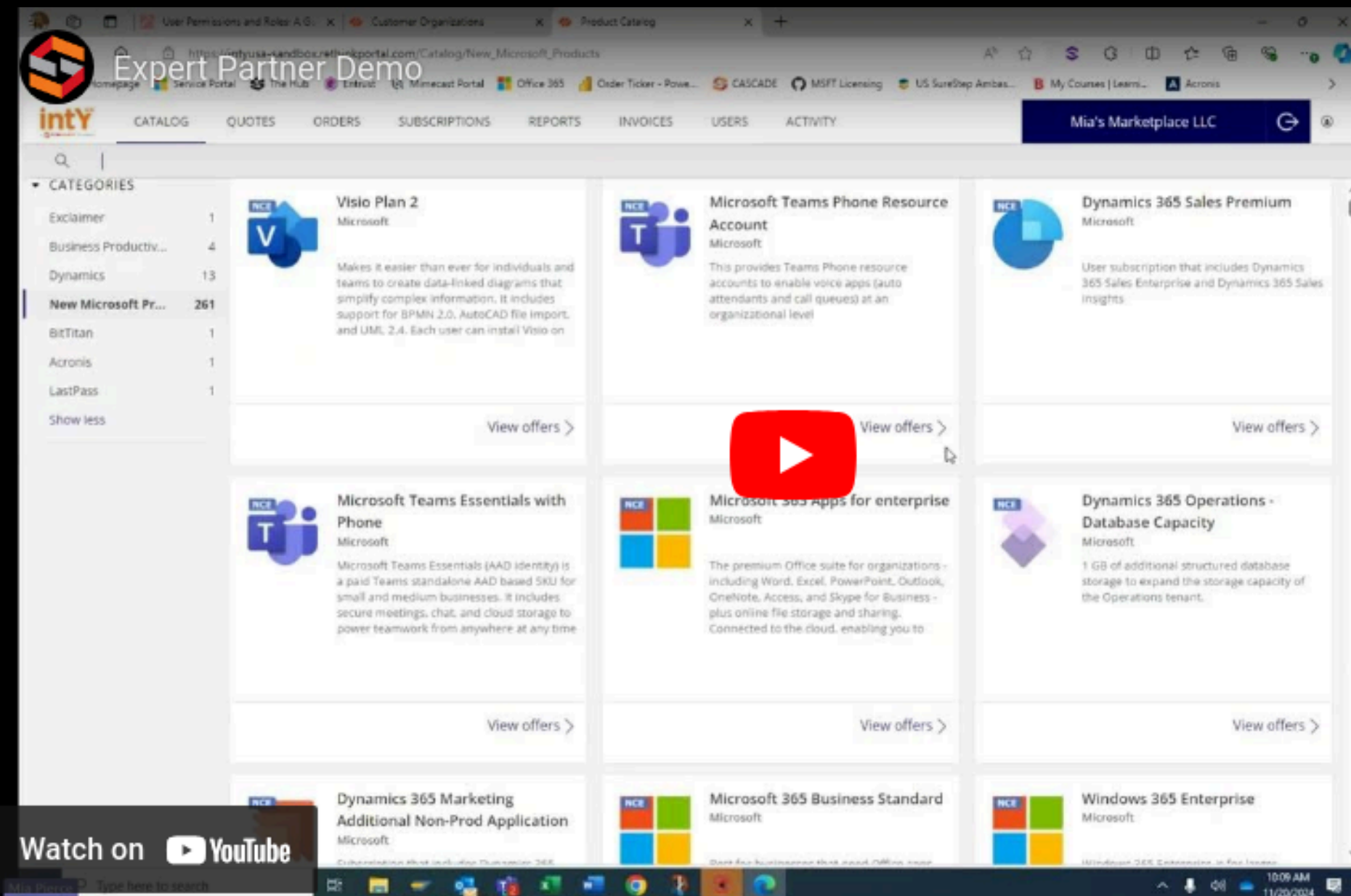
Tenant Domain *
miaisreallyreallyreallycool.onmicrosoft.com

Term duration *
1 month

8) FAQs + DEMO

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

[Channel Exchange FAQs Page](#)



Share



Watch on YouTube



9) 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!



channel
exchange
a scansource® company

