Software Portal

Allen-Bradley

by ROCKWELL AUTOMATION

Reference Manual

Original Instructions

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About This Publication

This document provides information on navigating the Software Portal. To use the Software Portal:

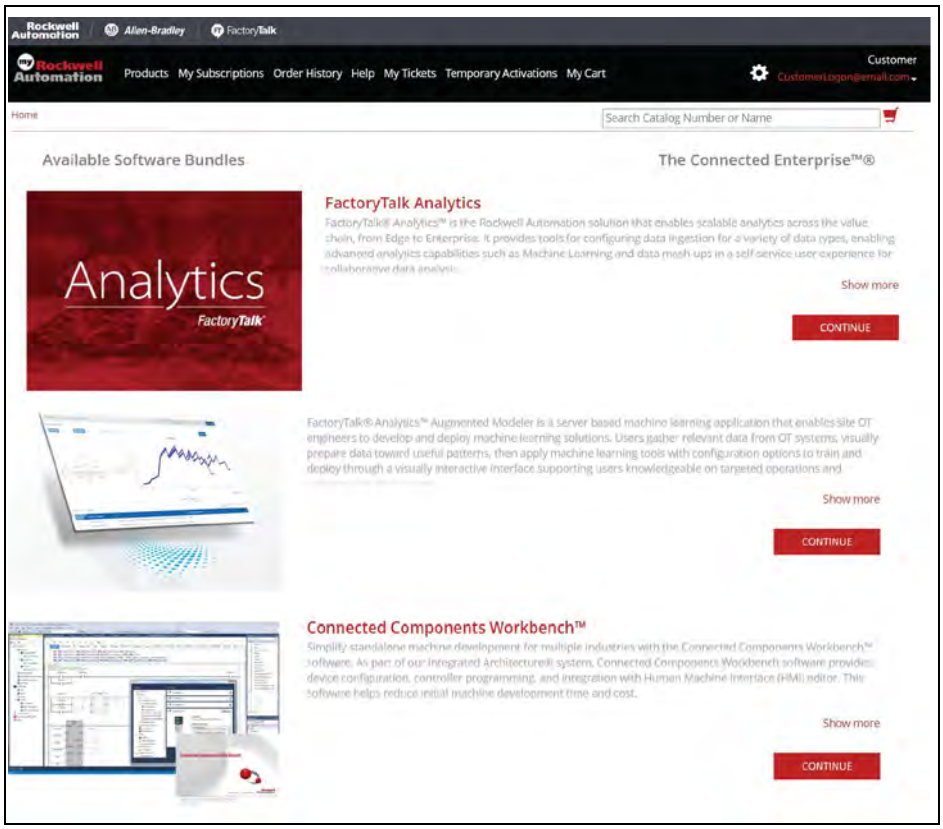
- You must be registered in the Rockwell Knowledgebase system
- You must have a valid sold-to Business Product ID (BPID)

The Software Portal is used by Rockwell Automation customers, distributors, and Rockwell Automation salespeople. The Software Portal is where quotes, software orders, users licenses, orders status and many other functions are managed and performed.

Certain functions are limited based on who is logging into the Software Portal and what functions they are trying to perform.

What is the Software Portal?

1. The Software Portal is part of the myRockwell environment and serves as a software ordering, registration, and license management platform.
2. It is a platform to enable you to have visibility and management of all your software contracts and licenses.
3. The Software Portal is a web-based platform where you can shop and purchase software products that are all bundled with 1 year of technical maintenance and support.



Before You Begin

What to know.

- To use the Software Portal requires registration to the Rockwell Automation Knowledgebase system.
- You can order directly with Rockwell Automation or purchase through your local distributor.
- You must have a valid 'sold-to' BPID (Business Product ID) with Rockwell Automation.
- You must accept the supplemental License Agreement prior to your software order being fulfilled.
- You have an option for a hands-off' approach to purchasing software in the Software Portal.
  - Your local distributor can create quotes and manage licenses for you.
  - You can submit orders via email requests sent to you from the Software Portal.

Benefits of Using the Software Portal

- Software is downloaded, installed, and activated on your computer (or on those you designate as software users)
- Visibility to all your software licenses being used (by whom and where)
- Flexibility to change/modify your software package on each activation at renewal
- Flexibility in the length and start date of the contract
- No direct user interface with the cloud
- First year technical support and maintenance included with all software as well as options for upgrading your support

Download Firmware, AOP, EDS, and Other Files

Download firmware, associated files (such as AOP, EDS, and DTM), and access product release notes from the Product Compatibility and Download Center at rok.auto/pcdc.

How to Login

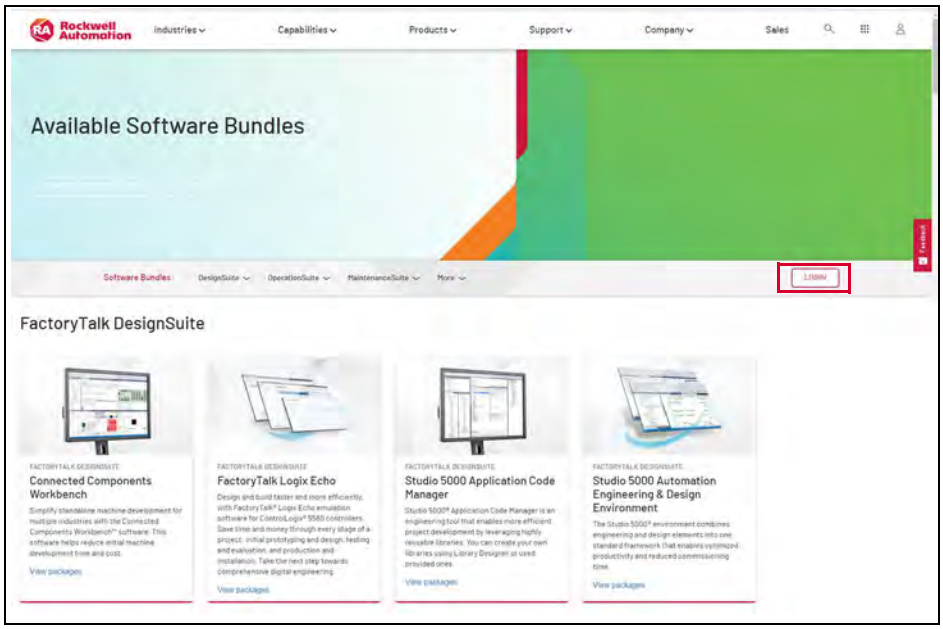
Software Portal Login

Login to the Software Portal on the Rockwell Automation website

www.rockwellautomation.com/en-us/tools/software-subscriptions-updated

The Software Subscriptions page contains a button to login to the Software Portal. The subscriptions page provides information on Rockwell Automation software suites. The page also provides more specific information on software families and products available through the Software Portal.

Click login to begin the process of accessing the Software Portal.



From the Rockwell Automation Home page (www.rockwellautomation.com/en-us/), the Software Subscriptions link is accessible when you click on the tool (waffle) icon on the top right of the page. When the tool menu is displayed, click the Software Subscriptions link.

Sign In

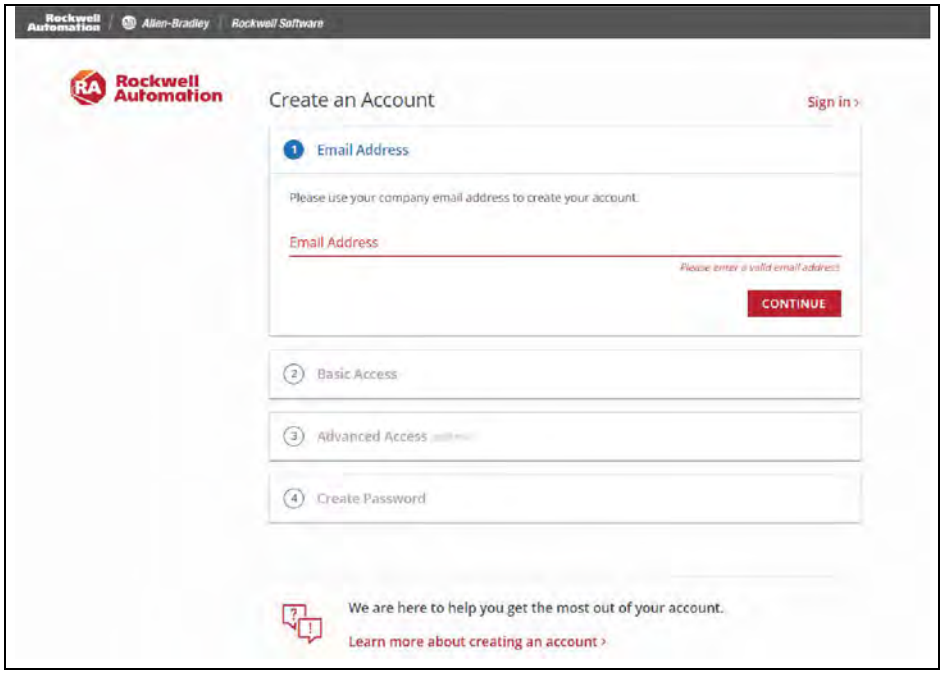
When you click login, the Sign In page will display.

Returning User

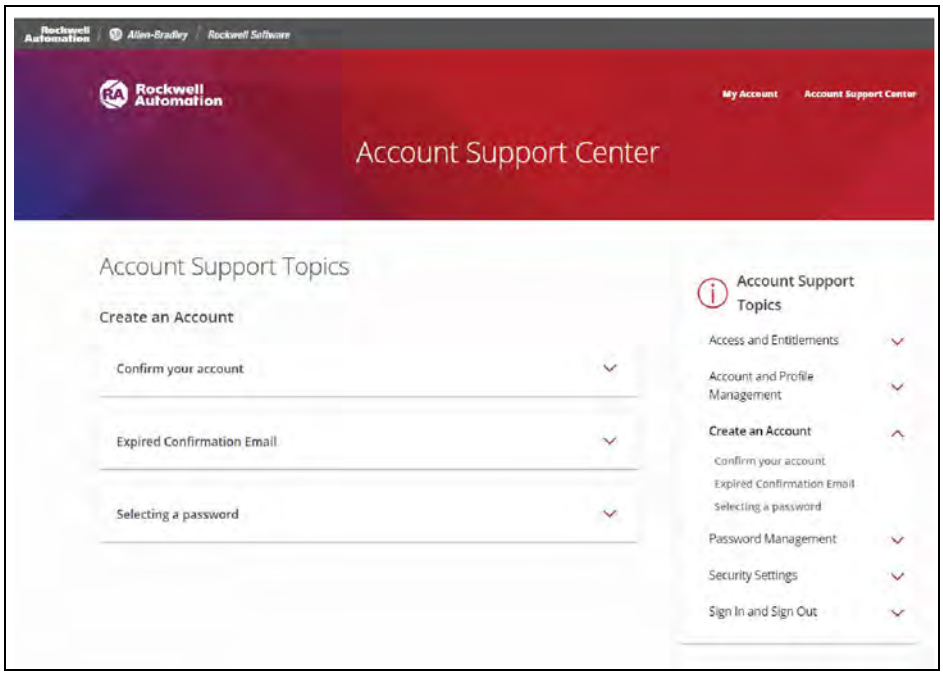
If you are a returning user and have an account, enter your email and password to Sign In.

New User

To create a New User account, you will need to complete all four fields on the Create an Account page. Once you provide all the required information, your account will be automatically created. You will now be able to create a quote or order from the Software Portal.



If you need to learn more about creating account, click the link at the bottom of the Create an Account page.



Support on multiple topics is available under the various menus.

Software Portal Access

Access to the Software Portal is available to all Rockwell Automation customers, distributors, and Rockwell Automation employees. The portal functions differently for each type of user. The functions that a user will be able to access will vary depending on the type of user.

- Rockwell Automation customer
  - Owner
  - Software User
  - Software Administrator
- Distributor
- Rockwell Automation employee

Users in the Software Portal only have access and privileges within the Software Portal environment. Users do not have access or privileges in other business systems.

IMPORTANT The Software Portal Online Help contains a list of video tutorials for help with the Software Portal.

Rockwell Automation Customer

Owner

The owner has the responsibility for the purchase, upgrade, and renewal of contracts, managing licenses, and assigning users to licenses. The owner provides visibility to all the offerings and management capabilities of the contracts for their company.

The owner is the person who completes the order process, assigns software users, and software administrators. Owners will also automatically be set up as software users. Owners will receive renewal notification emails when their contract is within 120 days of expiration.

An owner can assign the contract (or quote) to another person within their company to be added as an additional owner and manage the contract. The owner can transfer the contract to a new owner at a new company, as in the case of an OEM or systems integrator.

The owner has the ability to assign software users to activation licenses during the quote process or when the contract is released and active.

The owner will receive an Owner Welcome Kit email with software download and license information when an order is submitted.

Software User

Software users have software licenses (activations) assigned to them. Software users are assigned licenses (activations) from an owner. Software users receive activation and software download information from a User Welcome Kit email.

Software users have visibility to all offerings in the Software Portal. They also have the ability to create and view quotes.

If you are an OEM or Systems integrator, you can assign licenses to your users.

Software Administrator

It is recommended as a best practice to assign a software administrator. The software administrator manages licenses, users, and can be notified of upcoming renewals. The software administrator has visibility and management capabilities to all offerings and contracts across multiple sites. An owner only has visibility to their contracts.

The software administrator is created by the owner.

Distributor

Distributors can create and assign quotes to customers. They cannot complete the order process or renew a quote on behalf of a customer. They can only assign users software licenses to quotes, not active contracts.

Rockwell Automation Employee

Rockwell Automation employees can create and assign quotes to customers. They cannot complete the order process or renew a quote on behalf of a customer. They can only assign users software licenses to quotes, not active contracts.

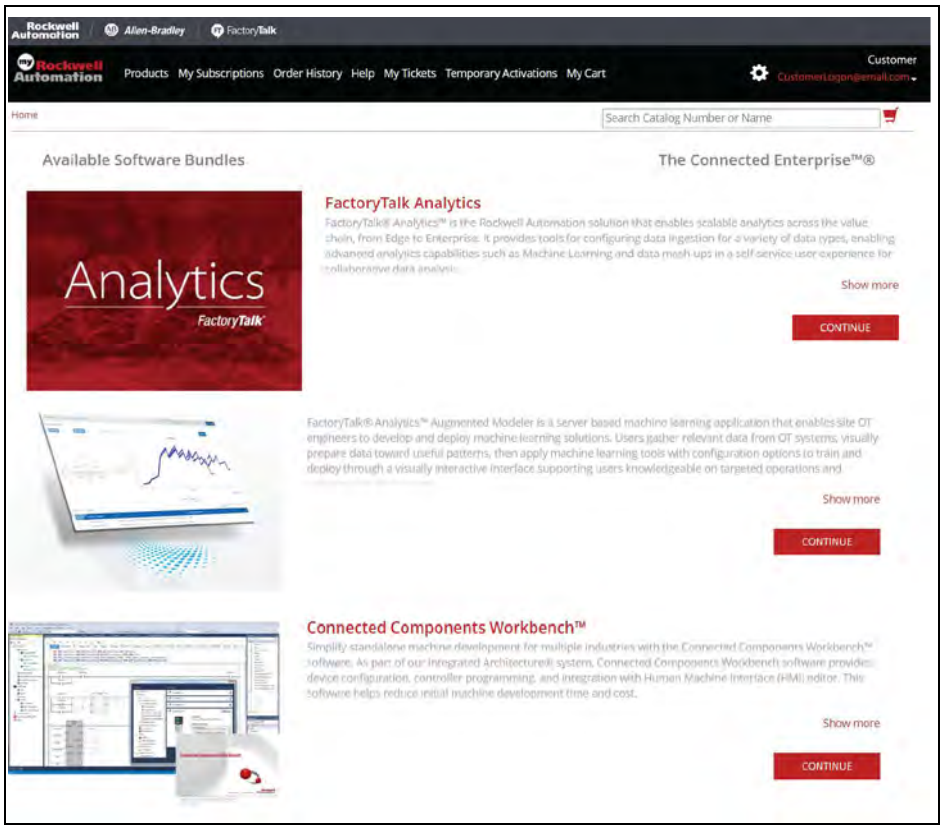
Software Portal Overview

Software Portal Home Page

The Software Portal is part of the myRockwell environment. You will be able to manage all of your software contracts and licenses from the portal. The Software Portal is a web-based platform where you can:

- Select software
- Purchase software
- Register software
- Manage software licenses
- View and manage software contracts

The Software Portal Home page is the first page you see when you login.



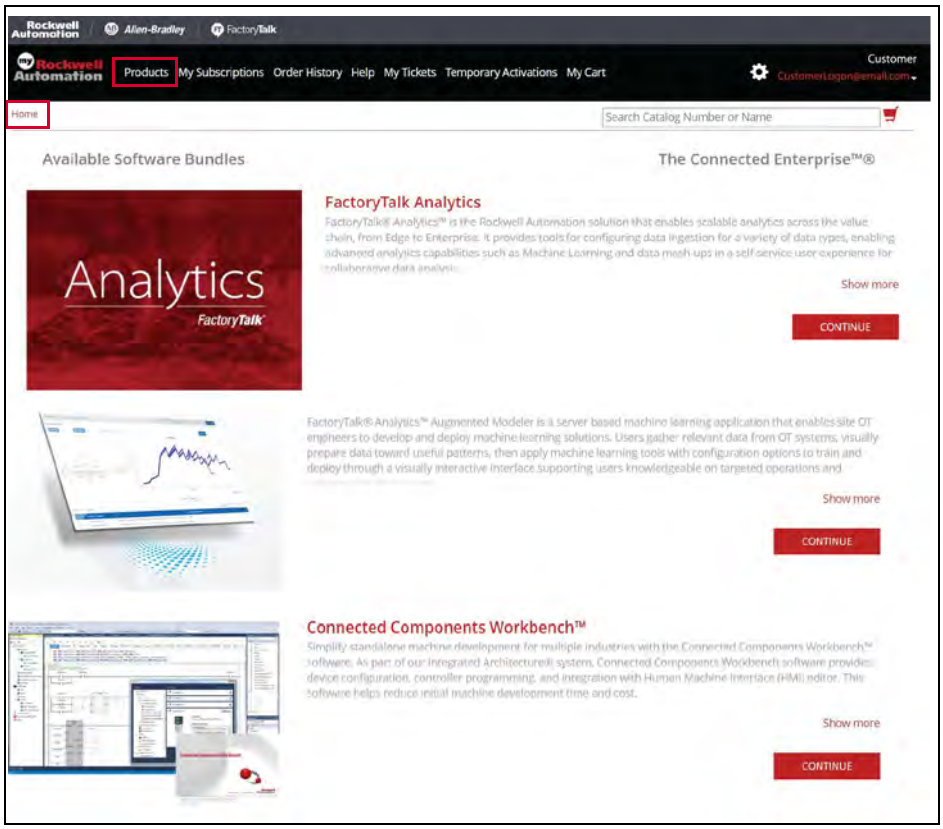
From this page, you will be able to navigate through the Software Portal pages and links to:

- Download, install, and activate software
- View usage of software licenses
- Modify your software package
- Technical support and maintenance
- Change length and start date of contracts

Products

The Home page is the first page you see when you login to the Software Portal. It is also available when you click Products in the main menu.

The Products (Home) page lists the software available for purchase in the Software Portal. It is from this page that you can begin the quote, order and purchase process.



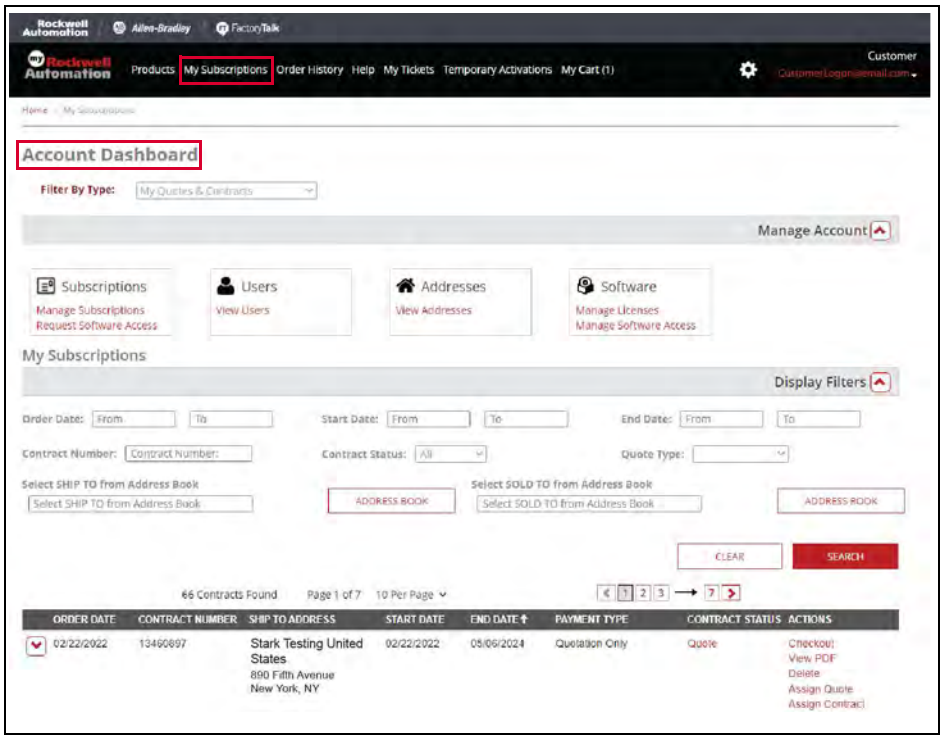
My Subscriptions

Click My Subscriptions to go to your Account Dashboard. The Account Dashboard page provides visibility and access to the contracts assigned to you and your company. All contracts are identified by the contract number.

The cross reference for your Purchase Order number to the contract number is found in your Owner Welcome Kit email.

This page also provides multiple navigation links for advanced functionality to add software users to licenses, manage licenses and activations, check order status, and manage contracts.

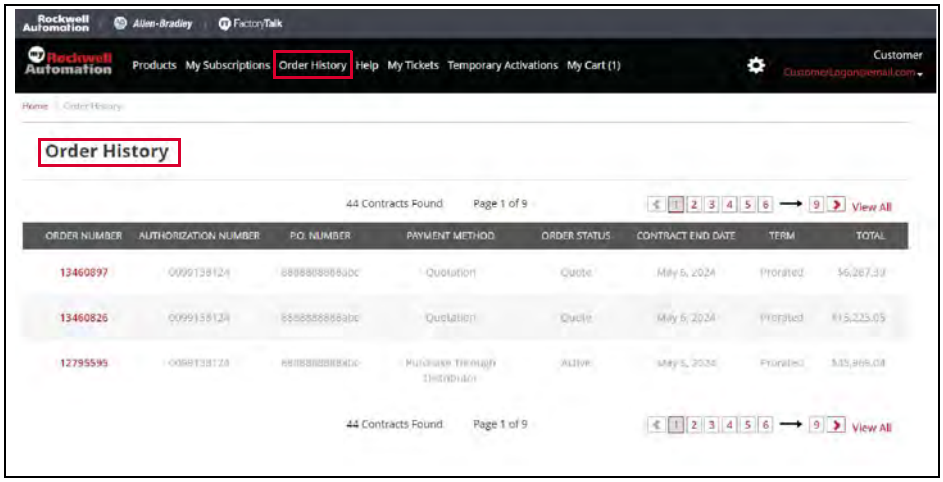
The functionality visible on this page is dependent on the role of the user who signs in. Owners, administrators, and users will have slightly different options and actions available to them when viewing this page.



Order History

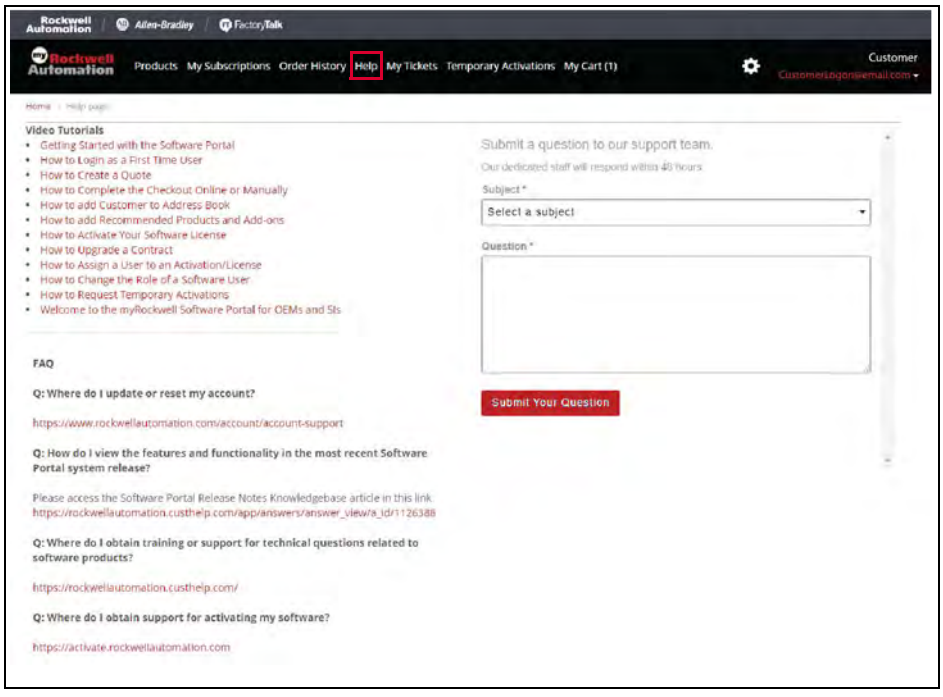
The Order History page shows the history of all your past orders and quotations.

A contract will stay in the originator's Order History even if the contract has been transferred. To find a contract originated by someone who is no longer at your company, use the Archived Quotes filter to search for the contract.



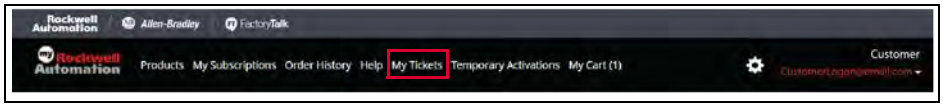
Help

The Help menu provides links to several video tutorials, answers the most common questions, and enables you to submit inquires directly to the Software Portal support team.



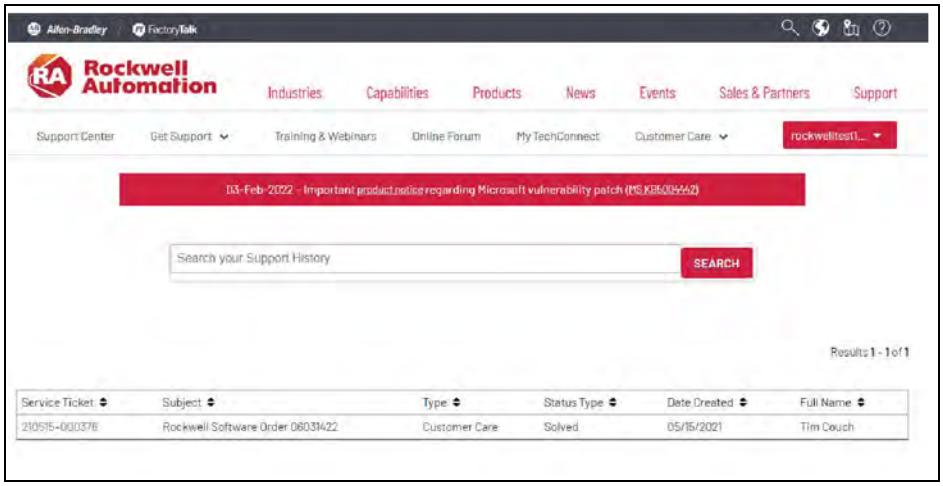
My Tickets

Click My Tickets to view tickets for your account.



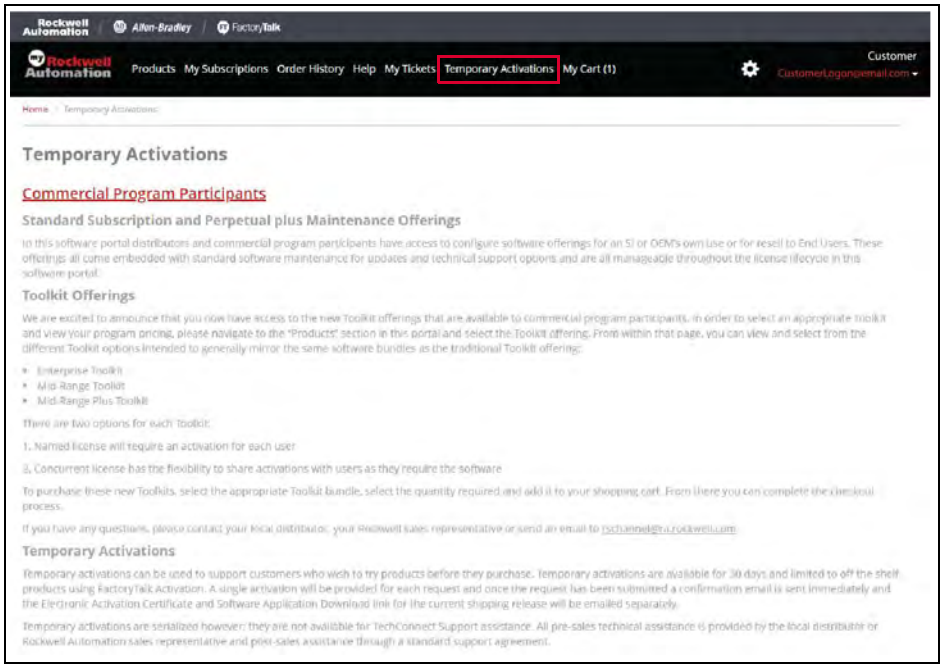
When you click My Tickests, a new window for the Rockwell Automation customer support page will open. Here, you will see active Service tickets for your account.

Service Tickets are created when you submit questions through the customer support question submission on the Help page. The Help page is the page where you would contact the Software Webmaster team.



Temporary Activations

The Temporary Activations page is available for Commercial Program Participants. You can also look up products from this page.

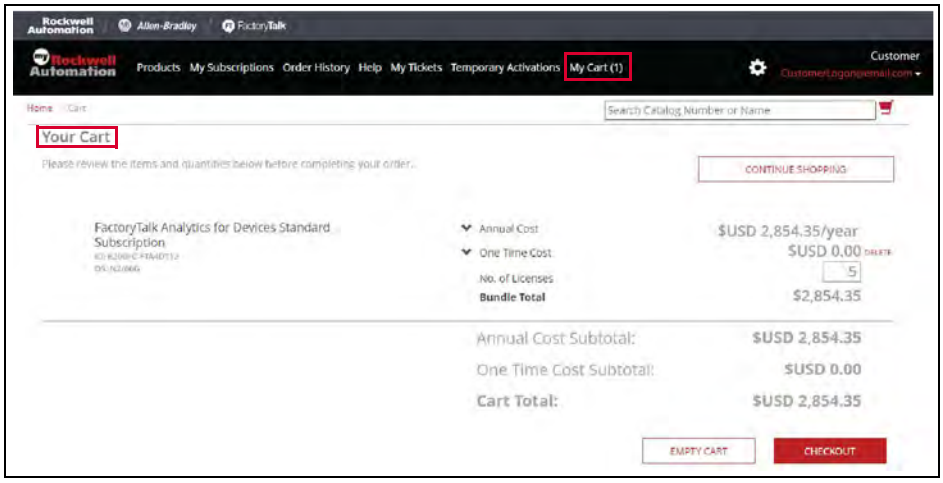


My Cart

Click My Cart in the Software Portal menu to go to the Your Cart page. The Your Cart page shows the products selected for a quote or order. The page shows associated pricing and terms for products in annual and one-time costs.

Annual costs include subscription licenses, maintenance, and support costs. These items are then renewed at the end of the contract term.

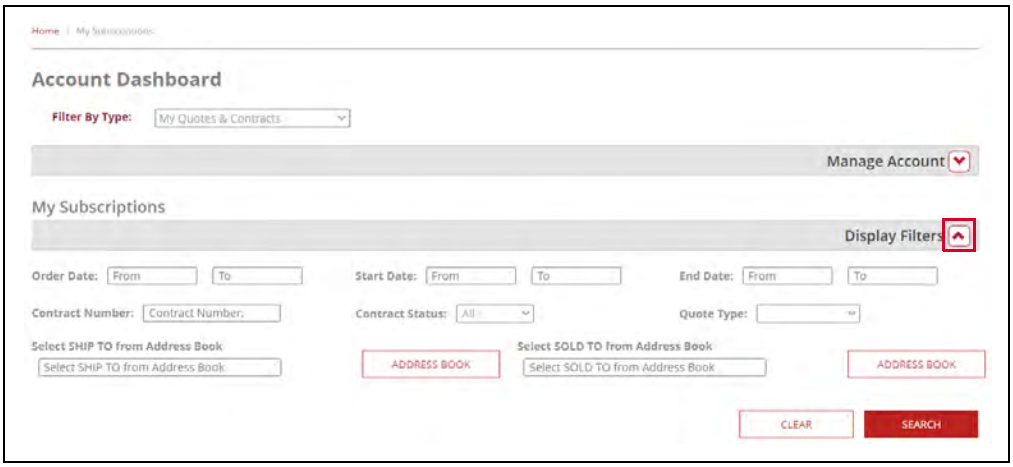
One-time costs include perpetual software licenses. Since they are a one-time buy, you own the license forever. However, the associated first-year software maintenance and support for the perpetual license is an annual cost that needs to be renewed before contract end date.



Display Filters Bar

Click the expansion arrow on the Display Filters bar to view the additional filter options.

- Order Date
- Start Date
- End Date
- Contract Number
- Contact Status
- Quote Type
- SHIP TO
- SOLD TO

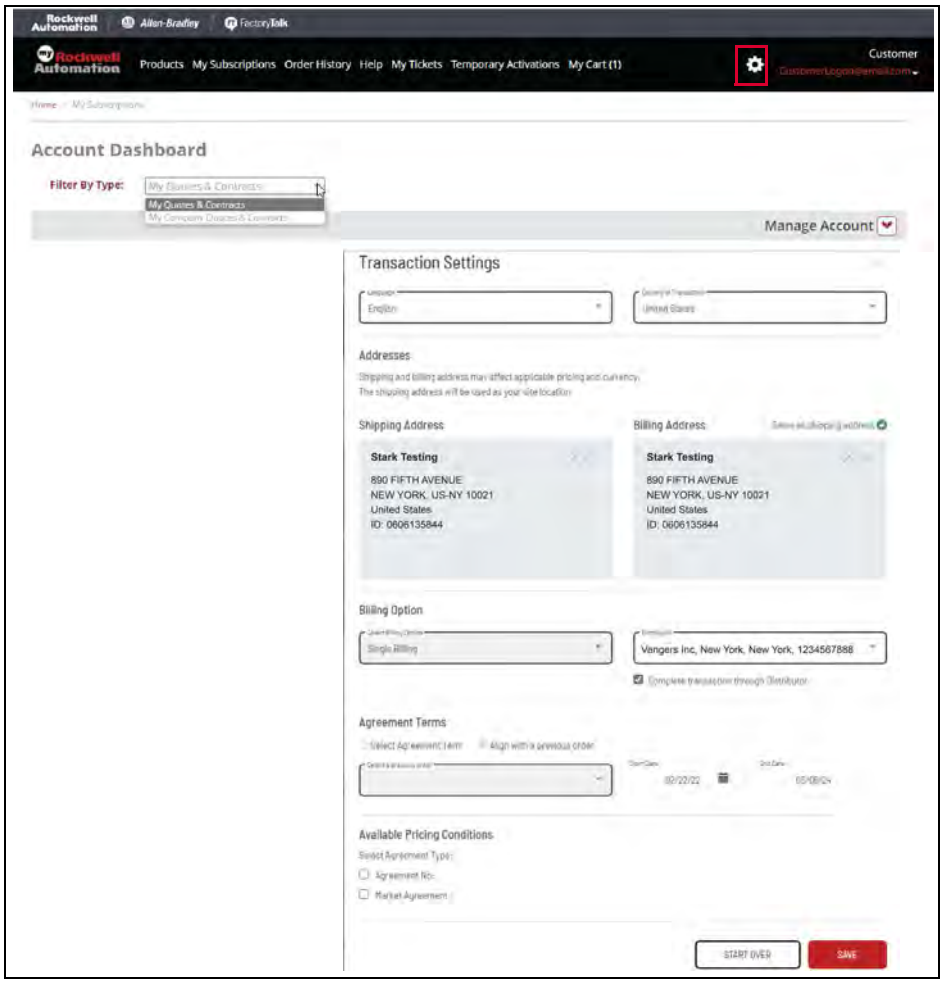


Transaction Settings

Click the gear icon on the top right of the Software Portal menu to display Transaction Settings. Transaction Settings allows you to set basic settings for your contract that will be saved and applied to your transactions each time you create a new quote or order.

These settings include language, country of transaction, shipping and billing address, billing options, agreement terms, special pricing agreements and choose if your purchase will be direct to Rockwell Automation or purchased through a distributor.

The first time you sign into the Software Portal, it is recommended that you configure your Transaction Settings. The Transaction Settings need to be configured once. When saved, the settings will be applied to your transactions.



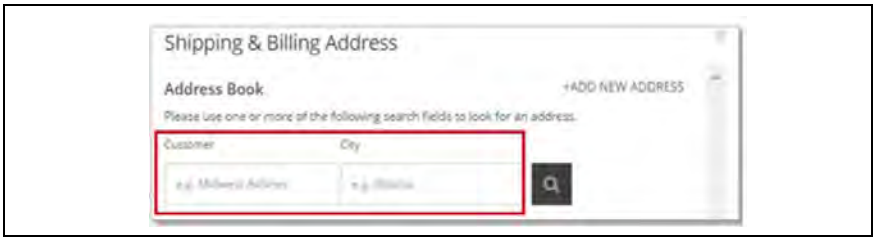
Configure Transaction settings

Language and Country

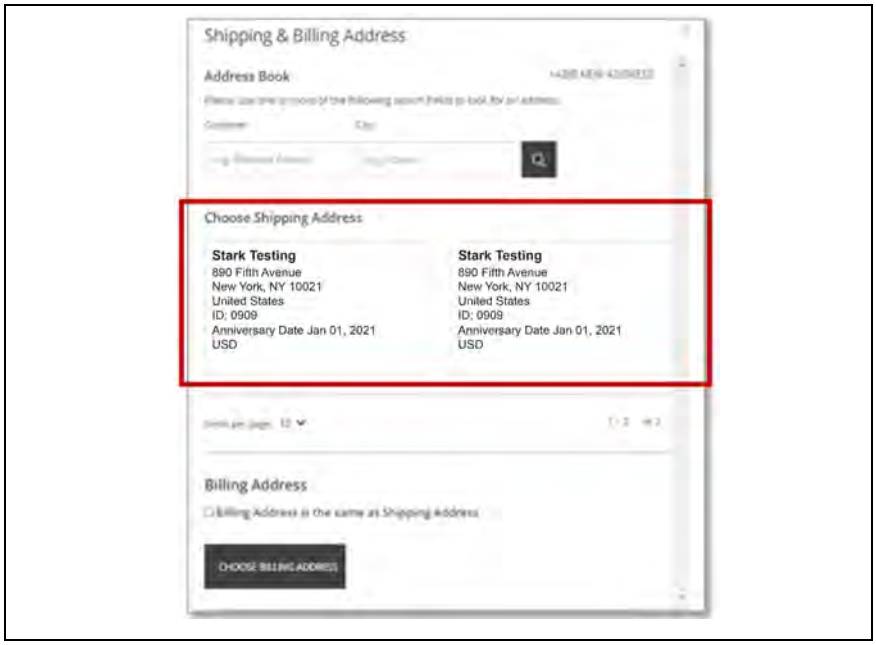
Select the desired language

Shipping and Billing

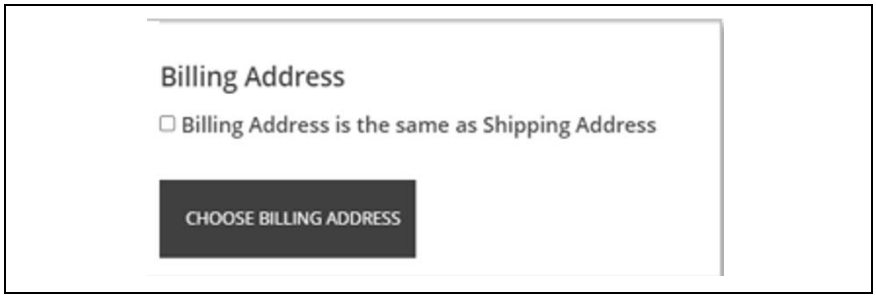
1. Select your shipping address by clicking the Add icon (pencil).
2. Enter the customer information into the Customer and City fields
3. Click the search function to find and guarantee that primary accounts are being used.



4. Click the address for your location that appears.



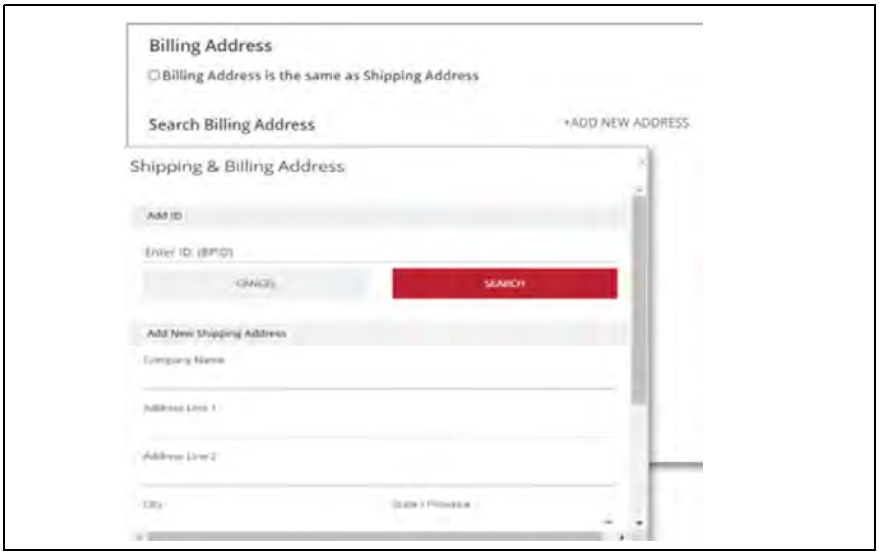
5. When choosing your billing address, you can simply click the Billing Address is the same as Shipping Address box or you can click CHOOSE BILLING ADDRESS to bill a different address.



6. When choosing to search for a different company billing address, it is recommended that you use the built-in search feature. Type in the company name and city and click the search icon. The Primary address locations for companies that are setup with Rockwell Automation will appear.

7.

If the searched address is not found, you can use the +ADD NEW ADDRESS link to search for an address using a BPID.



The +ADD NEW ADDRESS does not guarantee that the BPID and address is a primary account, it may be a secondary account. Please contact the Master Data team to have your address and BPID added as a primary account, masterdatagroupNA@RA.rockwell.com.

If your address does appear at all, please contact the Master Data team at the email listed above.

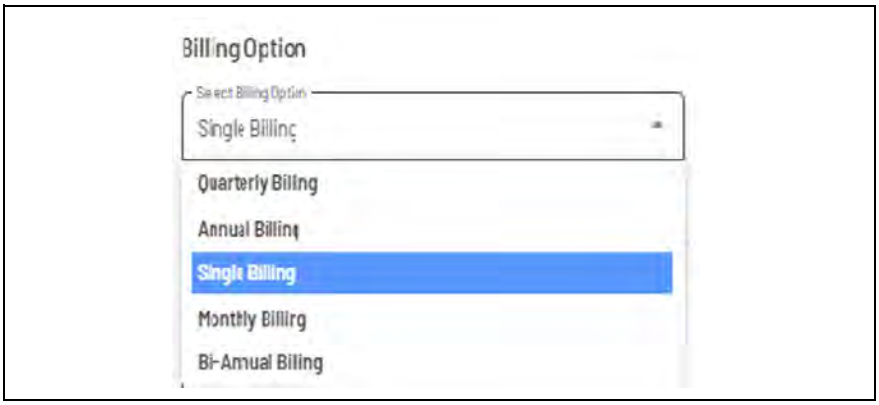
Enter Contract Details

In this section, you can set the date for when your contract will start, how often to be billed, the billing terms, and whether the order will be purchased through a distributor or direct with Rockwell Automation.

Billing Options

Multiple billing options are available for your contract:

- Quarterly
- Annual
- Single Billing (One-time Multi-Year)



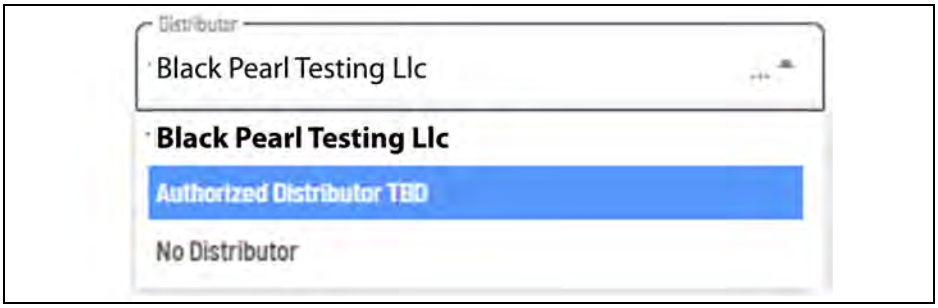
- Monthly
- Bi-Annual

Distributor Option

The distributor field is pre-populated with the in-APR distributor closest to your company based on the distributor locator.

The distributor can be modified. You may select another distributor in the dropdown list, Authorized Distributor TBD or No Distributor if purchasing direct.

If TBD, type in the name and address of the desired distributor. Add any additional special comments if necessary.



For a direct purchase, uncheck the Complete transaction through Distributor checkbox and select no distributor.

Agreement Start Date Options

The Agreement Start Date is the day your software contract begins.

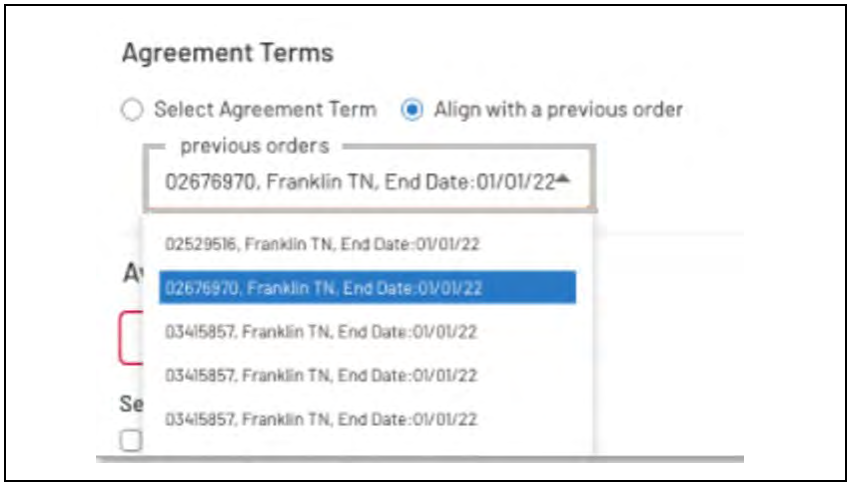
- Invoicing is applied
- Maintenance and support begin
- Owner and User Welcome Kits containing software download and activation information will be emailed.

The Software Portal provides three options for selecting your start date.

- Align to a Term
  - Select the contract start date and how many years you would like the contract to be for; 1–5 years are supported.
  - If you have a TechConnect agreement with Rockwell Automation, the agreement term will default to the TechConnect anniversary date. Your contract will be prorated based on the number of days in the contract period.

The agreement start-date defaults to today's date. The start date can be changed to a future date.Align to an Anniversary Date

- Align to a previous order
  - Select from the list of past orders to align your new contract date to. You can select the start and end dates to adjust the date as necessary and your contract will be prorated accordingly.



- Align to an Anniversary Date

Delaying the Start Date of a Contract

If you would like to delay the start of the contract, select the date in the future and the contract will start on that date. You can also choose to use the start date to align with the ship date of materials.

IMPORTANT Effective immediately for Information Solutions orders, if the contract or service starts in the future, the contract start date (CSD) is not changeable in the period of 90 days before contract/service starts. This includes ThingWorx, Vuforia, Onshape, Windchill, PTC learning, MES, FactoryTalk® Analytics, and other IS applications.

If the contract start date is more than 90 days out and the contract start date needs to be extended further into the future, you may request a start date adjustment by submitting a request through the support team question function on the Help page

Select Available Pricing Agreements

The Software Portal will automatically search for any pricing agreements that you have negotiated with Rockwell Automation.

If applicable, select the Agreement Type and/or choose the radio button next to the agreement that applies. Only one agreement at a time can be applied.

Click SAVE to store all your Transaction Settings for future portal orders.

How to Order

Order Workflow Options

It takes a few easy steps to create quotes and submit them for purchase in the Software Portal. From within the Software Portal, you can place orders through your local distributor or Rockwell Automation.

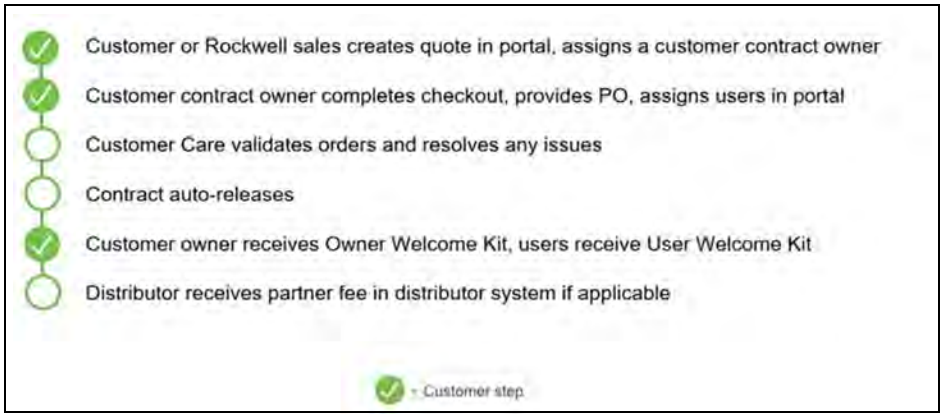
If you prefer a 'hands off' approach to using the Software Portal, your distributor can create a quote on your behalf.

There are multiple ways to order and purchase software:

- Direct Order
- Purchase Through Distributor
- Hands Off

Direct Order

The customer or a Rockwell Automation sales representative manages the purchase of software and maintenance contracts.



Quote Creation

The customer or a Rockwell Automation sales representative navigates through software suite options and bundles to select software and maintenance packages. When the customer is satisfied with the order, an Owner is assigned and the quote is submitted.

Order Process

To complete the order process, the Owner:

- Provides PO information
- Assigns users
- Reviews the order
- Clicks checkout

Validation

Customer Care representatives will contact the Owner to validate the order and resolve any issues that may arise.

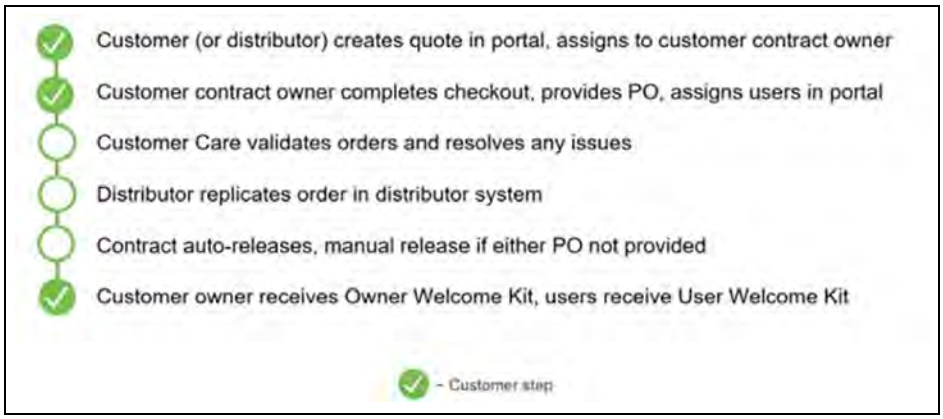
Contract Auto-Release

On the agreement start date, the Owner is sent a Welcome Kit in an email with instructions and contact information. Users that were assigned software will receive a Welcome Kit with download instructions.

Distributor receives a partner fee in the distributor system if it is applicable.

Purchase Through Distributor

The customer or distributor takes control and manages the selection of software and maintenance contracts. If the distributor creates the quote, they will assign the customer as the Owner to complete the order process.



Quote Creation

The customer or distributor navigates through software suite options and bundles to select software and maintenance packages. An Owner is assigned.

Order is Completed

To complete the order process, the Owner:

- Provides PO information
- Assigns users
- Reviews the order
- Clicks checkout

Validation

Customer Care representatives will contact the Owner to validate the order and resolve any issues that may arise.

Distributor Replication

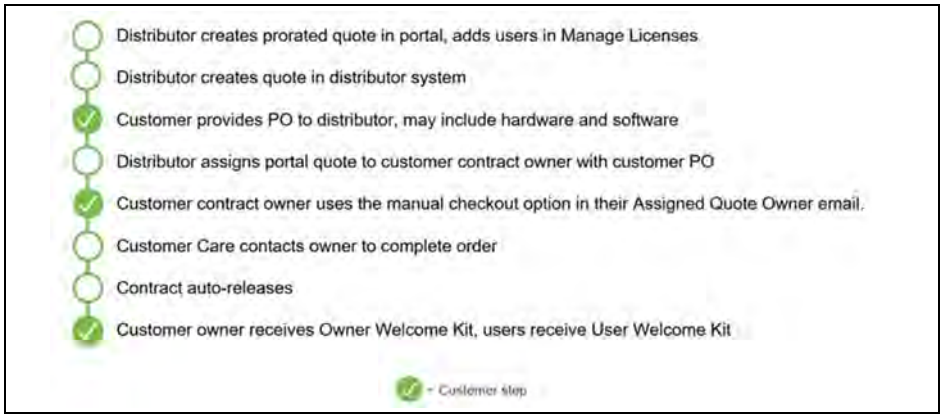
The Distributor replicates the order in the distribution system.

Contract Auto-Release

On the agreement start date, the Owner is sent a Welcome Kit in an email with instructions and contact information. Users that were assigned software will receive a Welcome Kit with download instructions.

Hands Off

The distributor manages the selection of software and maintenance contracts. The customer must provide the distributor with a PO and users to assign software licenses to. The distributor may also need hardware and software information to be provided by the customer prior to an order being submitted.



Quote Creation

The distributor navigates through software suite options and bundles to select software and maintenance packages base on information provided by the customer. The distributor:

- Assigns users
- Creates a quote in the distributor system

When the distributor completes the quote, an email is sent to the Owner with quote information to complete the order.

Customer Provides Information

To complete the order process, the customer must provide the PO to the distributor. The customer will also need to provide software and hardware information if needed.

Owner Assigned

Once the distributor receives the required information, the quote is assigned to an Owner with the PO that was provided.

Owner Completes Order Process

The Owner completes the order process through the checkout option that is provided with the Assigned Quote Owner email.

- Reviews the Order
- Clicks checkout from email, no login required to the Software Portal.
- Repeat customers will have order placed on their behalf.

Validation

Customer Care representatives will contact the Owner to validate the order and resolve any issues that may arise.

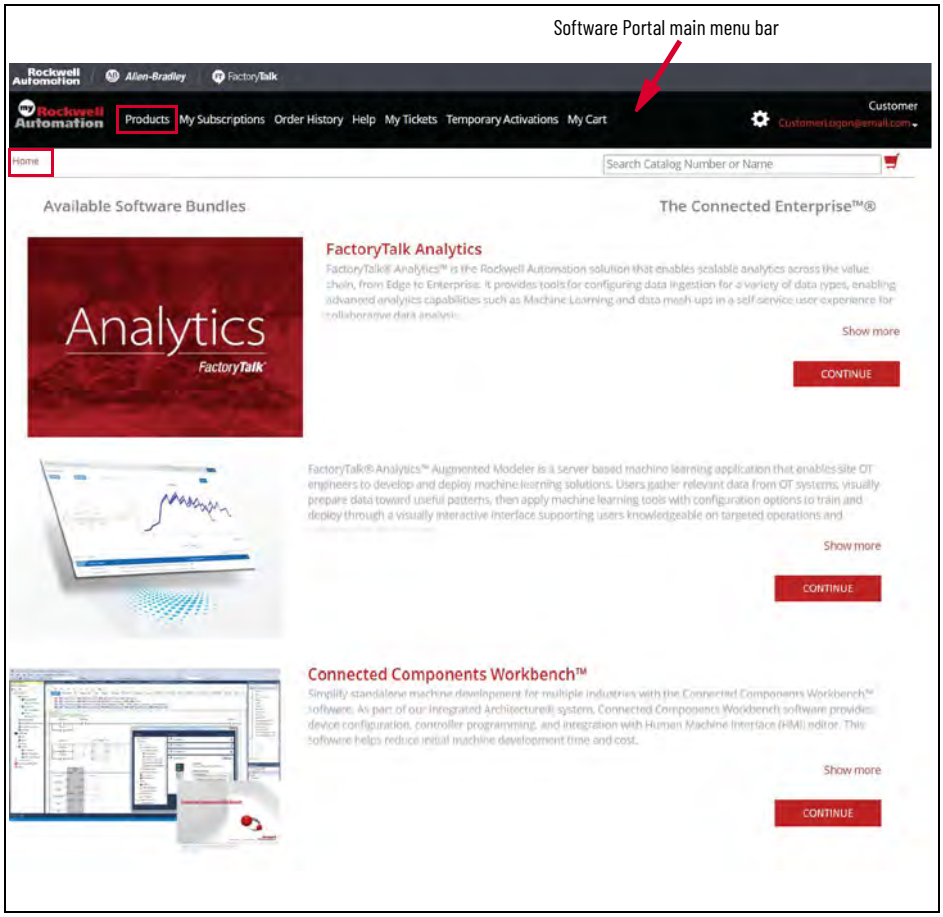
Contract Auto-Release

On the agreement start date, the Owner is sent a Welcome Kit in an email with instructions and contact information. Users that were assigned software will receive a Welcome Kit with download instructions.

Software Portal Home Page

Product Menu

The Software Portal Home page is the first page you see when you login. You will also be taken to this page when you click Products on the main menu bar. The Home page is where you can view the available software bundles and start your quote and order process.



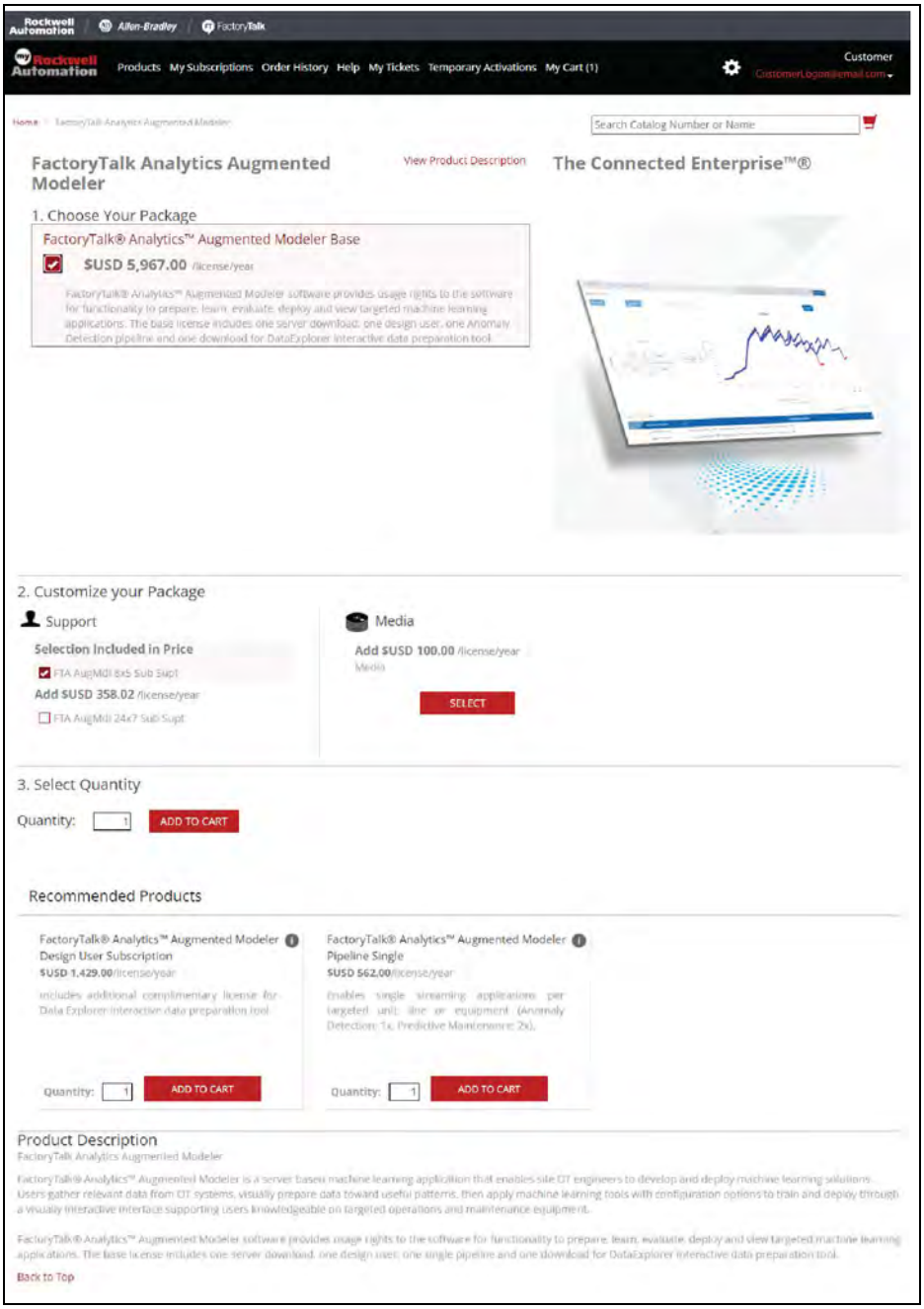
Click CONTINUE or the product brand listing to view the various software and purchase options available. If you know the catalog number, enter that in the search bar to start your quote and order.

Software Bundles

When you select a bundle, the brand page for the bundle will display. You can simply explore the offerings per brand or begin the order process by starting a quote.

From the brand page you can:

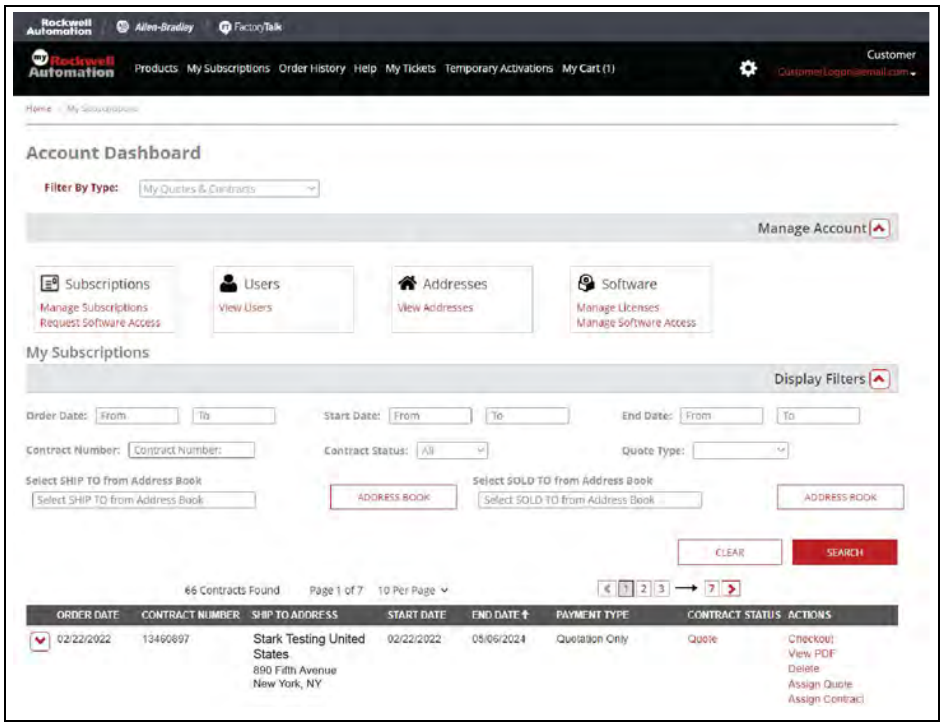
- Choose your package
- Customize your package
  - Select support type
  - Select media
- Select the quantity
- Add recommended products
- Review the product description



My Subscriptions Overview

Account Dashboard

When you click My Subscriptions on the main menu bar, the Account Dashboard page will open. The Account Dashboard page is where you manage your accounts, contracts, and subscriptions. Here you can control user licenses, upgrade and buy software, renew contracts, and view your order status.



The state the contract is in (Quote, Assigned, Approved, Submitted, Active, On Hold, Expired, and Canceled) will determine the actions an owner can take in Manage Subscriptions. The actions will appear in red and will be displayed on the far right of the contract.

Order Status	Who takes next Action	Action to take
Quote	Customer	After creating a quote, the customer can click Generate a quote. The customer can assign a quote owner directly from the Quote Confirmation page or Quote Confirmation email. The Order Status is changed to Assigned. **OR** After generating a quote, the customer can click Submit to complete the checkout process and submit an order. The Order Status is changed to Submitted
Assigned	Customer	The customer owner receives the owner assignment email with instructions to complete the checkout. The email provides steps to complete the online checkout process. The customer may log in to the software portal to complete this task or Initiate Manual Checkout from the link in the email. A customer care representative will contact the customer for order information. The Order Status is changed to submitted in either case.
Submitted	Customer	Receive an email copy of the Order Acknowledgment confirmation
Submitted	Software Portal Customer Care	The order is submitted into the Rockwell Automation system and automatically released. Rockwell Automation customer care will receive an order acknowledgment and validate the order as needed. The Order Status is changed to Active.
Active	Customer	The customer receives the welcome kit email on the contract start date. The owner can assign software licenses to users.
Active	Software Portal Customer Care	The contract is created.
Expired	Customer	The customer can choose to renew the contract via the Renew link on the My Subscriptions page. Clicking Renew creates a new quote to submit for purchase through the checkout process.
Cancelled	Customer	The customer can choose to requote the order using the Buy More link on the My Subscriptions page. Clicking the Buy More link creates a new quote to submit for purchase through the checkout process.

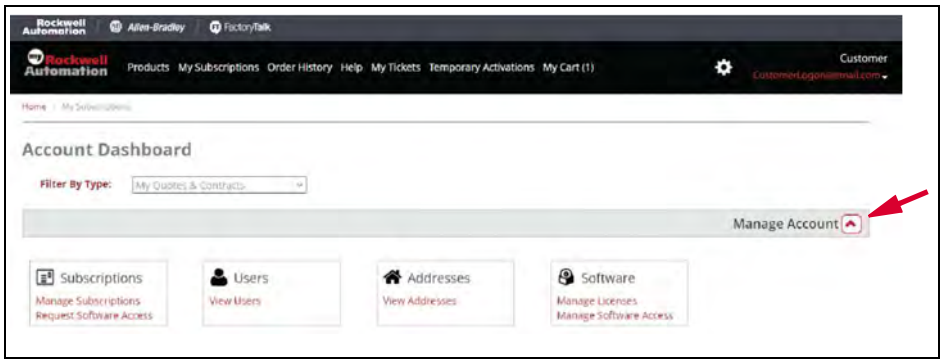
Filter by Type

With Filter by Type, you can filter by My Quotes & Contracts or My Company Quotes & Contracts. You can filter to see the quotes and contracts that only you are the owner of. If you have Software Administrator privileges, you can see the quotes and contracts of your entire company

Manage Account Bar

Click the expansion arrow on the Manage Account bar to view the additional control options.

- Subscriptions
- Users
- Addresses
- Software



Subscriptions

The Subscriptions sub-menu contains the Manage Subscriptions and Request Software Access links.

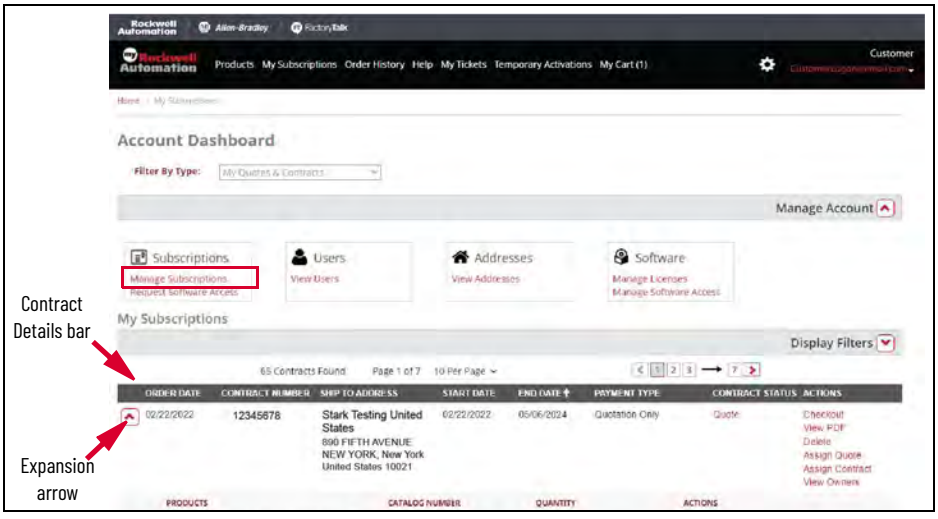
Manage Subscriptions

Click the Manage Subscriptions link to display the Subscriptions bar. This bar provides navigation to advanced functionality. It will offer different functionality depending on the type of user.

You can mange the order with the functions under ACTION.

- Checkout
- View PDF
- Delete
- Assign Quote
- Assign Contract
- View Owners

Click the expansion arrow next to the ORDER DATE, to display additional product information for an order.



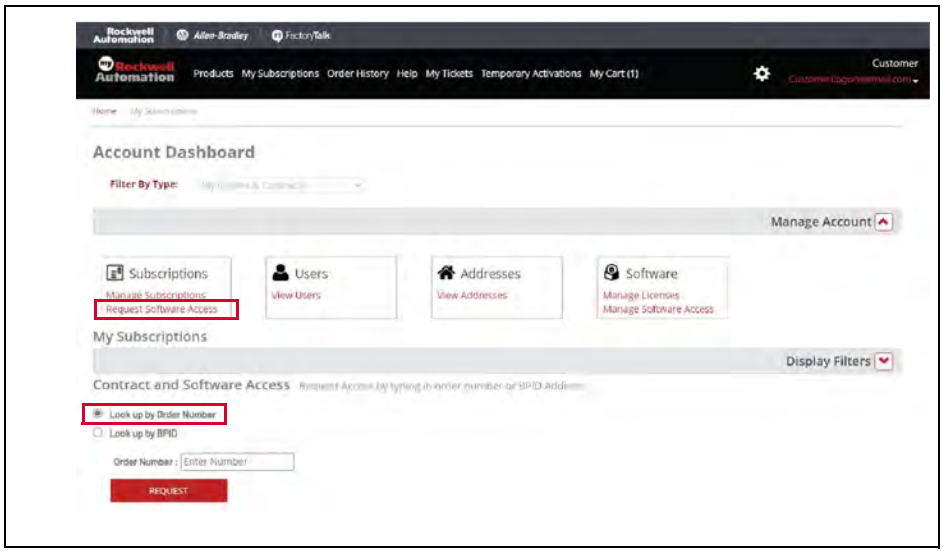
Request Software Access

To request software access, click the Request Software Access link. You can request access in two ways:

- Look up by Order Number
- Look up by BPID

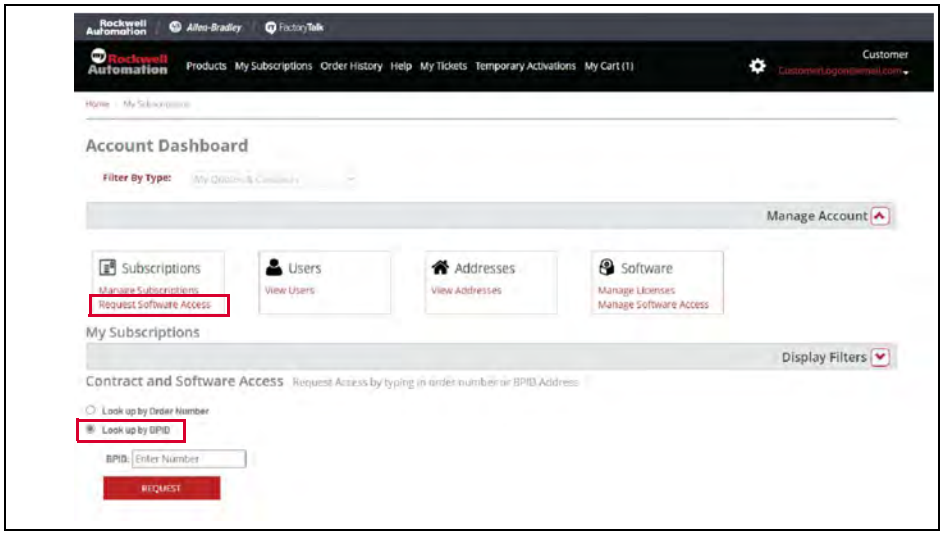
Click the Look up by Order Number to search by Order Numbers.

1. Enter the Order Number in the Order Number field
2. Click REQUEST.



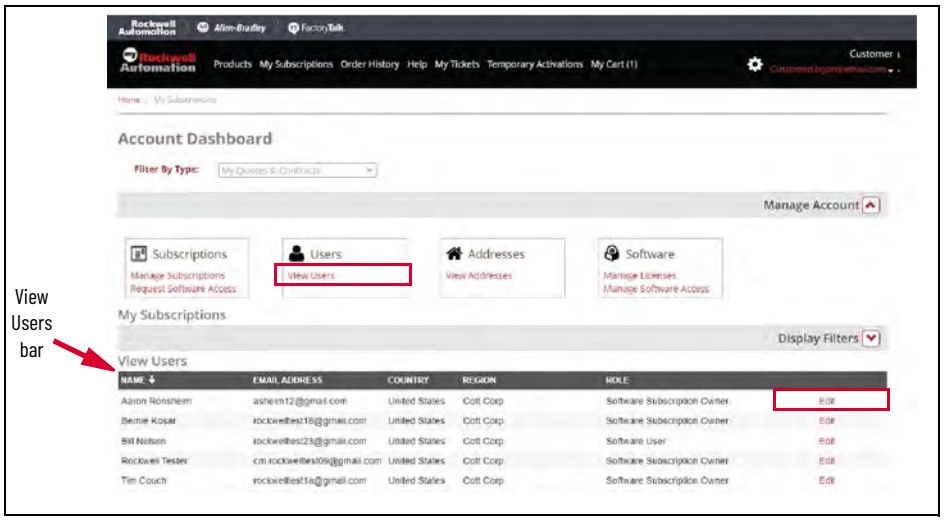
Click the Look up by BPID to search by Business Product IDs.

1. Enter the BPID Number in the BPID Number field
2. Click REQUEST.



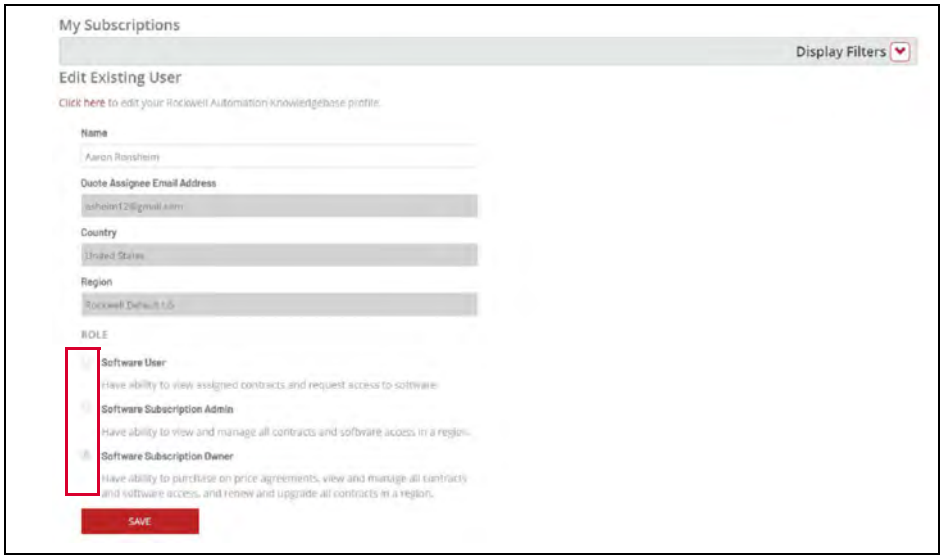
Users

Only **owners** will be able to access the View Users link. Click on the View Users link to view the View Users bar and users who have been assigned software roles. Click on any of the fields on the View User bar to sort by ascending or descending.



Click Edit to change the role of a user to:

- Software User
- Software Subscription Enterprise Admin
- Software Subscription Owner.



To change the role:

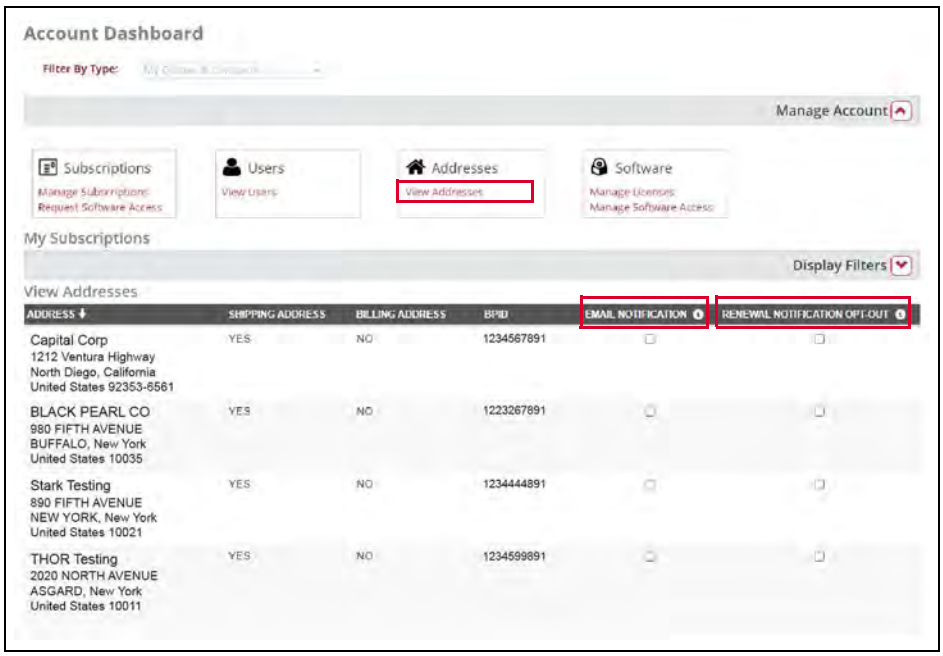
1. Select the role you want to assign
2. Click Save

Addresses

Only **owners** will be able to access the View Addresses link. Click on the View Addresses link to view the View Addresses bar.

If you want to receive notifications about orders or renewals for a specific address, click the corresponding box for the address under EMAIL NOTIFICATION.

If you do not want to receive notifications about orders or renewals for a specific address click the corresponding box for the address under RENEWAL NOTIFICATION OPT OUT.



Software

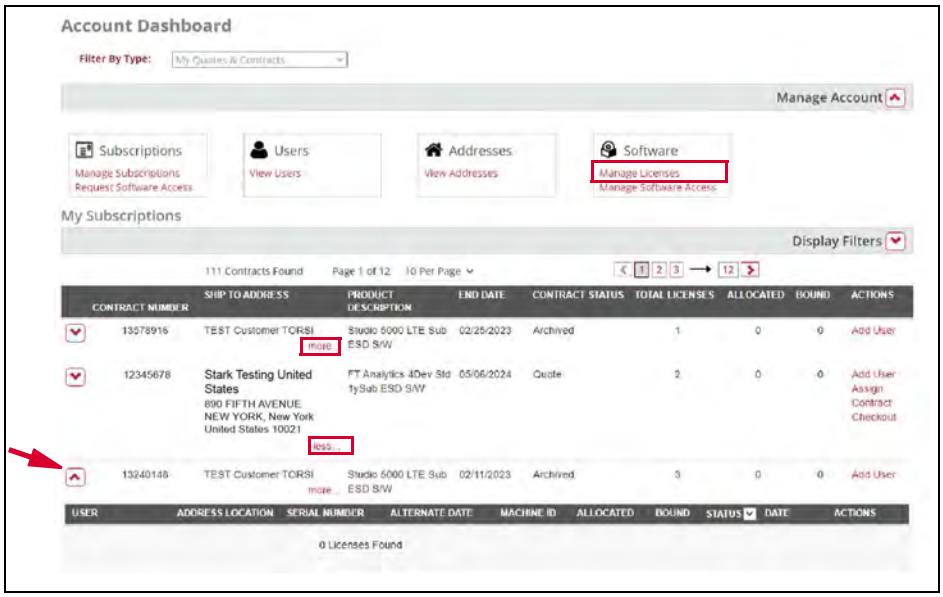
Manage Licenses

Only **owners** will be able to access the Manage Licenses link. Click the Manage Licenses link in the Software sub-menu to view the Manage License bar. This link is available to owners in the quote stage and after an order has become active. If the contract is in the submitted state, no license management can be performed. Owners are sent links to Manage Licenses in the owner welcome kit.

Distributors and Rockwell Automation employees may add users to software licenses.

Contract and software information is displayed under various headers. Click the expansion arrow to the left of the CONTRACT NUMBER to see additional information on the contract. You may also click the more... and less... links to expand the address field.

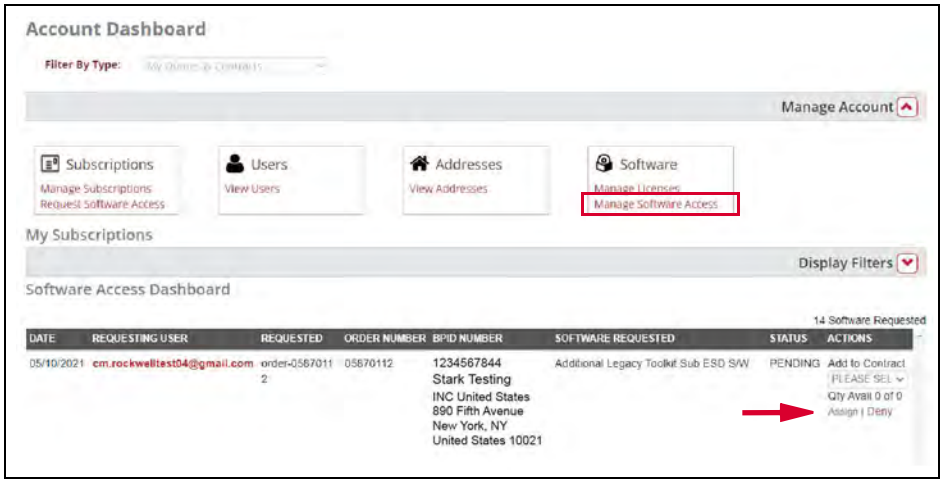
Various functions are available under ACTIONS. You can perform these actions in the quote and order phase but not while in the submitted state.



Software

Manage Software Access

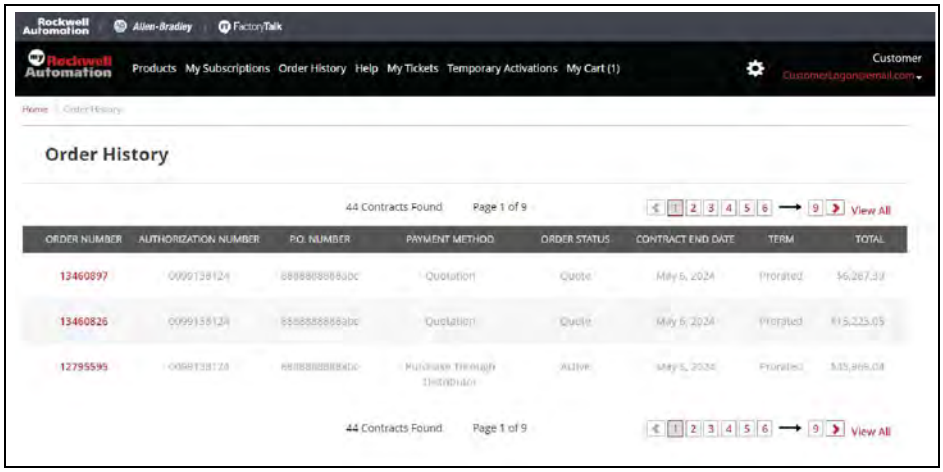
Click the Manage Software Access link in the Software sub-menu to view the Software Access Dashboard bar. Various functions are available under ACTIONS. You can perform these actions to grant or deny access to users.



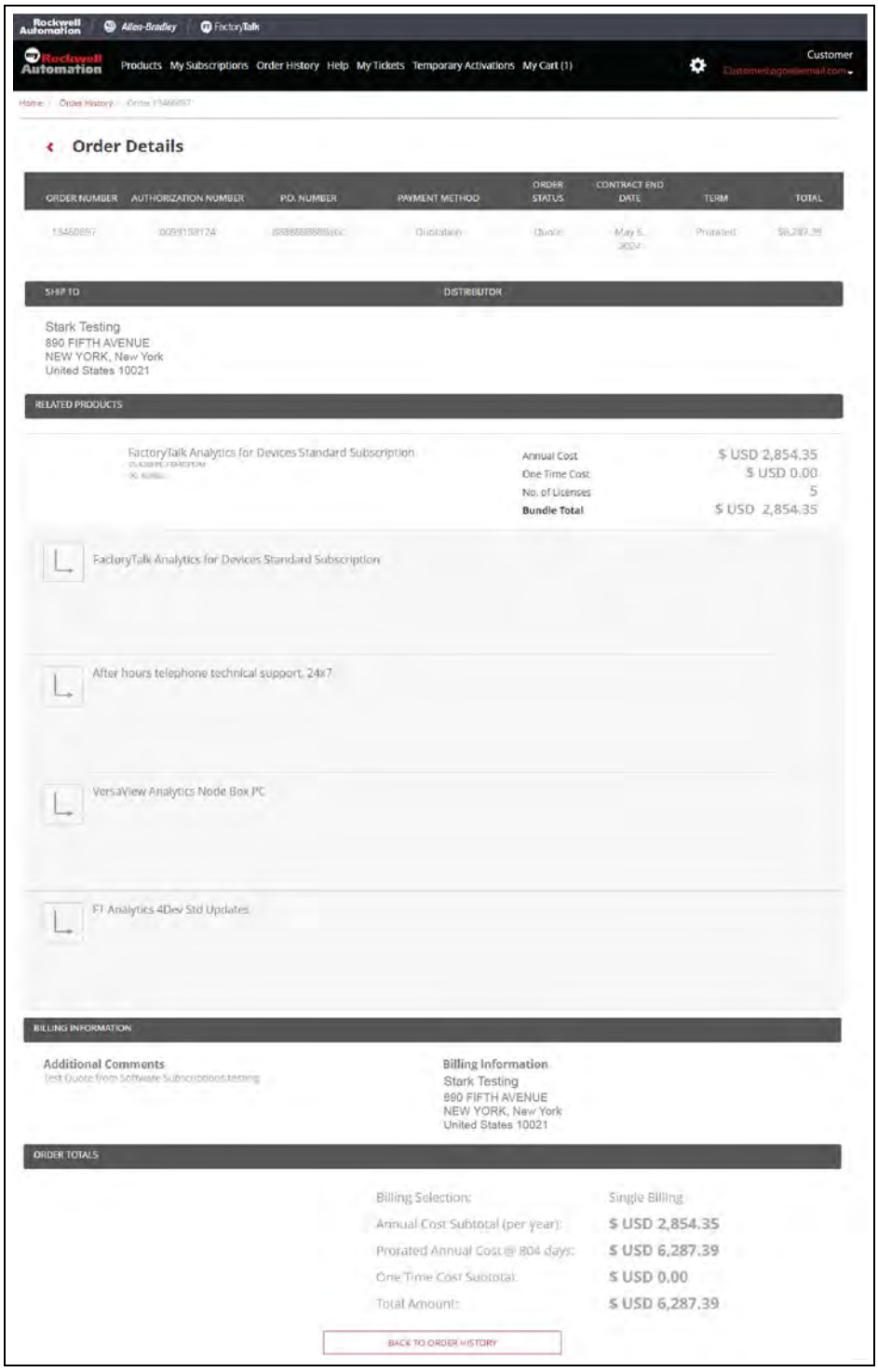
Order History Page Overview

Order History

The Order History page shows the history of all your past orders and quotations. A contract will stay in the originator's Order History even if the contract has been transferred.



Click on ORDER NUMBER to see more detailed information for any order.

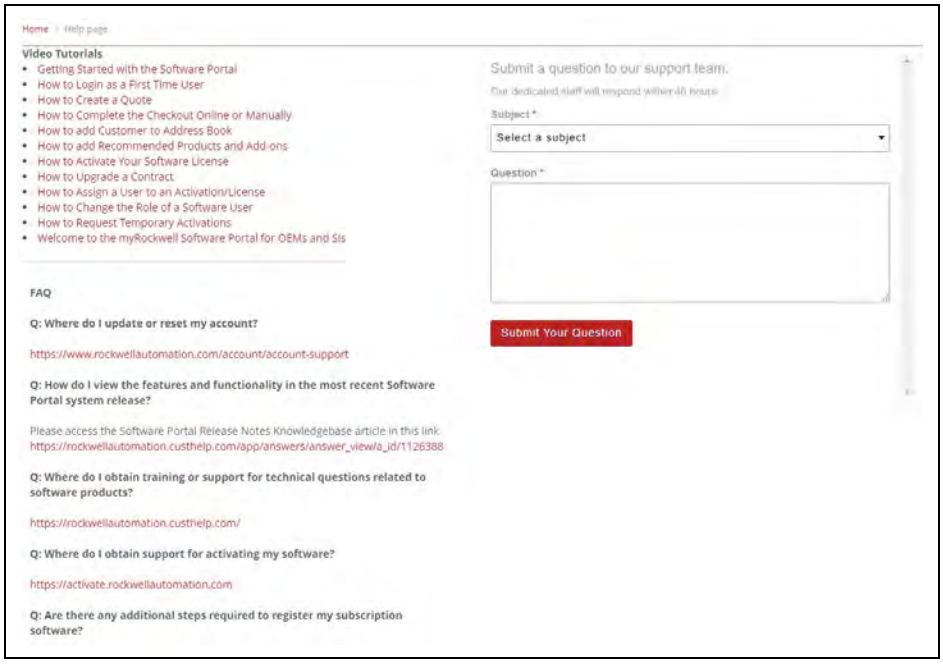


To find a contract originated by someone who is no longer at your company, use the Archived Quotes filter to search for the contract. The filter functionality is covered in Filtering.

Help Page Overview

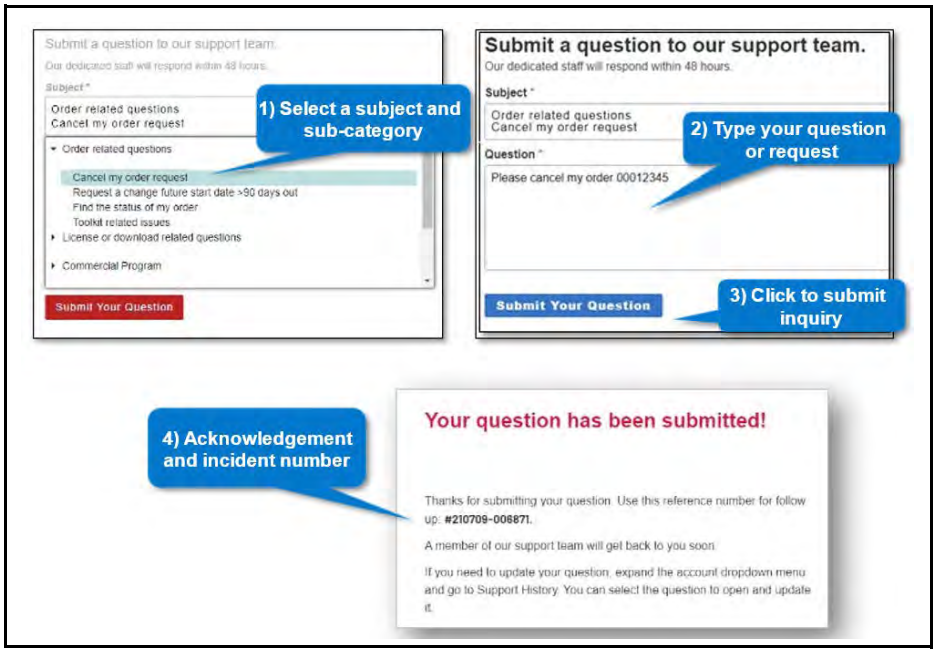
Help

The Help menu provides links to several video tutorials, answers the most common questions, and enables a user to submit inquires directly to the Software Portal support team.



Service Ticket Submittal and Incident Management

To ask a question or submit an incident to the support team, select a Subject in the drop-down and enter your question in the question field. Once you submit your question you will receive both an automatic acknowledgment on the page and an email providing an incident number for tracking purposes. You should expect to receive a resolution response within 48 hours.

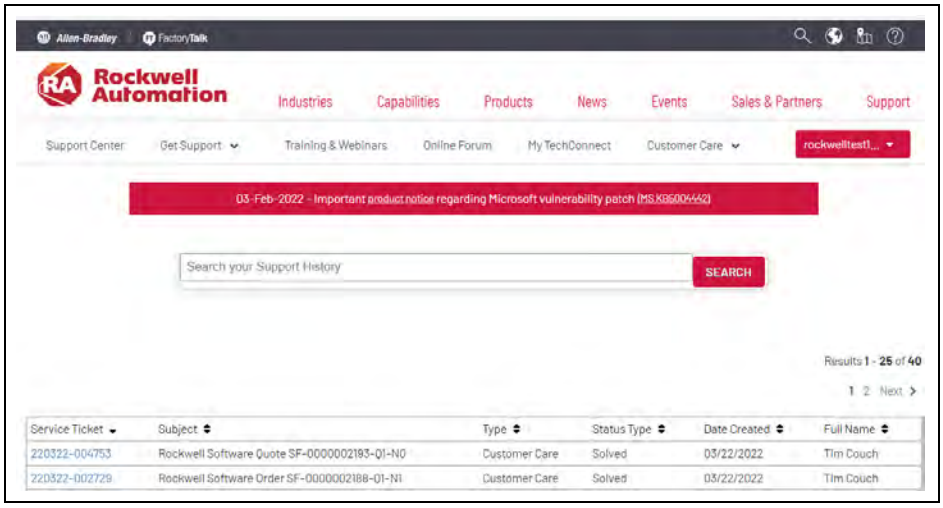


My Tickets Page Overview

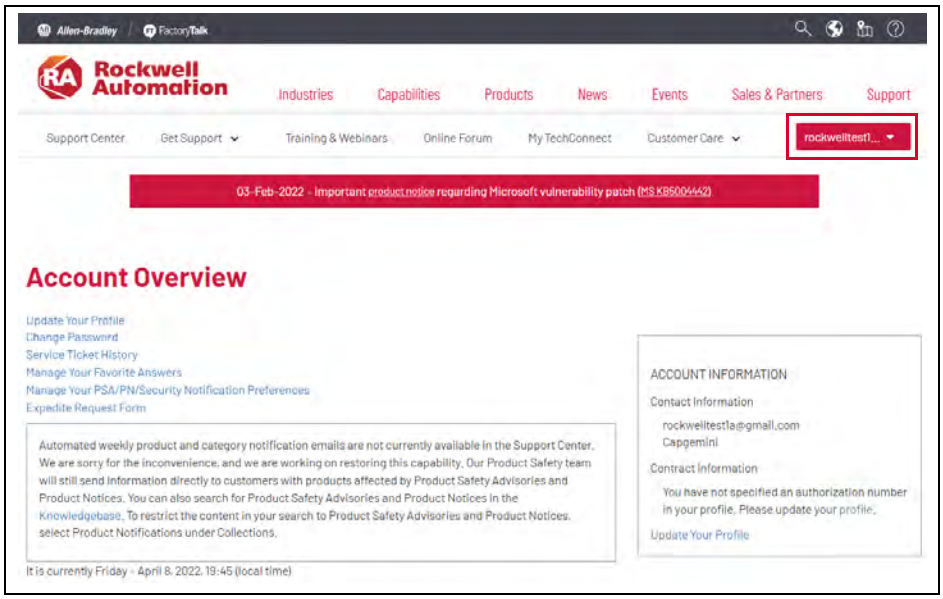
Support Center

When you click My Tickets in the Software Portal menu, a Support Center page will open in another window. You will see the your current Service Tickets and can also filter by any of the column headers.

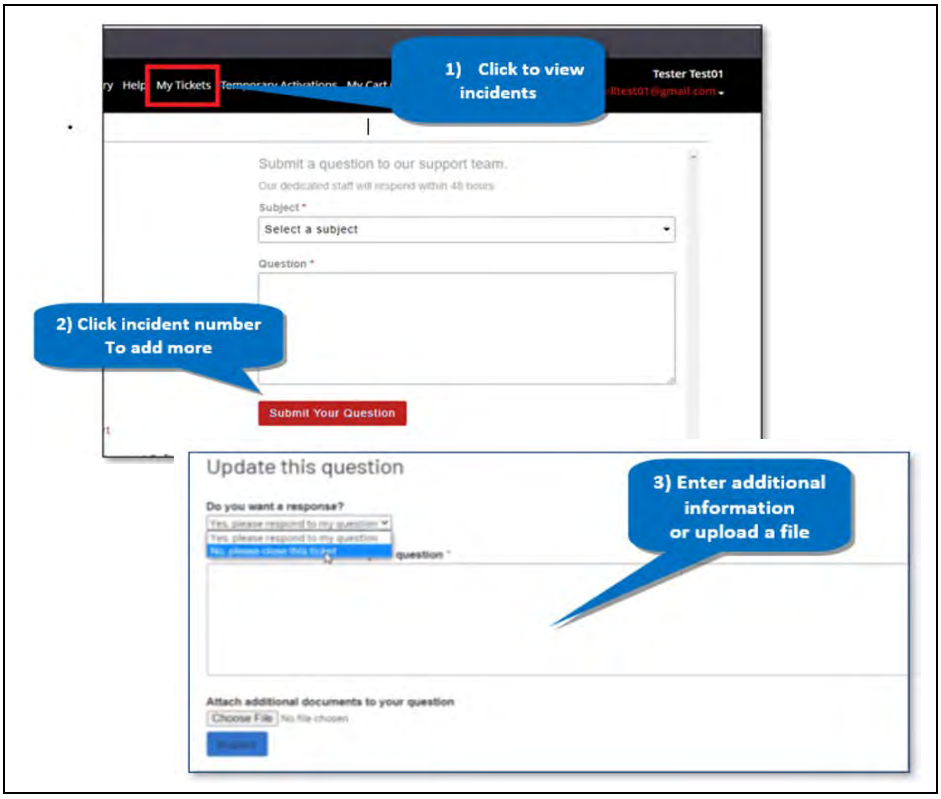
The menu bar and search function offer additional methods for finding information and help.



If you click your user icon on the screen, the Account Overview will display. You can perform updates and manage your account from here.

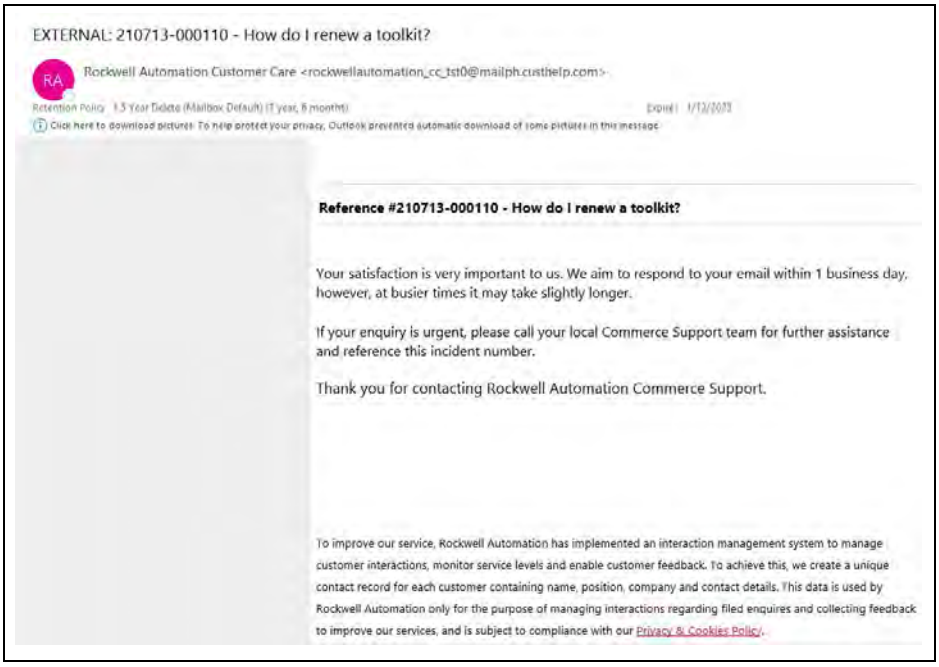


Click the Service Ticket number link to add attachments or additional information as needed. Current users using Rockwell Automation hardware services and products that have a Knowledgebase account will see all their Service Tickets in one place.



Email Acknowledgement

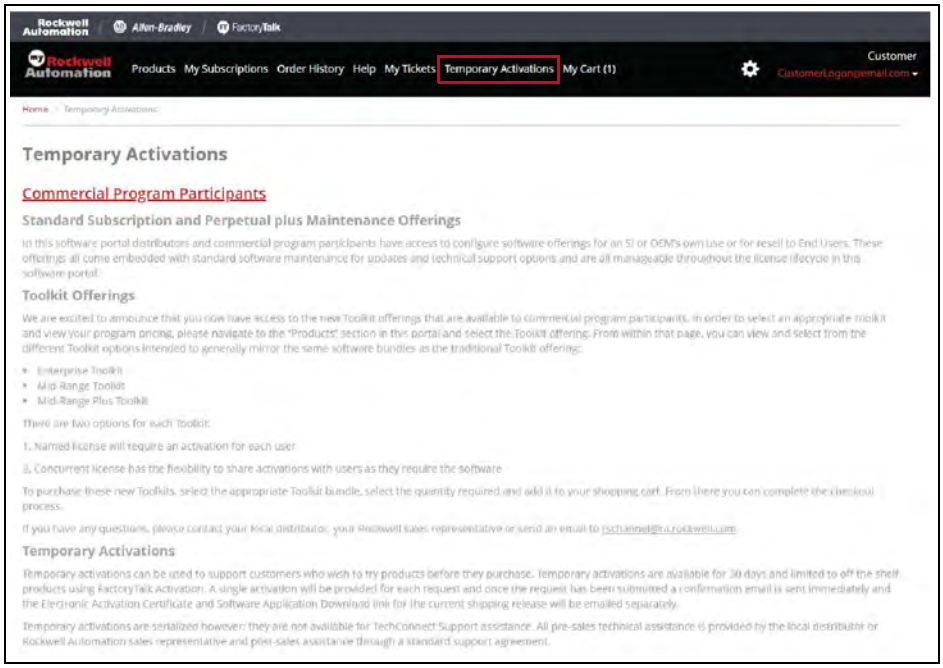
After submitting a question, you will receive an automatic email acknowledgment of your incident submittal. A reference number is included in the email for tracking purposes.



Temporary Activations Page Overview

Temporary Activations

The Temporary Activations page is available for Commercial Program Participants. You can also look up products from this page.



My Cart Page Overview

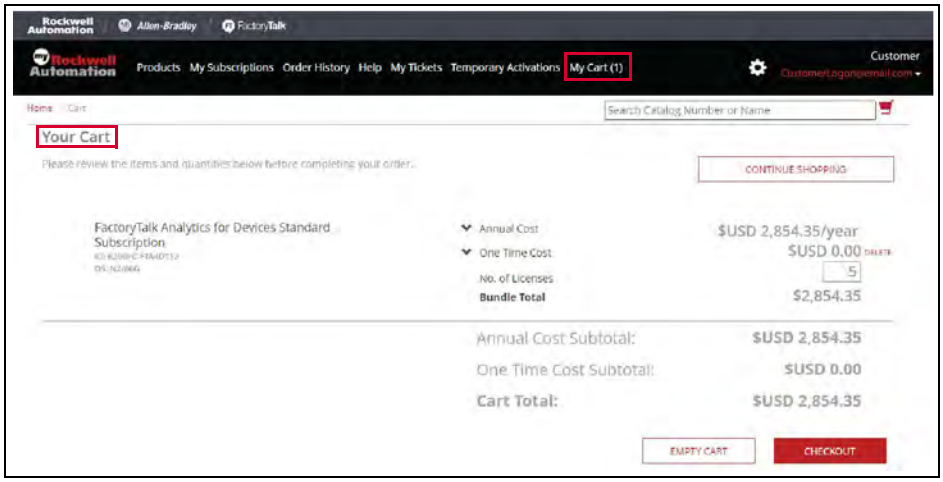
Your Cart

My Cart

Click My Cart in the Software Portal menu to go to the Your Cart page. The Your Cart page shows the products selected for a quote or order. The page shows associated pricing and terms for products in annual and one-time costs.

Annual costs include subscription licenses, maintenance, and support costs. These items are then renewed at the end of the contract term.

One-time costs include perpetual software licenses. Since they are a one-time buy, you own the license forever. However, the associated first-year software maintenance and support for the perpetual license is an annual cost that needs to be renewed yearly.



Quote and Order Process

Create Quote

Any Software Portal role can create a quotation. The quotation can be submitted for checkout or assigned to another person in your company to complete the checkout. The person who completes the order process becomes the owner.

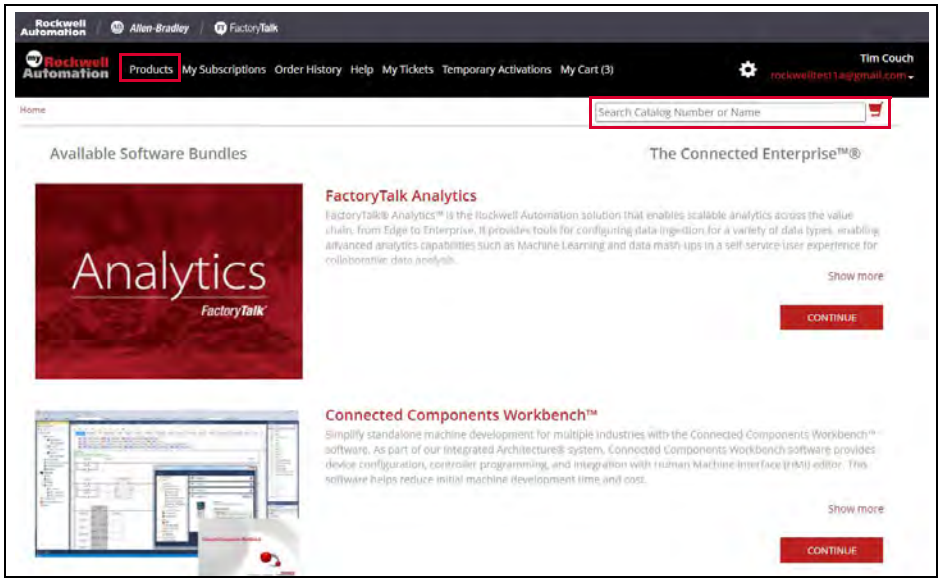
If a distributor is creating a quote on your behalf, they will assign someone as an owner at your company to complete the order process.

The quote process is completed by following these steps:

1. Configure the Transaction Settings for the contract (if needed).
2. Select the software products to add to the quote.
3. Select optional add-ons and recommended products.
4. Choose to create a quote and assign it to an owner or complete the order process.

Software Selection from Products Page

The Products page at the top of the Software Portal screen lists the software brands available for purchase. Once you select a brand, the Software Portal will display the specific software offerings, additional technical support options, add-on products options and any recommended products if applicable. Alternatively, you can search for a product simply by typing the catalog numbers directly into the search bar for a quick look up.



To add a product to your quote:

- Type in the catalog number in the search bar
- click the product brand in the listing
- Click CONTINUE next to the brand name.

Choose Your Package

Rockwell Automation offers flexible subscription-based licenses as well as the traditional perpetual software licenses for most products.

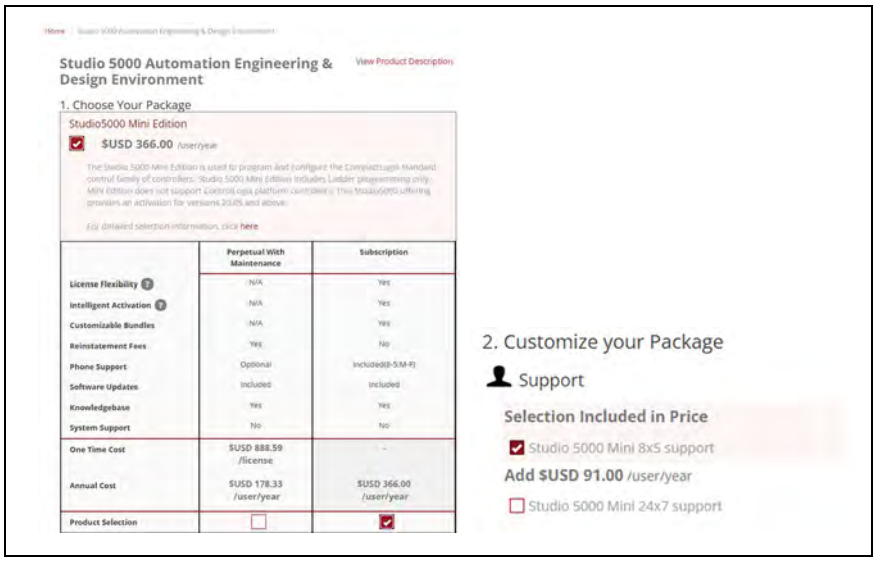
The Subscription option provides flexibility to upgrade and change your licenses over time as needed. The cost of the subscription includes maintenance and technical support which is renewed annually. You own the license with maintenance and support for the term of the contract. At renewal, you have the option of modifying your contract and licenses as needed.

Another option is Perpetual, where the Maintenance option is a one-time cost for the software license and includes the first year of maintenance and technical support (annual cost). With this option, you own the software license forever, but will be required to renew the Software Maintenance and Support contract each year to continue support.

IMPORTANT Software contract terms can be set to 1,2,3,4, or 5-year term contract agreements. Contract end dates can also be aligned with other contracts for a common renewal date and the contract cost will be prorated to adjust for the alignment date.

Select your software bundle

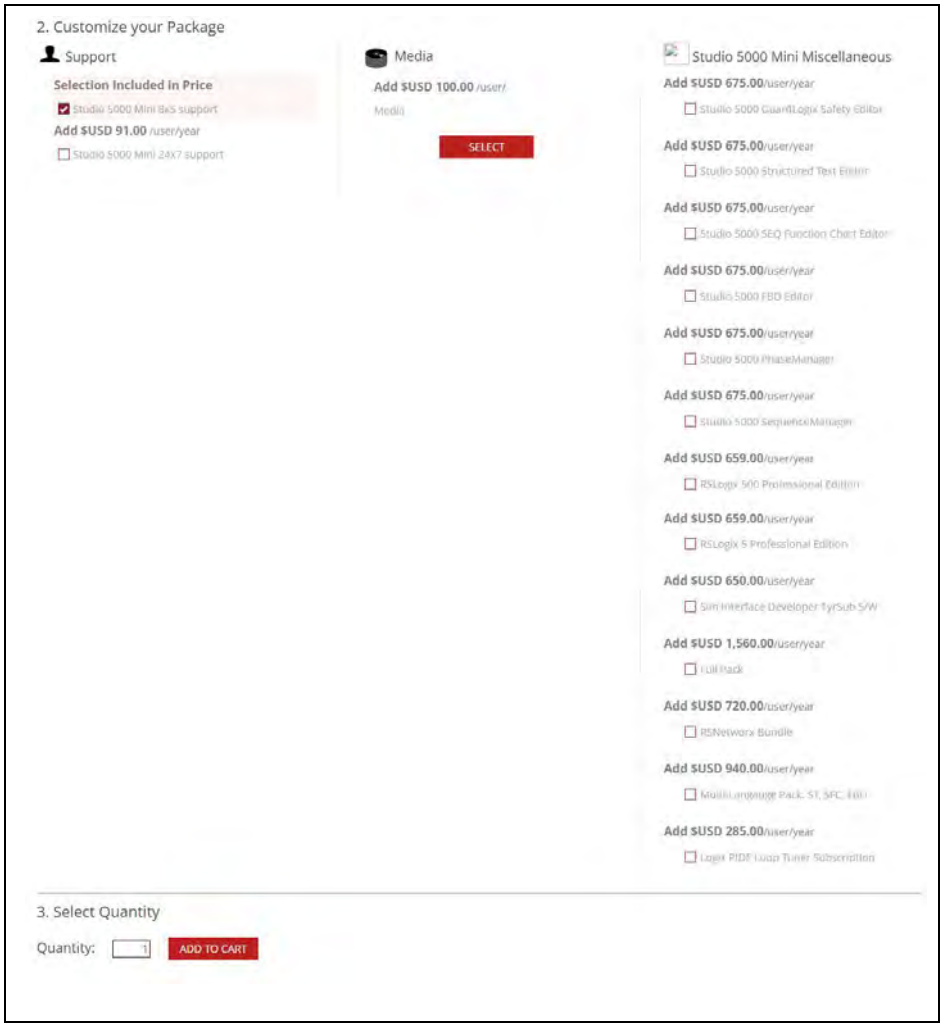
1. Select the type of software license you want to use.



Choose Support Options and Media

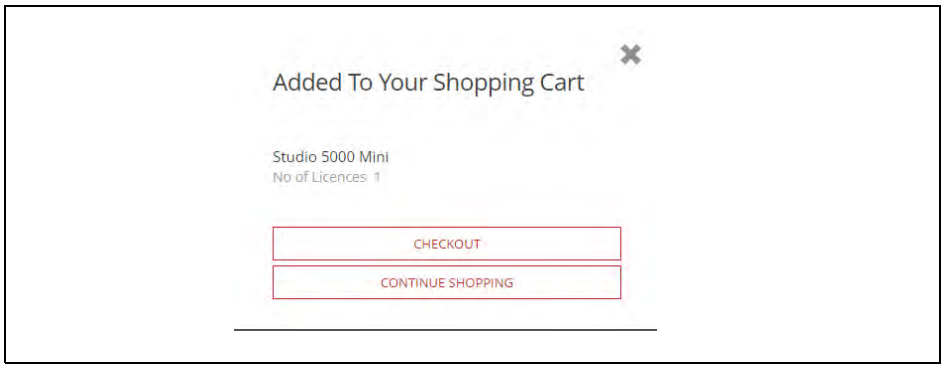
For each package selected, you can customize your package by choosing to upgrade the technical support and/or media options.

Some products, such as Studio 5000, offer additional add-on functionality that can be included in your bundle.



Select your desired products as needed and click ADD TO CART. You will be prompted to checkout your order or to continue shopping to add additional items to your cart.

To add recommended products that are available for your software package, click CONTINUE SHOPPING. If you have completed your selections, click CHECKOUT.

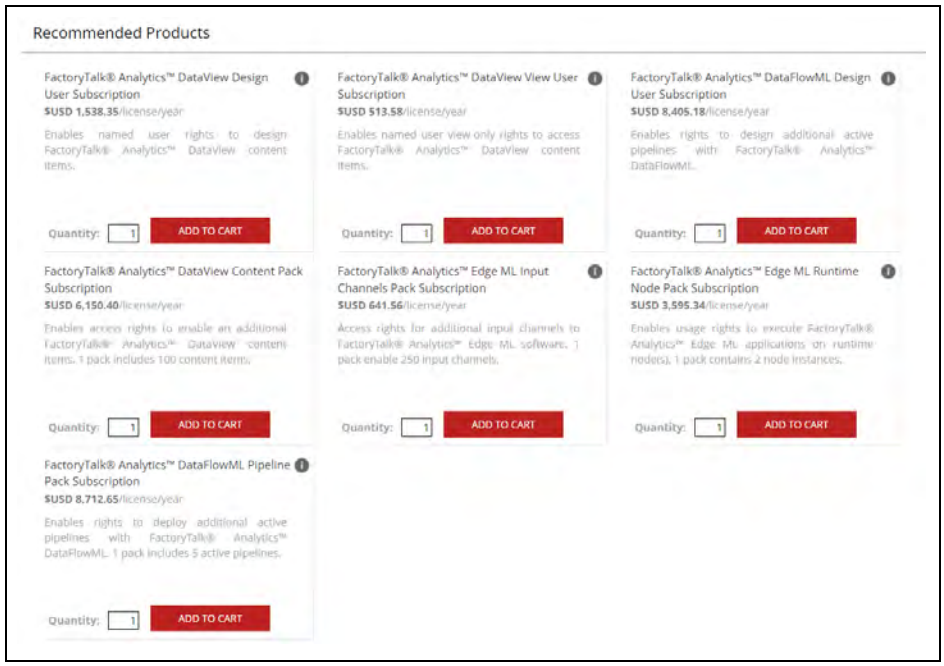


If you have an existing software contract and need to add additional functions to your license (programming editor, upgrade in package or change in technical support), use the Upgrade action in My Subscriptions.

To add additional licenses to your contract, use the Buy More action in My Subscriptions.

Choose Recommended Products

Recommended products are optional software products that can be added to your quote or order. When selected, they will appear as a separate line item in Your Cart and will not be combined into any previous software bundle items you were building prior to your quote or order.

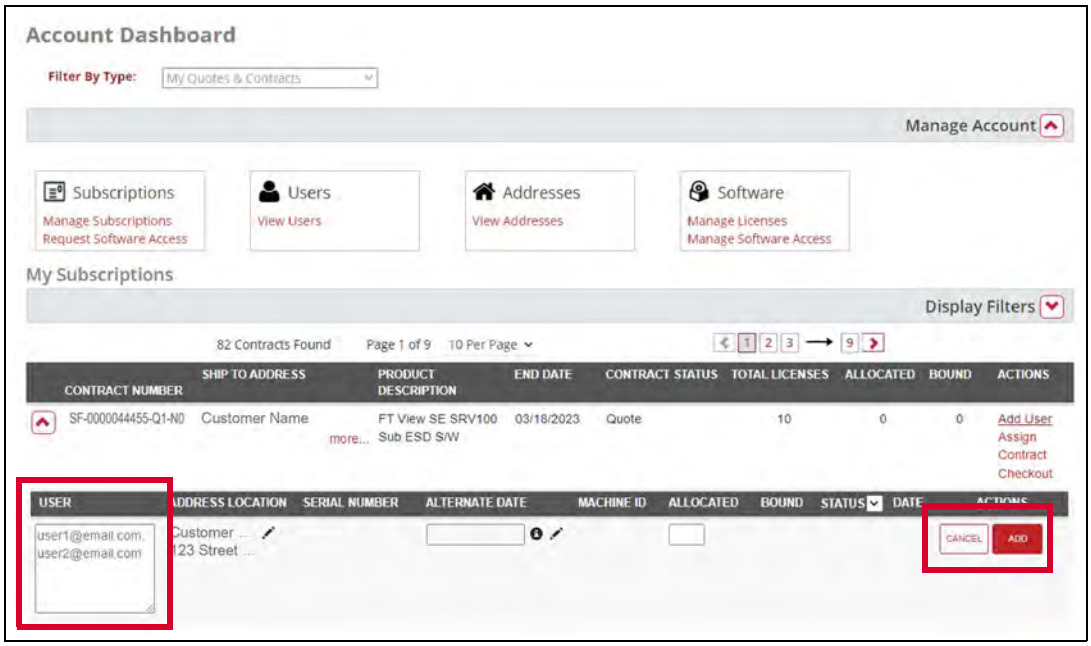


Not all software offerings have recommended products to choose from.

Click CONTINUE SHOPPING to add more items to Your Cart. If you have completed your selections, click CHECKOUT.

Assign Users to a Software License

1. To assign users to a contract, click the Add User link.



2. To assign a license to a user enter the email address for the user under USER.
3. Make sure the email address is correct.
4. Click ADD.

Example text is provided for the format of the email address field and shows how to add multiple users at one time. Up to 15 emails can be added at a time.

If you are an OEM, you can assign your end-user emails here. On transfer of contract, these licenses will be maintained to the software users assigned.

Users will show as Pending until they activate their software license. Once a user has been added to the Manage license page, they cannot be removed. Users can remain in Pending status with their activation unbound with no issues.

There is no limit to the number of assigned users to licenses while the BOUND license count is less than the TOTAL LICENSES count. Once the BOUND licenses are equal to the ALLOCATED, no more users can activate licenses or be assigned a license. The Add User Assign Contract link is inhibited.

If a license is not used and shows Pending, it will not count towards the total license count.

CONTRACT NUMBER	SHIP TO ADDRESS	PRODUCT DESCRIPTION	END DATE	CONTRACT STATUS	TOTAL LICENSES	ALLOCATED	BOUND	ACTIONS
SF-0000044455-Q1-N0	Customer Name more…	Stucio 5000 Pro 1 yr Subsc ESD S/W	12/31/2021	Submitted	3	3	3	Add User Assign Contract

USER	ADDRESS LOCATION	SERIAL NUMBER	ALTERNATE DATE	MACHINE ID	ALLOCATED	BOUND	STATUS	DATE	ACTIONS
Customer.com	Customer 123 Street	122		12iT1	2	2	Bound	2	Edit Delete

Licenses can be assigned to users outside of your company, as in the case of an OEM and end user.

When assigning licenses to software users with different locations and alternate start dates, use the help ticketing system and select Complex quotations or special pricing

Deleting Software Users Assigned Licenses

Once a user is assigned a license by email, the entry remains on record and cannot be edited or deleted. To return or unbind a user-activated license, the assigned user of the license must use the Rehost function in the FactoryTalk® Activation Manager. The total allocations will be updated to reflect the returned activation.

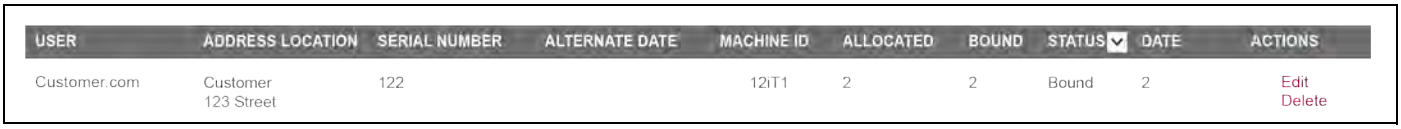
Unknown User

An Unknown user will appear under the USER column in Manage Licenses when a software user manually activates their software using FactoryTalk Activation Manager versus using the automatic activation feature in their User Welcome Kit email.

The owner can edit this entry by choosing Edit. The owner can type in a valid email address for the Unknown user.

License Activation Status

The Manage Licenses link in the Account Dashboard provides status on the activation licenses assigned to your contracts. In addition, you can sort your view of the license allocation based on these statuses.



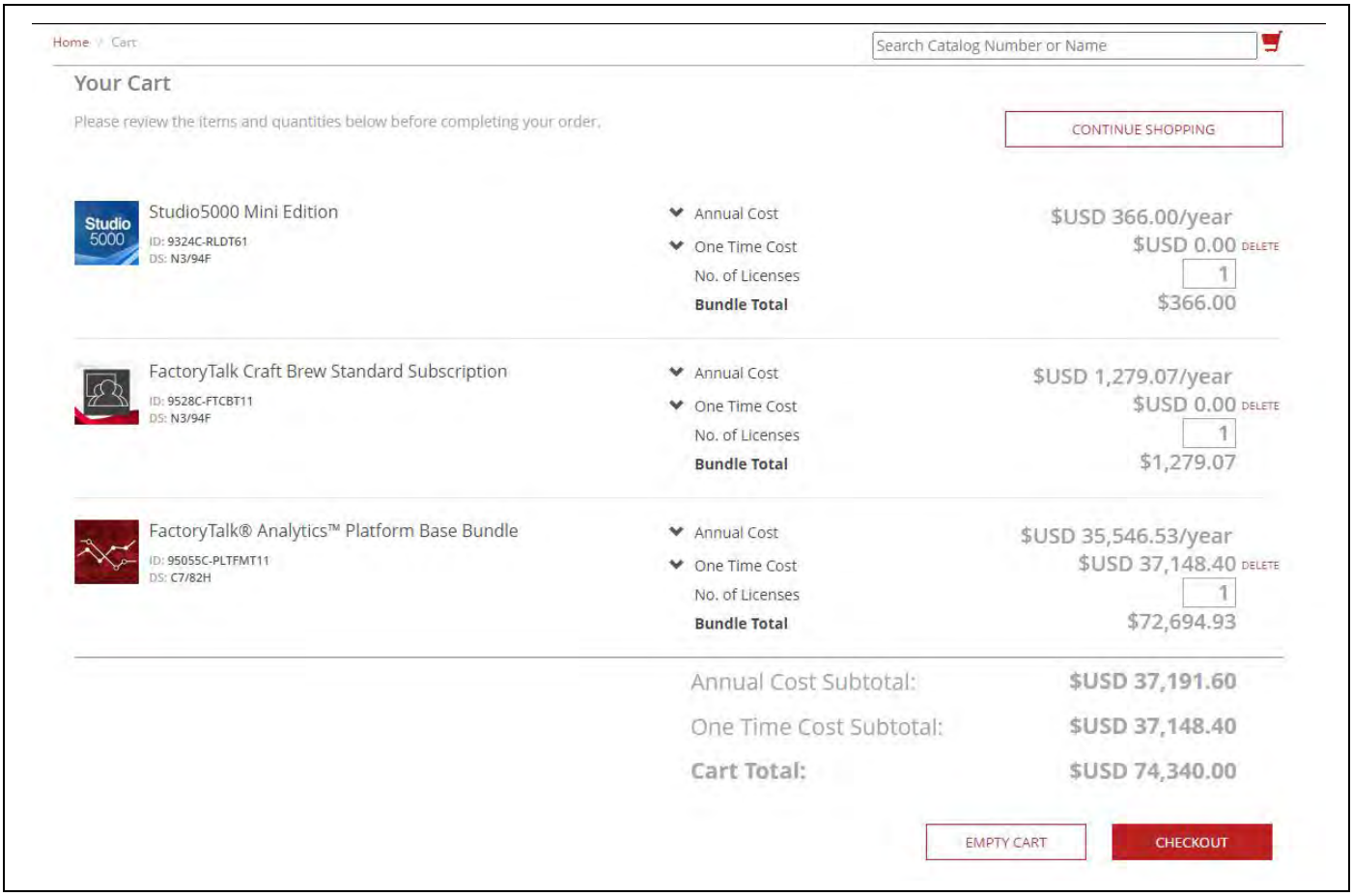
USER	ADDRESS LOCATION	SERIAL NUMBER	ALTERNATE DATE	MACHINE ID	ALLOCATED	BOUND	STATUS	DATE	ACTIONS
Customer.com	Customer 123 Street	122		12iT1	2	2	Bound	2	Edit Delete

Licenses will have one of the following statuses:

- PENDING—A software user email was added to a contract and a User Welcome Kit email was sent to the user. The user did not activate license. There is no limit on the number of pending licenses. Pending licenses are not deleted and can be hidden by filtering under STATUS.
- BOUND—The user activated their license successfully.
- EXPIRED—The license activation has expired and is no longer available to use.
- RENEW—The license has been selected to be renewed as part of a new contract and is waiting activation. (This status will display in the new renewed contract).
- RENEWED—The activation has been renewed and the license has been assigned to a new contract.
- ERROR—The license has an error and is not active. For support, contact Rockwell Automation at: activate.rockwellautomation.com.

Complete Order Process

Navigate to Your Cart on the Software Portal and review your selections. If pricing on the Your Cart page does not match what you are expecting, check your Transaction Settings to see if any expected agreements should be selected. If a distributor created the quote, check and apply the same agreement number as the one the distributor applied.



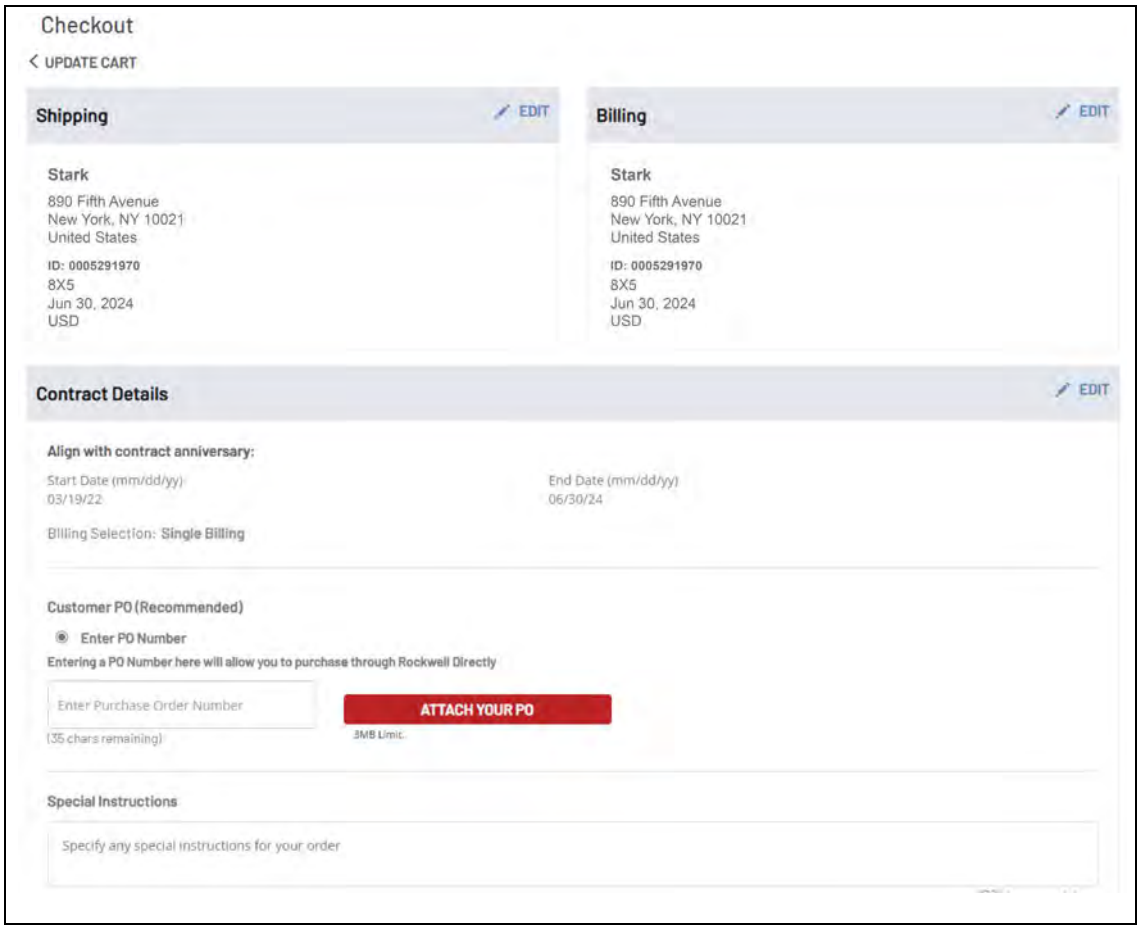
Click CHECKOUT to move to the Checkout page.

Complete Checkout

The Checkout page will automatically pre-populate the shipping, billing address, and contract details that were configured in the Transaction Settings.

To edit any of the settings, use EDIT (pencil icon) to open Transaction Settings and make changes. The changes will reflect in the checkout page.

To change the number licenses, click the UPDATE CART link at the top of the page. This will navigate you back to the Your Cart page where you adjust the quantity as needed.



To complete the order process:

1. Review your order.
2. Enter your Purchase Order number.
3. Apply any promotional discounts.
4. Check the License Agreement and other applicable boxes at the bottom of the page.

Purchase Order Entry

It is recommended that you add your purchase order number (PO) to your quotes. You have the option of entering your PO when you create your own quote or when you are assigned a quote from a distributor. An order will not be fully submitted until a PO has been added to the transaction.

The PO you enter will also be used at the time of renewal. You will receive a renewal notification indicating that you can keep the same PO or choose to enter a new PO at that time.

Your PO will appear in your order acknowledgment email and renewal notices along with your order number.

Purchase Through Distribution Orders

Your distributor can enter your PO on your behalf. You will either receive a confirmation email that an order has been placed for you, or if you are a new customer, you will receive an email to complete and finalize the order process.

Direct Orders to Rockwell Automation

For direct orders, you must enter the PO and attach your actual purchase order PDF file.

Promo Codes and Incentive Dollars

You may apply either a promo code or incentive dollars on an order, not both. The incentive dollars selection will only appear if you have incentive dollars to spend.

Promo Code

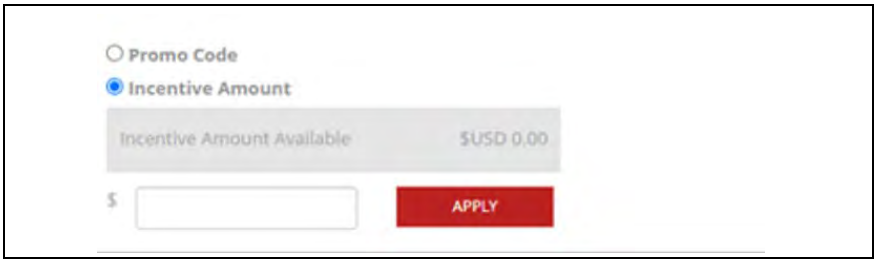
If you have a promo code,

1. Select Promo Code.
2. Enter your code in the box.
3. Click APPLY.

Incentive Dollars

If you have a incentive dollars,

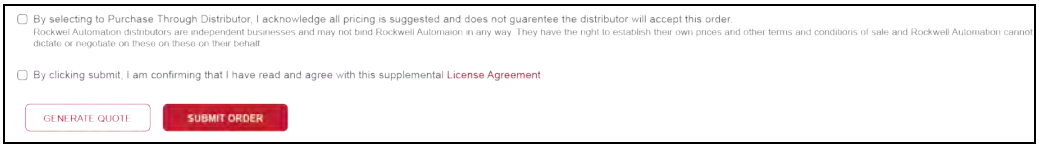
1. Select Incentive Amount.
   The amount of incentive dollars available for you to use will display.
2. Enter the amount of incentive dollars you wish to use.
3. Click APPLY.



Complete Quote or Order

As the final part of the process, you must:

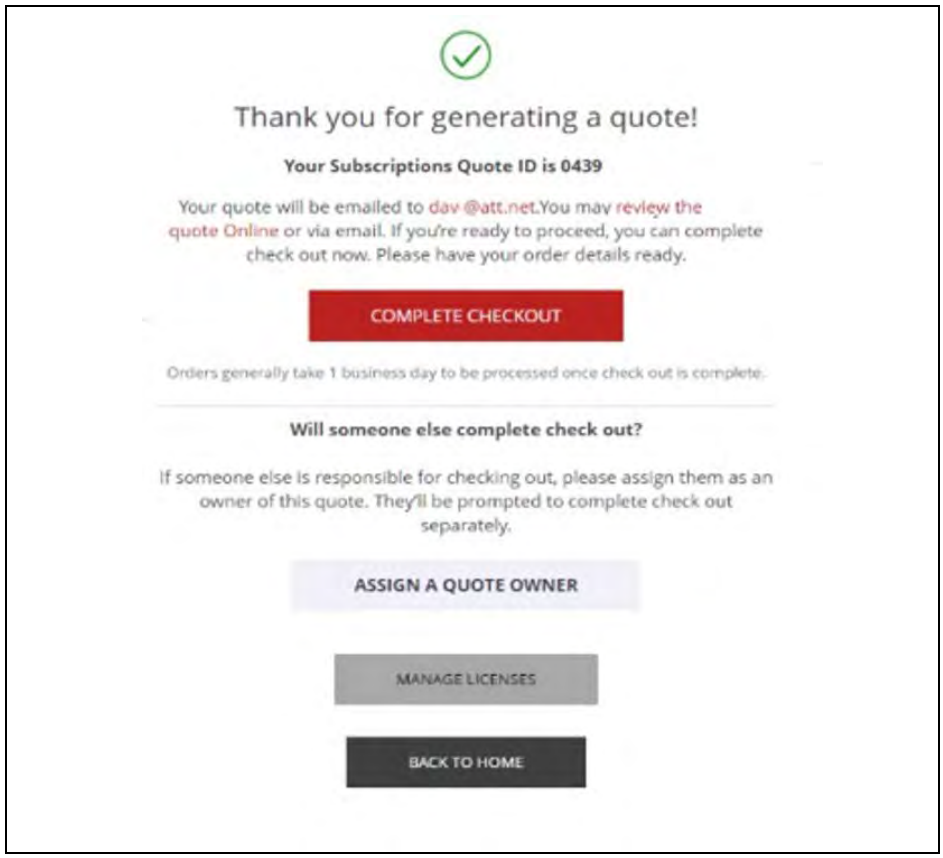
- Acknowledge that all prices shown are suggested and does not guarantee the distributor will accept the order (if applicable)
- Accept the License Agreement
- Click GENERATE QUOTE for a quote or Click SUBMIT ORDER to generate an order.



Manage the Quote

Assign Quote

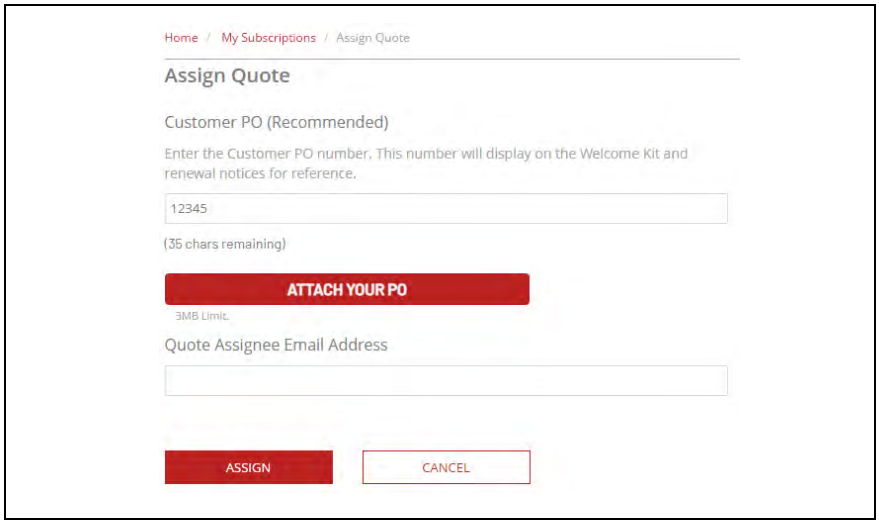
Once your quote has been generated, a quote confirmation will be displayed in the Software Portal with a quote reference number. In addition, you will also receive an email with a quote reference number and a quote for the BOM in an attached PDF file.



The quote confirmation and email both provide links to complete the order process, as well as an option to assign the quote to another person to be the owner. Assigning the quote to another person allows that person to complete the checkout process as the owner. The owner will have access to software downloads, activations, and will receive renewal notifications. The owner is responsible for completion of the checkout process and submittal of the quote as an order.

A link to Manage Licenses is provided to assign software licenses to software users. Licenses can be assigned during the quote stage or after the contract is released. To assign licenses:

1. Click ASSIGN A QUOTE OWNER directly from the Quote Confirmation page to assign the quote to the individual who will be the owner.
2. Enter the person's email address
3. Click ASSIGN



4. Click on YES to confirm you want to send the email.

The owner will receive an email once the quote has been assigned to them. When you assign the quote to another person, the pricing and proration will not change.

IMPORTANT A requote action may update your pricing and may pull in a new proration date. Please review any quotes carefully after choosing a requote to see if your pricing, pricing agreement number, or proration has changed.

Use Assign Quote in the Quote Confirmation email to assign the quote to the person responsible for management of software activations and licenses. This person will have access to software downloads, activations and will receive renewal notifications.

Confirmation Email

Your Quote Confirmation email provides details about the submitted quote as well as an option to review the quote and complete checkout. When you click COMPLETE CHECKOUT, you will be taken to the Software Portal to complete the order process.

Your software quote is attached and ready for review.

Your Subscription Quote ID is 00372006.

VIEW PDF

You may review your quote online or below. If you're ready to proceed, you can complete check out now. Please have your order details ready.

COMPLETE CHECK OUT

Orders generally take 1 business day to be processed once check out is complete.

FactoryTalk Analytics for Devices Standard Subscription ID: 6200PC-FTA4DT11M DS: N2/66G	Annual Cost: One Time Cost: No. of License: Bundle Total:	$ 2,256.00 $ 2,390.00 1 $4,646.00
FactoryTalk Analytics for Devices Standard Subscription		Included in price
Standard telephone technical support, 8-5 M-F		Included in price
FT Analytics 4Dev Std Updates		Included in price
VersaView Analytics Node Box PC		Included in price

Annual Cost Subtotal (per year):	**$USD 2,256.00**
Prorated Annual Cost @ 365 days:	**$USD 2,256.00**
One Time Cost Subtotal:	**$USD 2,390.00**
Total Amount:	**$USD 4,646.00**

Refer to View PDF link above for any applicable taxes.

View the Quote

Click the View PDF link, price, additional taxes, and fees can be viewed as a PDF file.

The PDF file contains the quote reference number, customer Ship To and Sold To information, along with customer details, taxes, quote terms and distributor information.

The View PDF link is also available in My Subscriptions once the quote is generated.

Pricing Holds

All software quotes have a 90-day pricing hold. Contracts that have terms longer than one year will have prices locked for the entire term.

Quotes Created by Distributors or Rockwell Sales

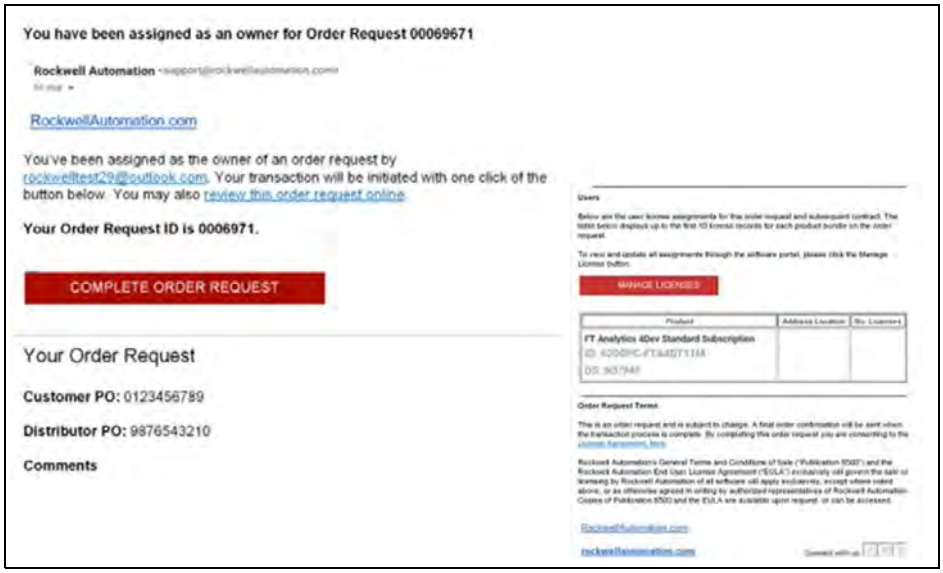
If a distributor or Rockwell Automation sales employee creates a quote for you, you will be assigned one of the following types of emails:

- Simple Owner Assignment email with a COMPLETE ORDER REQUEST button to checkout your order
- Repeat Owner Assignment email with notification that an order has been placed on your behalf
- Standard Owner Assignment email with options to checkout online in the Software Portal or manually with help from our Customer Care team

Simple Owner Assignment Email

When a distributor or Rockwell Automation sales employee creates a quote for you and enters your purchase order number into the Software Portal quote, you will be assigned as the owner. You will receive an Owner Assignment email with information on how to complete the checkout process.

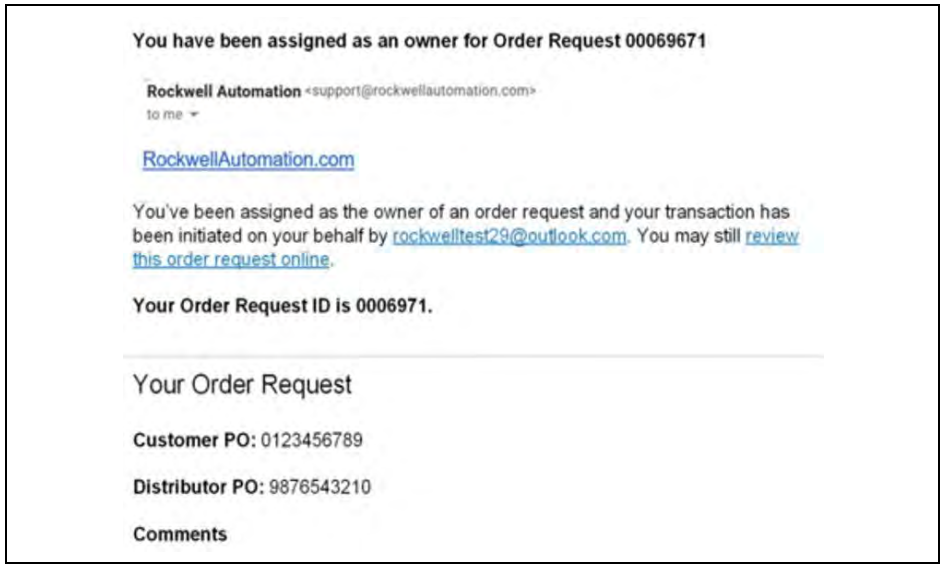
As the owner, you will have the ability to complete the checkout of the quote as an order. You do not need to sign into the Software Portal to review the order.



Click COMPLETE ORDER REQUEST to complete the order process. No further action is needed to place the order. Optionally, a link is provided to allow you to review the order request online in the Software Portal.

Repeat Owner Assignment Email

If you are a repeat customer, your Owner Assignment email will require no further action and you will be informed that an order has been placed on your behalf.



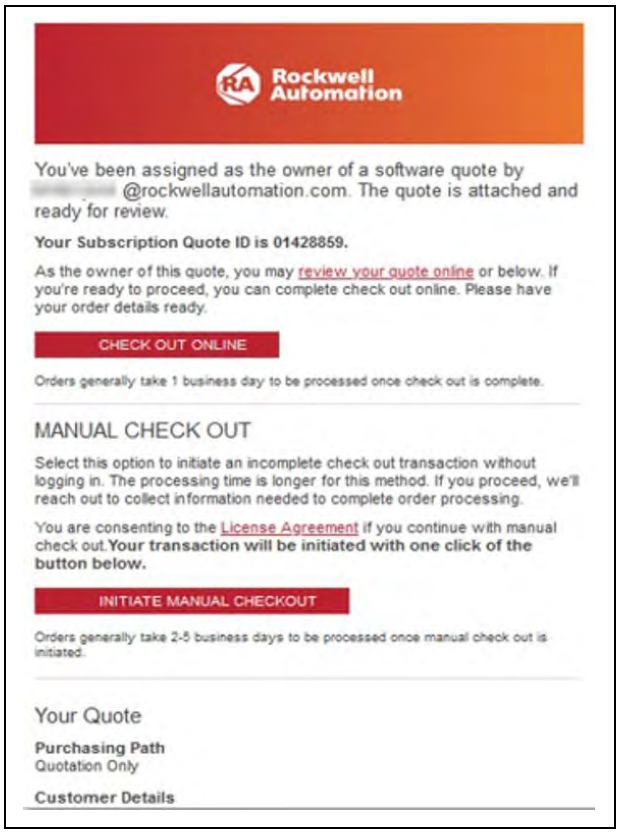
Click Manage Licenses to assign software licenses to users. You will be navigated to Manage Licenses on the Account Dashboard where you can use the Add User action to assign software licenses.

Your distributor can add software users to licenses while your contract is still in the quote stage (before you complete the checkout process for a quote to make it an order).

Use COMPLETE ORDER REQUEST in your email for the simplest method to place your software order. If you choose to complete the checkout process of your quote from within the Software Portal, make sure you do not to leave the checkout page without clicking Submit, or you may have to reapply your price agreement in Transaction Settings.

Standard Owner Assignment Email

If your purchase order has not been entered in the quote, you can expect to see an Owner Assignment email like the one shown here. The email will also include a Bill of Materials attached.

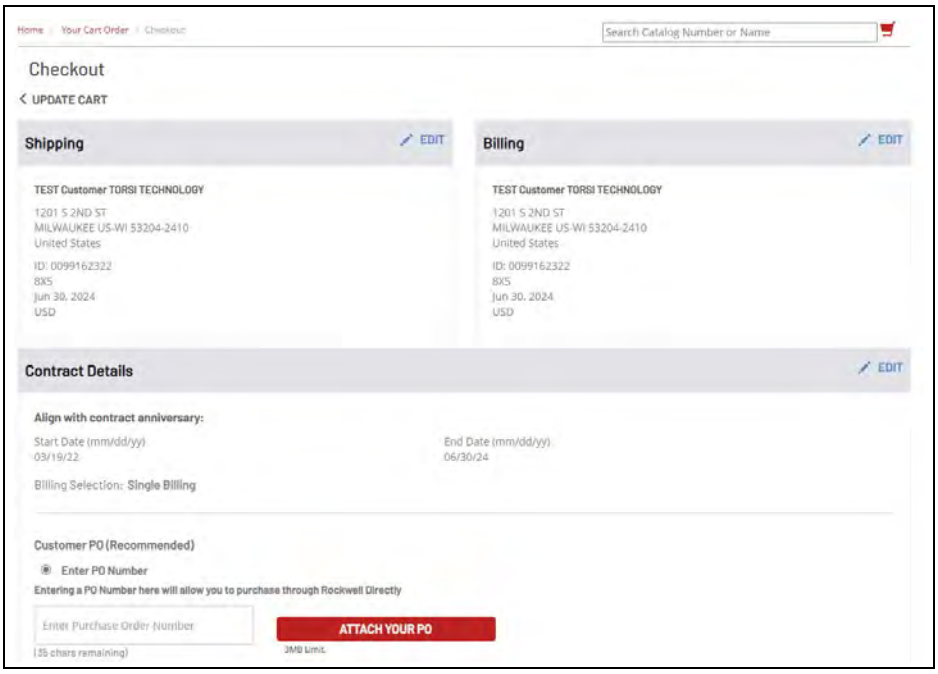


This email will provide you two options to submit your order:

- Checkout Online—Navigation to the Software Portal to review your order and complete the checkout process.
- Initiate Manual Checkout—Provides a method to complete the checkout process for your order without signing into the Software Portal.

Checkout Online

Clicking this link in the email will navigate you to the Software Portal Checkout page.



The details of the order including shipping address will be automatically completed for you. To complete the checkout and submit your order, you will need to:

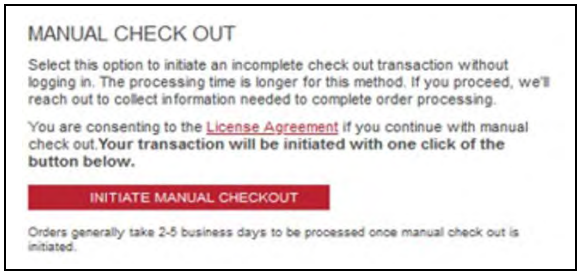
1. Enter your PO number.
2. Check the boxes at the bottom of the screen.

To modify your order and make any changes, click the Requote action located at the top left of the page. To edit your Ship To address in the Transaction Settings, click the gear icon at the top of the page.

Initiate Manual Checkout

Click this link to initiate the manual checkout process. The Manual Chekcout process does not require the owner to sign into the Software Portal to complete the order.

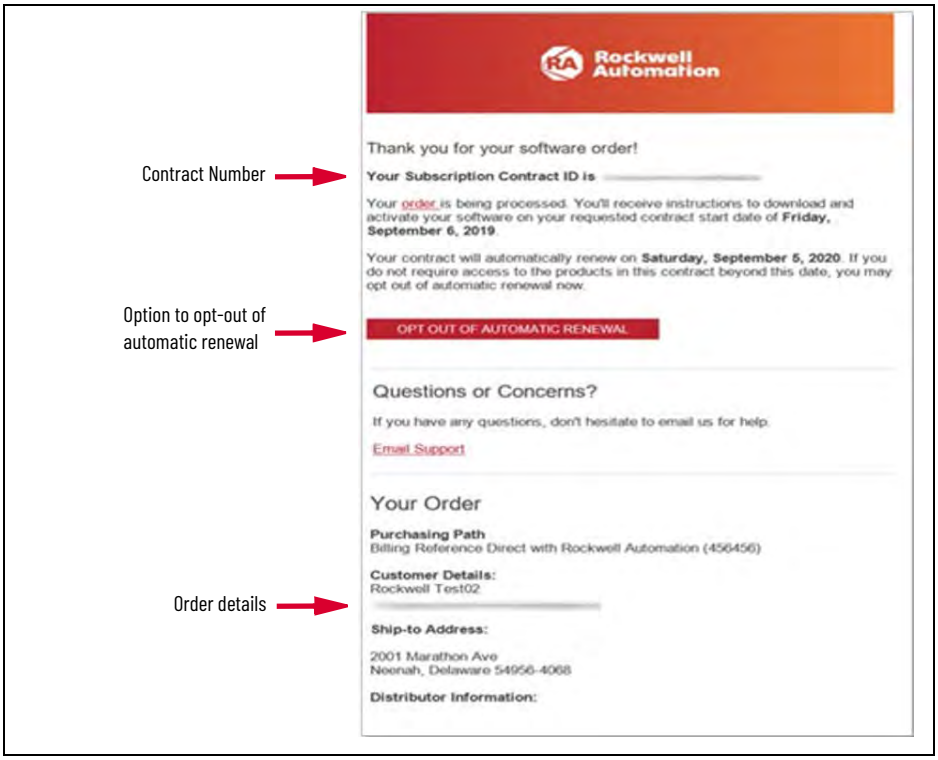
The owner should expect to be contacted by Rockwell Automation Customer Care requesting the required purchase order information to complete the purchase process. Manual checkout may add additional time for the order creation to be completed.



Customer Order Acknowledgment

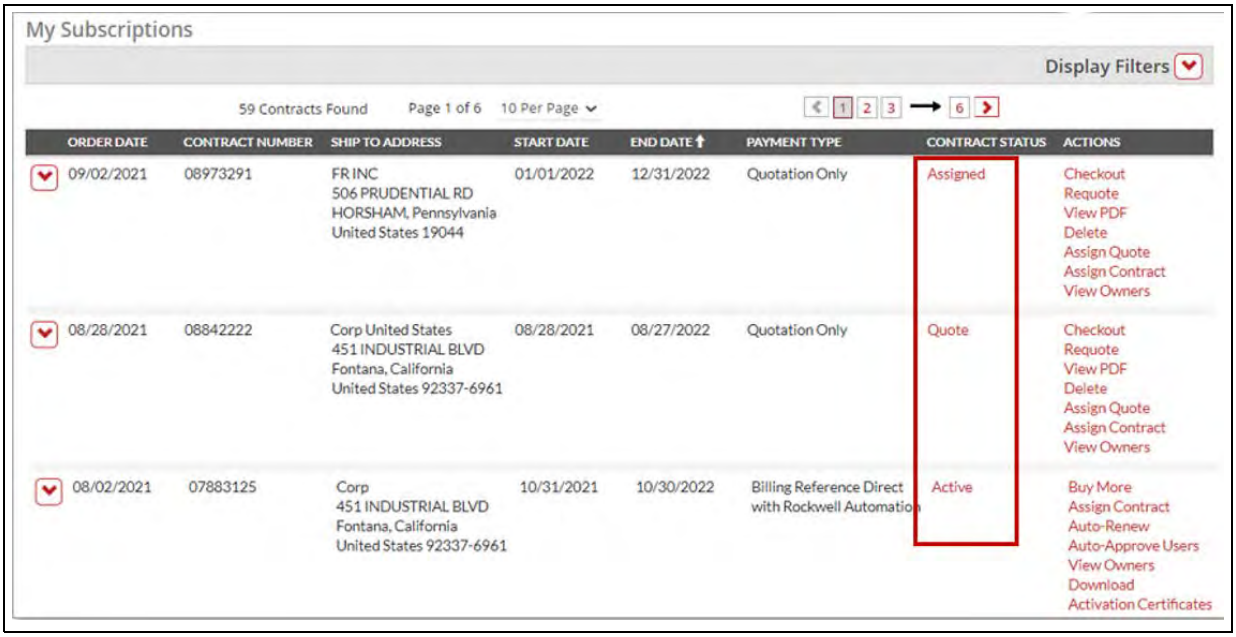
Once you have completed the checkout, you will receive an email with the order confirmation.

All software contracts are set up for Auto-Renew. The owner has the option to opt out of Auto-Renew by clicking the link in the email or by selecting the Auto Renew action in the My Subscriptions page at any time.



Contract Status

The status of your contracts can be viewed on the Software Portal page under My Subscriptions. Additional details can be viewed by clicking on the status that appears next to any of your contracts.



The contract can be in any one of the following states:

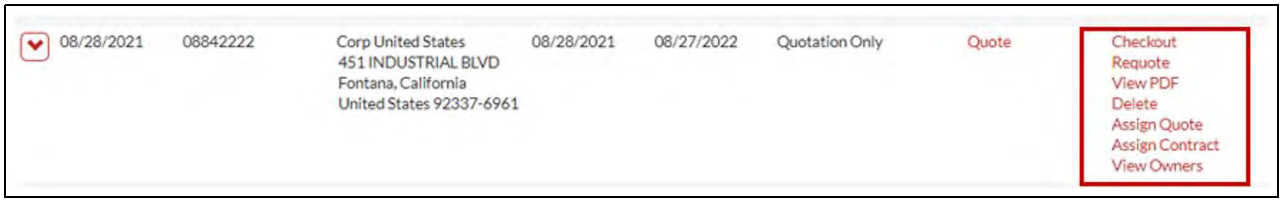
- Quote
- Assigned
- Approved (for Purchase Thru Distribution only)
- Submitted
- Active
- On Hold
- Expired
- Canceled

When the customer provides his PO directly to the distributor, the distributor can enter the PO directly into the Software Portal and create a contract that is Submitted and routed to become an Active contract.

Quote

This status indicates the contract is still in the quote stage and is ready to be submitted for checkout by the customer. The actions that can be taken at this stage are:

- Checkout—the owner will be taken to step 3 of the order process to submit the quote for purchase. A PO will need to be entered for Customer Direct purchases.
- Requote—the user will be taken to Your Cart for quantity adjustment and will apply discounts to the quote that was selected in Transaction Settings.
- View PDF—displays a PDF file of the quote for print, email and other forms of viewing.
- Delete—removes the quote from the Software Portal.
- Assign Quote—displays a window to assign a new owner for the quote.
- View Owners—lists the owners assigned to the quote.
- Assign Contract—displays a window to assign the owner of the contract.



IMPORTANT A Requote action may update your pricing and may pull in a new proration date. Please review any quotes carefully after choosing a Requote to see if your pricing, pricing agreement or proration has changed

Assigned

This status indicates the quote has been assigned for customer review via email and is pending to be Approved for order request by customer. The actions that can be taken at this stage are:

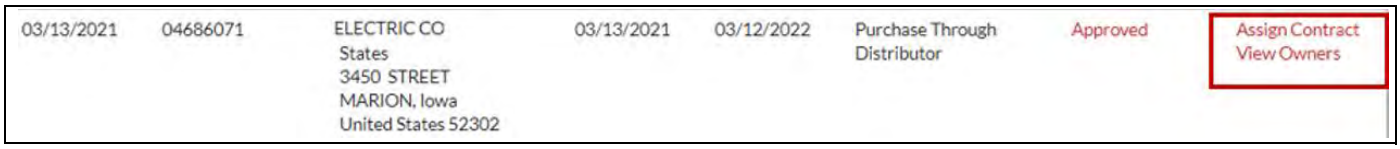
- Checkout—the owner will be taken to step 3 of the order process to submit the quote for purchase. A PO will need to be entered for Customer Direct purchases.
- Requote—the user will be taken to Your Cart for quantity adjustment and will apply discounts to the quote that was selected in Transaction Settings.
- View PDF—displays a PDF file of the quote for print, email and other forms of viewing.
- Delete—removes the quote from the Software Portal.
- Assign Quote—displays a window to assign a new owner for the quote.
- View Owners—lists the owners assigned to the quote.
- Assign Contract—displays a window to assign the owner of the contract.

Approved

The Approved order status is for Purchase through Distribution transactions only. After a quote is submitted for checkout by the customer it will be in the Approved status. The local distributor will be notified via email that your contract is now Approved. Once the distributor receives your PO and submits it into the Software Portal with their PO, the status will change to Submitted.

Once an order is changed to the Submitted status it is automatically routed to become Active. No further action is needed by the customer or distributor once both POs are entered. The actions that can be taken at the Approved stage are:

- View Owners—lists the owners assigned to the quote
- Assign Contract—displays a window to assign the owner of the contract.



Submitted

This status indicates the order has been submitted with both POs through the Software Portal and is actively being processed by Rockwell Automation for release. The next stage is Active. The actions that can be taken at this stage are:

- View Owners—lists the owners assigned to the quote.
- Assign Contract—displays a window to assign the owner of the contract.

When the customer provides his PO directly to the distributor, the distributor can enter the PO directly into the Software Portal and create a contract that is Submitted and routed to become an Active contract.

Active

This status indicates the contract is now Active. Owner and User Welcome Kit emails will be sent on the contract start date to owners and any software users assigned licenses. Owners can continue to assign software users licenses using the Manage Licenses page. The actions that can be taken at this stage are:

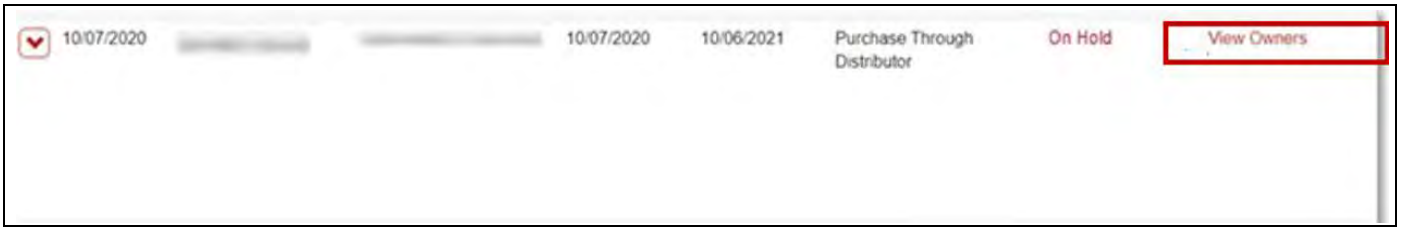
- Buy More—add additional licenses to Your Cart for the owner to checkout.
- Assign Contract—displays a window to assign the owner of the contract.
- Auto-Renew—displays a window to select automatic renewal.
- Auto-Approve Users—displays a window to have the Software Portal automatically approve software users assigned to Manage Licenses.
- View Owners—lists the owners assigned to the quote.
- Download—navigates the owner to the software download page.
- Activation Certificates—navigates the owner to the Activation email sent to users with license and activation information and links.
- Upgrade—will display upgrades that are available for a product

On Hold

This status indicates the order has been submitted and is On Hold. It is actively being reviewed for approval by the website support team. The customer will be contacted if any further action is required. The actions that can be taken at this stage are:

- View Owners—lists the owners assigned to the quote.

While the contract is on hold, no actions can be taken on the contract, this includes adding users to the licenses.

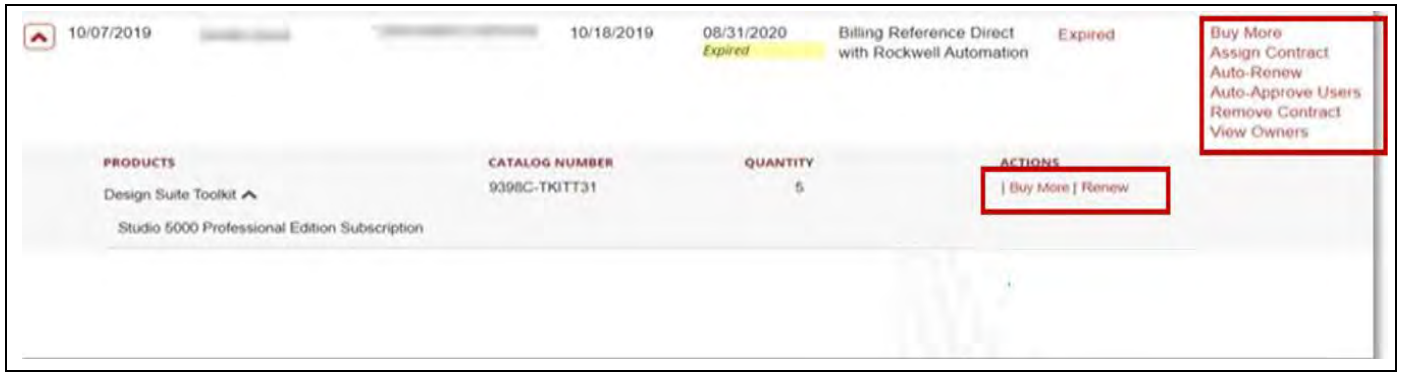


Expired

This status indicates the contract end date has been reached and the contract is now expired.

The contract can be re-quoted by selecting the Buy More action or by choosing Renew in the expanded Products window. The actions that can be taken at this stage are:

- Buy More—add additional licenses to Your Cart for the owner to checkout.
- Renew—displays a window to reselect products and add users to a new contract.
- Assign Contract—displays a window to assign the owner of the contract.
- Auto-Renew—displays a window to select automatic renewal.
- Auto-Approve Users—displays a window to have the Software Portal automatically approve software users assigned to Manage Licenses.
- Remove Contract—will delete the contract from My Subscriptions.
- View Owners—lists the owners assigned to the quote.



Canceled

This status indicates the contract has been canceled.

The owner can choose to repurchase this product on a new contract by clicking the Buy More action. The actions that can be taken at this stage are:

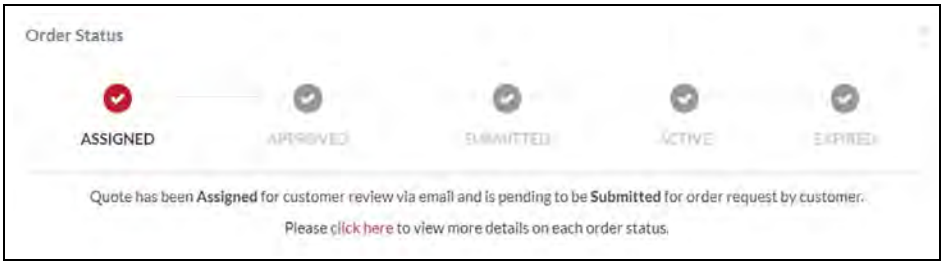
- Buy More—add additional licenses to Your Cart for the owner to checkout.
- Assign Contract—displays a window to assign the owner of the contract.
- View Owners—lists the owners assigned to the quote.
- Requote—the user will be taken to Your Cart for quantity adjustment and will apply discounts to the quote that was selected in Transaction Settings.

Order Status Tracker

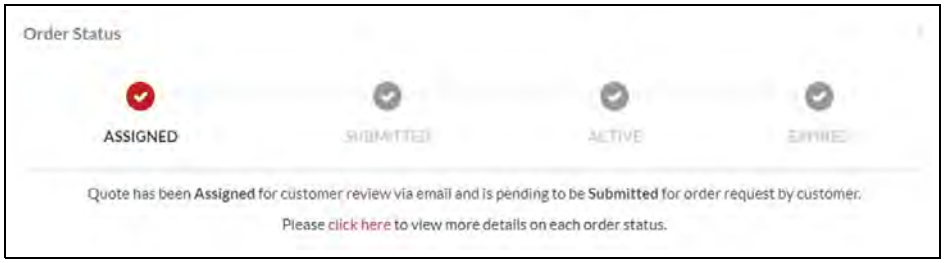
Click the link under CONTRACT STATUS to open the Order Status window. The Order Status window will display a tracker with five stages.

- Assigned
- Approved
- Submitted
- Active
- Expired

A red checked circle will mark completed stages.



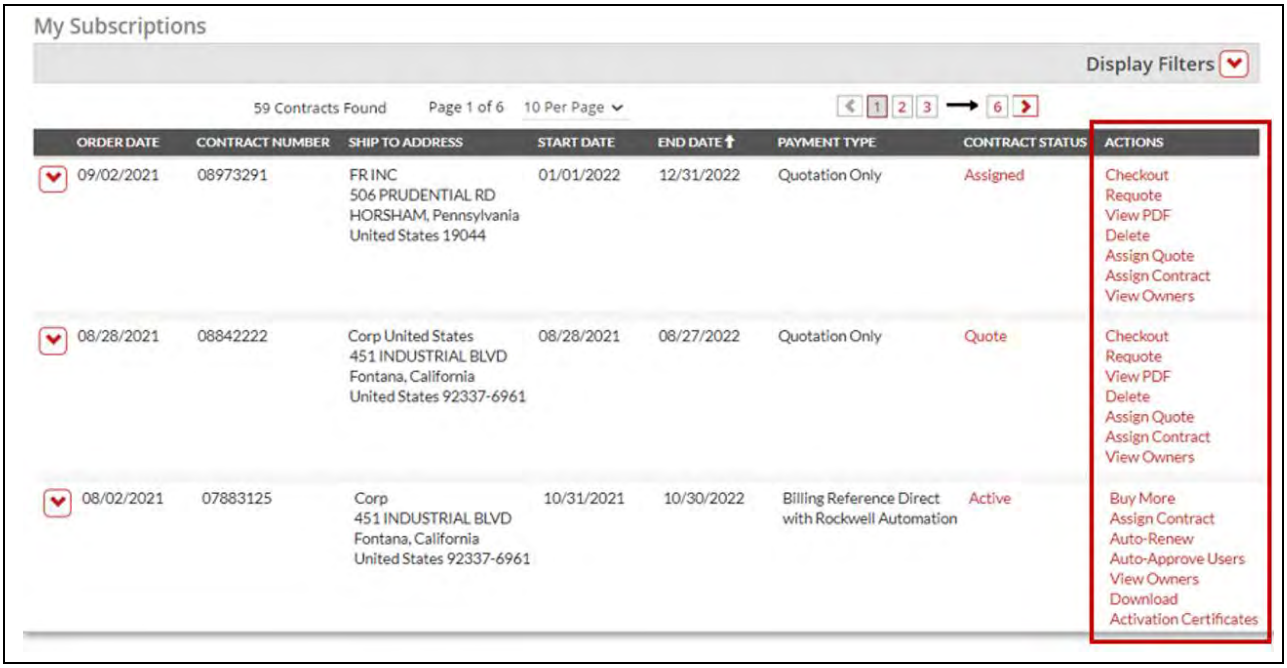
There are 4 transaction stages for a Customer Direct transaction.



Click on the click here link to view more details about the order status and view actions to take.

Owner Actions for Contracts

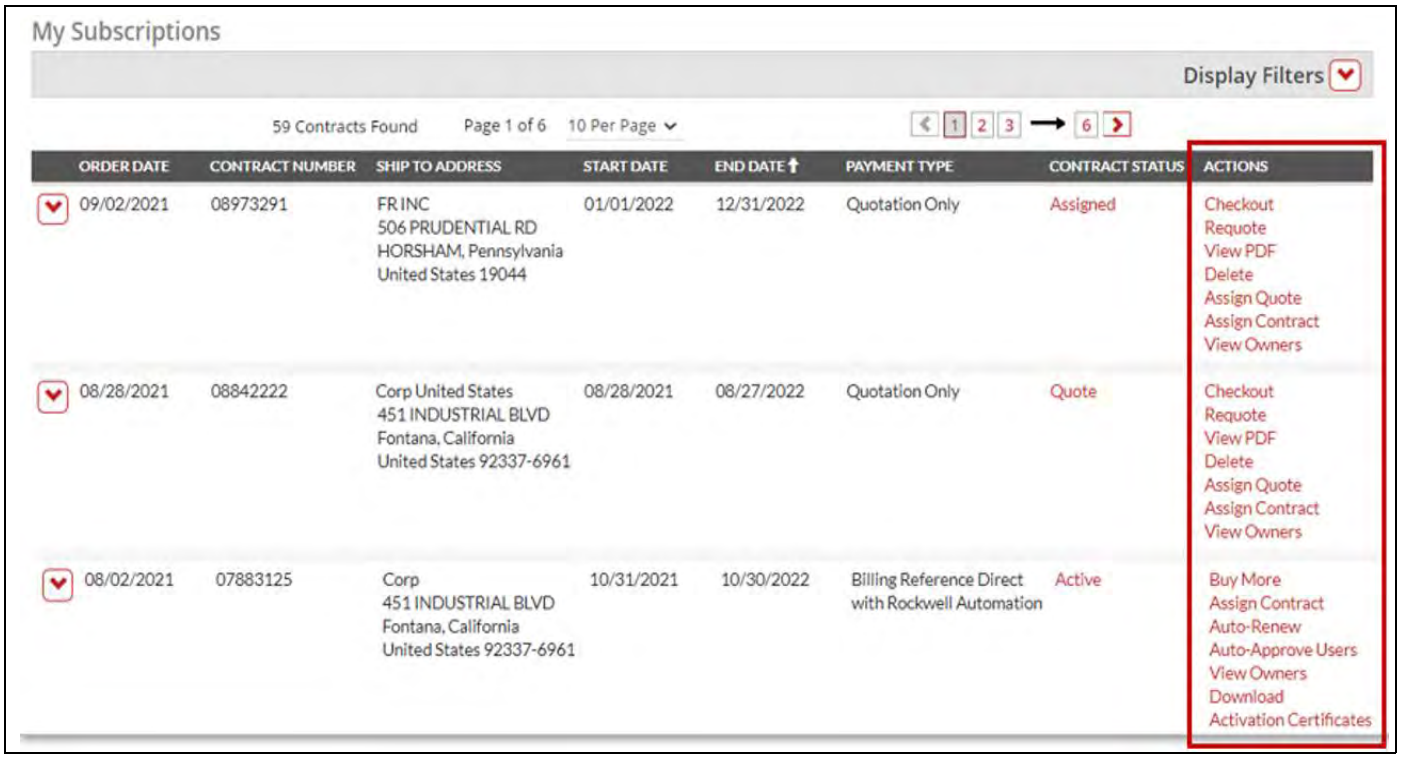
The contract status will determine the Actions available to the owner.



Actions

Buy More

While the contract is Active, the owner can add additional licenses using the Buy More action or add upgrades (if available for the product) by selecting the Upgrade action. Buy More will create a new contract. Clicking this action will navigate to the Your Cart page where product quantities can be adjusted, and checkout completed. This action will create a separate new contract with new serial numbers for the software licenses that were added.



IMPORTANT Contracts created after the December 10th, 2021 release using a new pervasive contract number format will be amended on a Buy More action. A new contract will not be created. New serial numbers will be created and amended to the original pervasive contract. The pervasive contract number will display a suffix of 'A1' for the amendment after checkout. Refer to the table at the end of this section for an explanation of the changes to the Buy More action.

Contract Type	Action	Distributor Action (Quote Only)	Customer Action (Quote and Checkout)
Original	Buy More	This action will create a new quote in the original format.	A new quote or contract will be created in the original format. New serial numbers will be created.
Original	Upgrade	This action will create a new quote in the original format.	A new quote or contract will be created in the original format. AT checkout, the new contract will be aligned to the original order and the serial numbers will remain the same.
New—with pervasive contract number	Buy More	This action will create a new quote in the original pervasive contract number and will increment the quote version.	This action will amend the original contract with new products. The pervasive contract number will stay the same and the quote version will be incremented, or the amendment version will be set to A1 upon checkout. New serial numbers will be created.
New—with pervasive contract number	Upgrade	This action will create a new quote in the original pervasive contract number and will increment the quote version.	This action will amend the original contract with the upgrade item. The pervasive contract number will stay the same and the quote version will be incremented, or the amendment version will be set to A1 upon checkout. The serial numbers will be the same.

Extending Volume Discounts (Step-In Pricing)

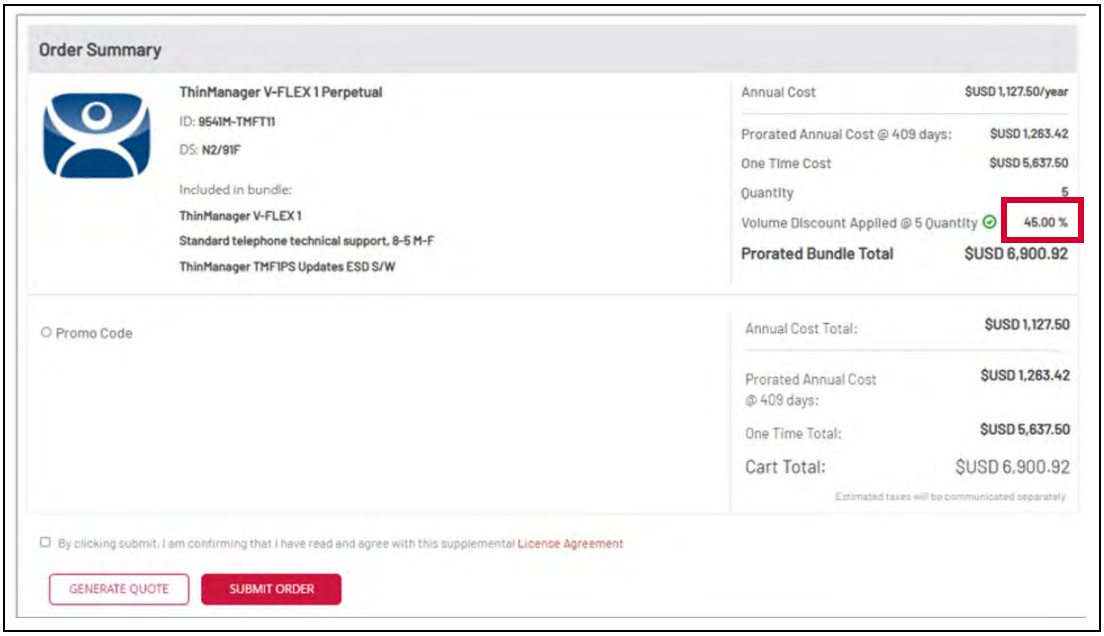
The Software Portal provides a cumulative (step-in) volume pricing discount when performing a Buy More action on software products with volume discounting.

Items that have volume discounts available will be shown with the Information icon. To be eligible for step-in volume pricing, both the original and new contract end dates must align. The Buy More selection will pass the previous volume discount total forward from an existing contract to create a new order. After you select Buy More and complete the checkout on a new order, Buy More will no longer be viewable on the contract. Choose the new contract to perform any additional Buy More actions.

When choosing a Buy More action for a product that has volume discounting, Your Cart is updated with new indicators when step-in volume pricing is applied:

- Volume Discount Applied indicator
- Volume Discount Message explaining the discount
- Cumulative Total Volume—The cumulative total volume of that product which has been purchased by the account previously during the contract life-cycle

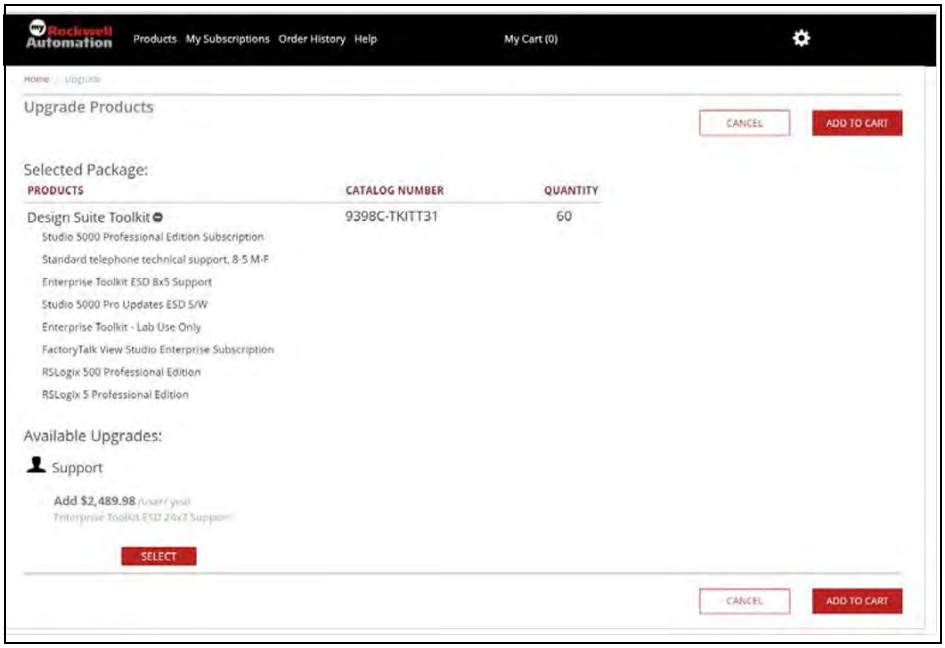
Your Order Summary screen will be updated with new indicators when step-in volume is applied.



IMPORTANT	Updates to the end date on the contract will invalidate the discounted pricing and may lead to the renew being unaligned. Updates made in Transaction Settings, will prompt the user with a blue box message stating that any changes related to volume discounting may impact the ability to consolidate the contract at time of renewal.

Upgrade

When you select Upgrade Products and click ADD TO CART, items will be added to your existing contract. Your cost will be prorated over the contract period. This action allows you to add any available options to your existing contract, such as upgraded support or Add-ons, that may not have been initially purchased.

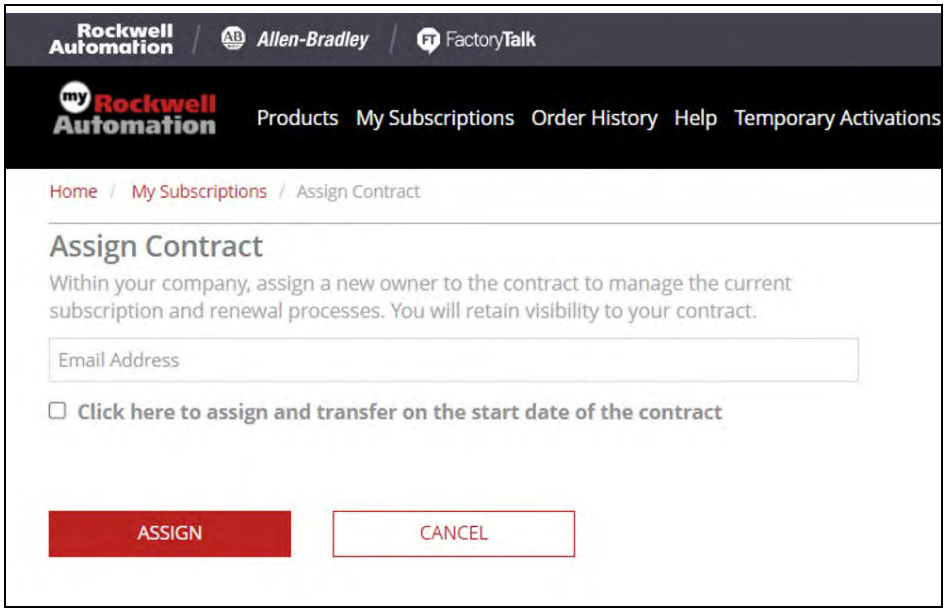


Assign Contract Actions

The Assign Contract action is available on the Account Dashboard. You can click the Manage Subscriptions link under Subscriptions or the Manage Licenses link under Software. The action provides you with two different options for assigning your contract.

- Assign the contract to a new or additional owner in your company to help manage and renew the contract
- Assign and transfer the contract on start date to a new owner at a different company, on the agreement start date.

The Assign Contract action is available for quotations and active contracts. For a quote, the assignment changes will only take effect on the contract start date.



Assign

To assign the contract to a new owner within your company to manage the contract, enter the email address of the new owner and click Assign.

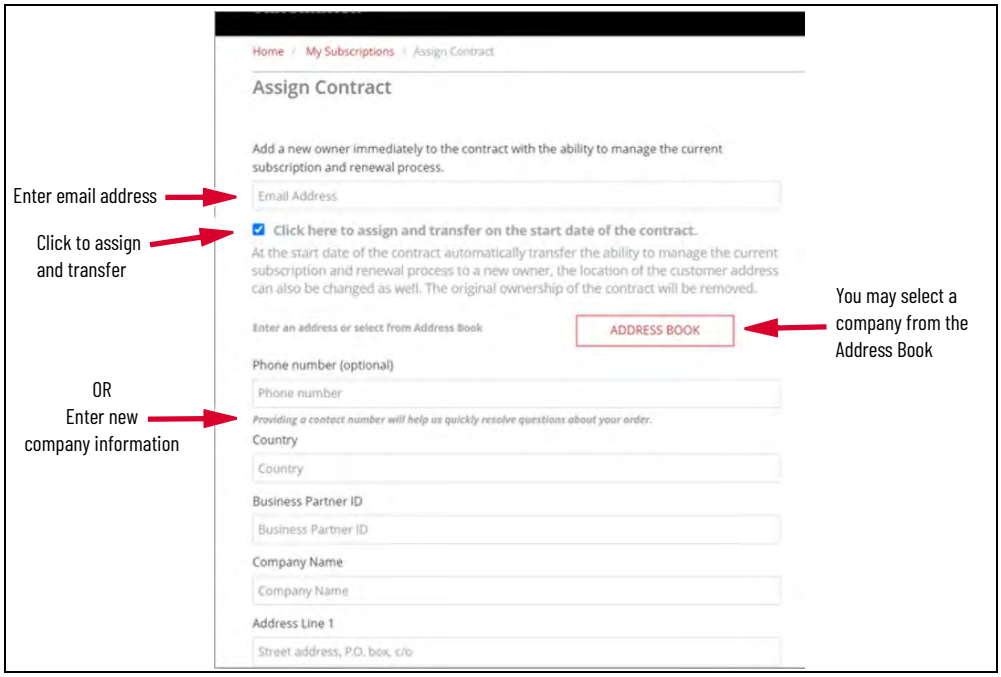
- The new owner is added to the contract and can manage the current subscription and renewal process.
- The new owner receives an Assigned Contract email to notify them they have been added as an owner to the contract.
- The original owner will also maintain visibility to the contract.

Assign and Transfer the Contract on Start Date

To assign the contract to a new user at a different company to manage the contract, click the checkbox to assign and transfer the contract on the start date of the contract. The end user will be responsible for management of the contract and will receive the contract renewal notices.

This option will remove you from contract ownership on the start date and you will lose all visibility to the contract.

When you check box, the dialog will expand to allow details of the new owner and their company to be entered.



Enter the email address of the new owner and address information. The user can use the Address Book to select a new customer address for the contract.

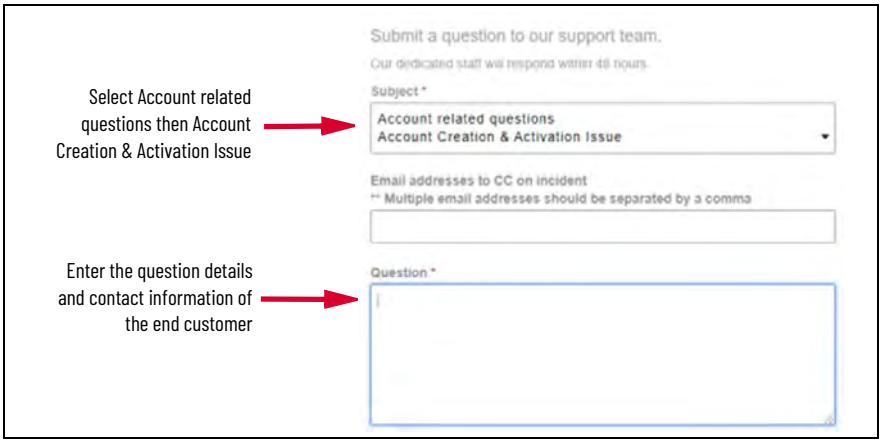
The address will be added as both the Ship To Address and Billing Address. If the Transaction is direct with Rockwell Automation, then the customer billing address will be the Sold To on the Transaction. If the Transaction is purchase through distribution, then the customer billing address will not be part of the transaction.

On the start date of the contract:

- The new owner is added to the contract and can manage the current subscription and renewal process.
- The new owner receives an Assigned Owner email to notify them they are the new owner of the contract and that they will be responsible for the contract renewal.

If your end customer does not have a valid BPID setup in the system, request support through the support team question function on the Help page.

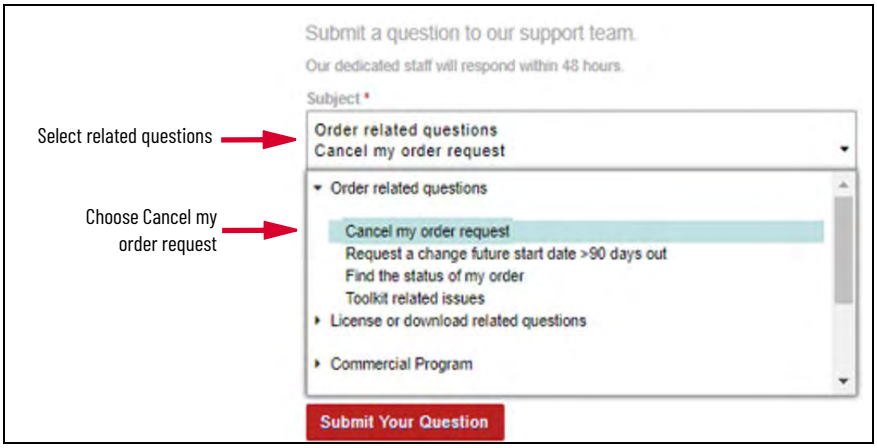
1. Select Subject—Account related questions
2. Select sub-category—Account creation and Activation
3. Provide details in the Question field regarding the end customer to be added and their contact information.



Cancel an Order Request

To cancel a quote or order request for a new contract before you receive the Owner Welcome kit, request support through the support team question function on the Help page.

1. Select Subject—Order related questions
2. Select sub-category—Cancel my order request
3. Provide the quote/order request number to cancel



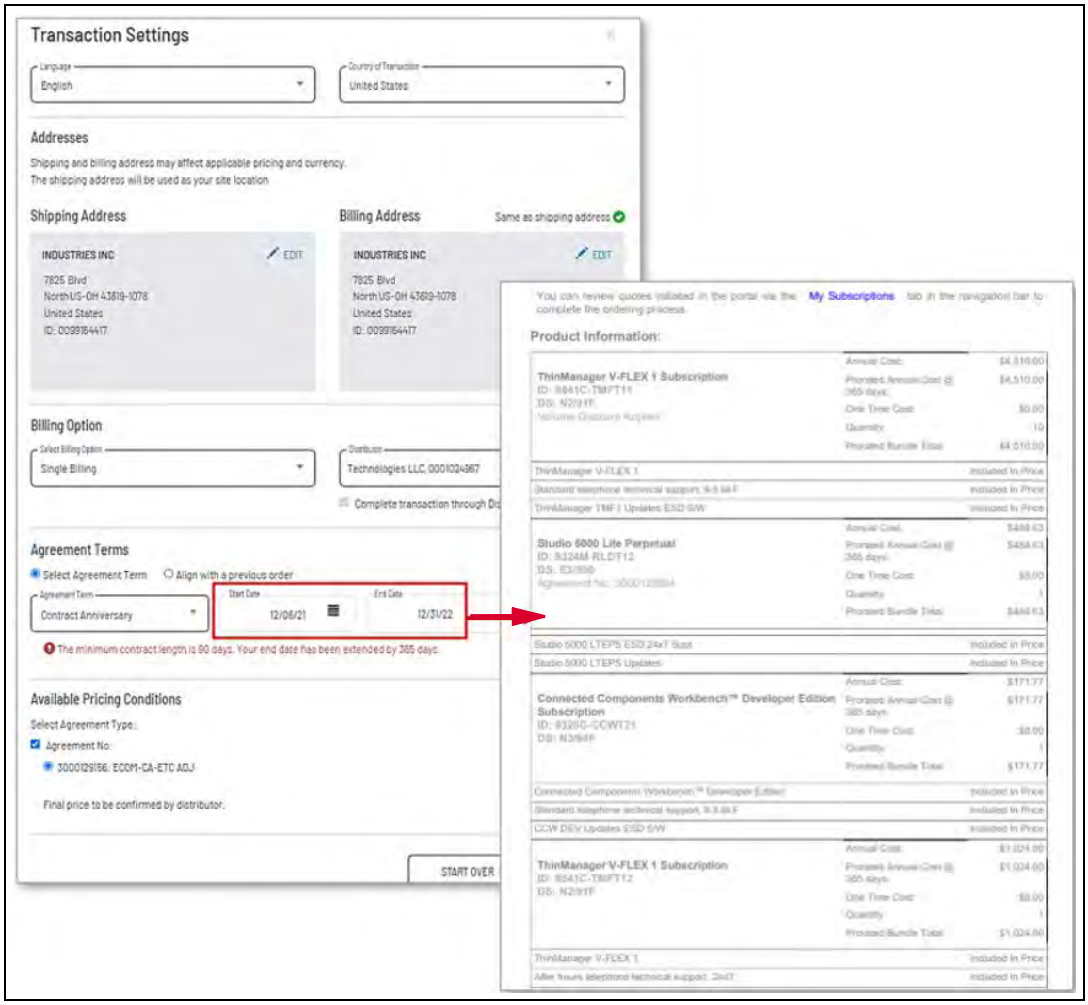
Renewals

As an owner or administrator, you will receive renewal notifications when a contract is approaching its expiration date. You will have option to either let the contract automatically renew or, if needed, take actions to modify the renewal contract and manually renew.

Software subscriptions must be renewed annually. The subscription renewal includes both the license (activation) and maintenance and support contract for the subscription. With a perpetual subscription with maintenance license, you own the license (activation) and it will not expire. However, the maintenance and support contract will expire and needs to renew annually.

Merging Contracts

To achieve a common renewal date for all your software, your renewal contract can have its end date aligned to a common anniversary date or to the end date of other contracts. Upon renewal, the software and maintenance contracts that have aligned end dates will automatically be combined into a single renewal quote.



Renewal notices including your current contract information and a quote are emailed via the Software Portal.

IMPORTANT Invoicing does not take place until the start date of the new renewed contract. If an order is canceled before the start date of the new contract, no invoicing will take place.

Auto Renewal

Software and perpetual subscriptions with maintenance licenses are set to Auto-Renew by default. You have the option to opt out of automatic renewal and perform a manual renewal.

If you make no changes to your renewal, the serial numbers stay the same. There is no added administrative work on your part.

If you do not receive a renewal notice but would like to renew, you can select the contract, and select Renew.

Your previous PO is referenced in your 120-day renewal quote. If you wish to change or update your PO, select the Modify Renewal link in your quote.

With Auto Renewal set, you will only receive one renewal notice, at 120 days. The system will assume you are going to renew whatever you bought last year and at 90 days prior to the expiration the system will create an order. If purchased through distribution, your distributor will review and finalize the renewal contract with you and process it in their system.

- 120 Days Prior to Renewal—An auto renewal email notice will be sent out. At this time, you can take action to change the PO, modify or cancel the contract.
- 90 Days Prior to Renewal—If no response has been made to the 120-day renewal notice, a renewal order confirmation email will be sent out to you and the contract will be ready for renewal.
  - If purchasing through distribution, your distributor will receive a renewal order confirmation email. Once your distributor has validated your order with you and submitted their PO, your distributor will renew your order with Rockwell Automation.
  - Your contract will display a Renewed status

Once the order is created it cannot be modified. That means the PO, the activation count, the incentive dollars (none will be applied) or the pricing discount (based on discounts already in place) are all based on the original order from last year.

If you would like to modify the quote, use the Modify Renewal link provided in the renewal notification email, or you can click the Requote action under My Subscriptions on the Account Dashboard. This will allow you to create a new quote that can be submitted as a new contract.

If you would like to cancel the renewal quote or order before the existing contract expiration date, contact your distributor or request support through the support team question function on the Help page.

Purchase Through Distribution Transactions

For purchase through distribution renewal orders, your distributor will receive an email to add their distributor PO to the renewal order. Once it is entered, the order will progress to Rockwell Automation and the renewal order will be created.

If your distributor does not submit a PO, the order will not be submitted to Rockwell Automation and the renewal order will terminate at 45 days after the expiration date.

Your distributor has additional options on managing your renewals:

- They can choose to receive renewal notification emails on your contracts by selecting to receive email notifications in View Addresses under My Account.
- They can choose to turn on/off auto-renewal on your behalf by clicking the Auto-Renew action.
- They can create a renewal quote for you by selecting the contract and clicking the Requote action. If you choose, they can also enter your PO at that time so that no further steps would be required for you to renew. You will then receive a Repeat Owner Assignment email with notification that an order has been placed on your behalf.

Auto Renewal Opted Out

If you opt out of Auto Renewal, you will receive renewal notices. When each renewal notice is sent, a quote will be generated and you will have an opportunity to adjust the quote to meet your needs moving forward. This includes the number of activations, PO you intend to assign to the order, as well as leveraging any incentive dollars that may be available at the time the quote is converted to an order.

Renewal Notices:

- 120 Days Prior to Renewal—An auto renewal email notice will be sent out. At this time, you can take action to change the PO, modify, or cancel the contract.
- 45 Days Prior to Renewal—If you have elected not to auto renew and no action has been taken from the prior renewal notifications, a renewal notice email will be sent out with suggested actions to change the PO, modify, or cancel the contract.
- 10 Days Prior to Renewal—If you have elected not to auto renew and no action has been taken from the prior renewal notifications, a final renewal notice email will be sent out with suggested actions to change the PO or to cancel the contract.
- The contract will expire at the end of the contract term if no action is taken.

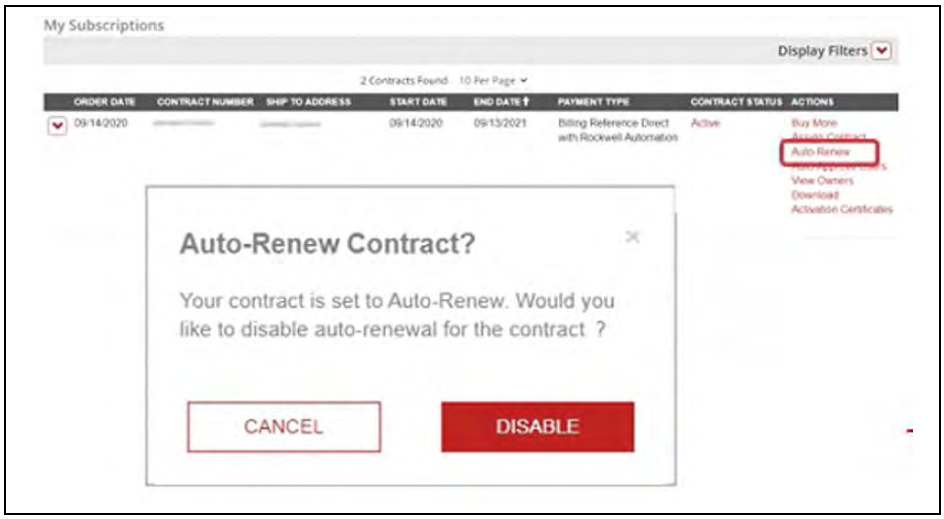
Renewal Notification Opt Out—To opt out of receiving renewal email notifications, click the View addresses link in My Subscriptions and click the box for Renewal Notification Opt Out. This will stop the email notifications, but not opt your orders out of automatic renew.

Disabling Automatic Renewal

No additional actions for renewal need to be taken by the owner unless they want to update their PO or modify or cancel the contract.

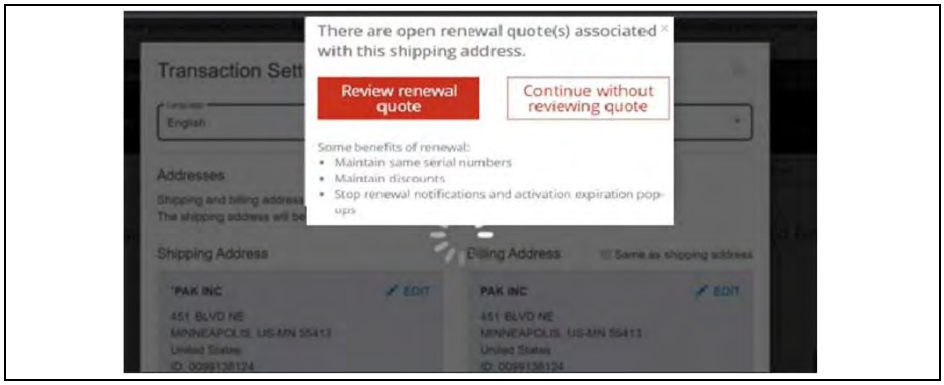
IMPORTANT Your existing PO will be used in the auto renewal unless you take steps to change it.

All customers will start out with the auto-renew feature turned on and then they must opt out of automatic renewal if desired. Options to opt out are provided in renewal emails to the owner and can be accessed in My Subscriptions by clicking the Auto Renew action.



Renewal Quote Notification

A notification about active renewal quotes will display when updating the shipping address in Transaction Settings if a renewal quote exists. The notification displayed will provide options to consider reviewing the renewal quote or to continue in Transaction Settings without review.



Click Review renewal quote to navigate to My Subscriptions where all renewal quotes will be displayed.

Renewal Email Notifications

At 120 days before expiration, a renewal email will be sent to the owner notifying them of the automatic renewal of their contract. It includes a copy of the quote attached and the contract information including:

- Billing and shipping address
- Distributor information
- Existing subscriptions
- Cost of subscriptions
- Current users
- Quote terms

Automatic Renewal

If automatic renewal is enabled for your contract, you will receive the following renewal email notification.

A quote is attached to the email as a PDF file. The PDF file can be reviewed and emailed as needed.

Rockwell Automation

Software Subscription Quotation

Quote Information:

Additional Comments:

Product Information:

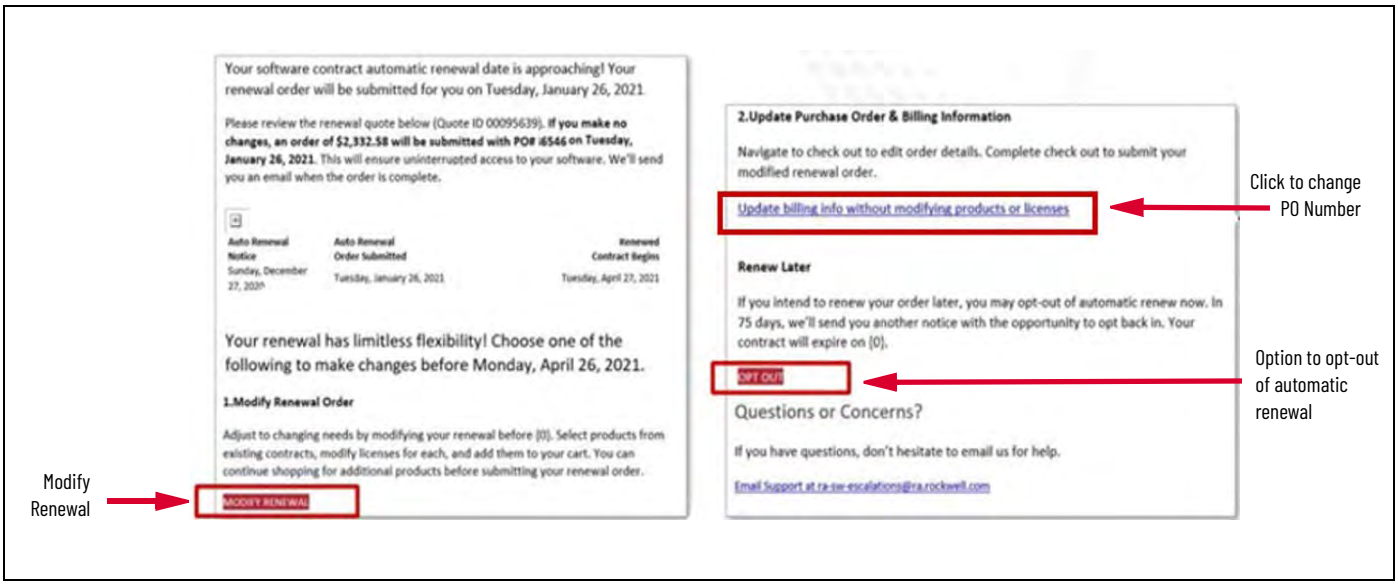
Order Total:

Quote Terms:

The email provides three important links:

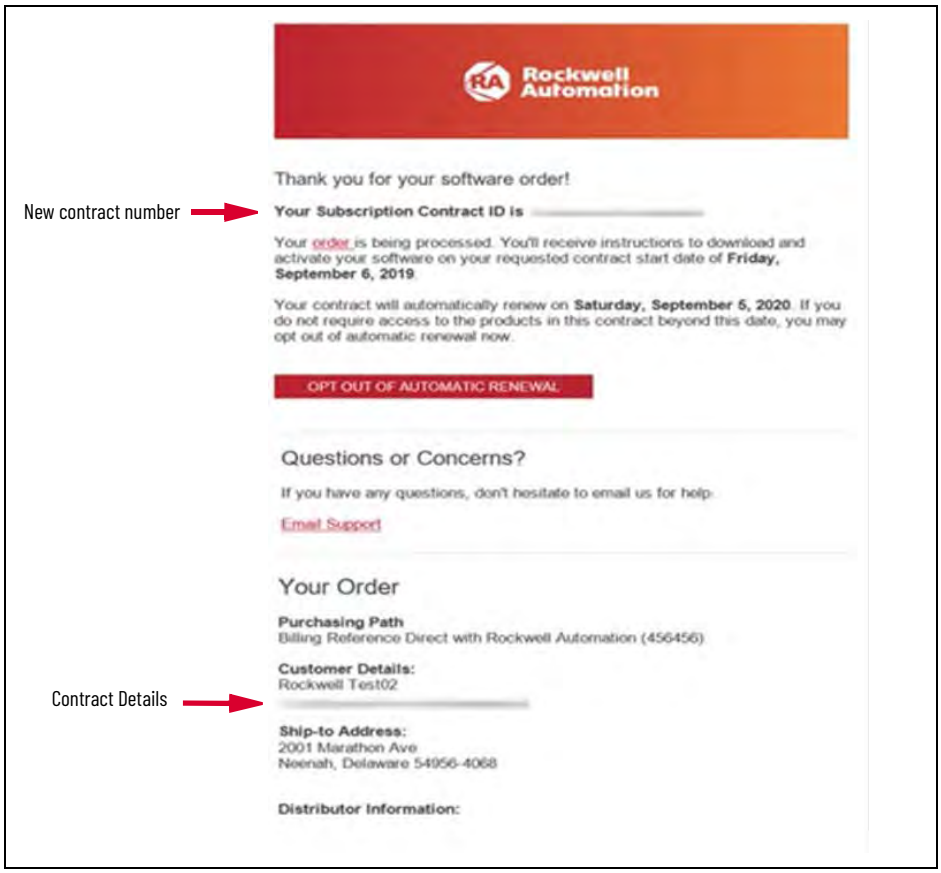
- Update billing info without modifying products or licenses—Use this link to only change the Purchase Order number or other billing information. If you only change the billing information and do not modify any product license, then your contract will renew with the same serial numbers.
- Modify Renewal—Use the Modify Renewal link if changes to the contract are needed such as adding or removing licenses or adding additional products. If you modify the renewal, new serial numbers will be generated for the new contract.
- Opt Out—Use the Opt Out link if you do not want automatic renewal. Rockwell Automation will send out email renewal notifications at 120 days, 45 days and 10 days to remind you of a pending expiration of a subscription or perpetual maintenance and support contract.

If you opt out of auto renewal, you can manually renewal, or you can opt back into auto-renew using the Renew Contract and Auto-Renew actions in My Subscriptions.



At 90 days before the contract expiration, if no modifications are made to the renewal, a renewal order request is created and an order confirmation email is sent to the owner. The previous purchase order will be populated in the order request.

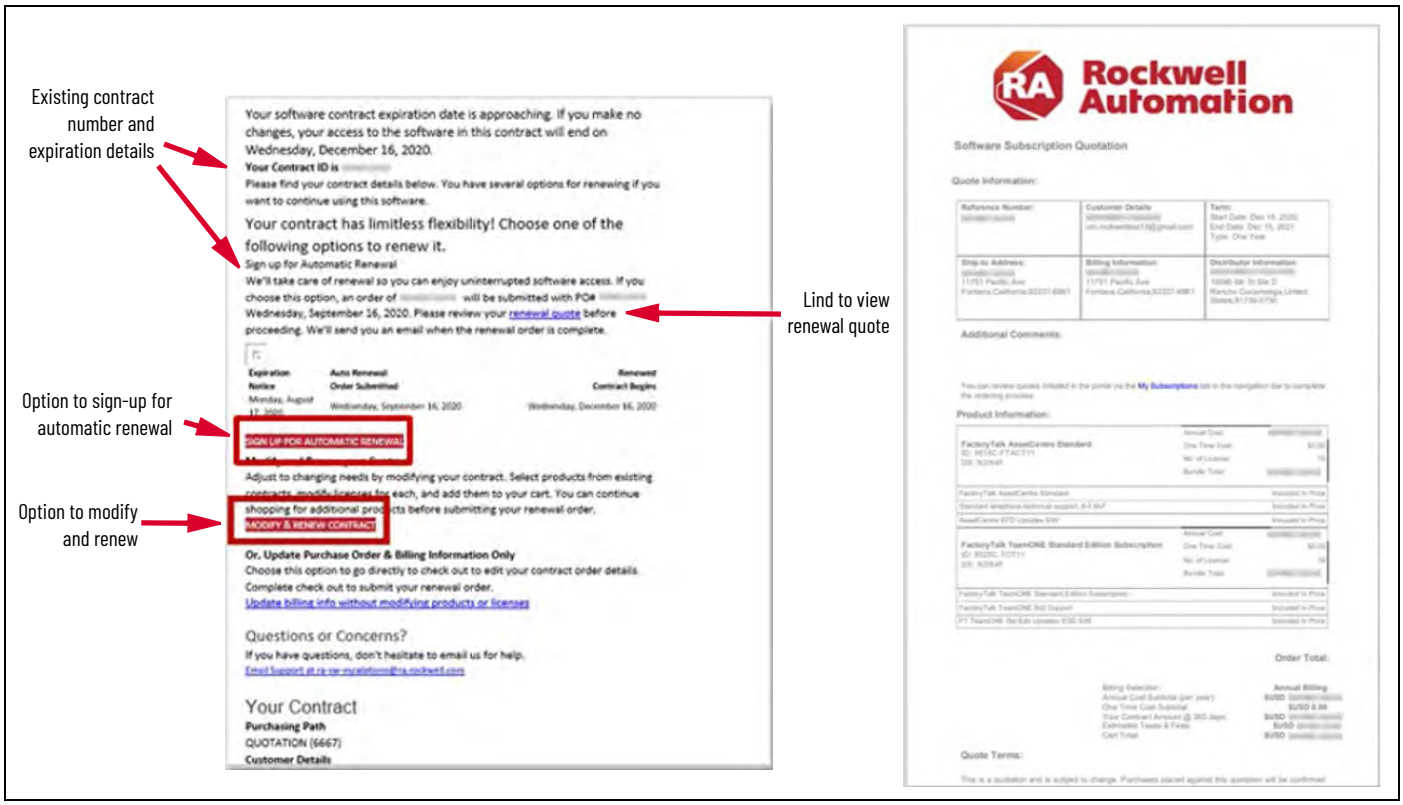
For purchase through distribution, your distributor will also receive a renewal order confirmation email. Once your distributor has validated your renewal order with you, your distributor will renew your order with Rockwell Automation and invoicing will take place.



Manual renewal

If you have opted out of automatic renewal, you will need to manually renew your order in My Subscriptions.

When a contract is within the 120, 45 and 10 days of expiration, a renewal email will be sent to the owner notifying them of the upcoming expiration. It includes a copy of the quote attached and a link to navigate them to My Subscriptions in the Software Portal to modify and renew their contract.

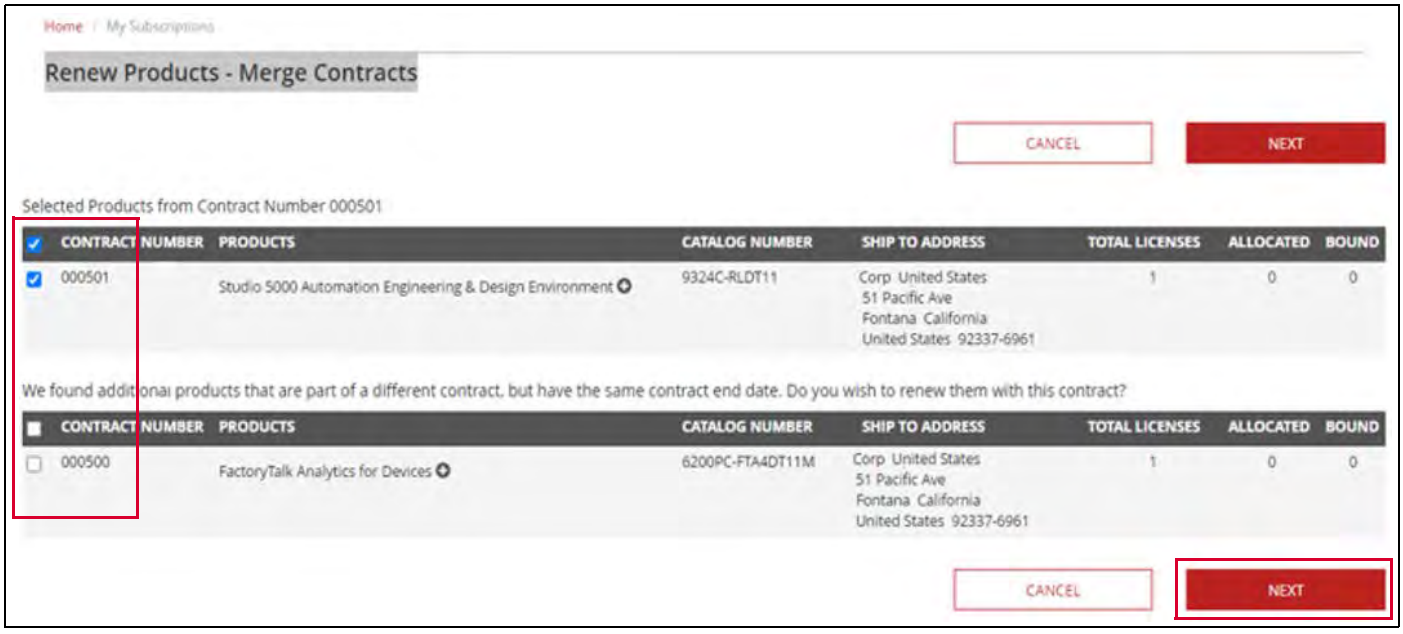


In My Subscriptions, the Renew Contract action will be available within the 120-day expiration of your contract.

The owner can click the link in their renewal email or navigate to My Subscriptions in the Software Portal.

1. In My Subscriptions select the contract to renew.
2. Click the Renew Contract action.

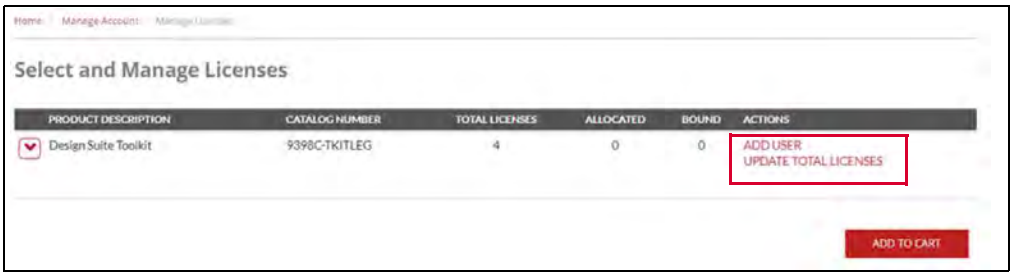
In the Renew Products—Merge Contracts page, you can select items that are in the contract up for renewal to be added to the new contract being created. You can also select other products that are part of a different contract but have the same end date and add them to the new contract being created for the renewal. All selected items will be added to the new contract being created during this renewal.



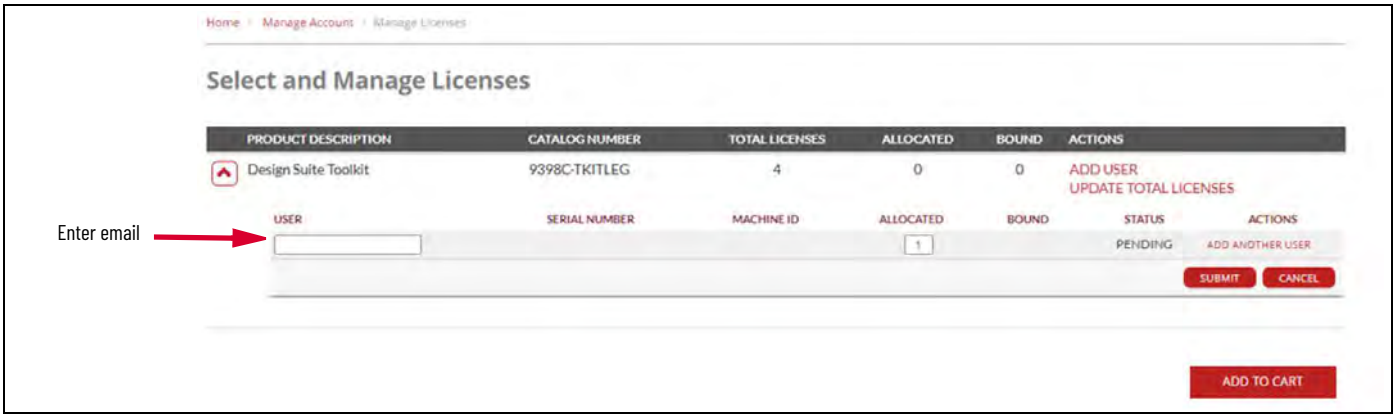
3. All current items that are part of the contract will be pre-selected for renewal.
4. Review the list of pre-selected items and confirm the ones you wish to renew.
5. De-select any items you do NOT wish to renew.
6. Click NEXT to continue.

During renewal, the owner can add additional users and update the total licenses to the contract.

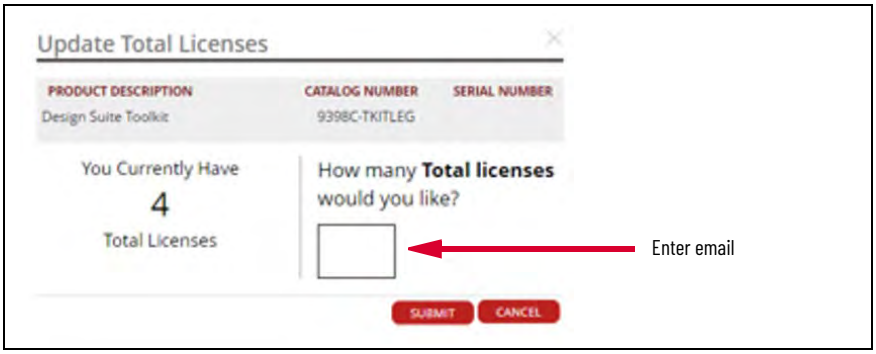
7. Click ADD USERS.



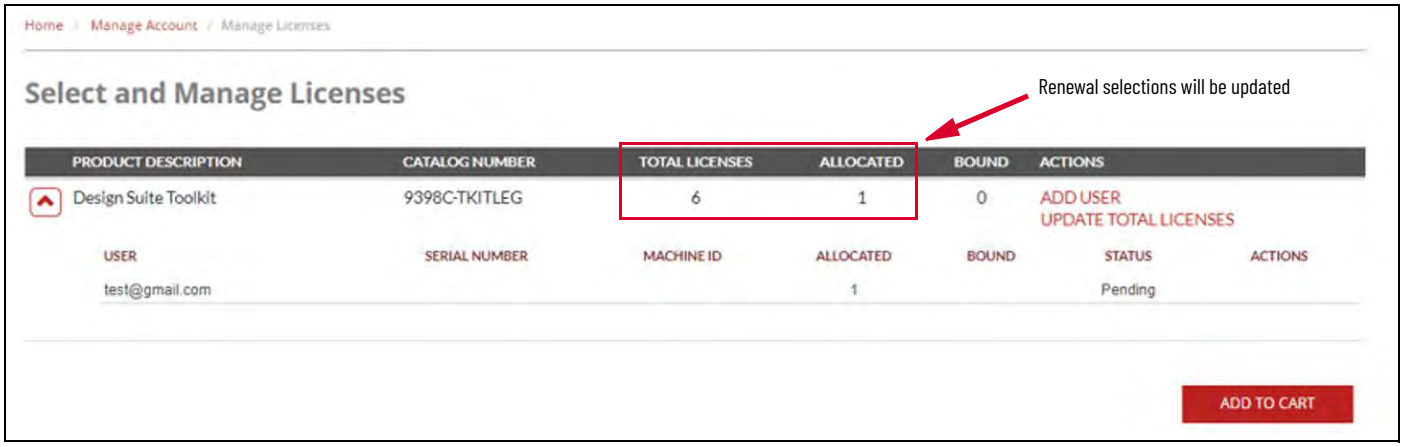
8. Enter the email address of the user you wish to assign a license to.



9. Click SUBMIT after entering email address.
10. Select UPDATE TOTAL LICENSES to increase the quantity of a license.

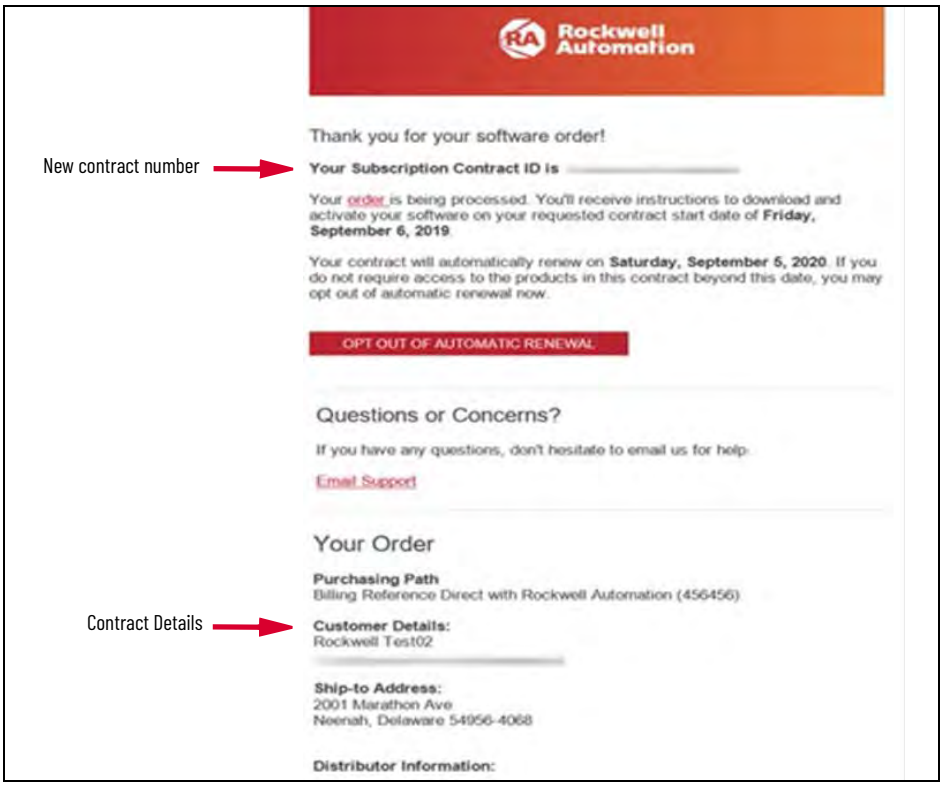


11. Click SUBMIT.



12. Review your selections and click ADD TO CART.
13. Click on CHECKOUT, if you are ready to checkout or CONTINUE SHOPPING, if you would like to add more items to your shopping cart

14. When you click CHECKOUT, the owner will receive an order acknowledgment email regarding the renewal.



For a simple renewal experience, use the automatic renewal option. If you choose to manually renew online in the Software Portal, be sure to choose the Renew Contract action, not Buy More.

Activation Renewals

Viewing and Validating User Renewal Status

Manage Licenses will display status of your current licenses.

For bound licenses that have been assigned to an email address and activated via ACTIVATE SOFTWARE in the User Welcome Kit emails, those licenses will be aligned in Manage License with their bound machine name.

On the renewal start date the user will receive an existing user notification which has instructions on scenarios including automatic, manual, and disconnected activation.

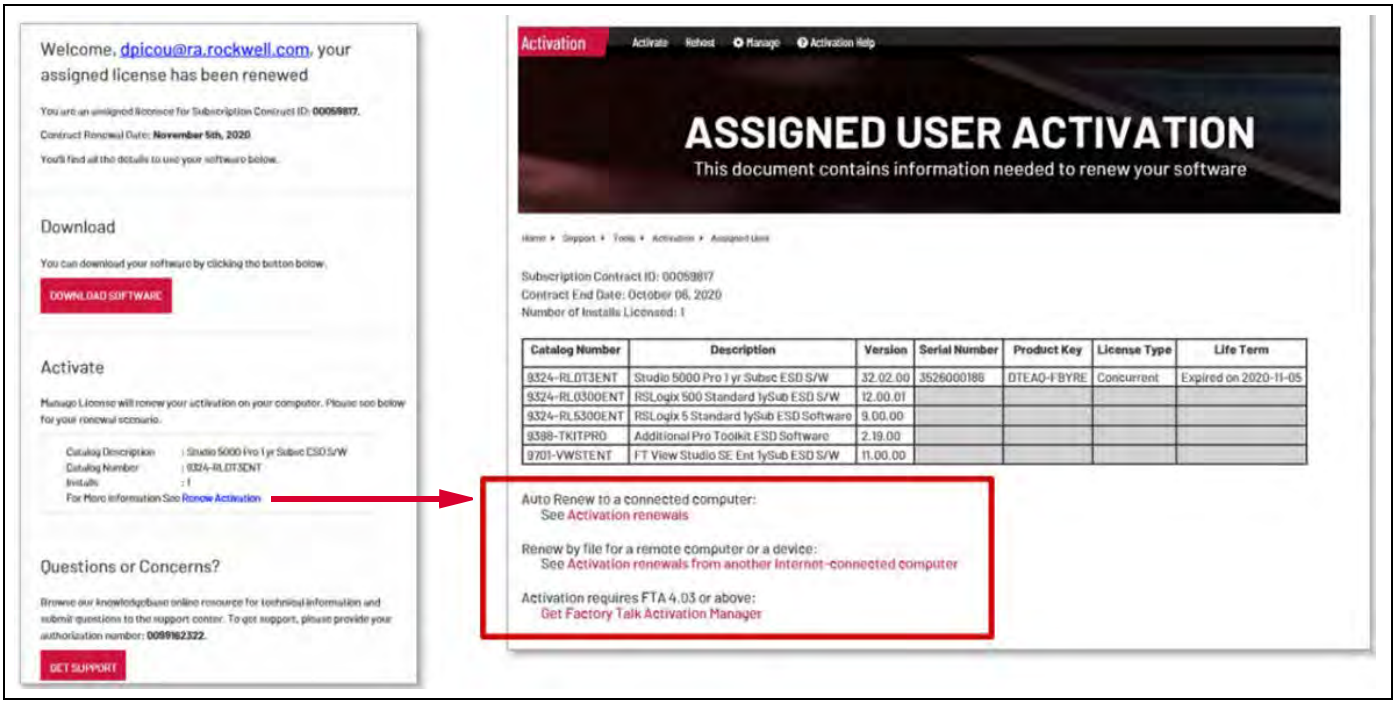
For any licenses that are assigned as Unknown, (where a software user activated their software using FTAM), and they are aligned and bound in Manage Licenses to a machine name, they will not automatically receive the existing user notification with instructions for activation.

- Before contract expiration, the owner or administrator can populate the Unknown licenses with a user email to align and enable a renewal email. On the renewal start date the user will receive an existing user notification which has instructions on scenarios including automatic, manual activation and disconnect activation.
- If no email is provided for Unknown, the email notification will not be sent.

If Codemeter and FTAM version is less than 4.04, '130-xxx' will display instead of Unknown.

Existing User Notification Email

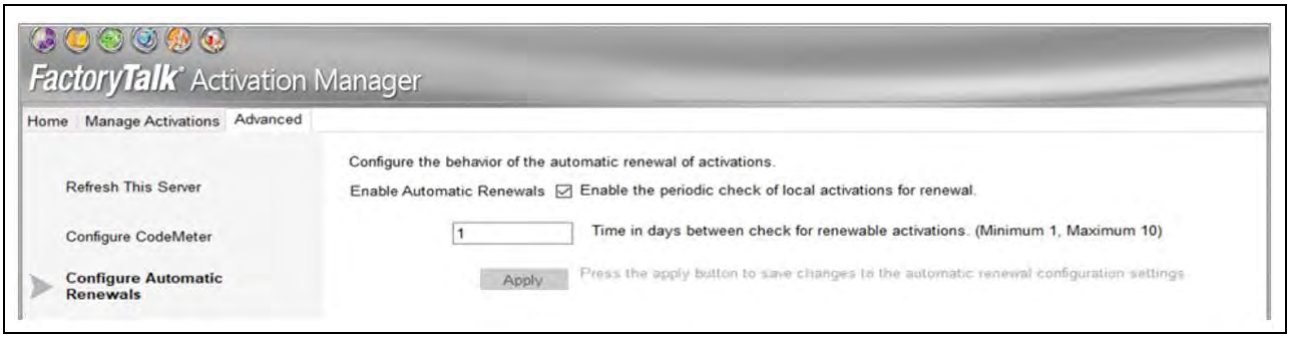
The existing user notification email contains a blue Renew Activation link that will navigate the software user to the Rockwell Automation Activation page with information on their current activations and information to renew their current activations.



Click the red link that applies to your renewal scenario. Each scenario will provide instructions for activation in FactoryTalk® Activation Manager.

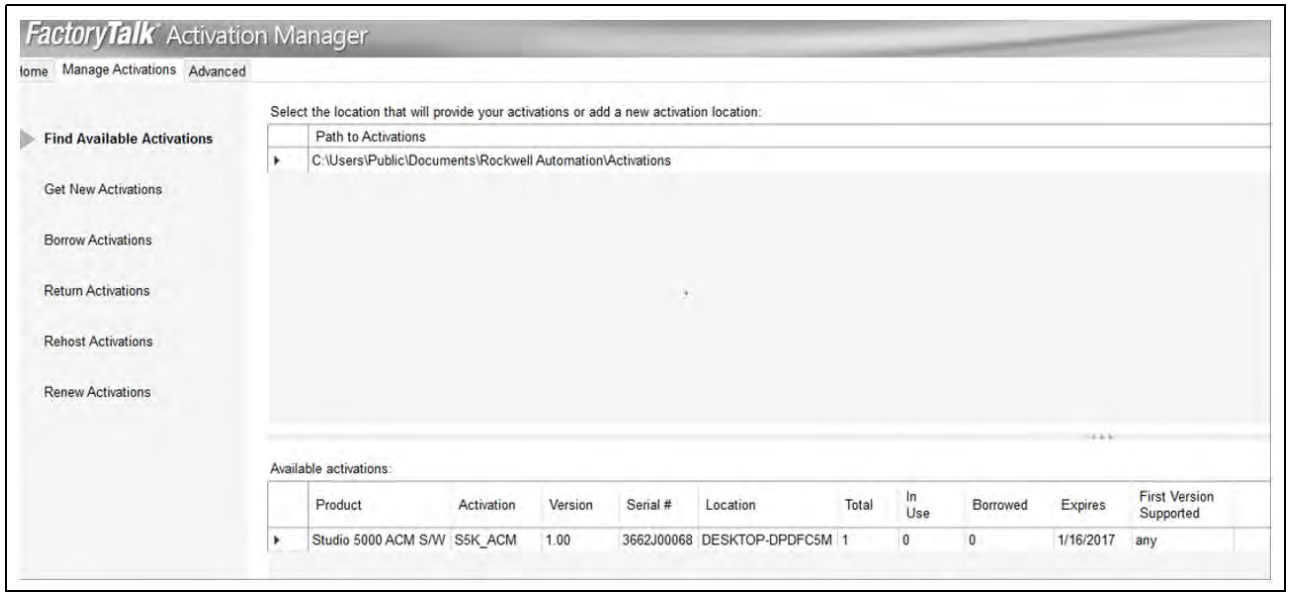
Scenario Options:

1. If the software user in the plant is connected to the internet and has auto-renew configured in FactoryTalk Activation Manager, no action needed, activation happens automatically.
2. If the software user in the plant is connected to the internet and does not have auto-renew configured in FactoryTalk Activation Manager, select Renew Activations on Manage License tab to activate the license.



3. If the software user is disconnected/air gap from the internet, use a removable storage device to move activation to the device. Follow the instructions on the activation page.

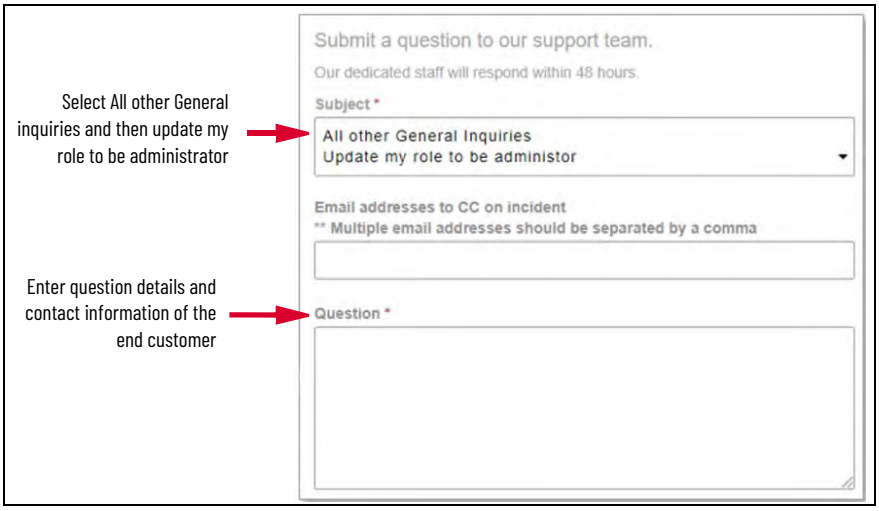
Once the activation is renewed, it will retain the same serial number a new expiration date will be displayed in FactoryTalk Activation Manager.



Toolkit Librarians

If your Toolkit Librarian contact changed, since your last Toolkit renewal, take the following actions:

1. Send an email to rschannel@ra.rockwell.com
2. Request to be an administrator by submitting a request through the support team question function on the Help page.
3. Select Subject—All other General Inquiries
4. Select sub-category—Update my role to be an administrator.



5. Enter the following details in the Question box.
   - Subscription contract number
   - BPID
   - Previous name or email address (preferred but optional)
   - New name with email address

Contract Dates

Purchase Date

The purchase date is the date the order is placed (submitted) for purchase.

- The owner will receive an order confirmation email.
- The owner can assign software users to licenses in the Manage Licenses page.

Agreement Start Date

The agreement start date selected Transaction Settings for the contract agreement and support to start.

- The owner will receive their Welcome Kit email containing software download and license information. Software users will receive their Welcome Kits containing links to download and activate their software.
- Support begins on this date.
- Invoicing is aligned to this date.

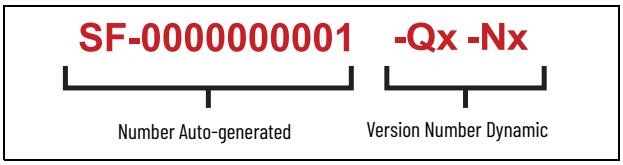
For a common renewal date for all your software contracts, or if you would like to merge software contracts at the next renewal, we recommend aligning contract end dates.

The options for alignment will only display if you have existing Software Portal contracts.

New Contract Number Breakdown

Transactions created after the December 10th, 2021 release will use a new contract number format. In My Subscriptions, your transactions will be displayed with either the old contract number style or the new number.

The new contract number format contains an auto- generated number field and two version fields. The first field is the quote version. The second field identifies if the transactions is an order, amendment, or renewal. An amendment is an upgrade or change to an existing order.



- SF-0000000001-Qx-Nx (Contract number with Quote and Order Version)
- SF-0000000001-Qx-Ax (Contract number with Quote and Amendment Version)
- SF-0000000001-Qx-Rx (Contract number with Quote and Renewal Version)

SF-xxxxxxxxxx—The ten-digit contract number is auto generated and will not change until a renewal quote is created.

Qx—The quote version x can continuously increment with the transaction as requotes and amendments are performed.

Ax—The amendment version x can continuously increment with the transaction as amendments are performed.

Nx—The order version x is either 0 (no order) or 1(order created).

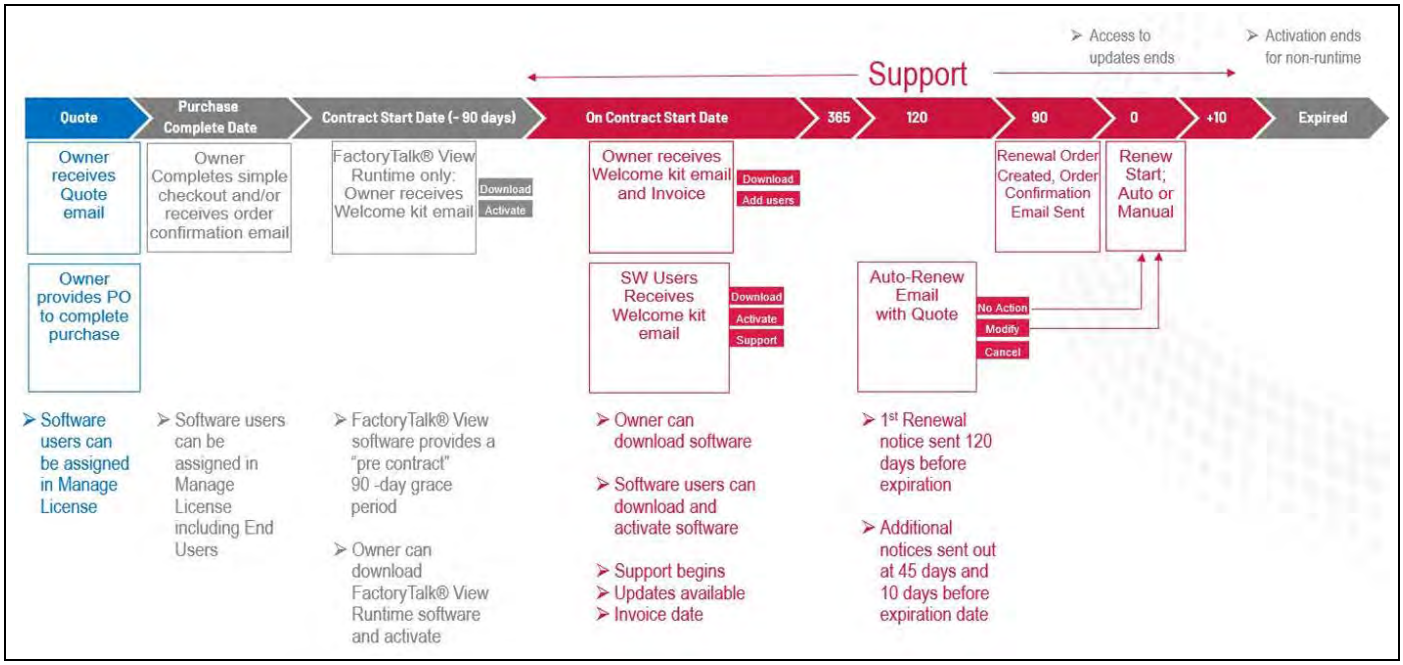
Rx—The renewal version x is either 0 (no renewal order) or 1(renewal order created).

The new contract number format is maintained throughout the agreement cycle with version information throughout your transaction and will be displayed in Software Portal pages, documents, invoices, and emails.

This affects transactions in the US, Australia, and Canada.

Toolkits and transactions placed by RA support groups (for example: superseded transactions) do not have the new contract format numbers. The original contract style will be displayed.

Contract Timeline



Contract Management Options

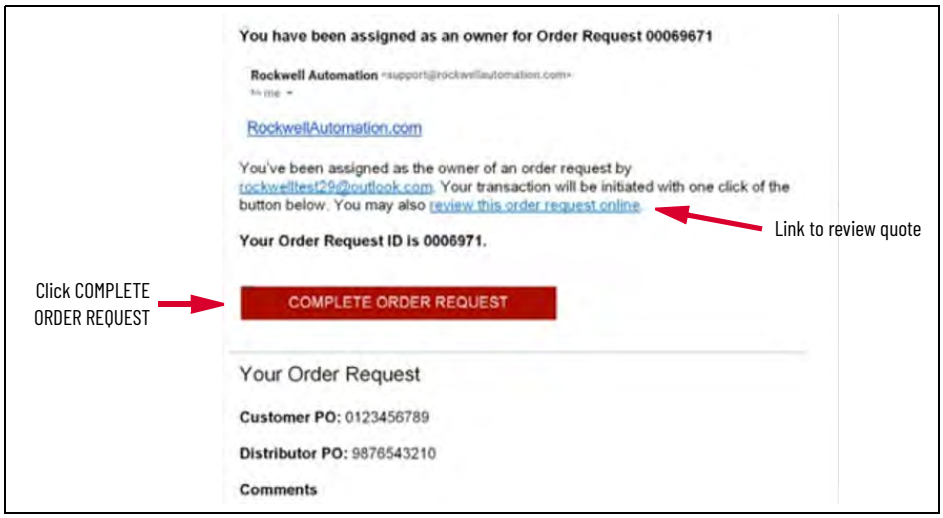
After the initial purchase of your subscription, you have 3 options for managing the software contract:

- Maintain Contract—You will initially purchase software and maintenance and assign the end user's names to licenses in Manage Licenses. The end user will be a software user only and you still maintain the contract. This option will retain you as the owner and you will receive the contract renewal notices.
- Assign and Transfer Contract on Start Date—You will purchase software and maintenance and transfer ownership of the contract and licenses to the end user on the contract start date. The end user will be responsible for management of the contract and receive the contract renewal notices. This option will remove you from ownership on the start date and you will lose all visibility to the contract.
- Opt Out of Contract—You will initially purchase software and maintenance but will not be renewing the maintenance at contract end date, you will let the maintenance contract expire. This option will remove you from ownership at time of renewal.

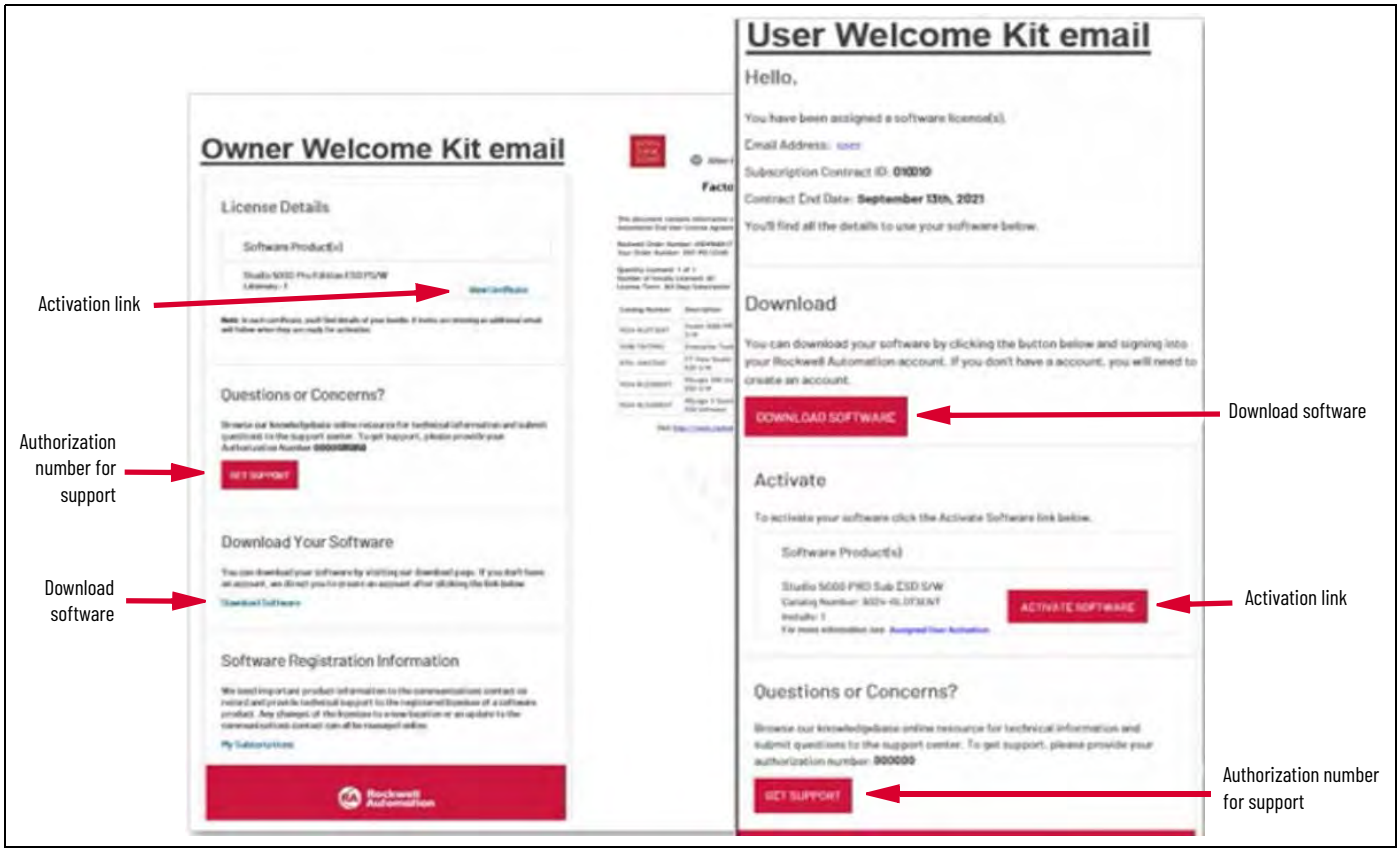
Maintain Ownership Option

In this option you choose to own and maintain the software contract and assign licenses to a user.

1. Distributor assigns you as the quote owner.

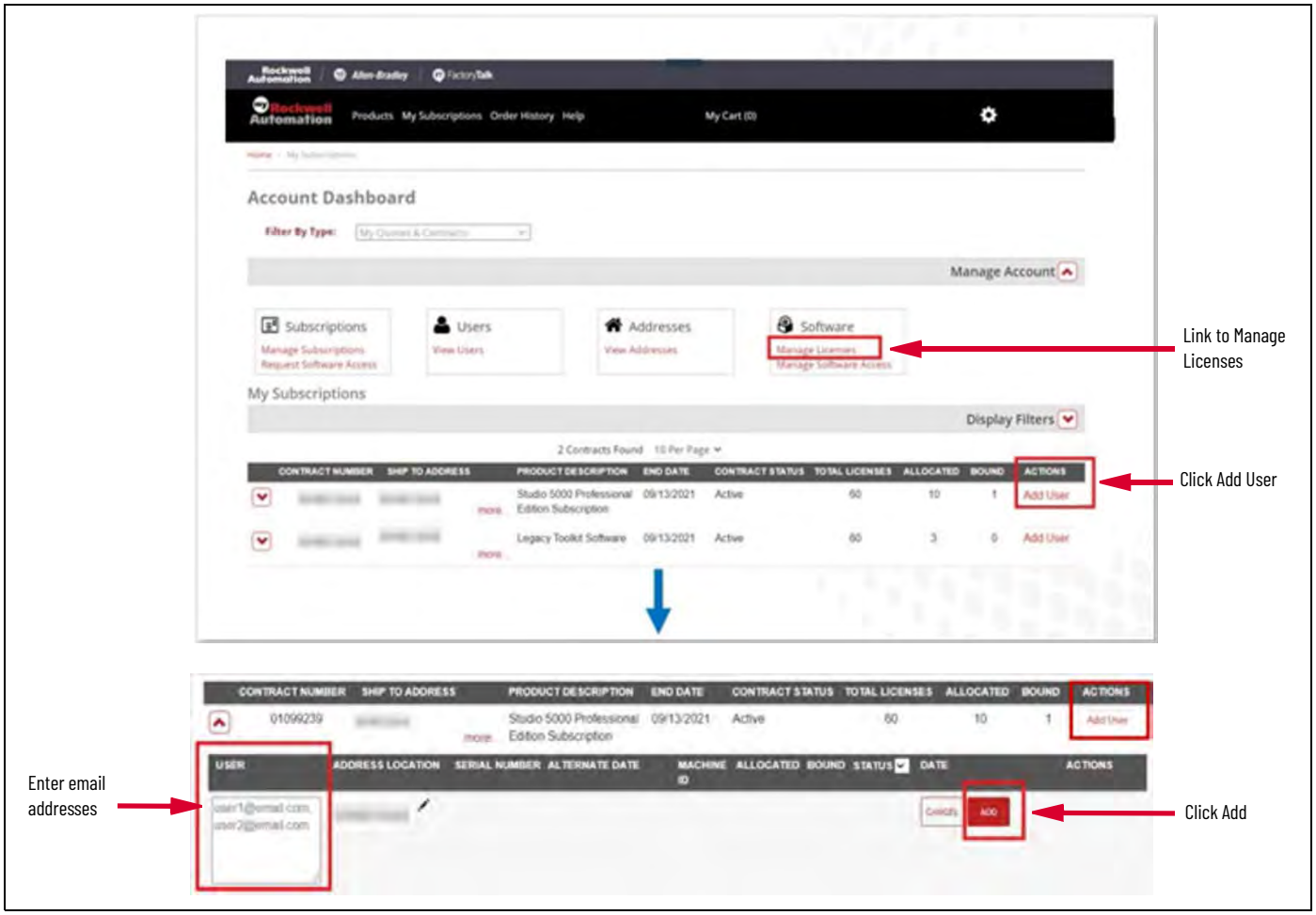


2. Complete the checkout for your order from the email or optionally online in the Software Portal.
3. Owner and User Welcome Kits containing software download and activation links will be emailed on agreement start date.



4. Authorization numbers for support are provided at bottom of each Welcome Kit email.

5. Assign software licenses to end user email addresses using the Manage Licenses link in the Software Portal.



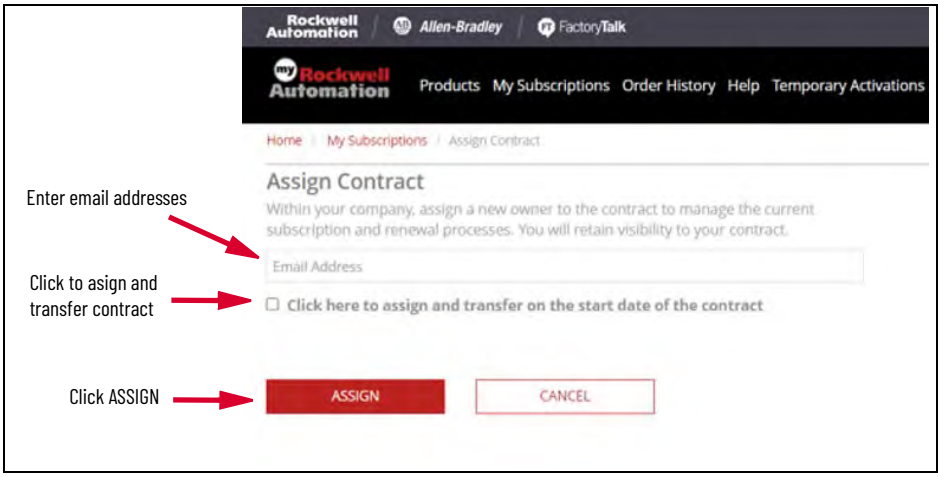
Assign and Transfer Contract on Start Date

In this option, you can choose to assign your contract to your end user.

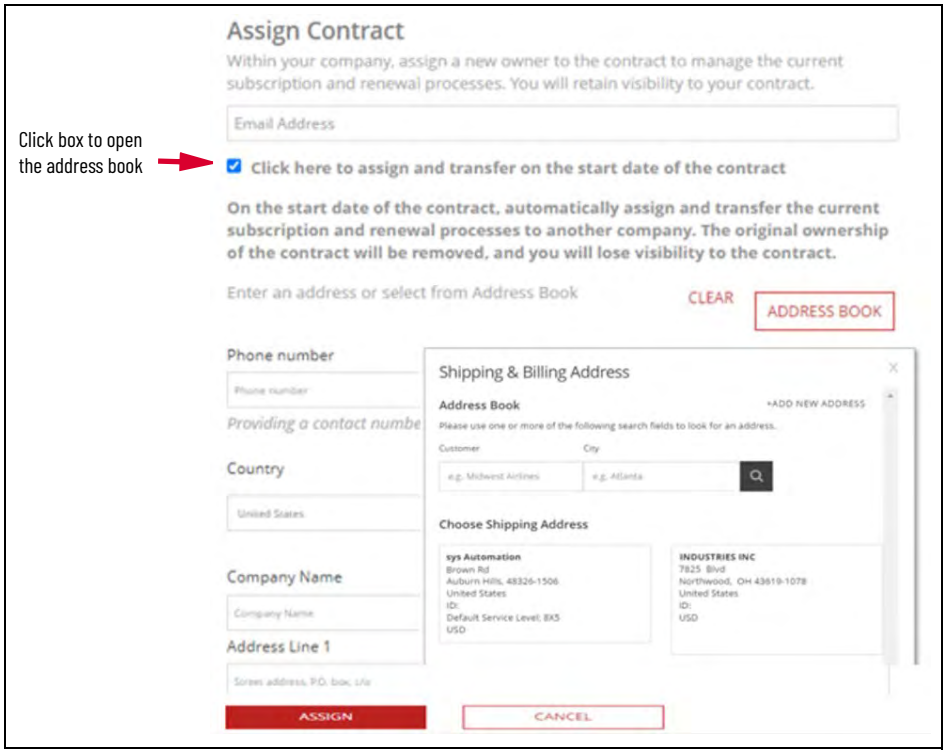
1. Select My Subscriptions in the Software.
2. Select ASSIGN CONTRACT action.

3. Enter the email address of the new owner.

4. Click the checkbox to assign and transfer the contract on the start date of the contract.



When you check the checkbox to assign and transfer contract, the Assign Contract page will expand to allow the selection of a new owner to assign the contract to.

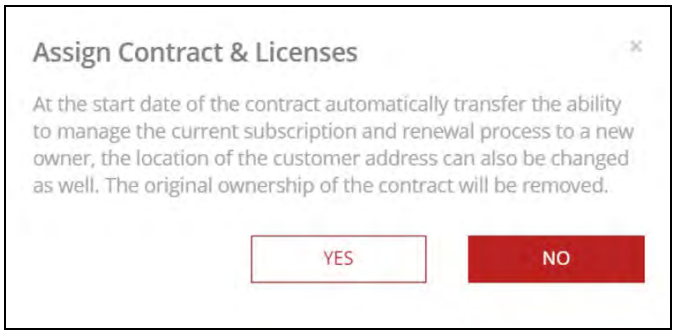


5. The owner can enter or use the Address Book to select a new address for the contract.

The address will be added as both the Ship To Address and Billing Address in the portal. If the Transaction is Rockwell Direct, then the Customer Billing Address will be the SOLD TO on the Transaction. If the Transaction is Purchase Through Distribution, then Customer Billing Address won't be part of the transaction.

6. Click Assign.

7. Confirm to proceed with the transfer.



On the contract start date the new owner receives a simple Order Assignment email, and the original ownership of the contract will be removed.

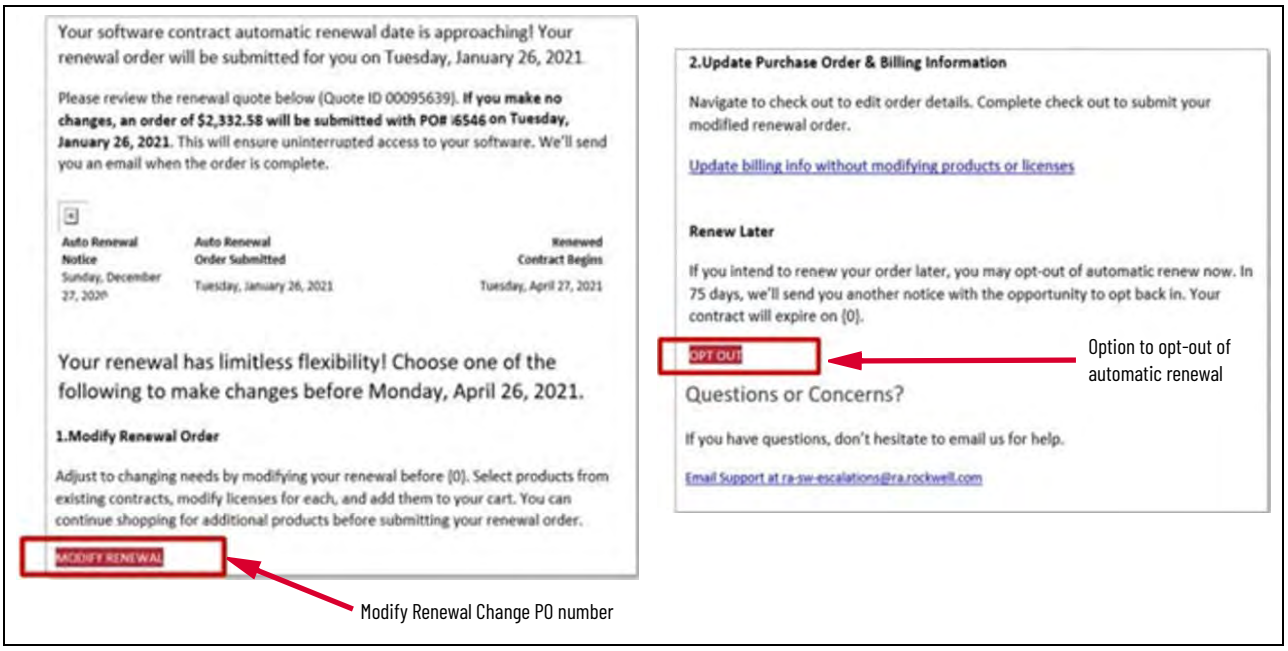
This action will remove the original owner from the contract, and they will NOT have visibility to the contract.

IMPORTANT	You can transfer a contract and renewal to your end customer after you have already received your 120-day renewal notice. You will need to assign and transfer your contract to the new customer and then you will need to use the Assign Quote action in My Subscriptions to assign your renewal quote to your end customer as well.

Opt Out of Contract Option

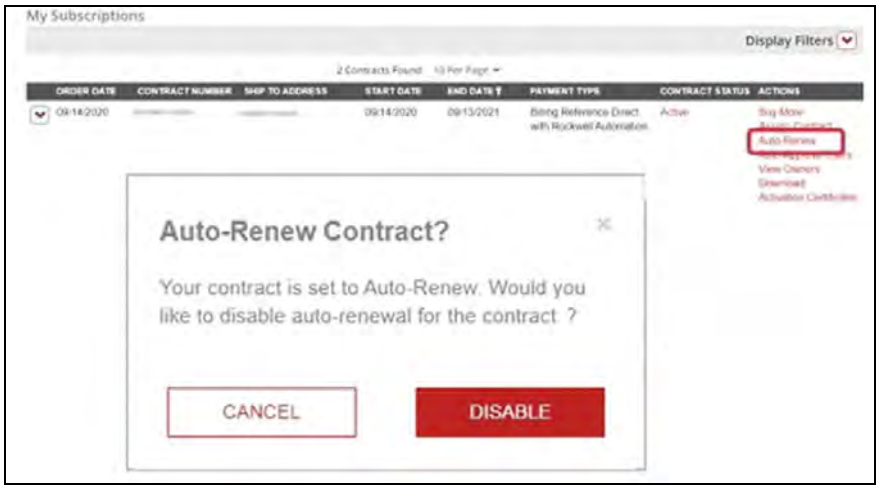
By default, all contracts are setup for automatic renewal. You can opt out at any time.

The option to OPT OUT will be included in the renewal email you will receive 120 days before the contract expires. The email also provides an option to Modify your renewal if changes are needed to the contract.



Alternatively, you can take action from the My Subscriptions tab in the Software Portal to disable the Automatic renewal.

1. For the selected contract, select the Auto Renew action.
2. Click Disable in the Auto-Renew Contract dialog window.



Multi-Site and Multi-Start Contracts

For help with structuring a complex quote spanning multiple sites with multiple start dates, submit a request through the support team question function on the Help page.

Welcome Kits

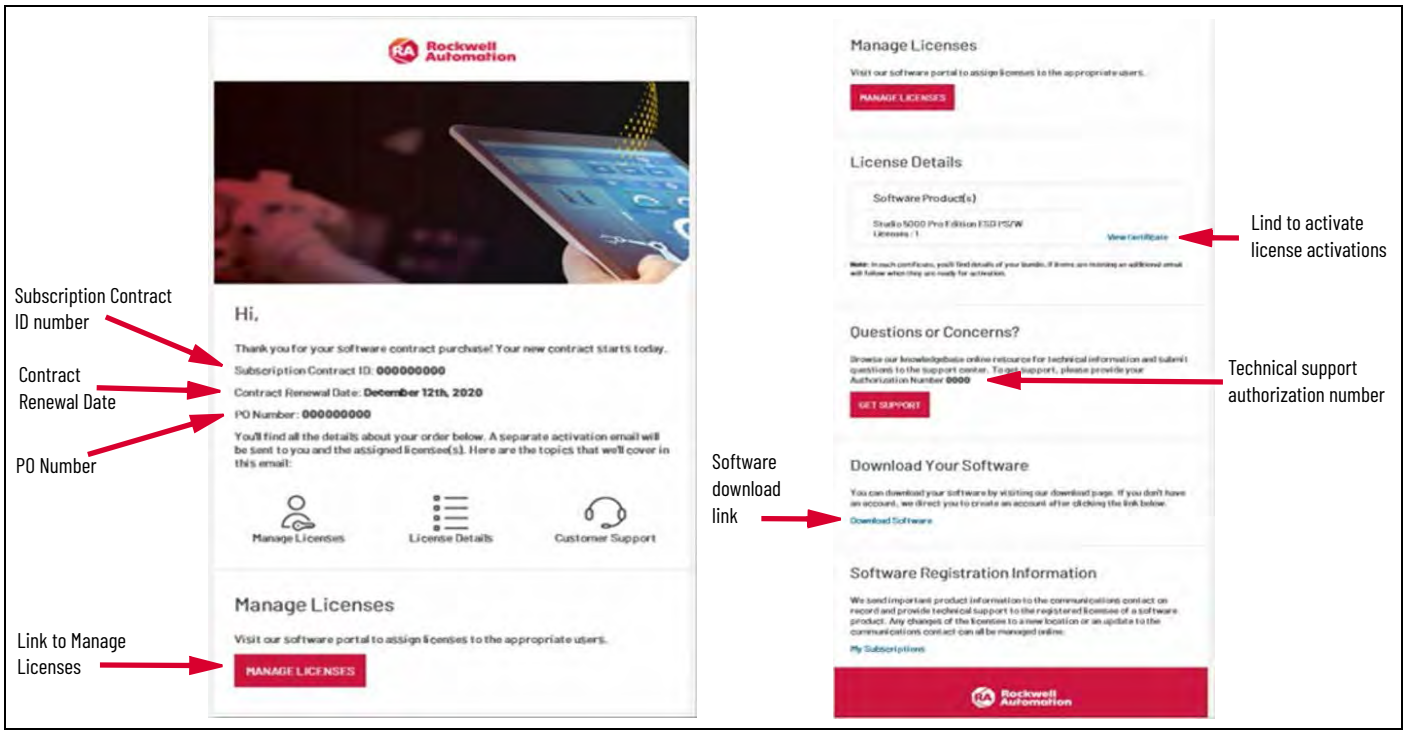
Once an order has been completed and submitted, on the agreement start date an Owner Welcome Kit and User Welcome Kit email with the license and software information is generated and sent to the owner. An owner is automatically assigned as a software user and assigned one license.

Users assigned software licenses will receive their own User Welcome Kit email with activation and license information on the contract start date or when they are added to an active contract by an owner.

Owner Welcome Kit

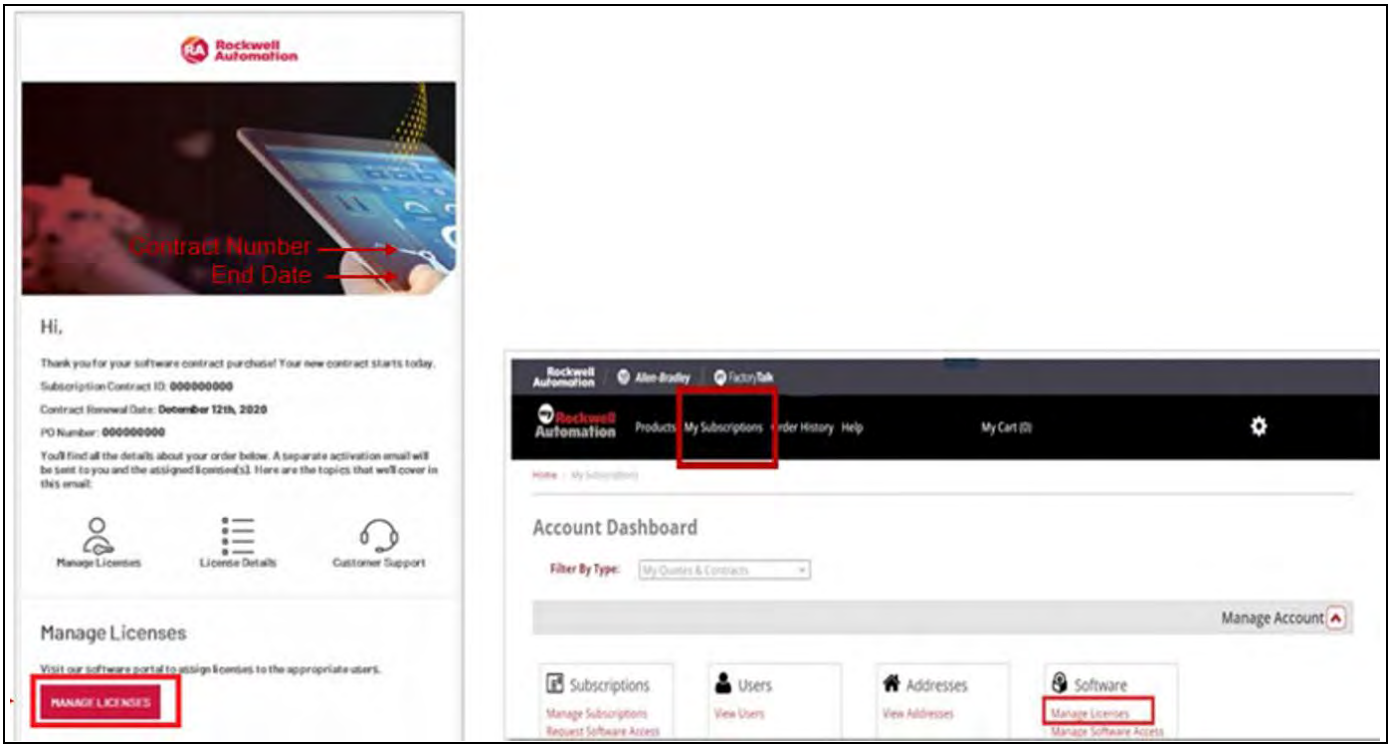
The Owner Welcome Kit email contains:

- Contract details
  - Software product name
  - Serial number
  - Number of licenses
  - Authorization number for technical support
  - Your purchase order number and subscription contract ID.
- Links to
  - Download your software.
  - Manage Licenses page—to assign users to software licenses.



Managing Licenses Link

Software licenses are assigned to software users using the Manage Licenses link located on the Account Dashboard. For ease of use, the owner is sent this link in their Owner Welcome Kit email.

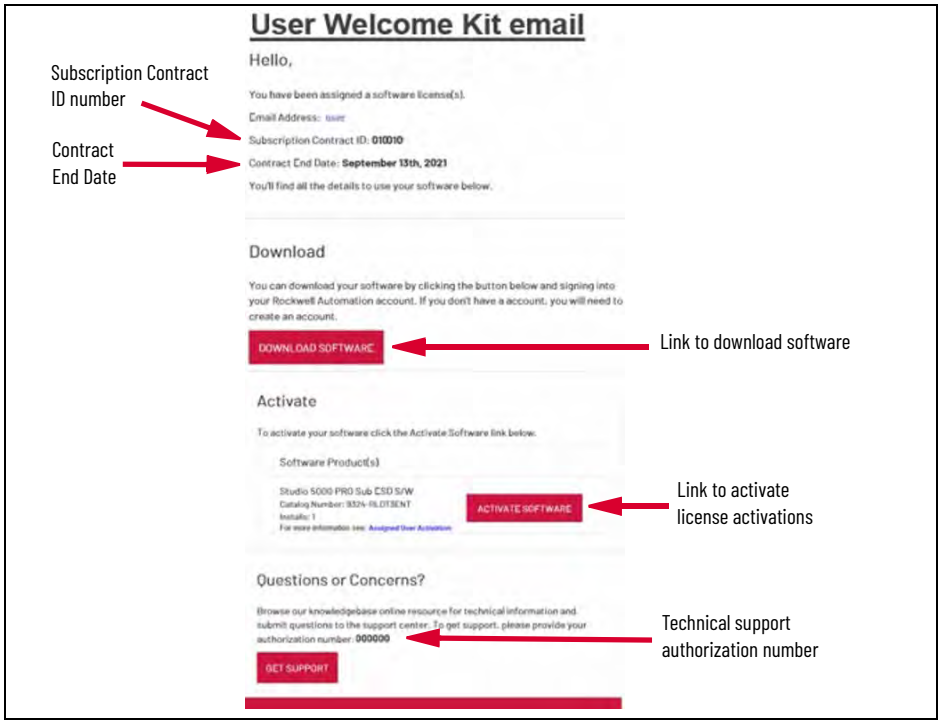


User Welcome Kits

The software User Welcome Kit email contains:

- Software catalog number
- Subscription contract ID
- Authorization numbers for technical support
- A button with a link to download software
- A button with link to activate their license

Any users assigned a software license on the contract will be emailed a User Welcome Kit with instructions to download and activate their software.



Optionally, the user can manually activate their software license using FactoryTalk® Activation Manager.

- The owner does not need to use their software license and it will not count against the maximum license count.
- The unused license will show as Pending and may be left in this state.

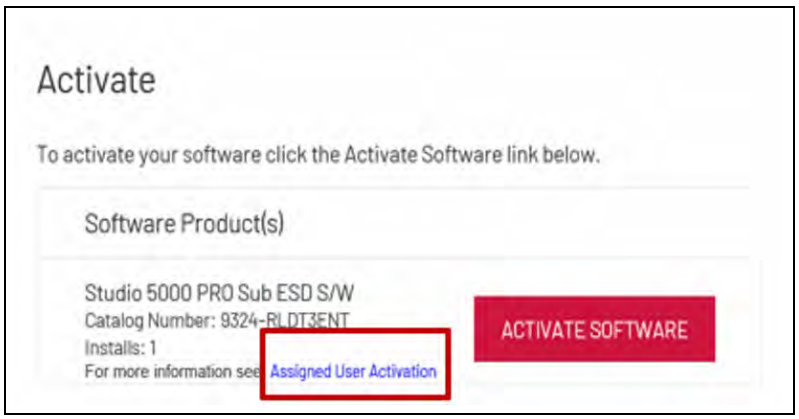
IMPORTANT Users will not receive their User Welcome Kit email or activate their software until the contract start date.

Activation

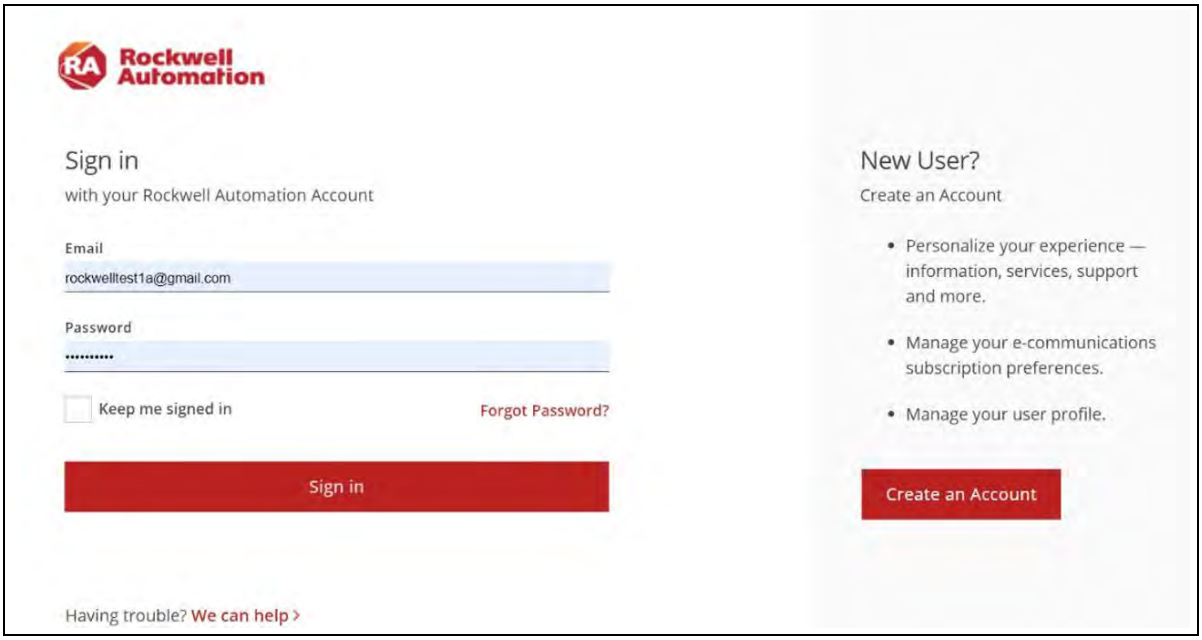
The User Welcome Kit email includes all information needed to get you up and running with your software. Streamlined activations with a single serial number are available for bundled software.

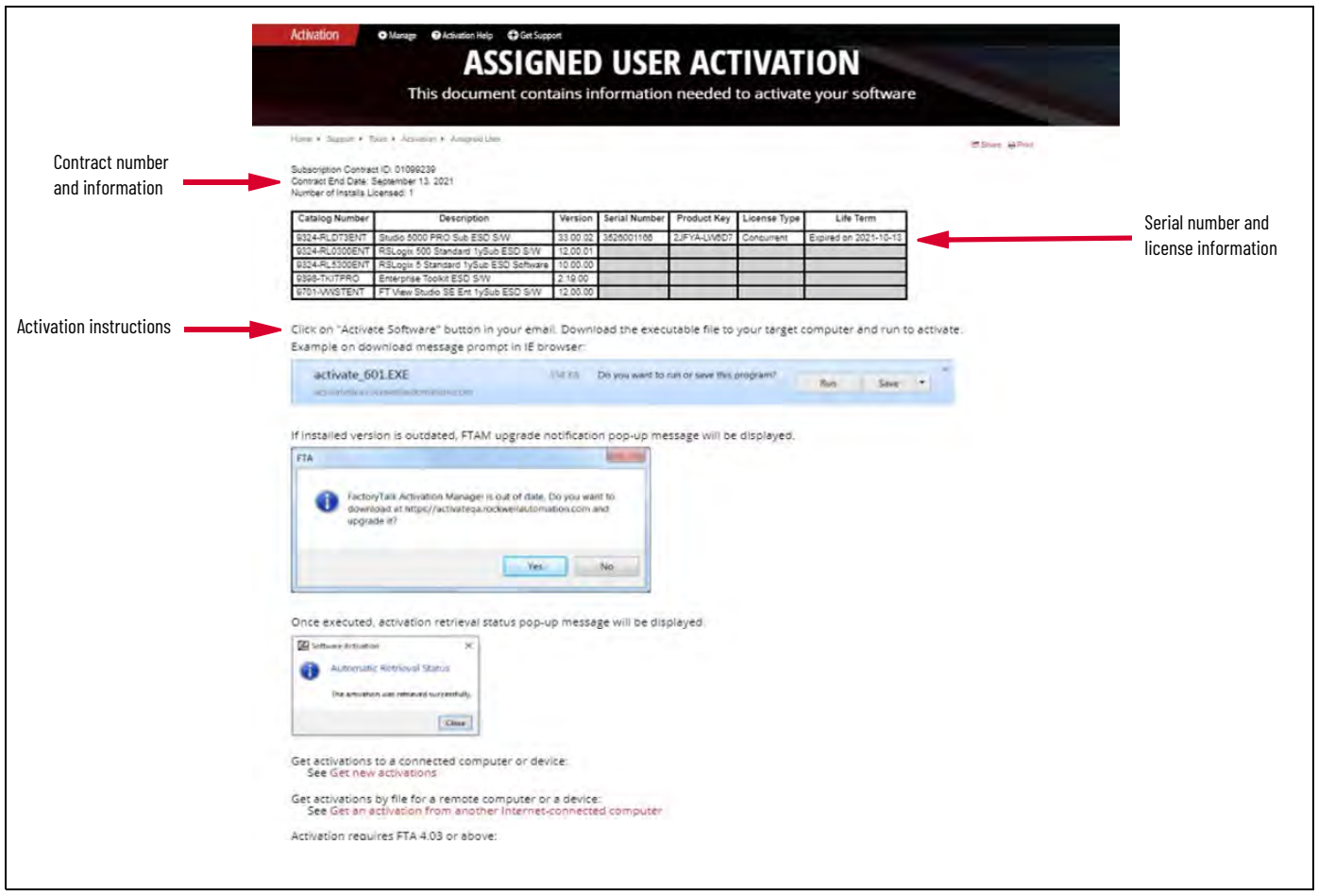
Detailed instructions, serial number, and product key are available using the Assigned User Activation link. The kit also includes links to detailed instructions for activating a disconnected computer.

To view more information about your activation license, click Assigned User Activation.



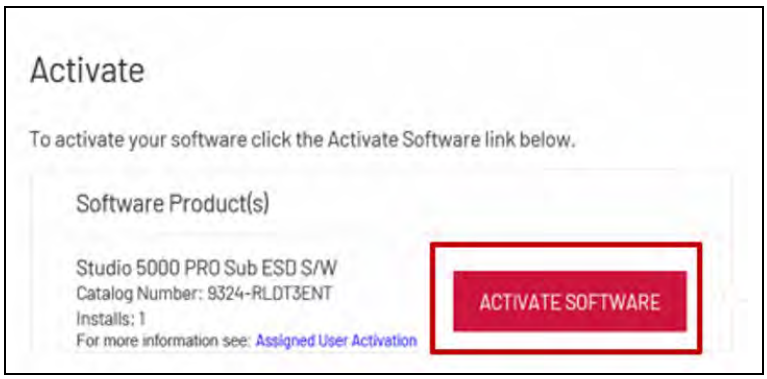
You will be navigated to the Rockwell Automation Account Sign in page. You will sign in using your Rockwell Automation credentials.





The activation license information includes all the products supported by the activation license, including Add-on items that have been added to the contract.

It is recommended that you click ACTIVATE SOFTWARE to activate your licenses. This offers a low-touch Auto Activate functionality which automatically binds the serial number and machine ID to your license.



ACTIVATE SOFTWARE is used to activate software on a computer. When you click ACTIVATE SOFTWARE, a window will display. Depending on your browser, you may be asked to:

- Run—to activate software on your local computer.
- Save—to download the executable and activate software on your local computer.
- Save As—is used to download the executable file to another computer.

All options require the activated computer to be connected to the internet. After ACTIVATE SOFTWARE is used, it cannot be used again. It is inactive.

If you do not have the User Welcome Kits email to download and activate your license, the same license activation information is available from the Activation Certificates link on the Account Dashboard under My Subscriptions.

Manual activation via the FactoryTalk Activation Manager can be used for remote or disconnected devices.

Software Support and Maintenance

Overview

Software purchased through the Software Portal includes Software Maintenance and Support. Subscription based software will have support automatically included over the term of the contract, while perpetual with maintenance will have the first year of support and maintenance included, with the level of support chosen during product selection.

The lowest cost selection for Perpetual with Maintenance is the Self Assist option. The upgrade to 8x5 support or 24x7 will include chat and other phone support options.

The table below lists the Software Maintenance and Support options along with the site based TechConnect support option.

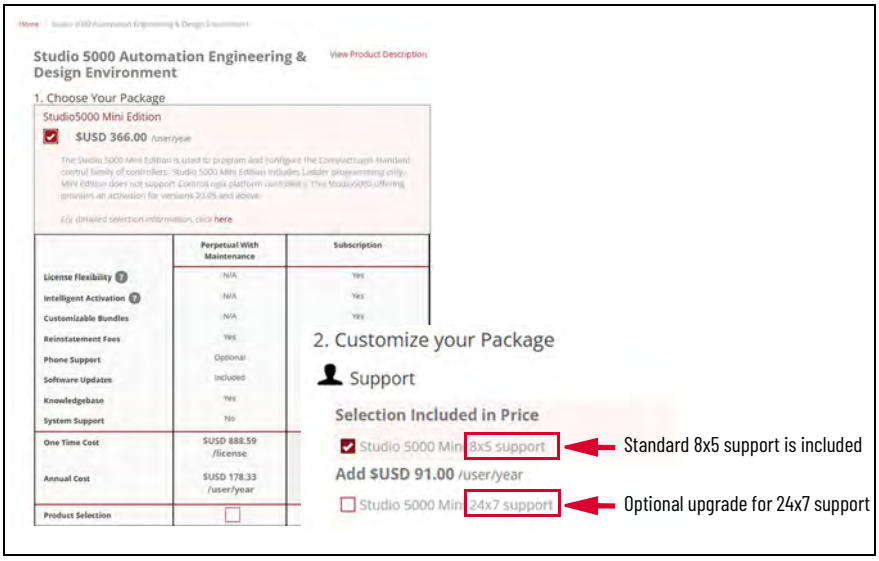
Differences between Software Support and Tech Connect

	TechConnect	Software Support & Maintenance Subscriptions	Software Support & Maintenance Perpetual with Maintenance
Entitlement (Who Can Call In)	Site	Subscription Owner/User	License Owner/User
Services	✓ 8x5 Phone ✓ Chat ✓ Submit a Question ✓ Software Updates ✓ Knowledgebase ✓ Genius Webinars ✓ Live View Support	✓ 8x5 Phone ✓ Chat ✓ Submit a Question ✓ Software Updates ✓ Knowledgebase	✓ Submit a Question ✓ Software Updates ✓ Knowledgebase
Upgrades	• 24x7 Phone	• 24x7 Phone	• 8x5 Phone and Chat • 24x7 Phone
Coverage	Hardware and Software	Software	Software

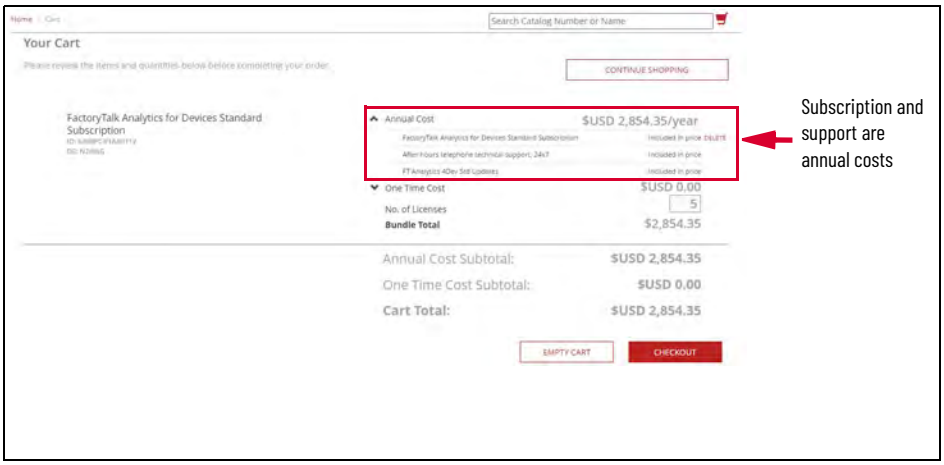
Standard Software Subscription

The standard software subscription includes:

- 8x5 phone support—Real-time product phone support and remote desktop troubleshooting, available in 20 languages.
- Chat support—Real-time mobile-friendly chat support through our Online Support Center (Knowledgebase). Chat is available 24x7 for select product families.
- Submit a question—Submit a question through our Online Support Center (Knowledgebase) and an expert engineer will respond within one business day.
- Software updates—Access our Rockwell Automation Support Center for downloads and software replacements. In addition to downloading software, you can set alerts for new software updates including firmware, release notes, associated software, drivers, tools and utilities.
- Knowledgebase—Search the Knowledgebase for answers to your questions, interact with peers through forums, bookmark information, request notifications of upgrades and chat with Rockwell Automation engineers.
- Optional Upgrade to 24x7 phone support—Receive coverage around the clock, including weekends and holidays.



At checkout, Your Cart will show the support and maintenance for the subscriptions as part of the annual cost.

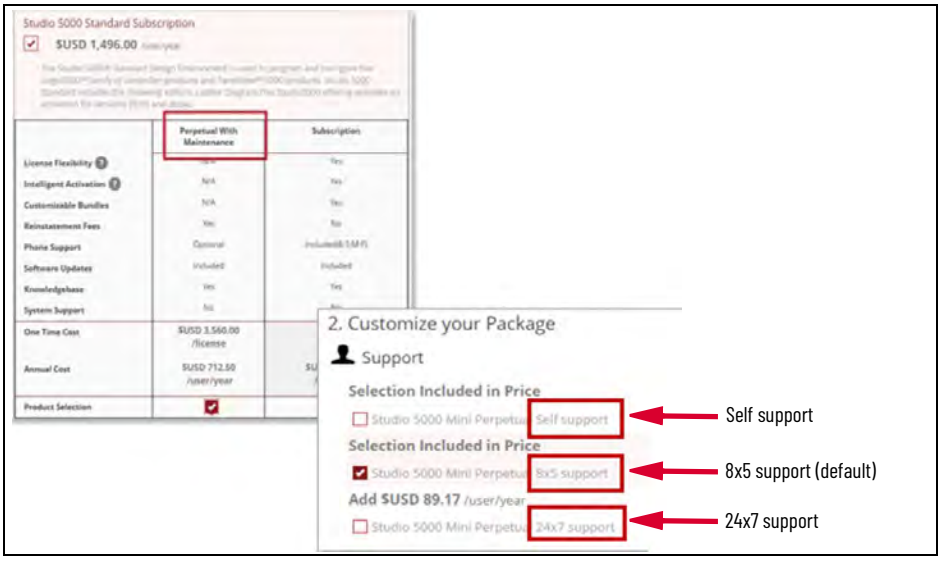


Perpetual Software with Maintenance

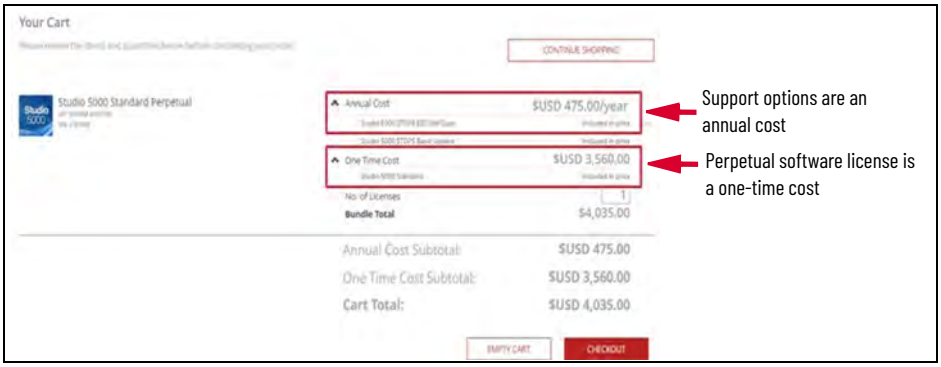
The perpetual software with maintenance includes:

- Self-Assist
  - Software updates—ability to get software updates, permits the user to go to the latest release.
  - Knowledgebase access.
  - Email support—ability to contact technical support by submitting a question.
- 8x5 Phone Support—includes all the self-assist options and provides chat and talking to live person.
- 24x7 Phone Support—includes all the self-assist options and provides chat and talking to live person.

Support options are shown in the Software Portal when selecting your Perpetual with Maintenance.



At checkout, Your Cart will show the perpetual software as a one-time cost, while the support and maintenance is displayed as an annual cost.



OEM and SI Software Process and Contract Management Options

Know these key points to ensure a smooth transaction:

- Either you or your distributor can create a quote for the software you wish to purchase in the software portal.
- Pricing agreements can be selected and applied to your quote.
- At time of purchase, the Software Portal quote will be assigned to you as the owner of the quote or contract.
- Click Complete Order in your Order Request email to complete your order.
  - If you are a repeat customer, and have worked through the Software Portal previously, no action is required. An email acknowledgment is sent that the order was placed on your behalf.

FactoryTalk® Software runtime activations

Rockwell Automation understands you need time to get software up and running on PC/HMI equipment. Therefore, FactoryTalk View runtime software activations have a pre-contract start date grace period of 90 days.

Ninety (90) days before the agreement start date, owner Welcome Kit emails with FactoryTalk View runtime software download and activation links are sent to owners.

IMPORTANT This only applies FactoryTalk View runtime software activations.

Example: If June 1st is the agreement start date in the Software Portal for a FactoryTalk View runtime software, the download and activation will be available 90 days earlier on March 1st.

The support and invoice are aligned with the agreement date of June 1st.

Portal ID Items

Item	Location	Comments
Customer Purchase Order Number	• Order Confirmation email • Owner Assignment email • Owner Welcome Kit email • Renewal Notice • Renewal Quote	
Order Number	• Order Confirmation email • Owner Welcome Kit email • User Welcome Kit email • Assigned User Activation Page • My Subscriptions page	Same as contract number and subscription ID number
Quote Number	• Quote confirmation email • Quote PDF in confirmation email and in the • View PDF in My Subscriptions • Owner Assignment email • Alternative Owner Assignment email	Once a quote is converted to an order, the transaction will be assigned a new contract number and the quote will be archived. Use the archive filter in My Subscriptions to view old quotes.
Customer BPID	• Quote PDF in quote confirmation email and in the View PDF in My Subscriptions • My Subscriptions—View Addresses	
Authorization Number	• Owner Welcome Kit email • User Welcome Kit email • Renewal Quote	
Serial Number	• Owner Welcome Kit—View Certificate • User Welcome Kit—Assigned User Activation • Manage Licenses	
Machine ID	• Manage Licenses	
Catalog Number	• Quote confirmation email • Cart during checkout • Quote PDF in confirmation email and in the • View PDF in My Subscriptions • Owner Assignment email • Order Confirmation email • User Welcome Kit—Assigned User Activation • Renewal Notice • Renewal Quote	

Rockwell Automation Support

Use these resources to access support information.

Technical Support Center	Find help with how-to videos, FAQs, chat, user forums, and product notification updates.	rok.auto/support
Knowledgebase	Access Knowledgebase articles.	rok.auto/knowledgebase
Local Technical Support Phone Numbers	Locate the telephone number for your country.	rok.auto/phonesupport
Literature Library	Find installation instructions, manuals, brochures, and technical data publications.	rok.auto/literature
Product Compatibility and Download Center (PCDC)	Download firmware, associated files (such as AOP, EDS, and DTM), and access product release notes.	rok.auto/pcdc

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Your comments help us serve your documentation needs better. If you have any suggestions on how to improve our content, complete the form at rok.auto/docfeedback.

Waste Electrical and Electronic Equipment (WEEE)

At the end of life, this equipment should be collected separately from any unsorted municipal waste.

Rockwell Automation maintains current product environmental compliance information on its website at rok.auto/pec.

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