



Commerce Portal User Guide

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What is the Commerce Portal

1. The Commerce Portal is part of the Rockwell Automation e-commerce 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 Commerce 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.

The image displays three screenshots of the Rockwell Automation Commerce Portal. The top-left screenshot shows the 'Available Software Bundles' section with three options: Arena Simulation Software, Connected Components Workbench™, and Emulate3D. The top-right screenshot shows the 'FactoryTalk Historian SE' product page, including a 'Choose Your Package' section with a table comparing 'Perpetual With Maintenance' and 'Subscription' options. The bottom screenshot shows the 'My Subscriptions' page, which lists two active contracts for 'TORSE TECHNOLOGY' with details on order dates, contract numbers, and addresses.

FactoryTalk Historian SE

1. Choose Your Package

Historian SE Standard - 1,000 tags
\$USD 6,016.00 /license/year

Included in this package is a Historian SE Server with 1,000 tags and communications software required for historizing data from Rockwell Automation controllers.

Tag capacity can be added in increments of 1,000 by entering multiple quantities of this package (tag licensing is additive). A volume discount will be applied when added to your CART. See Recommended Products for additional Add On components.

FactoryTalk VantagePoint EMI is NOT included in this package but can be purchased separately on the VantagePoint product page.

For additional information please check the [Ordering Guide](#).

	Perpetual With Maintenance	Subscription
License Flexibility	N/A	Yes
Intelligent Activation	N/A	Yes
Customizable Bundles	N/A	Yes
Reinstatement Fees	Yes	No
Phone Support	Optional	Included (\$8.5M Ft)
Software Updates	Included	Yes
Knowledgebase	Yes	Yes
System Support	No	No
One Time Cost	\$USD 15,030.00 /license	-
Annual Cost	\$USD 3,006.00 /license/year	\$USD 6,016.00 /license/year

Product Selection ☐ ☒

Historian SE - 500 tags with Productivity Clients
☐ **\$USD 6,733.00 /license/year**

My Subscriptions

Filter By Type: **My Quotes & Contracts**

Contract Number

8 Contracts Found 10 Per Page

Order Date	Contract Number	Ship To Address	Start Date	End Date	Payment Type	Contract Status	Actions
12/19/2021	11702859	TORSE TECHNOLOGY United States 1201 S 2ND ST E-3A19 MILWAUKEE, Wisconsin United States 53204-2410	12/19/2021	12/10/2022	Quotation Only	Quote	Checkout Request Quote View PDF Delete Assign Quote Assign Contract View Owners
12/19/2021	11702998	TORSE TECHNOLOGY United States 1201 S 2ND ST E-3A19 MILWAUKEE, Wisconsin United States 53204-2410	12/19/2021	12/10/2022	Quotation Only	Quote	Checkout Request Quote View PDF Delete Assign Quote Assign Contract View Owners

Benefits of Using the Commerce Portal

Purchasing software through the Commerce Portal provides a single location from which to purchase, manage, upgrade, and renew your software contracts with Rockwell Automation.

When using the Commerce Portal, you have these great benefits:

- 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 and billing methods
- Automatic renewal

Commerce Portal Offerings

- FactoryTalk Design, Operation and Maintenance suite software offerings
- 1st year technical support and maintenance included with all software as well as options for upgrading your support
- Subscription and Software as a Service (SaaS) offerings available

The image displays a collection of software products offered by Rockwell Automation, organized into four main categories:

- FactoryTalk DesignSuite:** Includes Connected Components Workbench, FactoryTalk Logix Echo, Studio 5000 Application Code Manager, Studio 5000 Automation Engineering & Design Environment, and Studio 5000 License Portal.
- FactoryTalk OperationSuite:** Includes FactoryTalk Batch, FactoryTalk Craft Brew, FactoryTalk Historian SE, FactoryTalk Linx Gateway, ThisManager, FactoryTalk Metrics, FactoryTalk Transaction Manager, FactoryTalk View SE, and FactoryTalk View ME.
- FactoryTalk MaintenanceSuite:** Includes FactoryTalk AssetCentre and FactoryTalk Network Manager.
- Learning+:** Includes Learning+ (Rockwell Automation Learning offering) and RADWIN (Remote Asset Management Software).

Before You Begin

The Commerce Portal is used by Rockwell Automation customers, distributors, and Rockwell Automation salespeople to create quotes, place software orders, add users to licenses, and to view order status. Certain functions may be limited based upon who is logging into the Commerce Portal and what function they are performing.

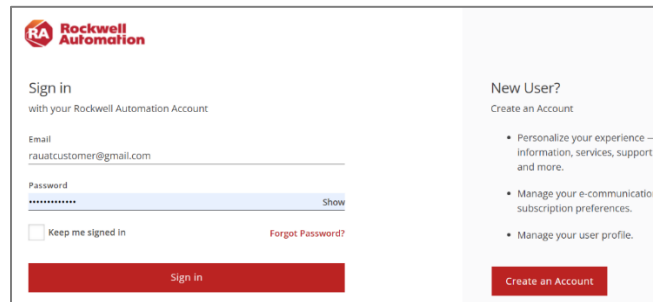
What to Know

1. The Commerce Portal requires registration to the Rockwell Automation [Knowledgebase](#) and you must have a valid “sold-to” BPID (Business Product ID) with Rockwell Automation.
2. You must accept the supplemental License Agreement prior to your software order being fulfilled. Note- for Simple Checkout transactions, your Order Request Confirmation email will contain a link to the terms and conditions that you are agreeing to when clicking the Completing Order Request button.
3. You can purchase through your local distributor or order directly with Rockwell Automation. You do have an option for a “hands-off” approach to purchasing software in the Commerce Portal.
4. All purchases through the Commerce Portal have maintenance and support included for the first term. Your maintenance and support can be renewed from the 120 Day Renewal Notification email or the Commerce Portal.
5. Software cannot be ordered in bulk and split into separate serial numbers. Quantities are consolidated into a single serial number on a single contract.
6. Software and Maintenance contract ownership can be transferred using the Commerce Portal. Activation License transfer must be done via Manage Licenses in the Commerce Portal.

Logging into the Commerce Portal

Log in to Commerce Portal at commerce.rockwellautomation.com/.

A Knowledgebase login is required for entry - available at:
<https://rockwellautomation.custhelp.com/>.



The image shows a web interface for Rockwell Automation. On the left, there is a 'Sign in' section with the text 'with your Rockwell Automation Account'. It includes an email field with 'rauatcustomer@gmail.com', a password field with masked characters and a 'Show' link, a 'Keep me signed in' checkbox, and a 'Forgot Password?' link. A red 'Sign in' button is at the bottom. On the right, there is a 'New User?' section with the text 'Create an Account'. It lists three benefits: 'Personalize your experience — information, services, support and more.', 'Manage your e-communications subscription preferences.', and 'Manage your user profile.' A red 'Create an Account' button is at the bottom.

Click **Sign In** to log into your Rockwell Automation Knowledgebase credentials or select **Create an Account** to create a new account. Your account will be created automatically, and you will be able to log in and place an order or submit an existing quote.

If you have a quote that has been assigned to you before you have created a login for the Rockwell Automation Knowledgebase, your account will be synchronized when your login is created, and you will be able to view your quotes in My Subscriptions.

Getting Started with the Commerce Portal

This chapter provides a quick overview of how to quickly get started with the Commerce Portal to complete an order request, allocate activation licenses and download and activate software. More detailed steps are included in later chapters.

Creating quotations and submitting them for purchase in the Commerce Portal is completed in a few easy steps. From within the Commerce Portal, select the software you need and place your orders through your local distributor or make your purchase direct to Rockwell Automation. A Welcome Kit email will be sent to you with instructions for downloading, activating and allocating activation licenses to software users.



If you prefer a “hands off” approach to using the Commerce Portal, use our Simple Checkout Workflow process.

Select Software and Create a Quote

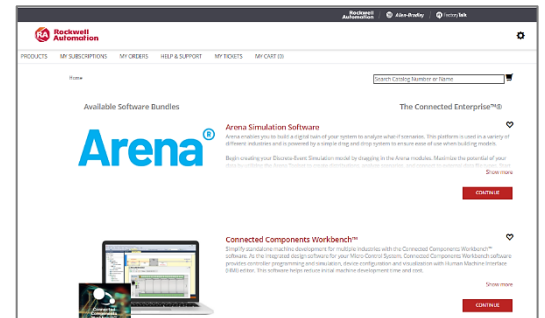
1. Login to the Commerce Portal and on the Products page, choose the software brand you want to purchase by clicking the Continue button

OR

Type the desired catalog directly into the field located at the top right of the screen.

2. Select the type of software package you want to purchase, optional add-ons, customizations, quantity and recommended products

3. Select **ADD to CART**



	Perpetual With Maintenance	Subscription
License Flexibility	N/A	Yes
Intelligent Activation	N/A	Yes
Customizable Bundles	N/A	Yes
Reinstatement Fees	Yes	No
Phone Support	Optional	Included (8-5/M-F)
Software Updates	Included	Included
Knowledgebase	Yes	Yes
System Support	No	No
One Time Cost	SUSD 31,400.00 /license	-
		SUSD 12,560.00 /license/year

4. Choose **CHECKOUT** or click the **CART** icon when completed shopping

5. Review your CART and click **CHECKOUT**

6. Review the details of your quote and choose **EDIT** to change any of the settings

7. Enter your PO only if you wish to checkout and submit and order request otherwise leave empty for your quote

8. Check the boxes regarding purchasing through distribution and that you agree to the End User License Agreement

9. Click **GENERATE QUOTE**

Home / Cart

Search Catalog Number or Name

Your Cart

Please review the items and quantities below before completing your order.

[CONTINUE SHOPPING](#)

FactoryTalk View SE Large Bundle: Unlimited Display Server with 25 Clients (U) 970C-VMS003.2010 (U) KD03P	Annual Cost: \$USD 12,560.00/year One Time Cost: \$USD 0.00 No. of Licenses: 1 Bundle Total: \$12,560.00
--	--

Annual Cost Subtotal: \$USD 12,560.00
 One Time Cost Subtotal: \$USD 0.00
Cart Total: \$USD 12,560.00

[EMPTY CART](#) [CHECKOUT](#)

Home / Your Cart Order / Checkout

Search Catalog Number or Name

Checkout

[UPDATE CART](#)

Shipping [EDIT](#)

YORIS TECHNOLOGY
 1201 S. 2ND ST
 MILWAUKEE WI 53204-2410
 United States
 (U) 0091962322

Billing [EDIT](#)

YORIS TECHNOLOGY
 1201 S. 2ND ST
 MILWAUKEE WI 53204-2410
 United States
 (U) 0091962322

Contract Details [EDIT](#)

Align with contract anniversary:
 Start Date (mm/dd/yyyy): 10/31/22 End Date (mm/dd/yyyy): 06/30/24

Billing Selection: **Single Billing**

Customer PO (Recommended)
 Enter the Customer PO Number for the selected Distributor for the order. This number will display on the Welcome Kit and Renewal Notices for reference.

Enter Purchase Order Number
 (30 chars remaining)

Payment Through Distributor: **Electric Supply Co. West Allis, Wisconsin**

Preferred Distributor Address and Special Instructions

Specify your preferred distributor's name and address and any special instructions for your order
 (300 chars remaining)

Order Summary

FactoryTalk View SE Large Bundle: Unlimited Display Server with 25 Clients (U) 970C-VMS003.2010 (U) KD03P Included in bundle: FactoryTalk View SE Large Bundle: Unlimited Display Server with 25 Clients FactoryTalk View SE Large Bundle: Unlimited Display Server with 25 Clients full support FactoryTalk View SE Large Bundle: Unlimited Display Server with 25 Clients updates	Annual Cost: \$USD 12,560.00/year Proposed Annual Cost @ 50% days: \$USD 20,921.86 One Time Cost: \$USD 0.00 Quantity: 1 Proposed Bundle Total: \$USD 20,921.86
--	--

☐ Promo Code

Annual Cost Total:	\$USD 12,560.00
Proposed Annual Cost @ 50% days:	\$USD 20,921.86
One Time Total:	\$USD 0.00
Cart Total:	\$USD 20,921.86

Estimated taxes will be communicated separately.

☐ By selecting to Purchase Through Distributor I acknowledge all pricing is suggested and does not guarantee the distributor will accept this order.
Estimated Subtotal and taxes are independent business model suggestions and not a final price. They have the right to establish their own prices and other terms and conditions of sale and Reseller Authorization does not constitute an agreement to sell.

☐ By clicking submit, I am confirming that I have read and agree with this supplemental License Agreement

[GENERATE QUOTE](#) [SUBMIT ORDER](#)

2. Complete the Order

Use the Simple Checkout Workflow- if you prefer to have a “hands-off” approach and allow your distributor to complete the order request for you.

OR

Use the Purchase through Distribution Workflow- if you prefer to submit your own order request in the Commerce Portal and the transaction be purchased through distribution.

OR

Use the Purchase Direct Workflow- if you prefer to submit your own order request in the Commerce Portal and the transaction be purchased directly with Rockwell Automation.

Simple Checkout Workflow

1. Your distributor creates a quote on your behalf within the Commerce Portal. You will receive a quote confirmation email with details to review.
2. When you are ready to purchase, provide your PO to your distributor. They will add your PO to the quote and assign you as the owner of the contract. This action will initiate an order request and an email confirmation will be sent to you.
3. Simply, click the **Complete Order Request** button from within the email confirmation you receive. You will only need to click this button once, on your first transaction with Rockwell Automation. **If you are a returning customer**, a Simple Checkout order will be placed automatically, so you do not need to take any additional actions. An order confirmation email will be sent to you with the order details.
4. On the contract start date, you will receive a Welcome Kit email with instructions on downloading and activating software and how to assign licenses to software users.
5. Your distributor can allocate licenses to software users for you in the Commerce Portal. On the contract start date, Welcome Kit emails will be sent to those users with instructions on activating their software.

Rockwell Automation

Customer Quote Assigned / Ready for Review
Action Required: Customer

You have been assigned a quote by John Smith (john.smith@abc.com) is attached and ready for review. See below for required next steps.

Quote #: quote id
Start date: month day, year
End date: month day, year

What you need to do
Review the attached quote or view online. If you're proceed, you can complete check out online. Please order details ready. If someone else is responsible for the quote or placing the order, you can assign a different owner to continue the process. By completing this action you are consenting to all Rockwell Automation terms and conditions.

[Check Out Now](#) [Assign a Quote](#)

Rockwell Automation

Simple Order Request Ready for Review
Action Required: New Customer

Please review and approve this order requested by John Smith (john.smith@ra-dist.com). Orders are generally processed within 1 business day. See below for required next steps.

Order request: order #
Customer PO: xxxxxxxx
Distributor PO: yyyyyyyy
Start date: month day, year
End date: month day, year
Automatic renewal: on/off

What you need to do
Review the order summary below. If everything looks accurate, you can complete your order request. By completing this order request, you are consenting to Rockwell Automation [terms and conditions](#). If you have questions or concerns, please contact John Smith (john.smith@ra-dist.com).

[Complete Order Request](#)

Get Support
If you need assistance at any time, you have options:

- Contact your local authorized distributor.
REVERE ELECTRIC SUPPLY CO
1515 Walnut Ridge Dr Rm Y
Hartland, Wisconsin United States - 53029-9317
- Submit a support ticket:
 - [Log in](#) to the commerce portal.
 - Click on Help from the main menu.
 - Reference your contract number in the text box.
 - Submit your inquiry.
- For login issues, contact us [here](#).

Standard Purchase Through Distribution Workflow

Customer Creates Quote

1. Create a quote in the Commerce Portal by selecting a product.
2. Click the gear icon to set the Transaction Settings for your quote. Select the shipping and billing addresses, distributor to purchase through, and any special price agreements you may have with Rockwell Automation. You will receive a quote confirmation email with details to review.
3. Complete the checkout in the Commerce Portal by entering your PO and other information needed and click the **SUBMIT ORDER** button. Review your order confirmation email that will be sent to you with details.
4. Send a copy of your PO to your local distributor as they will need this confirmation to complete the order processing of your transaction.
5. On the contract start date, you will receive a Welcome Kit email with instructions on downloading and activating software and how to assign licenses to software users.

Transaction Settings

LanguageEnglish

CurrencyUnited States

Address

Shipping and billing address may have different pricing and currency.
The shipping address will be used as your site location.

Shipping Address

TORG TECHNOLOGY
2031 S 2ND ST
MILWAUKEE, WI 53128-2402
United States
ID: 00368C322

Billing Address

Same as shipping address

TORG TECHNOLOGY
2031 S 2ND ST
MILWAUKEE, WI 53128-2402
United States
ID: 00368C322

Billing Options

Select Shipping

Single Billing

Select ID

Electric Supply Co., Wisconsin

Complete transaction through Distributor

Agreement Terms

Select Agreement Term

Align with a previous order

Agreement fromContract Administrator

Last seen03/21/22

Invoice08/05/24

Available Pricing Conditions

Select Pricing Condition:
☐ Partner Level

START OVER

SUBMIT

RALUX CUSTOMERS RALUX CUSTOMERS
rmaxwell@ralux.com

Connected Enterprise™

This platform is used in a variety of
different use cases when building models.
You can maximize the potential of your
model by customizing many different
parameters.

CONTINUE

Components Workbench™
Components Workbench interface
with Human Machine Interface

SHOW MORE

notice high quality models of their
performance for their
with support for both Simulation and

SHOW MORE

CONTINUE

Shipping	Billing
TORIS TECHNOLOGY 1201 S 2ND ST MILWAUKEE WI-WI 53204-2410 United States ID: 0009962322	TORIS TECHNOLOGY 1201 S 2ND ST MILWAUKEE WI-WI 53204-2410 United States ID: 0009962322

Contract Details

Align with contract anniversary:

Start Date (mm/dd/yyyy)
10/1/2022
End Date (mm/dd/yyyy)
06/30/23

Billing Selection: Single Billing

Customer PO (Recommended)

Enter the Customer PO Number for the selected Distribution for the order. This number will display on the Welcome Kit and Renewal notices for reference.


Enter Purchase Order Number
(Optional - Recommended)

Payment Through Distributor: Electric Supply Co., West Allis, Wisconsin, 000007406

Preferred Distribution Address and Special Instructions

100% online remaining

Order Summary



Hudson SE - 500 tags with Productivity Clients

ID: BSW-HST20
ID: 1420000

Included in Bundle:
Hudson SE - 500 tags with Productivity Clients

Hudson SE - 500 tags with Productivity Clients (update)

Hudson SE - 500 tags with Productivity Clients (update)

Annual Cost	USD \$ 6,783.00/year
Priced Annual Cost @ 90K days:	USD \$12,25.52
One Time Cost	USD \$0.00
Quantity	1
Priced Bundle Total	USD \$11,215.52

☐ Promo Code

Annual Cost Total	USD \$ 6,783.00
Priced Annual Cost @ 90K days:	USD \$12,25.52
One Time Costs	USD \$0.00
Cart Total	USD \$11,215.52

Estimated taxes will be shown at checkout separately.

☐ By clicking to Purchase Through Distributor I acknowledge all pricing is suggested and does not guarantee the distributor will accept this order.
 Payment distribution and delivery schedule is dependent on distributor and may not meet Forecast & cannot be set any way. They have the right to withhold their shipment and other terms and conditions of sale and Forecast documents are not binding or accepted unless we have signed.

☐ By clicking submit, I am confirming that I have read and agree with this supplemental License Agreement

CONTINUE QUOTE

Submit order

Distributor Creates Quote

1. A quote is created in the Commerce Portal by your distributor. If the distributor creates the quote, they will need to assign you as the contract owner for you to complete checkout. A quote confirmation to be emailed to you.
2. Click the **Check Out Now** button in the email to navigate to your quote in the Commerce Portal and complete the checkout.

Rockwell Automation

Customer Quote Assigned / Ready for Review
Action Required: Customer

You have been assigned a quote by John Smith (jsmith@abc.com). The quote is attached and ready for review. See below for required next steps.

Quote #: quote #
Start date: month day, year
End date: month day, year

What you need to do
Review the attached quote or view [online](#). If you're ready to proceed, you can complete check out online. Please have your order details ready. If someone else is responsible for reviewing the quote or placing the order, you can assign a different quote owner to continue the process. By completing this order request, you are consenting to all Rockwell Automation [terms and conditions](#).

[Check Out Now](#) [Assign a Quote Owner](#)

3. Enter your PO and other information into the checkout screen and click **SUBMIT ORDER**
4. Send a copy of your PO to your local distributor as they will need this confirmation to complete the order processing of your transaction.

Shipping [EDIT](#)

Billing [EDIT](#)

Contract Details [EDIT](#)

Align with customer agreement
Last date (month/day/year) End date (month/day/year)
Billing Method: ☐ Single Billing ☐ Recurring Billing

Customer PO (Recommended)
Enter the Customer PO number for the order (this number will display on the invoice and be used for reference)

Payment Through Distribution ☐ **Preferred Distributor Address and Special Instructions**

Order Summary

Item	Quantity	Unit Price	Total Price
Rockwell Automation - 1000 pages with Productivity Objects	1	\$1000.00	\$1000.00
Rockwell Automation - 1000 pages with Productivity Objects	1	\$1000.00	\$1000.00
Rockwell Automation - 1000 pages with Productivity Objects	1	\$1000.00	\$1000.00
Rockwell Automation - 1000 pages with Productivity Objects	1	\$1000.00	\$1000.00
Subtotal			\$4000.00
Tax			\$0.00
Grand Total			\$4000.00

[Previous Step](#) [Submit Order](#)

5. On the contract start date, you will receive a Welcome Kit email with instructions on downloading and activating software and how to assign licenses to software users.

Customer Direct Order Workflow

1. Create a quote in the Commerce Portal by selecting a product.
2. Click the gear icon to set the Transaction Settings for your quote.
 - Select the shipping and billing addresses and any special price agreements you may have with Rockwell Automation.
 - Choose **No Distributor** for the distributor field in a direct order. You will receive a quote confirmation email with details to review.
3. Complete the checkout in the Commerce Portal by entering and attaching your PO and completing information needed.
4. Click the **SUBMIT ORDER** button. Review your order confirmation email that will be sent to you with details.
5. On the contract start date, you will receive a Welcome Kit email with instructions on downloading and activating software and how to assign licenses to software users.

Transaction Settings

Language: English | Country of Transaction: United States

Addresses
Shipping and billing address may affect applicable pricing and currency. The shipping address will be used as your site location.

Shipping Address
TORG TECHNOLOGY
1201 S 2ND ST
MILWAUKEE, US-WI 53204-2410
United States
ID: 0009162322

Billing Address
TORG TECHNOLOGY
1201 S 2ND ST
MILWAUKEE, US-WI 53204-2410
United States
ID: 0009162322

Billing Option
Billing Cycle: Single Billing | Distributor: No Distributor
☐ Complete transaction through Distributor

Agreement Terms
Select Agreement Term: ☐ Align with a previous order
Agreement Term: Contract Anniversary | Start Date: 10/1/22 | End Date: 06/30/24

Available Pricing Conditions
Select Agreement Type: ☒ Agreement No.

Checkout
UPDATE CART

Shipping
TORG TECHNOLOGY
1201 S 2ND ST
MILWAUKEE, US-WI 53204-2410
United States
ID: 0009162322

Billing
TORG TECHNOLOGY
1201 S 2ND ST
MILWAUKEE, US-WI 53204-2410
United States
ID: 0009162322

Contract Details
Align with contract anniversary:
Start Date (mm/dd/yyyy): 10/1/22 | End Date (mm/dd/yyyy): 06/30/24
Billing Selection: Single Billing

Customer PO (Recommended)
Enter PO Number
Entering a PO Number here will allow you to purchase through Rockwell Directly.
Enter Purchase Order Number: [Field] | ATTACH YOUR PO (PDF only)

Special Instructions
Specify any special instructions for your order: [Field]

Order Summary

Item	Annual Cost
Historian SE - 500 tags with Productivity Clients	\$USD 13,488.00/year
Historian SE - 500 tags with Productivity Clients	\$USD 22,431.04
One Time Cost	\$USD 0.00
Quantity	2
Prorated Bundle Total	\$USD 22,431.04

☐ Promo Code

Annual Cost Total:	\$USD 13,488.00
Prorated Annual Cost @ 50% days:	\$USD 22,431.04
One Time Total:	\$USD 0.00
Cart Total:	\$USD 22,431.04

Excludes taxes and shipping costs.

☐ By clicking submit, I am confirming that I have read and agree with this supplemental License Agreement.

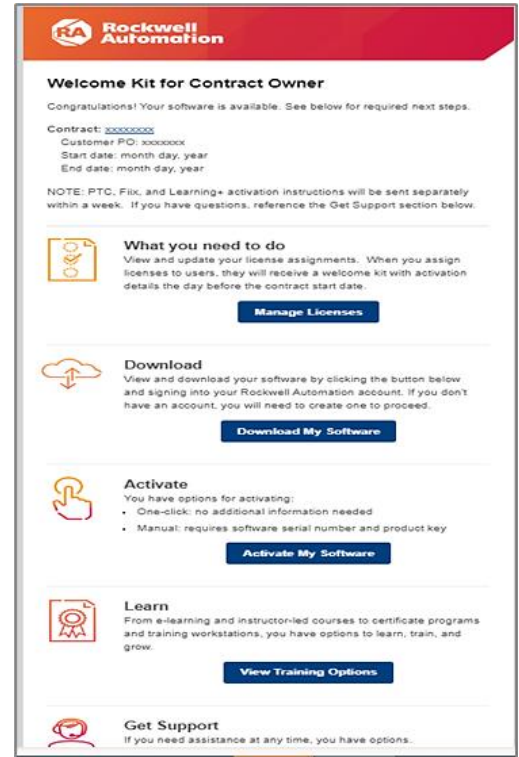
GENERATE QUOTE | **SUBMIT ORDER**

3. Allocate Licenses to Software Users

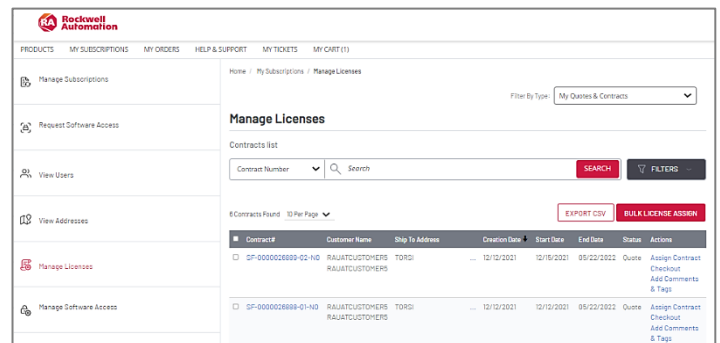
The Manage Licenses page of the Commerce Portal provides a dashboard of your quotes and contracts, software products purchased and license allocation information. Contract owners, those assigned as Commerce Portal software administrators, and distributor administrators can allocate licenses to software users.

1. Access Manage Licenses by clicking the **Manage Licenses** button from within your Welcome Kit email.
or

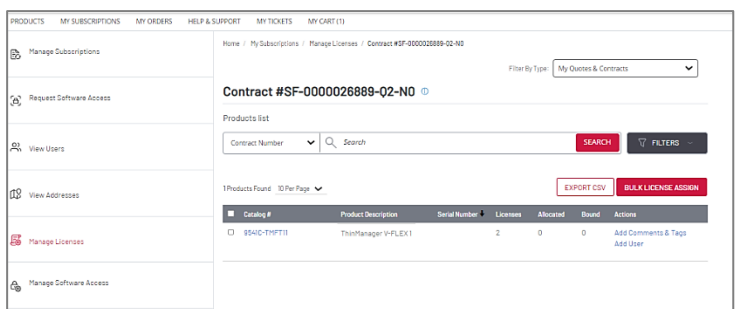
Log in to the Commerce Portal, choose **My Subscriptions** from the top menu and then select **Manage Licenses** from the left pane.



2. Click the blue quote or contact link that contains the software products and activation licenses you wish to allocate to software users.



3. You will navigate down a level in the contract to the product page. Here you can view the software products on this contract, serial numbers, and licenses allocation. Click the **Add Users** link.



- The fields required to be filled in are marked with asterisk *. Type in the allocation number and the email address of the software user to whom the license will be allocated to. Multiple emails (up to 15) can be assigned and separated with a comma. Click **ADD USERS** when complete.

Manual Import

IMPORTANT You only can import up to 50 emails with this option, to import more than 50 emails use [Bulk Import](#)

* **CONTRACT #** * **PRODUCT CATALOG #** **SERIAL #**

* **ALLOCATIONS** **ALTERNATE LOCATION** **ALTERNATE DATE**

* **USER EMAILS (UP TO 50)**

* Filled fields are mandatory

- The software users and the allocated licenses will appear in your user view located under the product catalog view. The licenses will show as Pending until the software users activate their software.

Use the breadcrumbs at the top of the page to track and navigate back up levels to product catalog and to the contract.

Home / My Subscriptions / Manage Licenses / Contract #SF-000026889-02-N0 / Catalog #954IC-TMFT11

Filter By Type:

Catalog# 954IC-TMFT11

Users list

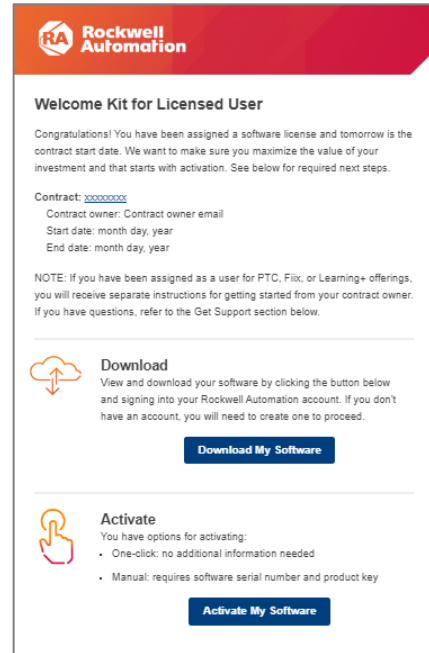
2 Users Found 10 Per Page

	User Email Address	Product Name	Machine ID	Allocated	Bound	Last Update	Status	Actions
<input type="checkbox"/>	joe@gmail.com	ThinManager THF1 Sub ESD S/W		2	0	11/02/2022	PENDING	Edit Delete Add Comments & Tags
<input type="checkbox"/>	Matt@mycompany.com	ThinManager THF1 Sub ESD S/W		2	0	11/02/2022	PENDING	Edit Delete Add Comments & Tags

4. Download and Activate Software

Welcome Kit emails, sent on the contract start date to those allocated licensed in the Manage License page, contain links for downloading and activating software.

1. Click the **Download My Software** button in your Welcome Kit emails to download your software.
2. Click the **Active My Software** button to activate your software.

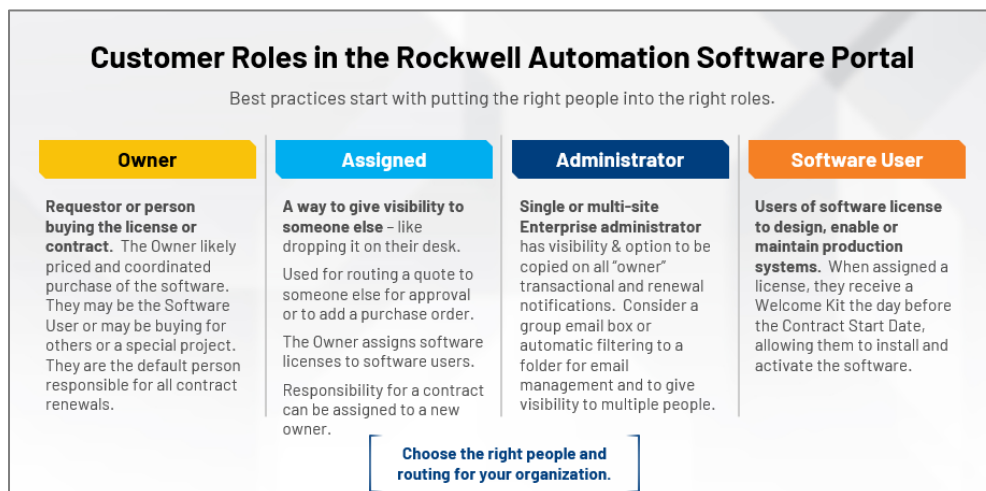


Links are also available to the contract owner in My Subscriptions of the Commerce Portal to download and activate software.

	05/23/2021 06193494	TORSI TECHNOLOGY United States 1201 S 2ND ST E-3A19 MILWAUKEE, Wisconsin United States 53204- 2410	05/23/2021 05/22/2022	Billing Reference Direct with Rockwell Automation	Active	Renew Contract Buy More Assign Contract Auto-Renew (On) Auto-Approve Users Remove Contract View Owners Download Activation Certificates
--	---------------------	---	-----------------------	---	--------	---

Commerce Portal Roles

Access to the Commerce 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 and this access is limited to the Commerce Portal, no other business systems.



Customer Roles

There are three role types that can be assigned to customers accessing the Commerce Portal. All roles allow access into the Commerce Portal to view products and create quotes.

Contract Owner and Assigned Owner

- The role of owner is assigned to any customer who creates a quote or is assigned a quote. They will have the ability to submit an order or “checkout”. The owner can assign the contract (or quote) to another person within their company to be added as an additional owner and manage the contract. Additionally, the owner can transfer the contract to a new owner at a new company, as in the case of an OEM or systems integrator.
- Owners receive a Welcome Kit email with software download and license information, and they will automatically be set up as a software user to have licenses allocated to them if so desired.
- The owner can allocate activation licenses to software users by using the Manage Licenses functionality in the Commerce Portal.
- The owner will receive renewal notification emails when their contract is within 120 days of expiration and can manually renew a contract.

Software User

- Software users are persons that need software licenses (activations). Software users are assigned licenses (activations) from a contract owner using the Manage Licenses page in the Commerce Portal. Software users receive activation and software download information from the Software User Welcome Kit emails. If you are an OEM or Systems integrator, you can assign licenses to your end customer.

Software Administrator

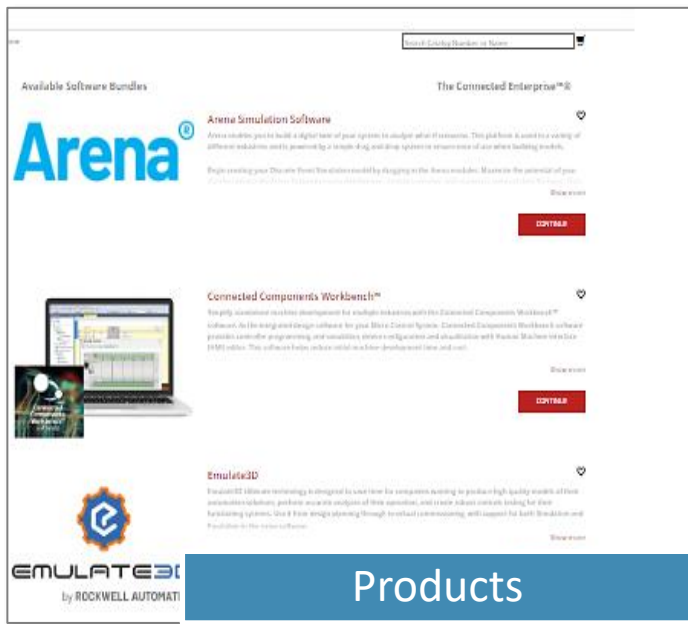
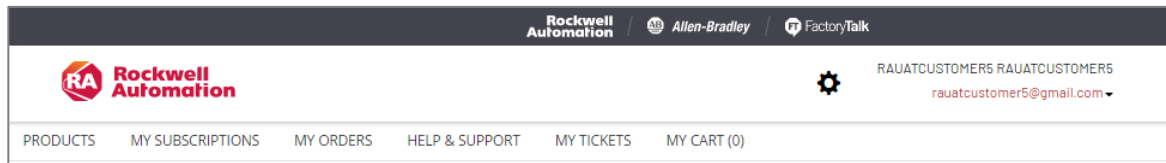
- It is recommended as a best practice to assign a person as an administrator. The software administrator role can be assigned to help manage licenses and users, and optionally be notified of upcoming renewals.
- The software administrator has visibility to all contract activities in a region and a software enterprise administrator role can have visibility across multiple regions.
- Software administrator roles can be created by the owner, via the View Users page in My Subscriptions or by submitting a ticket request via the Incident Management and Ticketing system in the Commerce Portal Help & Support page, and requesting a user be added as a Software Administrator or Software Enterprise Administrator.

Distributor Role

- Distributors can create and assign quotes to customers as well as assign software users licenses on behalf of their customer within Manage Licenses.

Commerce Portal Overview

This section provides a brief overview of the pages within the Commerce Portal. Links to the pages are located at the top of the page.



Begin a quote by selecting your software from the Products page. The Products page lists the software available for purchase in the Commerce Portal.

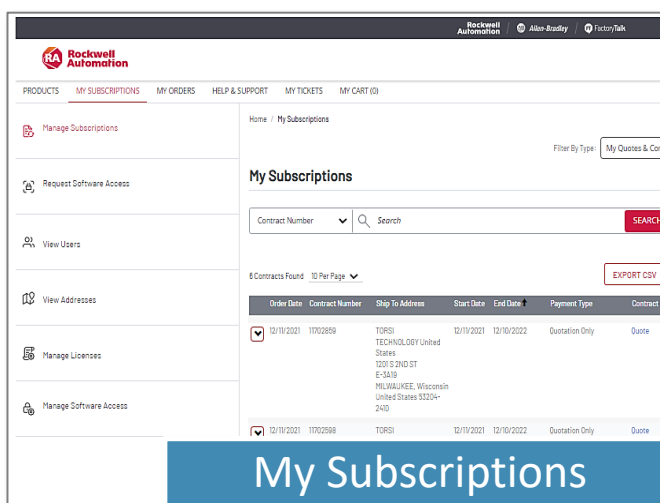
Click the CONTINUE button to begin to build your customized software bundle. Alternatively, if you know the catalog of the software you would like to purchase, type it directly into the catalog field at the top of the page.

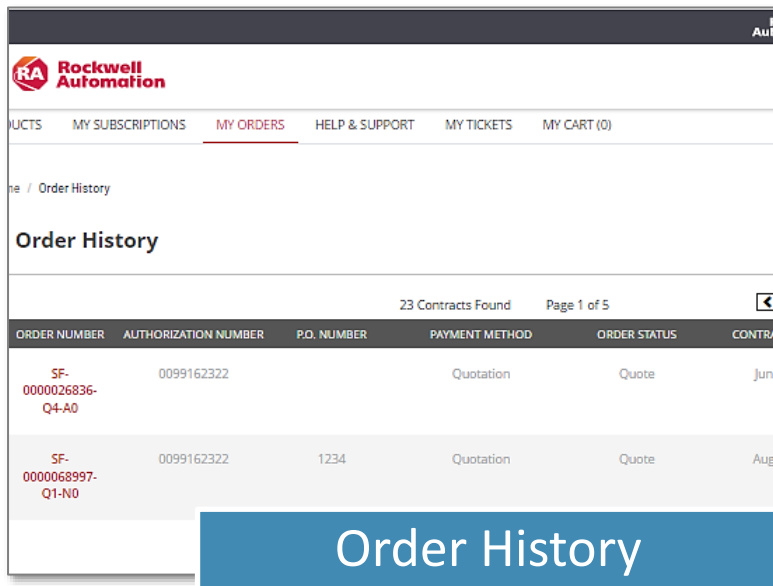
Click the heart shape icon below the product descriptions to add commonly used products to the Favorites list at the top of the Products page.

My Subscriptions provides visibility and access to the contracts assigned to you and your company. All contracts are identified by the contract number.

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

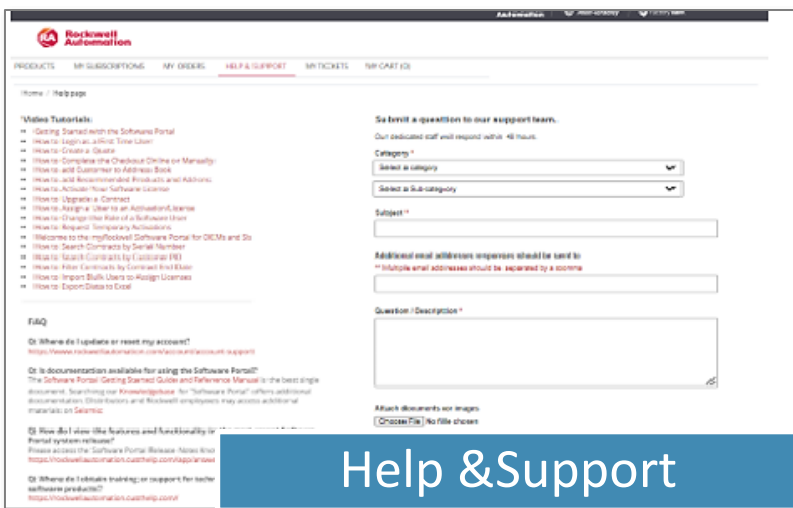
This page also provides multiple navigation links for advanced functionality to manage licenses and activations, check order status, and manage contracts. The functionality visible on this page is dependent on the role of the user who signs in. Owners, administrators, and users will have slightly different options and actions available to them when viewing this page.





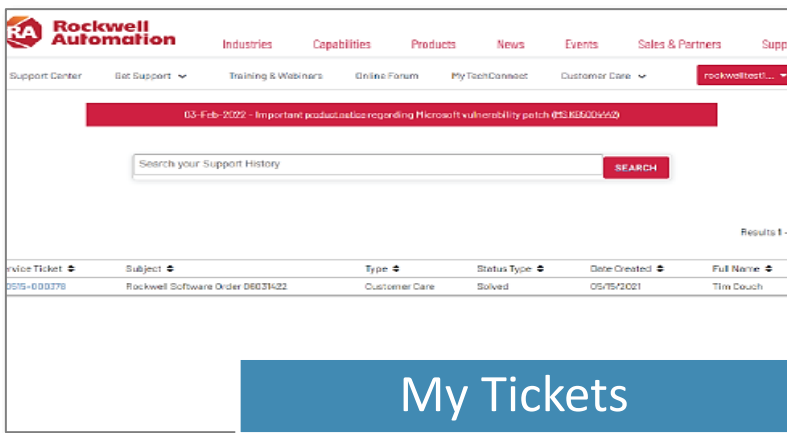
The Order History page shows a history of all your past orders and quotations you have generated.

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



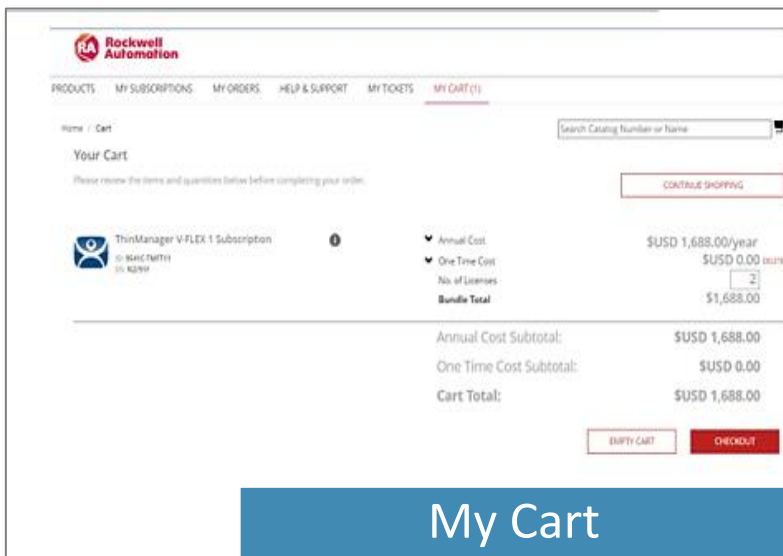
The Help & Support menu provides links to several video tutorials, answers the most common questions, and enables you to submit inquiries directly to the Commerce Portal support team.

Use the Category and Subcategories to help define your issue to receive timely support. Include additional emails of those to be copied on responses and any attachments as necessary to your support ticket.



When you click My Tickets, 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 & Support page.



My Cart breaks the cost down into annual cost and one-time costs.

Annual costs include subscription licenses and maintenance and support costs to stay in support. 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. (**Note-** the associated 1st year software maintenance & support for the perpetual license is an annual cost that needs to be renewed yearly to stay in support.)

*List Prices shown are for demonstration only.

Transaction Settings

Language: English | Country of Transaction: United States

Addresses
 Shipping and billing address may affect applicable pricing and currency.
 The shipping address will be used as your site location.

Shipping Address: [Redacted] / ADD | Billing Address: [Redacted] / ADD (Same as shipping address)

Billing Option
 Select Billing Option: Single Billing | Bankcard: [Redacted]
☐ Complete transaction through Distributor

Agreement Terms
 Select Agreement Term: 1 year | Start Date: 11/04/22 | End Date: 10/03/23

Available Pricing Conditions
 Select Agreement Type: [Redacted]

[START OVER] [SAVE]

Transaction Settings

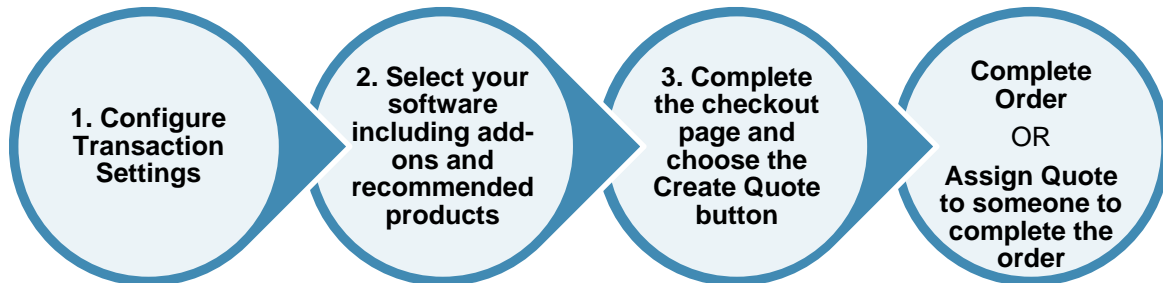
Transaction Settings allows you to set basic settings for your contract that will be saved and applied to your transactions each time you create a new quote or order.

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

The first time you log into the Commerce Portal, it is recommended that you configure your Transaction Settings. The Transaction Settings need to be configured once and when saved will be applied to your transactions.

Creating a Quote

The quote process is completed by following these steps:



Configure Transaction Settings

Click the gear icon on the top right of the Commerce Portal menu to display Transaction Settings.

Set basic settings for your contracts including 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.

Transaction Settings

Language: English Country of Transaction: United States

Addresses

Shipping Address: [ADD] Billing Address: [ADD] Same as shipping address: ☒

Billing Option: Single Billing Distributor: [ADD] Complete transaction through Distributor: ☐

Agreement Terms: Select Agreement Term: 1 year Start Date: 11/07/22 End Date: 11/06/23

Available Pricing Conditions: Select Agreement Type: [ADD]

START OVER SAVE

Language and Country

Select the desired language

Transaction Settings

Language: English Country of Transaction: United States

Shipping Address: [ADD] Billing Address: [ADD] Same as shipping address: ☒

Billing Option: Single Billing Distributor: [ADD] Complete transaction through Distributor: ☐

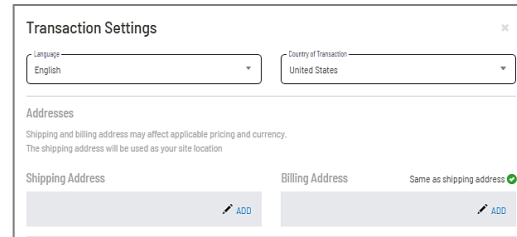
Agreement Terms: Select Agreement Term: 1 year Start Date: 11/07/22 End Date: 11/06/23

Available Pricing Conditions: Select Agreement Type: [ADD]

START OVER SAVE

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 icon 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 click the **CHOOSE BILLING ADDRESS** button to bill a different address.
 - 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.



Transaction Settings

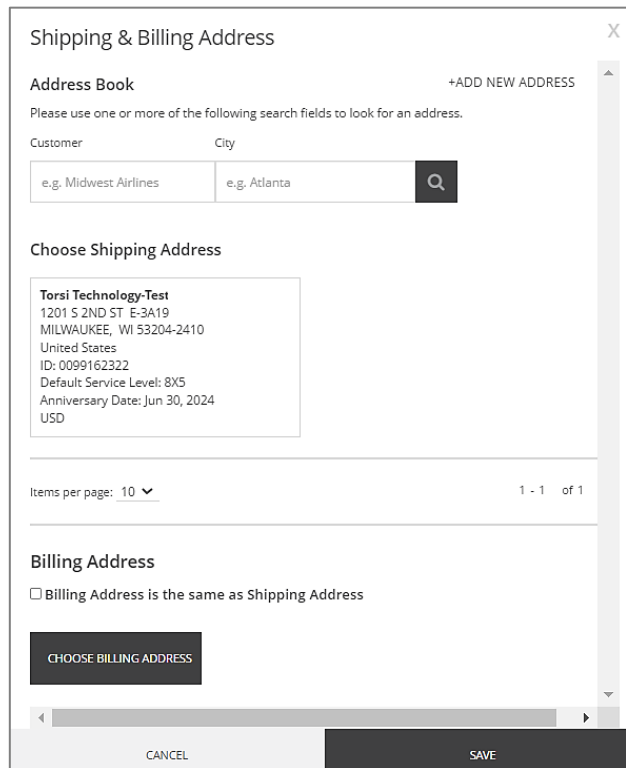
Language: English Country of Transaction: United States

Addresses

Shipping and billing address may affect applicable pricing and currency.
The shipping address will be used as your site location

Shipping Address: [Add icon]

Billing Address: [Add icon] Same as shipping address



Shipping & Billing Address

Address Book +ADD NEW ADDRESS

Please use one or more of the following search fields to look for an address.

Customer: [e.g. Midwest Airlines] City: [e.g. Atlanta] [Search icon]

Choose Shipping Address

Torsi Technology-Test
1201 S 2ND ST E-3A19
MILWAUKEE, WI 53204-2410
United States
ID: 0099162322
Default Service Level: 8X5
Anniversary Date: Jun 30, 2024
USD

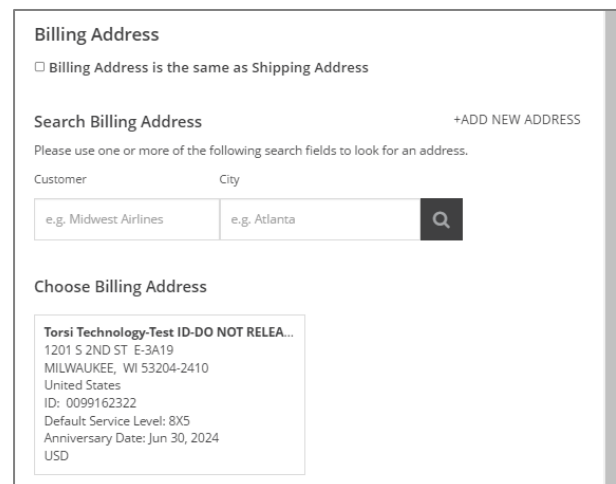
Items per page: 10 1 - 1 of 1

Billing Address

☐ Billing Address is the same as Shipping Address

CHOOSE BILLING ADDRESS

CANCEL SAVE



Billing Address

☐ Billing Address is the same as Shipping Address

Search Billing Address +ADD NEW ADDRESS

Please use one or more of the following search fields to look for an address.

Customer: [e.g. Midwest Airlines] City: [e.g. Atlanta] [Search icon]

Choose Billing Address

Torsi Technology-Test ID-DO NOT RELEA...
1201 S 2ND ST E-3A19
MILWAUKEE, WI 53204-2410
United States
ID: 0099162322
Default Service Level: 8X5
Anniversary Date: Jun 30, 2024
USD

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

Note-The +ADD NEW ADDRESS does not guarantee that the BPID and address is a primary account, it may be a secondary account. Please send a help ticket using the categories Account>Address Book/BPID Issues.

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 billing address. You may select another distributor in the dropdown list.

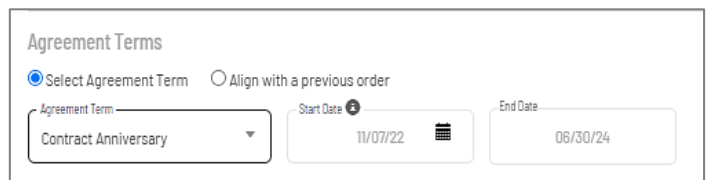
For direct orders uncheck the Complete transaction through Distributor checkbox and select **No Distributor**

Note- If your distributor does not appear, use Authorized Distributor TBD and enter the distributor name and address in the notes field of the checkout page. The Rockwell Automation Customer Care team will follow up with you before processing your order.

Agreement Start Date Options

The Agreement Start Date is when your software contract begins along with the following:

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



Agreement Terms

☒ Select Agreement Term ☐ Align with a previous order

Agreement Term: Contract Anniversary

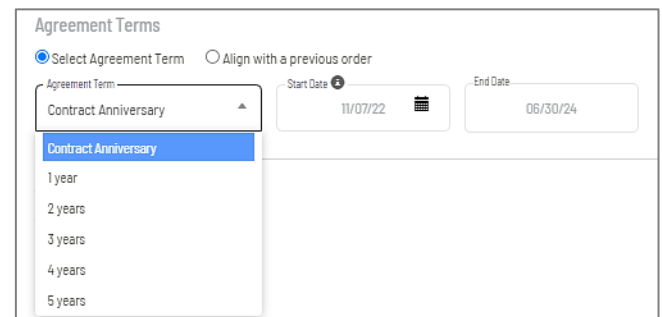
Start Date: 11/07/22

End Date: 06/30/24

Agreement Term

There are three contract term options to select:

- 1–5-year term agreement
- Contract Anniversary - 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 a previous order- Select from the list of past orders to align your new contract date to.



Agreement Terms

☒ Select Agreement Term ☐ Align with a previous order

Agreement Term: Contract Anniversary

Start Date: 11/07/22

End Date: 06/30/24

Contract Anniversary

1 year

2 years

3 years

4 years

5 years

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.

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 ticket on the Help & Support page.

Select Available Pricing Agreements

The Commerce 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.

Available Pricing Conditions

Select Agreement Type:

☐ Override Agreement

☐ Partner Level

☒ Agreement No:

☒ 3000132111: ECOM-PORTAL TESTING

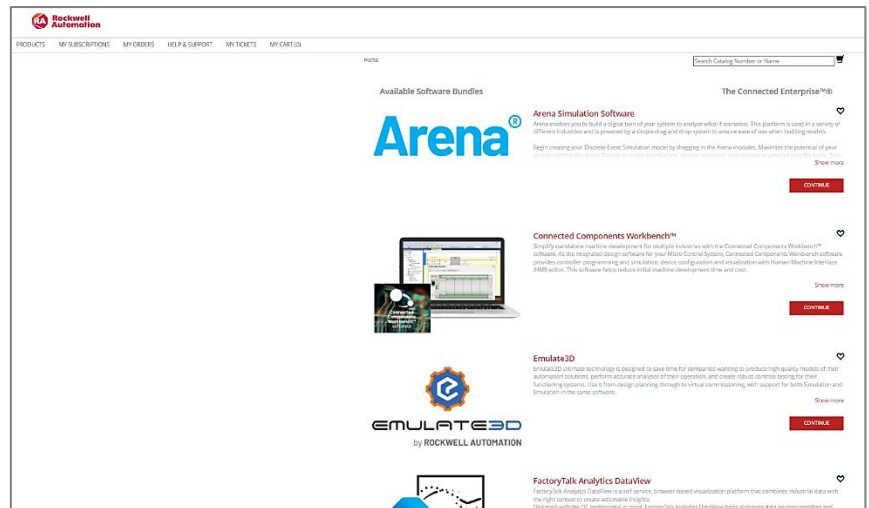
Software Selection

The Products page at the top of the Commerce Portal screen lists the software brands available for purchase. Once you select a brand, the Commerce 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 the **Continue** button 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 and is renewed annually. You own both the license and maintenance and support for the term of the contract. At renewal, you have the option of modifying your contract and licenses as needed.

The Perpetual with Maintenance option is a one-time cost for the software license and includes 1st year maintenance and technical support (annual cost). With this option, you own the software license forever, but will be required to renew the Software Maintenance & Support contract each year to continue support.

1. Selecting the type of software license you want to use, Perpetual with Maintenance or Subscription.

Home / FactoryTalk Historian SE

FactoryTalk Historian SE [View Product Description](#)

1. Choose Your Package

Historian SE Standard - 1,000 tags 1

☒ **\$USD 6,016.00 /license/year**

Included in this package is a Historian SE Server with 1,000 tags and communications software required for historizing data from Rockwell Automation controllers.

Tag capacity can be added in increments of 1,000 by entering multiple quantities of this package (tag licensing is additive). A volume discount will be applied when added to your CART. See Recommended Products for additional Add On components.

FactoryTalk VantagePoint EMI is NOT included in this package but can be purchased separately on the VantagePoint product page.

For additional information please check the [Ordering Guide](#).

	Perpetual With Maintenance	Subscription
License Flexibility 7	N/A	Yes
Intelligent Activation 7	N/A	Yes
Customizable Bundles	N/A	Yes
Reinstatement Fees	Yes	No
Phone Support	Optional	Included (8.5/M-F)
Software Updates	Included	Included
Knowledgebase	Yes	Yes
System Support	No	No
One Time Cost	\$USD 15,030.00 /license	-
Annual Cost	\$USD 3,006.00 /license/year	\$USD 6,016.00 /license/year

Product Selection

☐ **Historian SE - 500 tags with Productivity Clients**

☐ **\$USD 6,733.00 /license/year**

Included in this package is a Historian SE Server with 500 tags, communications software required for historizing data from Rockwell Automation controllers along with VantagePoint EMI Server with 1 Named User and 3 Concurrent Users. Tag capacity can be added in increments of 1,000 by entering multiple quantities of "Historian SE 1K Tag Add On" from Recommended Products (tag licensing is additive). A volume discount will be applied when added to your CART. See Recommended Products for additional Add On components.

For additional information please check the [Ordering Guide](#).

Historian SE Starter - 250 tags

☐ **\$USD 1,884.00 /license/year**

Included in this package is a Historian SE Server with 250 tags and communications software required for historizing data from Rockwell Automation controllers. See Recommended Products for additional Add On components.

FactoryTalk VantagePoint EMI is NOT included in this package but can be purchased separately on the VantagePoint product page.

For additional information please check the [Ordering Guide](#).

2. Customize your package by choosing Support Options and Media. Some products, such as Studio 5000, offer additional "Add On" functionality that can be included in your software package.

3. Select the Quantity of licenses to add to add to your quote and click **ADD TO CART**.

2. Customize your Package

Support 8

Selection Included in Price

☒ Historian SE, 1,000 Tag Add On 8x5 support

Add \$USD 1,503.00 /license/year

☐ Historian SE, 1,000 Tag Add On 24x7 support

Media

Add \$USD 102.95 /license/year

Media

SELECT

3. Select Quantity

Quantity: **ADD TO CART**

Recommended Products

Historian SE, 500 Tag Add On Subscription

\$USD 3,724.00 /license/year

Can also be used as a new 500 tag Historian SE Server or additional 500 tag for an existing Historian SE server.

Quantity: **ADD TO CART**

Historian SE, DataLink Client, 5 Users Subscription

\$USD 982.00 /license/year

DataLink is an Excel Add On Client application. Brings data from Historian SE into Excel to build reporting content. 5 Named User license

Quantity: **ADD TO CART**

Historian SE, Advance Server Add On Subscription

\$USD 2,594.00 /license/year

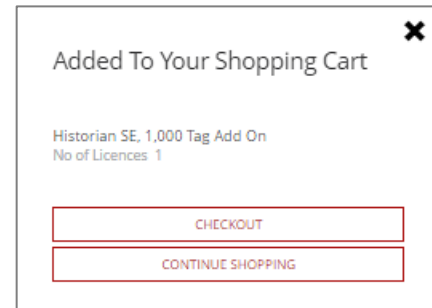
Provides OLEDB/ODBC, OPC DA/HDA, and Web Services API data access for 3rd party client applications. Historian CALs purchased separately.

Quantity: **ADD TO CART**

*List Prices shown are for demonstration only.

You will be prompted to checkout your order or to continue shopping to add additional items to your cart.

- To add other software or recommended products that are available for your software package, click **CONTINUE SHOPPING**
- Click on **CHECKOUT**, if you are ready to create your quote/order.



Recommended Products

Recommended products are optional software products that can be added to your quote or order. They will appear as a separate line item in your CART and will not be combined into any previous software bundle items you were previously building for your quote or order

4. Select any of the recommended products to accompany your purchase.
Note: Not all software offerings have recommended products to choose from.

Recommended Products		
<p>Historian SE, 500 Tag Add On Subscription</p> <p>\$USD 3,724.00/license/year</p> <p>Can also be used as a new 500 tag Historian SE Server or additional 500 tag for an existing Historian SE server.</p> <p>Quantity: <input type="text" value="1"/> ADD TO CART</p>	<p>Historian SE, DataLink Client, 5 Users Subscription</p> <p>\$USD 982.00/license/year</p> <p>DataLink is an Excel Add On Client application. Brings data from Historian SE into Excel to build reporting content. 5 Named User license</p> <p>Quantity: <input type="text" value="1"/> ADD TO CART</p>	<p>Historian SE, Advance Server Add On Subscription</p> <p>\$USD 2,594.00/license/year</p> <p>Provides OLEDB/ODBC, OPC, DA/HDA, and Web Services API data access for 3rd party client applications. Historian CALs purchased separately.</p> <p>Quantity: <input type="text" value="1"/> ADD TO CART</p>
<p>Historian SE, OLEDB Data Access Subscription</p> <p>\$USD 1,336.00/license/year</p> <p>Provides OLEDB/ODBC data access to the Historian server for 3rd party client applications. Historian CALs are purchased separately</p> <p>Quantity: <input type="text" value="1"/> ADD TO CART</p>	<p>Historian SE, Unlimited User CAL for 1K tag server Subscription</p> <p>\$USD 2,400.00/license/year</p> <p>Unlimited CALs for 1,000 Tag Historian SE server. User access through 3rd party client applications requires a CAL.</p> <p>Quantity: <input type="text" value="1"/> ADD TO CART</p>	<p>Historian SE, Unlimited User CAL for server up to 2.5K tags Subscription</p> <p>\$USD 5,200.00/license/year</p> <p>Unlimited CALs for Historian SE server up to 2,500 tags. User access through 3rd party client applications requires a CAL.</p> <p>Quantity: <input type="text" value="1"/> ADD TO CART</p>

*List Prices shown are for demonstration only.

To complete a quote, you will need to complete the checkout page and click the **CREATE QUOTE** button located on that page.

5. After all products have been added, select **CHECKOUT**.

Complete Checkout

The checkout process will navigate you to your CART where you review your software selection. Adjust the quantity of licenses or remove items.

If pricing in Your Cart 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.

6. After a review of your shopping cart, click on the **CHECKOUT** button.



Home / Cart

Search Catalog Number or Name

Your Cart

Please review the items and quantities below before completing your order.

[CONTINUE SHOPPING](#)

	Historian SE Standard - 1,000 tags ID: 9518C-HST111 DS: N91004		▼ Annual Cost ▼ One Time Cost No. of Licenses Bundle Total	\$USD 6,016.00/year \$USD 0.00 1 \$6,016.00
---	--	---	---	--

Annual Cost Subtotal:	\$USD 6,016.00
One Time Cost Subtotal:	\$USD 0.00
Cart Total:	\$USD 6,016.00

[EMPTY CART](#) [CHECKOUT](#)

*List Prices shown are for demonstration only.

This checkout action navigates you to the Checkout page where you can complete a final review of your order and enter your purchase order information. The page will automatically prepopulate 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 be reflected 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 your CART where you adjust the quantity as needed.
- Click the checkbox at the bottom of the page to agree to the License Agreement.
 - Click **GENERATE QUOTE** to create a quote.

The screenshot shows the 'Checkout' page with the following sections:

- Shipping:** Total Technology-Test ID: DO NOT RELEASE, 1201 S. 2ND ST, MILWAUKEE US-WI 53044-2410, United States, ID: 0099162322, 805, Jun 30, 2024, USD.
- Billing:** Total Technology-Test ID: DO NOT RELEASE, 1201 S. 2ND ST, MILWAUKEE US-WI 53044-2410, United States, ID: 0099162322, 805, Jun 30, 2024, USD.
- Contract Details:** Align with contract anniversary: Start Date (mm/dd/yyyy) 11/01/22, End Date (mm/dd/yyyy) 06/30/24, Billing Selection: Single Billing.
- Customer PO (Recommended):** Enter PO Number. Entering a PO Number here will allow you to purchase through Rockwell Directly.
- Special Instructions:** Specify any special instructions for your order.
- Order Summary:**

Item	Annual Cost	Prorated Annual Cost @ 601 days	One Time Cost	Quantity
Historian SE Standard - 1,000 tags ID: 8538C-HSTT01 US: N3180H Included in bundle: Historian SE, 1,000 Tag Add On Historian SE, 1,000 Tag Add On Bk support Historian SE, 1,000 Tag Add On Update	\$USD 6,018.00/year	\$USD 6,905.80	\$USD 0.00	1
Prorated Bundle Total	\$USD 9,905.80			

*List Prices shown are for demonstration only.

To complete an order request:

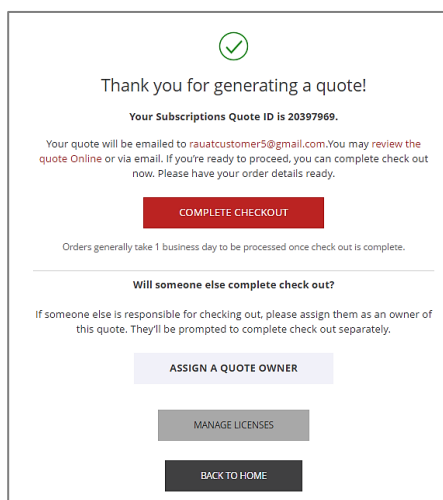
- Enter your Purchase Order number (and attach PO is order is direct with Rockwell Automation).
- Apply any promotional discounts you may have.
- If you have Incentive Dollars, a field will be available for you to enter the amount to apply to your order.
- Check the License Agreement and other applicable boxes located at the bottom of the page.
- Click **SUBMIT ORDER**.

It is recommended that you add your purchase order number 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 purchase order has been added to the transaction. **Note-**The Purchase Order number you enter will also be used at 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 number will appear in your order acknowledgement email and renewal notices along with your order number.

Quote Confirmation and Assign Quote

Once your quote has been generated, you will receive a quote confirmation and a confirmation email with an attached quote and bill of materials in a .pdf document.



Thank you for generating a quote!

Your Subscriptions Quote ID is 20397969.

Your quote will be emailed to rauatacustomer5@gmail.com. You may review the quote Online or via email. If you're ready to proceed, you can complete check out now. Please have your order details ready.

COMPLETE CHECKOUT

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

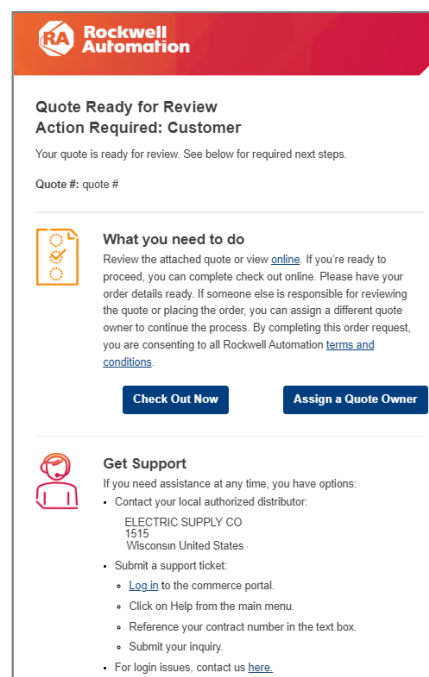
Will someone else complete check out?

If someone else is responsible for checking out, please assign them as an owner of this quote. They'll be prompted to complete check out separately.

ASSIGN A QUOTE OWNER

MANAGE LICENSES

BACK TO HOME



Rockwell Automation

Quote Ready for Review
Action Required: Customer

Your quote is ready for review. See below for required next steps.

Quote #: quote #

What you need to do

Review the attached quote or view [online](#). If you're ready to proceed, you can complete check out online. Please have your order details ready. If someone else is responsible for reviewing the quote or placing the order, you can assign a different quote owner to continue the process. By completing this order request, you are consenting to all Rockwell Automation [terms and conditions](#).

Check Out Now **Assign a Quote Owner**

Get Support

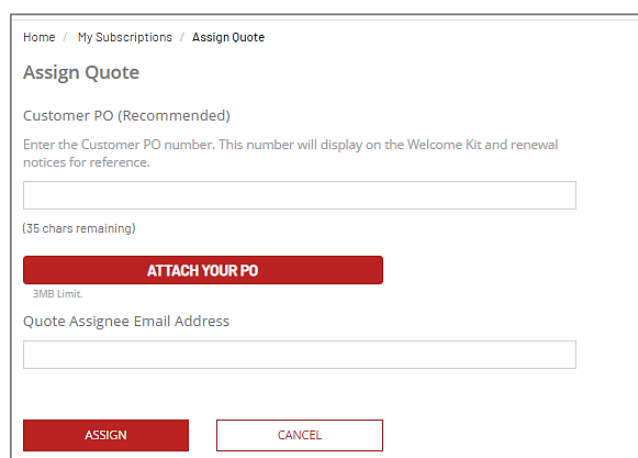
If you need assistance at any time, you have options:

- Contact your local authorized distributor:
 - ELECTRIC SUPPLY CO
 - 1515
 - Wisconsin United States
- Submit a support ticket:
 - [Log in](#) to the commerce portal.
 - Click on Help from the main menu.
 - Reference your contract number in the text box.
- Submit your inquiry.
- For login issues, contact us [here](#).

The quote confirmation and email both provide links to complete the checkout process, as well as an option to assign the quote to another person to be the quote/contract owner.

Assigning the quote to another person allows that person to check out the quote. This person will have access to software downloads, activations and will receive renewal notifications.

1. Click **ASSIGN A QUOTE OWNER** directly from either the Commerce Portal or email confirmation, or use the Assign Contract action in My Subscriptions, to assign the quote to the individual who will be the new contract owner.
2. Enter the person's email address and click on **ASSIGN**.



Home / My Subscriptions / Assign Quote

Assign Quote

Customer PO (Recommended)

Enter the Customer PO number. This number will display on the Welcome Kit and renewal notices for reference.

(35 chars remaining)

ATTACH YOUR PO

3MB Limit

Quote Assignee Email Address


ASSIGN **CANCEL**

Note- Distributors will use the Assign Quote function to assign Commerce Portal quotes they create to their end customers.

3. Click on **YES** to confirm you want to send the email.

The new 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. The new owner can click **Check Out Now** to submit an order request.

 **Rockwell Automation**

Customer Quote Assigned / Ready for Review
Action Required: Customer


You have been assigned a quote by John Smith (jnsmith@abc.com). The quote is attached and ready for review. See below for required next steps.

Quote #: quote #
Start date: month day, year
End date: month day, year

**What you need to do**

Review the attached quote or view [online](#). If you're ready to proceed, you can complete check out online. Please have your order details ready. If someone else is responsible for reviewing the quote or placing the order, you can assign a different quote owner to continue the process. By completing this order request, you are consenting to all Rockwell Automation [terms and conditions](#).

[Check Out Now](#)[Assign a Quote Owner](#)

**Need to make some changes?**

If you need to amend your quote before proceeding, you can either:

- Contact John Smith (john.smith@customer.com)
- Request changes from your distributor.
- Initiate a manual checkout without having to Log in. We will contact you to collect the information needed to complete the order. Manually initiated checkouts are generally processed within 5 business days.

[Initiate Manual Checkout](#)

Pricing Holds

All software quotes have a 90-day pricing hold. Contracts that have terms longer than 1 year will have prices locked in for the entire term.

How to Submit Order from an Assigned Owner Email

If your distributor has created a quote for you and **does not** have your purchase order entered into the quotation, or if this your first order request transaction in the Commerce Portal, you will need to take steps to complete the order request from your Assigned Owner email like the one shown here.

This email will provide you two options for submitting your order:

1. **Checkout Online** - Navigates you into the Commerce Portal to review your order and complete the checkout, including entering your PO.
2. **Initiate Manual Checkout** - Provides a method to check out your order without logging into the Commerce Portal.


Checkout Online

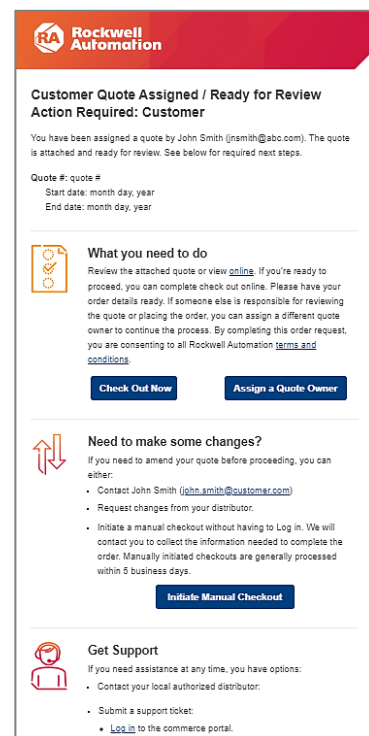
Clicking this link in the email will navigate you to the Commerce Portal Checkout page.

To complete the checkout and submit your order, you will need to:

1. Enter your PO number (and attach your PO if a direct order).
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 .



Rockwell Automation

Customer Quote Assigned / Ready for Review
Action Required: Customer

You have been assigned a quote by John Smith (jnsmith@abo.com). The quote is attached and ready for review. See below for required next steps.

Quote #: quote #
Start date: month day, year
End date: month day, year

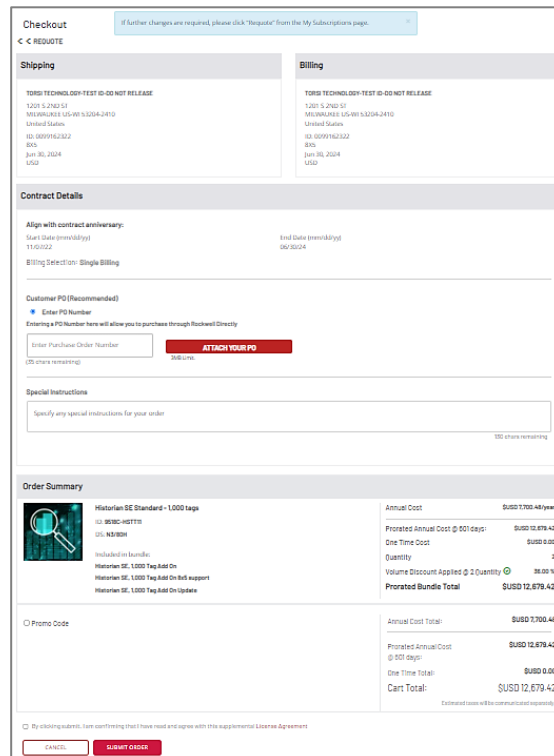
What you need to do
Review the attached quote or view [online](#). If you're ready to proceed, you can complete checkout online. Please have your order details ready. If someone else is responsible for reviewing the quote or placing the order, you can assign a different quote owner to continue the process. By completing this order request, you are consenting to all Rockwell Automation [terms and conditions](#).

[Check Out Now](#) [Assign a Quote Owner](#)

Need to make some changes?
If you need to amend your quote before proceeding, you can either:
• Contact John Smith (john.smith@customer.com)
• Request changes from your distributor.
• Initiate a manual checkout without having to Log in. We will contact you to collect the information needed to complete the order. Manually initiated checkouts are generally processed within 5 business days.

[Initiate Manual Checkout](#)

Get Support
If you need assistance at any time, you have options:
• Contact your local authorized distributor.
• Submit a support ticket:
• [Log in](#) to the commerce portal.



Checkout
< < REQUOTE

If further changes are required, please click "Requote" from the My Subscriptions page.

Shipping
TOSH TECHNOLOGY TEST ID-DO NOT RELEASE
1201 S. 2ND ST
MILWAUKEE WI 53204-2410
United States
ID: 0009162322
B2C
Jun 30, 2024
USD

Billing
TOSH TECHNOLOGY TEST ID-DO NOT RELEASE
1201 S. 2ND ST
MILWAUKEE WI 53204-2410
United States
ID: 0009162322
B2C
Jun 30, 2024
USD

Contract Details
Align with contract anniversary:
Start Date (mm/dd/yyyy): 11/01/22 End Date (mm/dd/yyyy): 06/30/24
Billing Selection: Single Billing

Customer PO (Recommended)
Enter PO Number
Entering a PO Number here will allow you to purchase through Rockwell Directly.
Enter Purchase Order Number [ATTACH YOUR PO](#)
(25 chars remaining) 360 chars

Special Instructions
Specify any special instructions for your order
150 chars remaining

Order Summary

Historian SE Standard - 1,000 tags	
12: 050EC-HISTTS	Annual Cost: \$USD 1,700.48/year
12: N3R0N	Promoted Annual Cost @ 301 days: \$USD 12,679.42
Included in bundle:	One Time Cost: \$USD 0.00
Historian SE, 1,000 Tag Add-On	Quantity: 2
Historian SE, 1,000 Tag Add-On full support	Volume Discount Applied @ 2 Quantity: 38.00 %
Historian SE, 1,000 Tag Add-On (updates)	Promoted Bundle Total: \$USD 12,679.42

☐ Promo Code

Annual Cost Total:	\$USD 1,700.48
Promoted Annual Cost @ 301 days:	\$USD 12,679.42
One Time Total:	\$USD 0.00
Cart Total:	\$USD 12,679.42

Estimated costs will be confirmed at delivery.


☐ By clicking submit, I am confirming that I have read and agree with this supplemental License Agreement

[Cancel](#) [Submit Order](#)

Initiate Manual Checkout

Clicking this link will initiate the manual checkout process. This process does not require the quote/contract owner to log into the Commerce Portal to complete the order.

The quote/contract owner should expect to be contacted by Rockwell Automation Customer Care via email requesting required purchase order information to complete the purchase process.



Need to make some changes?

If you need to amend your quote before proceeding, you can either:

- Contact John Smith (john.smith@customer.com)
- Request changes from your distributor.
- Initiate a manual checkout without having to Log in. We will contact you to collect the information needed to complete the order. Manually initiated checkouts are generally processed within 5 business days.

[Initiate Manual Checkout](#)


Note: Manual checkout may add additional time for the order creation to be completed.

Customer Order Acknowledgement

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

Note- If you are purchasing through a distributor, please send a copy of your purchase order to them for them to complete the order process.

All software contracts are set up for Auto-Renew. The contract 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.


**Rockwell Automation**

Order Request Confirmation

Customer Order Through Distribution


Thank you for your [order request](#). See below for important next steps.

Contract: [xxxxxxx](#)
Customer PO: xxxxxxx
Start date: month day, year
End date: month day, year



What's next


Send a purchase order to your distributor if you have not already done so. After your distributor has added their purchase order, you will receive instructions on installing and activating your software.



Get Support

If you need assistance at any time, you have options:

- Contact your local authorized distributor.
- Submit a support ticket:
 - [Log in](#) to the commerce portal.
 - Click on Help from the main menu.
 - Reference your contract number in the text box.
 - Submit your inquiry.
- For login issues, contact us [here](#).



Order Summary

Below is a summarized version of your order for the upcoming contract term. For more detail, refer to the email attachment.

Start date: month day, year
End date: month day, year

Order Details:

FactoryTalk Linx Gateway Basic
Bundle ID: xxx | Software ID: 110
Level of support: Self-Support, 8x5, 24x7
DS: xxx
S/N: xxx

One time cost: USD 0.00
Prorated annual cost @ 300 days: USD 249.30

Welcome Kits

Once an order has been completed and submitted, on the agreement start date an Owner Welcome Kit email with the license and software information is generated and sent to the contract owner.

Users allocated software licenses will receive their own User Welcome Kit email with activation and license information on the agreement start date, or when they are added to an active contract by an owner. An owner will also receive a User Welcome Kit email since they are automatically assigned one license.

The Owner Welcome Kit email contains:

Your contract details

- software product name
- serial number
- number of licenses
- authorization number for technical support
- your purchase order number and subscription contract ID

Includes links to

- download your software
- activate licenses
- manage Licenses page to allocate software licenses

The User Welcome Kit email contains:

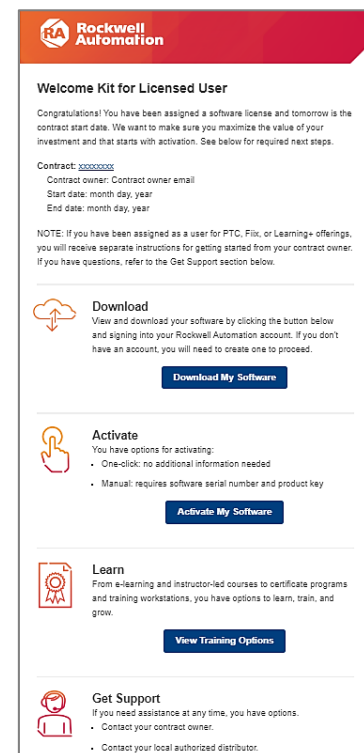
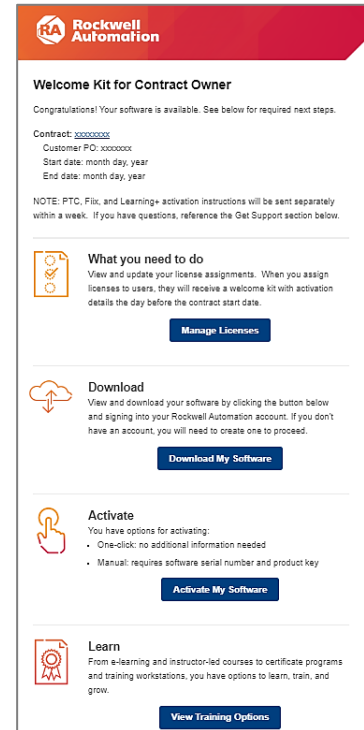
Your license details:

- software catalog number
- contract ID
- authorization numbers for technical support

Includes links to

- download software
- activate licenses
- additional training information

The contract 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 in the Manage Licenses page and is fine to be left in this state.



My Subscriptions

The My Subscriptions page allows you to view and manage your accounts, contracts, and licenses.

Here you will have access to a variety of actions you can take on your quotes and contracts, including:

- buying and downloading software
- upgrading, or purchasing additional licenses
- renewing contracts
- transferring your contract
- viewing your order status.

Use the advanced search and filtering options to locate contracts based on serial numbers, POs, project tags, and a wide variety of other factors. Save can be saved for quick and easy reuse.

Tabs on the left side of the page to navigate to other functions in the Commerce Portal.

Order Date	Contract Number	Ship To Address	Start Date	End Date	Payment Type	Contract Status	Actions
11/07/2022	20397969	TORSI TECHNOLOGY RELEASE United States 1201 S 2ND ST E-5A19 MILWAUKEE, Wisconsin United States 53204-2400	11/07/2022	06/30/2024	Quotation Only	Quote	Checkout Request View PDF Delete Assign Quote Assign Contract View Owners
12/12/2021	SF-0000026889-02-NO	TORSI TECHNOLOGY United States 1201 S 2ND ST E-5A19 MILWAUKEE, Wisconsin United States 53204-2400	12/15/2021	05/22/2022	Quotation Only	Quote	Checkout Request View PDF Delete Assign Quote Assign Contract View Owners
12/12/2021	SF-0000026889-03-NO	TORSI TECHNOLOGY United States 1201 S 2ND ST E-5A19 MILWAUKEE, Wisconsin United States 53204-2400	12/12/2021	05/22/2022	Quotation Only	Quote	Checkout Request View PDF Delete Assign Quote Assign Contract View Owners
12/12/2021	11702859	TORSI TECHNOLOGY United States 1201 S 2ND ST E-5A19 MILWAUKEE, Wisconsin United States 53204-2400	12/12/2021	12/10/2022	Quotation Only	Quote	Checkout Request View PDF Delete Assign Quote Assign Contract View Owners

Filter and Search

Filter by Type, choose:

- **My Quotes & Contracts** - allows you to see the quotes and contracts that only you are the owner of
- **My Company Quotes & Contracts** - allows you to see the quotes and contracts of your entire company if you have Software Administrator privileges

Order Date	Contract Number	Ship To Address	Start Date	End Date	Payment Type	Contract Status	Actions
11/07/2022	20397969	TORSI TECHNOLOGY RELEASE United States 1201 S 2ND ST E-5A19 MILWAUKEE, Wisconsin United States 53204-2400	11/07/2022	06/30/2024	Quotation Only	Quote	Checkout Request View PDF Delete Assign Quote Assign Contract View Owners
12/12/2021	SF-0000026889-02-NO	TORSI TECHNOLOGY United States 1201 S 2ND ST E-5A19 MILWAUKEE, Wisconsin United States 53204-2400	12/15/2021	05/22/2022	Quotation Only	Quote	Checkout Request View PDF Delete Assign Quote Assign Contract View Owners
12/12/2021	SF-0000026889-03-NO	TORSI TECHNOLOGY United States 1201 S 2ND ST E-5A19 MILWAUKEE, Wisconsin United States 53204-2400	12/12/2021	05/22/2022	Quotation Only	Quote	Checkout Request View PDF Delete Assign Quote Assign Contract View Owners
12/12/2021	11702859	TORSI TECHNOLOGY United States 1201 S 2ND ST E-5A19 MILWAUKEE, Wisconsin United States 53204-2400	12/12/2021	12/10/2022	Quotation Only	Quote	Checkout Request View PDF Delete Assign Quote Assign Contract View Owners

Search for a contract based on:

- Contract PO Number
- Catalog Number
- Brand
- Software Part Number
- Serial Number
- Assigned User
- Distributor PO
- Tags

Order Date	Contract Number	Ship To Address	Start Date	End Date	Payment Type	Contract Status	Actions
11/07/2022	20397969	TORSI TECHNOLOGY RELEASE United States 1201 S 2ND ST E-5A19 MILWAUKEE, Wisconsin United States 53204-2400	11/07/2022	06/30/2024	Quotation Only	Quote	Checkout Request View PDF Delete Assign Quote Assign Contract View Owners
12/12/2021	SF-0000026889-02-NO	TORSI TECHNOLOGY United States 1201 S 2ND ST E-5A19 MILWAUKEE, Wisconsin United States 53204-2400	12/15/2021	05/22/2022	Quotation Only	Quote	Checkout Request View PDF Delete Assign Quote Assign Contract View Owners
12/12/2021	SF-0000026889-03-NO	TORSI TECHNOLOGY United States 1201 S 2ND ST E-5A19 MILWAUKEE, Wisconsin United States 53204-2400	12/12/2021	05/22/2022	Quotation Only	Quote	Checkout Request View PDF Delete Assign Quote Assign Contract View Owners
12/12/2021	11702859	TORSI TECHNOLOGY United States 1201 S 2ND ST E-5A19 MILWAUKEE, Wisconsin United States 53204-2400	12/12/2021	12/10/2022	Quotation Only	Quote	Checkout Request View PDF Delete Assign Quote Assign Contract View Owners

Partial searches and multiple searches are supported by separating search criteria with commas.

Additional search filters include:

- Date range to search contracts based on:
 - Contract creation date
 - Contract start date
 - Contract end date
- Previous and Next 30, 60, 90, 120-day date selection
- Ship To or Sold To - BPID Address selection
- Contract status

Manage Licenses Filter By Type: My Quotes & Contracts

Contracts list

Contract Number Search

Date Range (Order / Start / End) Address (sold to / ship to) Contract Status

User Status Quote Type Payment Type

Saved Searches

Select an Address

Please use one or more of the following search fields to look for an address.

☒ Ship To ☐ Sold To

Customer City

e.g. Midwest Airlines e.g. Atlanta

Contract Status

- All
- Quote
- Assigned
- On Hold
- Submitted
- Approved
- Active
- Expired
- Cancelled
- Archived

- User license status:
 - All
 - Pending
 - Bound
 - Expired
 - Renewed Error
- Quote Type
- Payment Type
 - Quotation
 - Purchase Through Distribution
 - Enterprise Order
 - Lab Use Only Order
 - Billing Reference Direct with

Manage Licenses Filter By Type: My Quotes & Contracts

Contracts list

Contract Number Search

Date Range (Order / Start / End) Address (sold to / ship to) Contract Status

User Status Quote Type Payment Type

Saved Searches

User Status

- All
- Pending
- Bound
- Expired
- Renewed
- Error

Quote Type

- New Quote
- Renewal Quote

Payment Type

- Quotation, PTD, Enterprise, Lab Use, RD.
- ☒ Quotation
- ☒ Purchase Through Distributor
- ☒ Enterprise Order
- ☒ Lab Use Only Order
- ☒ Billing Reference Direct with Rockwell Automation

Saved Searches

Filters and search criteria can be saved using the SAVE SEARCH button.

- Click the SAVE SEARCH button
- Enter a name to save the search and click SAVE SEARCH
- Use the pulldown to reuse the saved search in the future

Search by serial number

Search by serial number

Save filter/search

Insert a title or name for your saved search

Search by serial number

Contract Status: On Hold

Manage Subscriptions

The Manage Subscriptions page allows you to manage your quotes and contracts in the Commerce Portal. This is done by using the functions under ACTION next to the contract you are managing.

Click the left expansion arrow to display the product catalog and quantity for that contract.

Order Date	Contract Number	Ship To Address	Start Date	End Date ↑	Payment Type	Contract Status	Actions
11/07/2022	20397969	TORSI TECHNOLOGY- RELEASE United States 1201 S 2ND ST E-3A19 MILWAUKEE, Wisconsin United States 53204- 2410	11/07/2022	06/30/2024	Quotation Only	Quote	Checkout Requote View PDF Delete Assign Quote Assign Contract View Owners
PRODUCTS		CATALOG NUMBER	QUANTITY	ACTIONS			
FactoryTalk Historian SE ▼		9518C-HSTT11	2				

05/23/2021	06193494	TORSI TECHNOLOGY United States 1201 S 2ND ST E-3A19 MILWAUKEE, Wisconsin United States 53204- 2410	05/23/2021	05/22/2022	Billing Reference Direct with Rockwell Automation	Active	Renew Contract Buy More Assign Contract Auto-Renew (On) Auto-Approve Users Remove Contract View Owners Download Activation Certificates
------------	----------	---	------------	------------	---	--------	---

Actions will vary depending on which status your contract is in.

Contract Status

The status of your contracts can be viewed using the Manage Subscriptions page in 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
- Expired On Hold Cancelled

PRODUCTS

MY SUBSCRIPTIONS

MY ORDERS

HELP & SUPPORT

MY TICKETS

MY CART (2)

Manage Subscriptions

Request Software Access

View Users

View Addresses

Manage Licenses

Home / My Subscriptions

Filter By Type:

My Quotes & Contracts

My Subscriptions

Contract Number

Search

SEARCH

FILTERS

7 Contracts Found 10 Per Page

EXPORT CSV

BULK LICENSE ASSIGN

Order Date	Contract Number	Ship To Address	Start Date	End Date	Payment Type	Contract Status	Actions
11/07/2022	20397969	TORSI TECHNOLOGY- RELEASE United States 1201 S 2ND ST E-3A19 MILWAUKEE, Wisconsin United States 53204- 2410	11/07/2022	06/30/2024	Quotation Only	Quote	<div>Checkout</div> <div>Requote</div> <div>View PDF</div> <div>Delete</div> <div>Assign Quote</div> <div>Assign Contract</div> <div>View Owners</div>

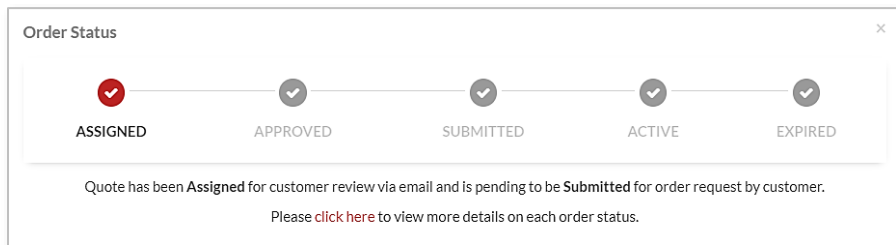
Order Status Tracker

Click on the Contract Status text to open the Order Status Tracker to see where in the transaction cycle the contract is.

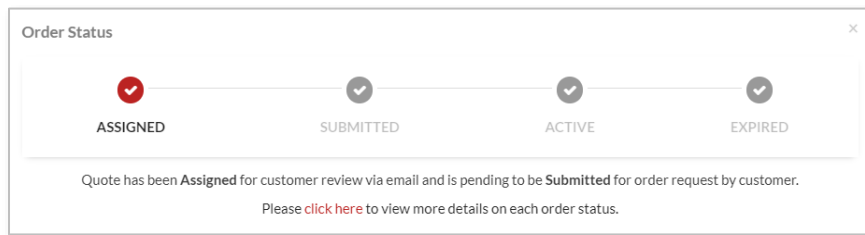
Order Date	Contract Number	Ship To Address	Start Date	End Date ↑	Payment Type	Contract Status	Actions
11/07/2022	20397969	TORSI TECHNOLOGY- RELEASE United States 1201 S 2ND ST E-3A19 MILWAUKEE, Wisconsin United States 53204- 2410	11/07/2022	06/30/2024	Quotation Only	Quote	Checkout Requote View PDF Delete Assign Quote Assign Contract View Owners

The Order Status Tracker will display a red checked circle for the completed stages of the transaction.

There are 5 transaction stages for a **Purchase Through Distributor** transaction.



There are 4 transaction stages for a **Customer Direct** transaction.



Status	Description	Actions Available
Quote	This status indicates the contract is still in the quote stage and is ready to be submitted for checkout by the customer.	Checkout Requote View PDF Delete Assign Quote Assign Contract
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.	Checkout Requote View PDF Delete Assign Quote Assign Contract
Approved	This 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. When the distributor receives your PO and submits it into the Commerce 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 when both POs are entered.	View Owners Assign Contract

Submitted	This status indicates the order has been submitted with POs through the Commerce Portal and is actively being processed by Rockwell Automation for release. The next stage is Active.	View Owners Assign Contract
Active	This status indicates the contract is now Active. Owner and User Welcome Kit emails will be sent on the agreement start date to owners and any software users assigned licenses. Owners can continue to assign software users licenses using the Manage Licenses page.	Buy More Assign Contract Auto-Renew Auto-Approve Users View Owners Download Activation Certificates Upgrade Renew (available at 120 days before expiration)
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.	View Owners
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.	Buy More Renew Reinstate
Cancelled	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.	Buy More Assign Contract View Owners Requote

***Note-** Cancelled on a quote indicates the pricing has been cancelled and is no longer valid.

Action descriptions are listed below.

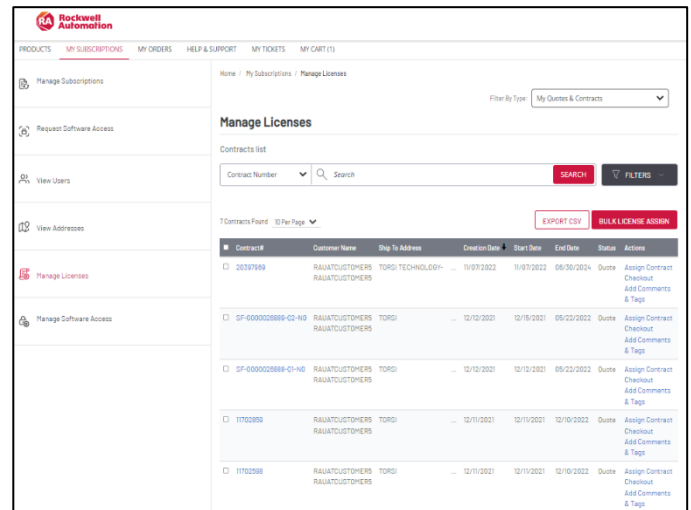
Actions	Use to:
Checkout	Submit a quote for order processing
Requote	Adjust quantity, special pricing agreement selection or to add additional products to a quote
View PDF	Display a PDF file of the quote for print, email or other forms of viewing
Delete	Removes the quote from the Commerce Portal
Assign Quote	Assign a new owner for the quote
View Owners	View the owners assigned to the quote/contract
Assign Contract	Assign a new owner of the contract
Buy More	Add additional licenses to your active contract. In some instances, a new contract is created as in the case of Toolkits
Upgrade	Upgrade the support the level or applicable product options
Renew	Manually renew your contract
Auto-Renew	Enable/Disable automatic renewal
Auto-Approve Users	Automatically approve software users assigned to Manage Licenses
Download	Navigates to the software download page
Activation Certificates	View license and activation information and activation links
Reinstate	Restore an expired contract, which may be subject to back-dating rules

Manage Licenses

Click the Manage Licenses tab to view or assign license allocations to software users. A link to Manage Licenses can also be found in the Owner Welcome Kit email.

The Manage License page provides:

- **Visibility** to users, licenses, software downloads in an organized and accessible environment
- **License management** including software deployment, viewing activation usage and filtering activation records
- **Comments and project/reference tagging** allows specific information and sort fields to be added to contract and user record data
- **Flexibility to deploy software** using automated workflows for connected users and support for disconnected legacy workflows
- **Streamlined software downloads and activations** provided from user Welcome Kit email



Contract#	Customer Name	Ship To Address	Creation Date	Start Date	End Date	Status	Actions
08347898	RAUATCUSTOMERS	TORO TECHNOLOGY	10/07/2022	10/07/2022	06/30/2024	Quota	Assign Contract Checkout Add Comments & Tags
SP-000000889-02-NB	RAUATCUSTOMERS	TORO	10/10/2021	10/10/2021	05/20/2022	Quota	Assign Contract Checkout Add Comments & Tags
SP-000000889-01-NB	RAUATCUSTOMERS	TORO	10/10/2021	10/10/2021	05/20/2022	Quota	Assign Contract Checkout Add Comments & Tags
11762086	RAUATCUSTOMERS	TORO	10/11/2021	10/11/2021	12/10/2022	Quota	Assign Contract Checkout Add Comments & Tags
11762088	RAUATCUSTOMERS	TORO	10/11/2021	10/11/2021	12/10/2022	Quota	Assign Contract Checkout Add Comments & Tags

License Activation Status

The Manage Licenses page provides status on the activation licenses allocated within your contracts. In addition, you can sort your view of the license allocation based on these statuses.

Licenses will have one of the following statuses:

Pending- A software license was allocated and a User Welcome Kit email was sent to the user. The user did not activate their license.

There is no limit on the number of pending licenses. These are not deleted and can be hidden by filtering in Manage Licenses.

Bound - The user activated their license successfully.

Expired - The license activation has expired and is no longer available to use.

Pending Renew - The license has been selected to be renewed as part of a new contract and is waiting activation. (This status will be displayed 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: <https://activate.rockwellautomation.com>.

View Addresses

Manage Licenses

Manage Software Access

3 Users Found10 Per Page

EXPORT CSV

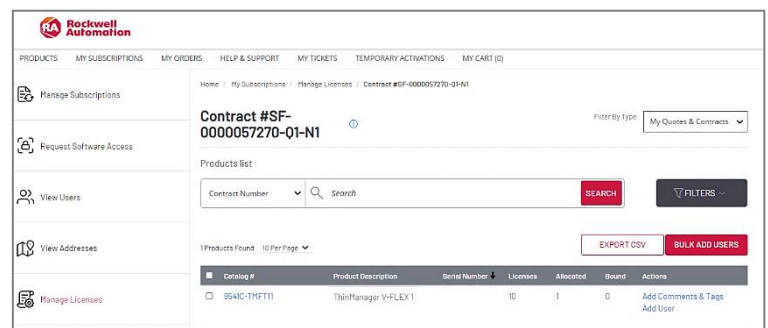
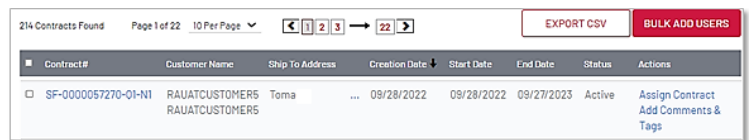
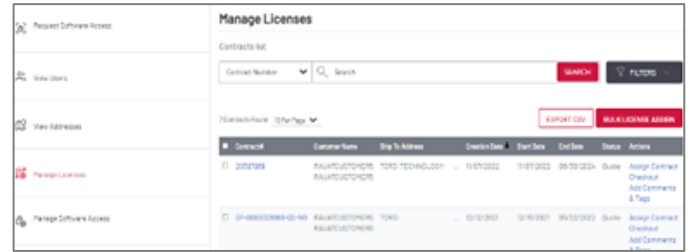
BULK LICENSE ASSIGN

	User Email Address	Product Name	Machine ID	Allocated	Bound	Last Update	Status	Actions
<input type="checkbox"/>	rautcustomer5@gmail.com	ThinManager FTA 1 VFLX ESD PS/W	1	0	05/23/2021	PENDING	Edit Delete Add Comments & Tags	
<input type="checkbox"/>	syang@rockwellautomation.com	ThinManager FTA 1 VFLX ESD PS/W	1	0	10/27/2022	PENDING	Add Comments & Tags	
<input type="checkbox"/>	syang@rockwellautomation.com	ThinManager FTA 1 VFLX ESD PS/W	1	0	10/27/2022	PENDING	Add Comments & Tags	

Assign Users to a Software License

1. Choose the **Manage Licenses** located in the left pane of the My Subscription page
2. Navigate to the contract containing the licenses you wish to allocate. Click the blue contract number link to navigate into the contract to view the Product List page
3. Find the product catalog in your contract that you will allocate licenses from and click the **Add User** link under Actions column

Note- Use the breadcrumbs at top of page to navigate back to Manage Licenses or My Subscriptions.



Licenses can be assigned to software users while the contract is in the quote stage or after the contract has become active. Software users can assign other software users to contracts in the quote stage only.

4. Enter the number of activations to be allocated to a user
5. Add the email(s) of the software user(s) to an assign activation to
 - Up to 50 emails can be entered.
 - Optionally, you can assign an alternate location BPID if the software user is at a different address
 - Optionally, you can add different date for the software user to receive their activation
6. Click **ADD USERS** when complete

Software users will appear in the table with the allocated amount assigned to them.

Allocations are Pending until the user activates their software using their user Welcome Kit email. Licenses will then be displayed as Bound.

Additional links are available to:

- edit or delete software user information
- add comments or project tagging information associated to the user and activation

Use the arrow under Actions to display alternate start dates and addresses

Home / My Subscriptions / Manage Licenses / Contract #SF-0000057270-01-N1 / Catalog #9541C-TMFT11

Catalog# 9541C-TMFT11 Filter By Type: My Quotes & Contracts

Users list

Contract Number Search SEARCH FILTERS

2 Users Found 10 Per Page EXPORT CSV BULK ADD USERS

	User Email Address	Product Name	Machine ID	Allocated	Bound	Last Update	Status	Actions
<input type="checkbox"/>	johndoe@gmail.com	ThinManager TMF1 Sub ESD S/W		2	0	10/05/2022	PENDING	Edit Delete Add Comments & Tags
<input type="checkbox"/>	rauacustomer5@gmail.com	ThinManager TMF1 Sub ESD S/W		1	0	08/28/2022	PENDING	Edit Delete Add Comments & Tags

	User Email Address	Product Name	Machine ID	Allocated	Bound	Last Update	Status	Actions
<input type="checkbox"/>	johndoe@gmail.com	ThinManager TMF1 Sub ESD S/W		2	0	10/05/2022	PENDING	Edit Delete Add Comments & Tags
Alternate Start Date:				Address Location: Tomago Aluminium Company Pty Ltd 638 Tomago Rd Tomago, New South Wales Australia 2322				

Note- If a license is not used and shows Pending, it will not count towards the total license count. There is no limit to the number of users that can be allocated licenses as Pending.

Note- Once a user has been added to the Manage License page, they cannot be removed. However, they can remain in the “Pending” status with their activation unbound with no issues.

Note- On transfer of the contract, these licenses will be maintained to the software users assigned in the Manage Licenses page. If you are an OEM, you can allocate licenses to your end-customer here.

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.

Project Tagging and Comments

Use the **Add Comments & Tags** action to document your project with specific comments or add tags at the contract, product and user levels that can be used in your search and filters.

- The large comment box supports up to 1000 characters.
- Tags are searchable and can be included in export file
- Tags are entered as single word, comma separated text
- An icon will display if a comment or tag has been added

	User Email Address	Product Name	Machine ID	Allocated ↓	Bound	Last Update	Status	Actions
<input type="checkbox"/>	johndoe@gmail.com	ThinManager TMF1 Sub ESD S/W		2	0	10/05/2022	PENDING	Edit Delete Add Comments & Tags

Add comments & Tags

Comments

Two allocations assigned for project A located in New Jersey.

939/1000

Tags

Plant1,Machine123,October

*Tags should be comma separated and single word & special characters are not allowed

CANCEL

SAVE

Bulk Add Users

To allocate licenses in bulk to large quantities of users, use the Bulk Add Users button to add email and allocation information into a .csv file that can be imported into the Commerce Portal.

1. Click the **ADD BULK USERS** button in Manage Licenses

Home / My Subscriptions / Manage Licenses

Manage Licenses

Filter By Type: My Quotes & Contracts

Contracts list

Contract Number Search

SEARCH

FILTERS

214 Contracts Found Page 1 of 22 10 Per Page

EXPORT CSV

BULK ADD USERS

Contract#	Customer Name	Ship To Address	Creation Date	Start Date	End Date	Status	Actions	
<input type="checkbox"/> 00762641	RAUATCUSTOMER5 RAUATCUSTOMER5	Tomago	...	10/05/2022	10/05/2022	09/07/2024	Active	Assign Contract Add Comments & Tags

2. In the Bulk Add Users dialog, download the Instructions and CSV Template file

Bulk Add Users

Import CSV

Review Data

Finish

Downloads

Instructions

CSV Template

UPLOAD CSV FILE

CLOSE

ADD USERS

3. Edit the CSV Template file by entering the required user and contract information into the columns and save

	A	B	C	D	E	F	G
	* Contract Number	* Product Catalog Number	Serial Number	* User Email Address	Ship To BPID	Allocations	Alternate Start Date(yyyy-mm-dd)
1	SF-0000057391-Q1-N1	9541C-TMFT11		john.doe@rockwellautomation.com		1	
2	SF-0000057391-Q1-N1	9541C-TMFT11		liadob@rockwellautomation.com		2	
3	SF-0000057391-Q1-N1	9541C-TMFT11		jackn@rockwellautomation.com		1	
4	SF-0000057391-Q1-N1	9541C-TMFT11		sarah@rockwellautomation.com	99777711	3	
5	SF-0000057391-Q1-N1	9541C-TMFT11		ml@gmail.com	99777777	4	2022-12-04

4. Click the **UPLOAD CSV File** button
5. Once the file is uploaded, click the **ADD USERS** button

6. In the Add Bulk Users dialog edit or correct any items that are flagged red or yellow as an error or warning
7. Click the **SAVE & CONTINUE** button to complete the import
8. Upon import complete, choose to view the users added to the contract in Manage Licenses or continue to add additional users

CONTRACT NUMBER	PRODUCT CATALOG NUMBER	SERIAL NUMBER	USER EMAIL ADDRESS	SHIP TO BPID	ALLOCATIONS	ALTERNATE START DATE	ACTIONS
SF-0000057391-Q1-N1	954V-TMFT11		john.doe@rockwellautomation.com		1		🗑
SF-0000057391-Q1-N1	954V-TMFT11		liadob@rockwellautomation.com		2		🗑
SF-0000057391-Q1-N1	954V-TMFT11		jackn@rockwellautomation.com		1		🗑
SF-0000057391-Q1-N1	954V-TMFT11		sarah@rockwellautomation.com	99777711	3		🗑
SF-0000057391-Q1-N1	954V-TMFT11		ml@gmail.com	99777777	4	2022-12-04	🗑

Export

Use the EXPORT CSV button to export software user email addresses, license allocations, serial number, tags BPIDs and much more.

1. Click the **EXPORT CSV** button in Manage Licenses or My Subscriptions

2. In the Export Data to CSV popup select fields you would like to include in the exported csv file

3. Click the **CONTINUE** button

4. When the export has completed, you will receive an email indicating the export was successful along with a link to download the csv file

5. Click the **Download** link in the email

6. View and save your export file

Home / My Subscriptions / Manage Licenses

Filter By Type: My Quotes & Contracts

Manage Licenses

Contracts list

Contract Number Search

214 Contracts Found Page 1 of 22 10 Per Page

Contract#	Customer Name	Ship To Address	Creation Date	Start Date	End Date	Status	Actions
00762641	RAUATCUSTOMERS	Tomago	...	10/05/2022	08/07/2024	Active	Assign Contract Add Comments & Tags

Export Data to CSV

Select Data ☐ Finish ☐

Informative line, it depends on the level the user triggers the download CSV, number of Contracts, catalogs or Users.


Main Fields

<input checked="" type="checkbox"/> User Email	<input checked="" type="checkbox"/> Contract Number	<input checked="" type="checkbox"/> Catalog Number	<input checked="" type="checkbox"/> Serial Number
<input checked="" type="checkbox"/> Address Location	<input checked="" type="checkbox"/> Allocations	<input checked="" type="checkbox"/> Alternate Start Date	

Additional Fields

<input type="checkbox"/> Available	<input type="checkbox"/> Bound	<input type="checkbox"/> Contract Comments	<input type="checkbox"/> Contract Start Date
<input type="checkbox"/> Contract End Date	<input type="checkbox"/> Contract Status	<input type="checkbox"/> Current User Status	<input type="checkbox"/> Hybrid Product Description
<input type="checkbox"/> Installs - Total Licenses	<input type="checkbox"/> Last Status Update	<input type="checkbox"/> Machine ID	<input type="checkbox"/> Request ID
<input type="checkbox"/> Ship To Address	<input type="checkbox"/> Sold To	<input type="checkbox"/> Payment Type	<input type="checkbox"/> Tag(s)
<input type="checkbox"/> User Email Add Date			

EXTERNAL: Fw: Manage Licenses Export Completed

 To: <cm.rockwelltest04@outlook.com>
Retention Policy 1.5 Year Delete (Mailbox Default) (1 year, 6 months) Expires
[Click here to download pictures.](#) To help protect your privacy, Outlook prevented automatic download of

From: support@rockwellautomation.com <support@rockwellautomation.com>
Sent: Friday, October 7, 2022 7:55 AM
To: cm.rockwelltest04@outlook.com <cm.rockwelltest04@outlook.com>
Subject: Manage Licenses Export Completed

Dear User,

Export is successfully completed. [Click here to download Download](#)

	A	B	C	D	E	F	G	H	I	J
	User Email	Contract Number	Catalog Number	Serial Number	Address Location	Allocations	Alternate Date	Contract Start Date	Ship To	Payment Type
1	cm.rockwelltest04@gmail.com	SF-000001720-QF-AL	95411M-11AN	3096455	4151000113	3096455	1	8/12/2021	3096455	ACCOUNT
2	cm.rockwelltest04@gmail.com	SF-000001707-Q1-N1	95411M-11AN	3096455	4151000113	3096455	1	29/10/2021	3096455	ACCOUNT
3	cm.rockwelltest04@gmail.com	SF-000001707-Q1-N1	95411M-11AN	3096455	4151000113	3096455	1	3/6/2022	3096455	ACCOUNT
4	cm.rockwelltest04@gmail.com	SF-000001707-Q1-N1	95411M-11AN	3096455	4151000113	3096455	1	18/04/2022	3096455	ACCOUNT
5	cm.rockwelltest04@gmail.com	SF-000001707-Q1-N1	95411M-11AN	3096455	4151000113	3096455	1	14/10/2021	3096455	ACCOUNT
6	cm.rockwelltest04@gmail.com	SF-000001707-Q1-N1	95411M-11AN	3096455	4151000113	3096455	1	9/8/2022	3096455	ACCOUNT
7	cm.rockwelltest04@gmail.com	SF-000001707-Q1-N1	95411M-11AN	3096455	4151000113	3096455	1	10/08/2022	3096455	ACCOUNT
8	cm.rockwelltest04@gmail.com	SF-000001707-Q1-N1	95411M-11AN	3096455	4151000113	3096455	1	3/12/2021	3096455	ACCOUNT
9	cm.rockwelltest04@gmail.com	SF-000001707-Q1-N1	95411M-11AN	3096455	4151000113	3096455	1	27/09/2022	3096455	ACCOUNT
10	cm.rockwelltest04@gmail.com	SF-000001707-Q1-N1	95411M-11AN	3096455	4151000113	3096455	1	6/4/2022	3096455	ACCOUNT
11	cm.rockwelltest04@gmail.com	SF-000001707-Q1-N1	95411M-11AN	3096455	4151000113	3096455	1	27/11/2021	3096455	ACCOUNT
12	cm.rockwelltest04@gmail.com	SF-000001707-Q1-N1	95411M-11AN	3096455	4151000113	3096455	1	16/12/2021	3096455	ACCOUNT
13	cm.rockwelltest04@gmail.com	SF-000001707-Q1-N1	95411M-11AN	3096455	4151000113	3096455	1	3/12/2021	3096455	ACCOUNT
14	cm.rockwelltest04@gmail.com	SF-000001707-Q1-N1	95411M-11AN	3096455	4151000113	3096455	1	30/07/2022	3096455	ACCOUNT
15	cm.rockwelltest04@gmail.com	SF-000001707-Q1-N1	95411M-11AN	3096455	4151000113	3096455	1	29/11/2021	3096455	ACCOUNT
16	cm.rockwelltest04@gmail.com	SF-000001707-Q1-N1	95411M-11AN	3096455	4151000113	3096455	1	20/04/2022	3096455	ACCOUNT
17	cm.rockwelltest04@gmail.com	SF-000001707-Q1-N1	95411M-11AN	3096455	4151000113	3096455	1	11/05/2022	3096455	ACCOUNT
18	cm.rockwelltest04@gmail.com	SF-000001707-Q1-N1	95411M-11AN	3096455	4151000113	3096455	1	4/8/2022	3096455	ACCOUNT
19	cm.rockwelltest04@gmail.com	SF-000001707-Q1-N1	95411M-11AN	3096455	4151000113	3096455	1	27/02/2022	3096455	ACCOUNT
20	cm.rockwelltest04@gmail.com	SF-000001707-Q1-N1	95411M-11AN	3096455	4151000113	3096455	1	18/11/2021	3096455	ACCOUNT
21	cm.rockwelltest04@gmail.com	SF-000001707-Q1-N1	95411M-11AN	3096455	4151000113	3096455	1	3/1/2022	3096455	ACCOUNT
22	cm.rockwelltest04@gmail.com	SF-000001707-Q1-N1	95411M-11AN	3096455	4151000113	3096455	1	20/07/2022	3096455	ACCOUNT
23	cm.rockwelltest04@gmail.com	SF-000001707-Q1-N1	95411M-11AN	3096455	4151000113	3096455	1	14/10/2021	3096455	ACCOUNT

View Users

The View Users page in My Subscriptions will display people who have been assigned contracts located in the same business locations. The contract owner can change the role of users that appear there.

To add additional persons to this View Users page and/or assign them roles, contact the Software Webmaster team by submitting a ticket request via the Incident Management and Ticketing page in the help menu.

1. In the My Subscriptions page, select the **View Users** page (only Owner roles will see a link to this page).

2. Click the **Edit** button next to the user's name to edit.

Request Software Access	View Users					
View Users	Name	Email Address	Country	Region	Role	
View Addresses	Portal Test	swportaltest@gmail.com	United States	Torsi Technology-Test ID-DO NOT RELEASE	Software Subscription Owner	Edit
Manage Licenses	RAUATCUSTOMERS RAUATCUSTOMERS	rauatacustomer5@gmail.com	United States	Torsi Technology-Test ID-DO NOT RELEASE	Software Subscription Owner	Edit
Manage Software Access	Rockwell Tester	cm.rockwelltest09@gmail.com	United States	Torsi Technology-Test ID-DO NOT RELEASE	Software Subscription Owner	Edit
	Tester 01	dd.rockwelltest01@gmail.com	United States	Torsi Technology-Test ID-DO NOT RELEASE	Software User	Edit
	Tester 02	mm.rockwelltest01@gmail.com	United States	Torsi Technology-Test ID-DO NOT RELEASE	Software Subscription Owner	Edit
	Tim Couch	rockwelltest1a@gmail.com	United States	Torsi Technology-Test ID-DO NOT RELEASE	Software Subscription Owner	Edit
	cm Test 04	cm.rockwelltest04@gmail.com	United States	Torsi Technology-Test ID-DO NOT RELEASE	Software Subscription Owner	Edit

3. Select the role to be assigned and click **Save**.
 - Software User
 - Software Subscription Administrator
 - Software Subscription Owner

Request Software Access	Edit Existing User
View Users	Click here to edit your Rockwell Automation Knowledgebase profile.
View Addresses	Name Portal Test
Manage Licenses	Quote Assignee Email Address swportaltest@gmail.com
Manage Software Access	Country United States
	Region Rockwell Default US
	ROLE <input type="radio"/> Software User Have ability to view assigned contracts and request access to software. <input type="radio"/> Software Subscription Admin Have ability to view and manage all contracts and software access in a region. <input checked="" type="radio"/> Software Subscription Owner Have ability to purchase on price agreements, view and manage all contracts and software access, and renew and upgrade all contracts in a region.
	SAVE

View Addresses (Contract Email Notifications)

Contract owners can set up email notifications on activities related to their contracts. They also have the option to opt out of receiving renewal email notifications.

1. Select the **View Addresses** page in My Subscriptions to view addresses and BPIDs assigned to your company.
2. Click the **Email Notification** box for any of the addresses to receive email notifications for orders, user requests and renewals.
3. Click the **Renewal Notification Opt Out** box to stop renewal notification emails from being sent.

Address	Shipping Address	Billing Address	BPID	Email Notification	Renewal Notification Opt-Out
Torsi Technology-Test ID-RELEASE 1201 S 2ND ST E-3A19 MILWAUKEE, Wisconsin United States 53204-2410	YES	NO	0099162322	<input type="checkbox"/>	<input type="checkbox"/>

Cancel an Order Request

To cancel a quote or order request for a new contract before you receive the Owner Welcome Kit, (submit a ticket request using the Ticketing System in the Help menu.

1. Select Subject: Order/Invoice
2. Select sub-category: Cancel order request
3. Provide the quote/order request number to cancel

Submit a question to our support team.

Our dedicated staff will respond within 48 hours.

Category *

Order / Invoice

Cancel order request

Activating your Software

The software User Welcome Kit email includes all the information needed to get you up and running with your software.

Download and activate your software by clicking the buttons in the email. This low touch functionality automatically activates your license for you and binds your serial number and machine ID to your license.

When the **Activate My Software** button is clicked, a pop-up will appear. Depending on your browser you may be asked to Run, Save or Save As.

- Use Run to activate to the local computer.
- Save is used to download the executable and to activate.
- Save As is used to download the executable to another computer. All options require the activated computer to be connected to the internet.

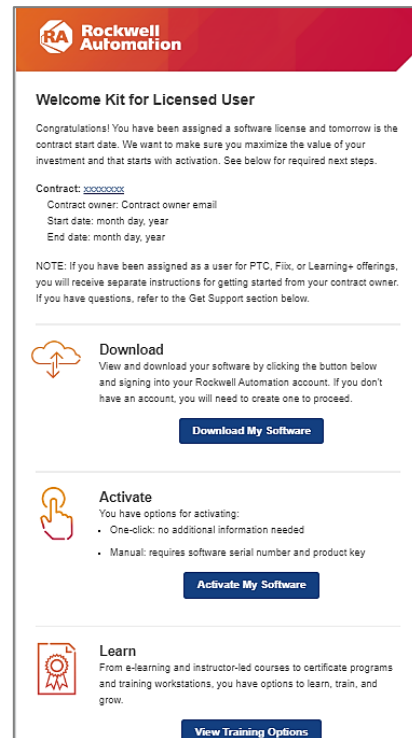
Note: After the Activate My Software button is used, it cannot be used again. It is inactive.

If you do not have the User Welcome Kits email on hand to download and activate your license, the same license activation information is also available in the Manage Subscriptions page in the Commerce Portal under the **Activation Certificates** link.

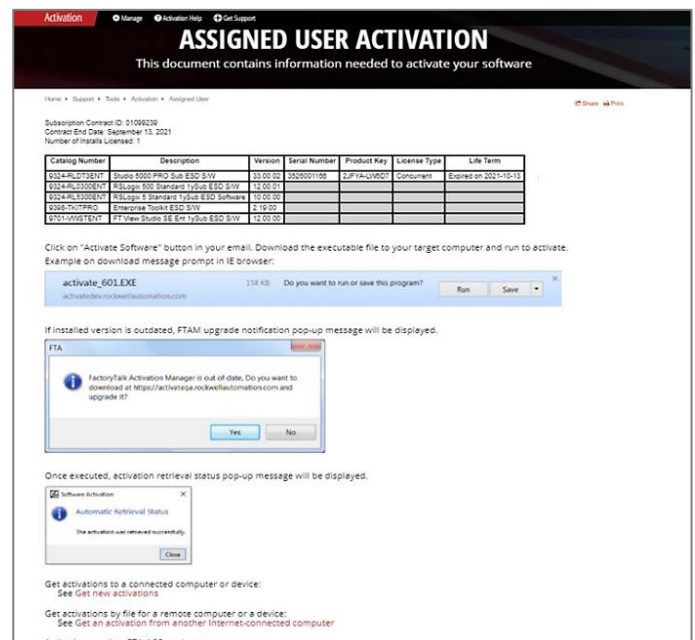
You will be navigated to the Rockwell Automation Activation web page, where you will need to sign in using your Rockwell Automation login.

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

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



05/23/2021 06193494	TECHNOLOGY United States 1201 S 2ND ST E-3A19 MILWAUKEE, Wisconsin United States 53204-2410	05/23/2021 05/22/2022	Billing Reference Direct with Rockwell Automation	Active	Renew Contract Buy More Assign Contract Auto-Renew (On) Auto-Approve Users Remove Contract View Owners Download Activation Certificates
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Buy More and Upgrade

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 amend your contract with the additional licenses you wish to purchase. Clicking this action will navigate to the Cart page where product quantities can be adjusted, and checkout completed.

New serial numbers will be created and amended to the original contract. The 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.

The screenshot displays the Rockwell Automation Commerce Portal. At the top, a contract summary bar shows details for contract 06193494, including the customer name (TECHNOLOGY United States), address (1201 S 2ND ST, E-3A19, MILWAUKEE, Wisconsin, United States 53204-2410), billing reference (Direct with Rockwell Automation), and status (Active). A list of actions is available on the right: Renew Contract, Buy More, Assign Contract, Auto-Renew (On), Auto-Approve Users, Remove Contract, View Owners, Download, and Activation Certificates.

Below the contract summary is the 'Your Cart' section. It contains two items:

Item	Annual Cost	One Time Cost	No. of Licenses	Bundle Total
Enterprise Toolkit - Concurrent (ID: 9288C-EXT131, OS: LINUX64)	\$USD 9,992.00/year	\$USD 0.00	1	\$9,992.00
Legacy Toolkit Software Subscription (ID: 9288C-TOOL135, OS: LINUX64)	\$USD 2.00/year	\$USD 0.00	1	\$2.00
Annual Cost Subtotal:		\$USD 9,994.00		
One Time Cost Subtotal:		\$USD 0.00		
Cart Total:		\$USD 9,994.00		

Buttons for 'CONTINUE SHOPPING', 'EMPTY CART', and 'CHECKOUT' are visible at the bottom of the cart section.


*List Prices shown are for demonstration only.

Note- Buy-More is not available in the last 151 days of an existing contract.

Note- Buy More for Toolkits and transactions processed by Rockwell Automation Customer Care will not amend your current contract. A new contract will be created.

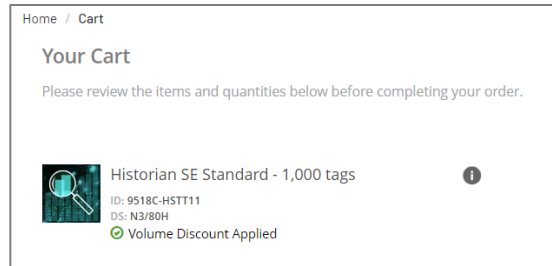
Volume Discounts (Step-In Pricing)


The Commerce 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 contracts end dates must align.
- Selecting Buy More will pass the previous volume discount total forward from an existing contract to the new order being created.
- After selecting Buy More and completing a checkout on a new order, the Buy More link will no longer be viewable in Manage Subscriptions on the contract. Choose the new contract to perform any additional Buy More actions.

The Commerce Portal will provide indicators that Step-In Volume Pricing is applied:

- CART will display a Volume Discount Applied indicator
- Order summary of the checkout page will have a Volume Discount Message explaining the discount



Order Summary	
 <p>Historian SE Standard - 1,000 tags ID: 9518C-HSTT11 DS: N3/80H Included in bundle: Historian SE, 1,000 Tag Add On Historian SE, 1,000 Tag Add On 8x5 support Historian SE, 1,000 Tag Add On Update</p>	<p>Annual Cost \$USD 7,700.48/year</p>
	<p>Prorated Annual Cost @ 365 days: \$USD 7,700.48</p>
	<p>One Time Cost \$USD 0.00</p>
	<p>Quantity 2</p>
	<p>Volume Discount Applied @ 2 Quantity 36.00 %</p>
<p>Prorated Bundle Total \$USD 7,700.48</p>	

*List Prices shown are for demonstration only.

Note- Updates to the end date of the contract will invalidate the discounted pricing and may lead to the renewal being unaligned.

Note- 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

This action allows you to add available options to your existing contract, such as upgraded support or Add-ons, which may not have been initially purchased. Upgrade will add items to your existing contract. Your costs will be prorated over the contract period. Upgrades are not available for all products.

Click the down arrow on your contract to view any products that may have the Upgrade action

04/06/2022 14667226	TORSI TECHNOLOGY United States 1201 S 2ND ST E-3A19 MILWAUKEE, Wisconsin United States 53204-2410	04/06/2022 04/05/2027	Billing Reference Direct with Rockwell Automation	Active	Buy More Assign Contract Auto-Renew (Off) Auto-Approve Users View Owners Download Activation Certificates
PRODUCTS	CATALOG NUMBER	QUANTITY	ACTIONS		
Design Suite Toolkit ▼	9398C-TKITT31	60	Buy More Upgrade		

Assign Contract

Use the Assign Contract action to:

- **Assign** the contract to a new or additional owner in your company to help manage and renew the contract
- **Transfer the license registration and support contract** to a new owner at a different company on the agreement's 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.

Order Date	Contract Number	Ship To Address	Start Date	End Date	Payment Type	Contract Status	Actions
11/07/2022	20397969	TORSI TECHNOLOGY- RELEASE United States 1201 S 2ND ST E-3A19 MILWAUKEE, Wisconsin United States 53204- 2410	11/07/2022	06/30/2024	Quotation Only	Quote	Checkout Requote View PDF Delete Assign Quote Assign Contract View Owners

Assign Contract

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 the **Assign** button.

- 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.

The screenshot shows the 'Assign Contract' page on the Rockwell Automation website. The page has a header with the Rockwell Automation logo and navigation links for Allen-Bradley and FactoryTalk. Below the header is a navigation bar with links for PRODUCTS, MY SUBSCRIPTIONS, MY ORDERS, HELP & SUPPORT, MY TICKETS, and MY CART (0). The main content area is titled 'Assign Contract' and includes a sub-header 'Home / My Subscriptions / Assign Contract'. The form prompts the user to 'Enter the email address of the person to assign or transfer the contract to.' and provides an 'Email Address' input field. Below the input field, there is a paragraph explaining that the contract will be assigned to a new person within the company, and the user will retain visibility. There is a checkbox and a link to 'transfer the license and support contract to a different company', with a note that this action will transfer the license, support contract, and renewal processes to the new owner, and the user will lose visibility of this contract. At the bottom of the form are two buttons: 'ASSIGN' (in red) and 'CANCEL'.

Transfer License and Support Contract

To assign the license registration and support contract to a new user at a different company, click the checkbox to **assign and transfer the contract on the start date of the contract**.

☒ Click here to transfer the license and support contract to a different company. On the start date of the contract, the license, support contract, and renewal processes will be transferred to the new owner. You will lose visibility of this 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.**

Note- When transferring the license registration and software and support contract to a new owner, individuals assigned licenses in Manage Licenses do not lose their license allocation.

Upon clicking the checkbox, 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 purchased 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 email to notify them they are the new owner of the contract and that they will be responsible for the contract renewal.

Home / My Subscriptions / Assign Contract

Assign Contract

Enter the email address of the person to assign or transfer the contract to.

Email Address

The Contract will be assigned to a new person within your company to manage the support contract and renewal process. You will retain visibility to this contract.

☒ Click here to transfer the license and support contract to a different company. On the start date of the contract, the license, support contract, and renewal processes will be transferred to the new owner. You will lose visibility of this contract.

On the start date of the contract, automatically assign and transfer the current subscription and renewal processes to another company. The original ownership of the contract will be removed, and you will lose visibility to the contract.

Enter an address or select from Address Book ADDRESS BOOK

Phone number

Providing a contact number will help us quickly resolve questions about your order.

Country

Company Name

Address Line 1

Address Line 2

City

State / Province (optional)

Zip / Postal Code

ASSIGN CANCEL

If your end customer does not have a valid BPID setup in the system, please send a ticket request via the Ticket System in the Commerce Portal help.

1. Select Subject: **Account**
2. Select sub-category: **Account creation, update, login or reset issue**
3. Provide details in the Question field regarding the end customer to be added and their contact information.

Submit a question to our support team.

Our dedicated staff will respond within 48 hours.

Category *

Renewals

As a software owner or administrator, you will receive renewal notifications when a contract is approaching its expiration date. You will have the option to either let the contract automatically renew to your prior purchase order, or if needed, take action to manually modify the renewal contract with a new purchase order or any other changes.

With a perpetual with maintenance and support contract, you own the license (activation), and it will not expire. The maintenance & support contract should be renewed prior to expiration to avoid reinstatement fees and backdating of a new contract to the prior expiration contract end date.

If software subscriptions are included and still required, they should be renewed prior to expiration. The subscription renewal includes both the license (activation) and maintenance & support contract for the subscription.

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

- Pricing in the renewal quote is valid for 120 days. After 120 days the pricing will show as expired.

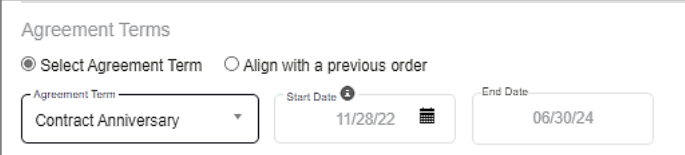
Note: Invoicing does not take place until the start date of the new renewed contract. If an order is cancelled before the start date of the new contract, no invoicing will take place. The start date of the new contract is set to the current expiration date plus 1 day.

Merging Contracts

Aligning end dates at time of purchase or renewal to other software contracts you have allows for contracts to be merged at the next renewal, simplifying your contract management.

During contract renewals, the portal will automatically default to align end dates to a common anniversary date if you have one.

Previously aligned contracts can be merged at the next renewal.

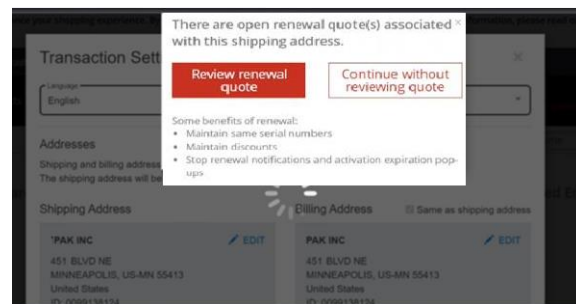


The screenshot shows a form titled "Agreement Terms". It has two radio buttons: "Select Agreement Term" (which is selected) and "Align with a previous order". Below the radio buttons, there is a dropdown menu for "Agreement Term" with "Contract Anniversary" selected. To the right of the dropdown are two date fields: "Start Date" with the value "11/28/22" and a calendar icon, and "End Date" with the value "06/30/24".

Renewal Quote Notifications

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.

- The Review renewal quote button will navigate the user to My Subscriptions and all renewal quotes will be displayed.



Automatic Renewals

Software subscriptions and perpetual with maintenance licenses are set to Auto-Renew by default.

	05/23/2021 06193494	TORSI TECHNOLOGY United States 1201 S 2ND ST E-3A19 MILWAUKEE, Wisconsin United States 53204- 2410	05/23/2021 05/22/2022	Billing Reference Direct with Rockwell Automation	Active	Renew Contract Buy More Assign Contract Auto-Renew(On) Auto-Approve Users Remove Contract View Owners Download Activation Certificates
--	---------------------	---	-----------------------	---	--------	--

- No additional actions for renewal need to be taken by the contract owner unless they want to update their PO or modify or cancel the contract. **Your existing PO will be used in the auto renewal unless you take steps to change it.**
- If you make no changes to your renewal, the serial/part 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 simply go to My Subscriptions, 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 request. If purchased through distribution, your distributor will review and finalize the renewal contract with you and process it in their system. The new contract will have a start date of “expiration date plus 1”.

- 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 in My Subscriptions 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 on the My Subscriptions page in the Commerce Portal. 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 send a request to Rockwell Automation by submitting a ticket request via the Incident Management and Ticketing page to cancel the order request.

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 45 days after the expiration date.

Renewal Notification: 120 Days Until Expiration
Action Required: Customer

Your contract renewal date is approaching. Your current contract is setup for automatic renewal and will be converted to an order on 22/22/22. See below for required next steps.

Renewal quote: 9999999
Current contract: 200000000
Customer PO: xxxxxxxx
Distributor PO: bbbbbb
Assigned to: name@company.com
Contract end: 22/22/22
Contract tag: tttttttt

What you need to do

1. Review the attached quote, then use the buttons below to update your purchase order or modify your contract. If you want to simplify contract management, you can align or merge previously aligned contracts during the renewal process.
2. If purchased through distribution, send the purchase order to your distributor if you have not already done so.

[Update PO](#) [Modify contract](#)

Important

- If you take no action:
 - a renewal order will be submitted with the prior PO on 22/22/22-00.
 - you will be invoiced on contract start date of 22/22/22+1.
- If you need more time, you can [turn off auto-renewal](#) and manually renew your order at a later date.
- PTC items not renewed by 22/22/22-30 may require new license codes. Contact Rockwell Automation [Customer Success](#) with any questions or concerns.

Get Support

If you need assistance at any time, you have options:

- Contact your local authorized distributor or Rockwell Automation [Customer Success](#).

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 in My Subscriptions
- They can choose to turn on/off auto-renewal on your behalf by selecting the contract in their My Subscriptions and clicking the Auto-Renew action.
- They can create a renewal quote for you by selecting the contract in their My Subscriptions 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 an email with notification that an order has been placed on your behalf.

Disabling Automatic Renewal

Click the **Auto-Renew** link in Manage Subscriptions to toggle the automatic renewal on or off as desired for your contracts. Options to opt out are also provided in renewal emails to the contract owner.

<input checked="" type="checkbox"/>	05/23/2021 06183494	TORSI TECHNOLOGY United States 1201 S 2ND ST E-3A19 MILWAUKEE, Wisconsin United States 53204- 2410	05/23/2021 05/22/2022	Billing Reference Direct with Rockwell Automation	Active	Renew Contract Buy More Assign Contract Auto-Renew (On) Auto-Approve Users Remove Contract View Owners Download Activation Certificates
-------------------------------------	---------------------	---	-----------------------	---	--------	---

If you opt out of Auto Renewal, you will receive renewal notices as outlined below. When a renewal notice is sent a quote will be generated and you 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 Email 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.

To opt out of receiving renewal email notifications:

1. click the **View Addresses** in the left pane in My Subscriptions
2. Click the box for **Renewal Notification Opt Out**.

Request Software Access

View Users

View Addresses

View Addresses

Address	Shipping Address	Billing Address	RPID	Email Notification	Renewal Notification Opt-Out
Torsi Technology-Test ID RELEASE 1201 S 2ND ST E-3A19 MILWAUKEE, Wisconsin United States 53204-2410	YES	NO	0099162322	<input type="checkbox"/>	<input checked="" type="checkbox"/>

This will stop email notifications only; your orders will still be set for automatic renewal unless you have selected to turn off auto renew in Manage Subscriptions.

Manual renewal

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

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

Note- The start date for the new contract is set to the current expiration date plus 1 day, regardless of when you choose to renew your contract.

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

Renewal Notification: 120 Days Until Expiration
Action Required: Customer

Your contract renewal date is approaching. Your current contract is not setup for automatic renewal and will expire on the contract end date unless you take action to renew. See below for required next steps.

Renewal quote: 00000000
Current contract: 00000000
Customer PO: 00000000
Distributor PO: 00000000
Assigned to: name@company.com
Contract end: zz/zz/zz
Contract tag: 00000000

What you need to do

1. Review the attached quote, then use the buttons below to update your purchase order or modify your contract. If you want to simplify contract management, you can align or merge previously aligned contracts during the renewal process.
2. If purchased through distribution, send the purchase order to your distributor if you have not already done so.

[Update PO](#) [Modify contract](#)

Important

- You will continue to receive renewal notifications until action is taken to renew. When you renew, your purchase order will be invoiced on contract start date zz/zz/zz+1.
- PTC items not renewed by zz/zz/zz-30 may require new license codes. Contact Rockwell Automation [Customer Success](#) with any questions or concerns.
- For all other products not renewed by zz/zz/zz:
 - no software updates or technical support will be available.
 - perpetual license activations will not be affected.
 - using software subscription(s) will be in violation of the end user license agreement.
 - a reinstatement fee will be applied to next renewal of this contract.
 - reinstated contract(s) will be back-dated to the prior contract end date; this will result in added cost for the gap in coverage.

1. Click the **Renew Contract** action.
2. In the Renew Products – Merge Contracts page, select the software products you wish to renew.
3. 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 renewal.

07/11/2020 00309207 Technology United States 07/11/2021 07/11/2022 Billing Reference Direct with Rockwell Automation Active [Renew Contract](#) [Buy More](#) [Assign Contract](#) [Auto-Renew\(Off\)](#) [Auto-Approve Users](#) [Remove Contract](#)

30 Commerce Rd
Rockland, Wisconsin
United States 02370-1053

Renew Products - Merge Contracts

[CANCEL](#) [NEXT](#)

Selected Products from Contract Number 00309207

CONTRACT NUMBER	PRODUCTS	CATALOG NUMBER	SHIP TO ADDRESS	TOTAL LICENSES	ALLOCATED	BOUND
00309207	Studio 5000 Automation Engineering & Design Environment	9324M-RLDT11	Torsi Technology United States 30 Commerce Rd Rockland Wisconsin United States 02370-1053	2	0	0
00309207	ThinManager Volume Discount Pricing	9541M-TMFT11	Torsi Technology United States 30 Commerce Rd Rockland Wisconsin United States 02370-1053	2	0	0

No Additional products are available to renew along with this contract

CONTRACT NUMBER	PRODUCTS	CATALOG NUMBER	SHIP TO ADDRESS	TOTAL LICENSES	ALLOCATED	BOUND
-----------------	----------	----------------	-----------------	----------------	-----------	-------

[CANCEL](#) [NEXT](#)

All selected items will be added to the new contract being created during this renewal.

4. Click **NEXT** to continue.

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

5. Click **ADD USERS**.

Home / Manage Account / Manage Licenses

Select and Manage Licenses

PRODUCT DESCRIPTION	CATALOG NUMBER	TOTAL LICENSES	ALLOCATED	BOUND	ACTIONS
<input checked="" type="checkbox"/> Studio 5000 Automation Engineering & Design Environment	9324M-RLDT11	2	0	0	ADD USER UPDATE TOTAL LICENSES
<input checked="" type="checkbox"/> ThinManager Volume Discount Pricing	954IM-TMFT11	2	0	0	ADD USER UPDATE TOTAL LICENSES

[ADD TO CART](#)

6. Enter the email address of the user you wish to assign a license to and click **SUBMIT**.

Select and Manage Licenses

PRODUCT DESCRIPTION	CATALOG NUMBER	TOTAL LICENSES	ALLOCATED	BOUND	ACTIONS
<input checked="" type="checkbox"/> Studio 5000 Automation Engineering & Design Environment	9324M-RLDT11	2	0	0	ADD USER UPDATE TOTAL LICENSES

USER	SERIAL NUMBER	MACHINE/HOST ID	ALLOCATED	BOUND	STATUS	ACTIONS
<input type="text"/>			1		PENDING	ADD ANOTHER USER

[SUBMIT](#) [CANCEL](#)

7. Select **UPDATE TOTAL LICENSES** to increase the quantity of a license. Enter the quantity desired and click **SUBMIT**.

Update Total Licenses

PRODUCT DESCRIPTION	CATALOG NUMBER	SERIAL NUMBER
Studio 5000 Automation Engineering & Design Environment	9324M-RLDT11	

You Currently Have
2
Total Licenses

How many **Total licenses** would you like?

[SUBMIT](#) [CANCEL](#)

8. Review your selections and click **ADD TO CART**.

9. Complete the Renewal by selecting **Checkout**.

The contract owner will receive an order acknowledgement email regarding the renewal.

Note: Distributors do not have access to the Renew Contract link and cannot complete a renewal or merge contracts. They can assist with aligning contract end dates so contracts can be merged in the next renewal cycle.

License Activation Renewals

Viewing and Validating User License Renewal Status

Use the Manage Licenses page in My Subscriptions to view the status of your current licenses.

For bound licenses that have been assigned to an email address and activated via the Activate Software button in the user Welcome Kit emails, those licenses will be aligned in Manage Licenses with their bound machine name. On the renewal start date the user will receive an email notification which will include instructions for automatic, manual, and disconnected activation.

For any licenses that are assigned as Unknown and bound in Manage Licenses to a machine name, they will not automatically receive the email notification with instructions for activation.

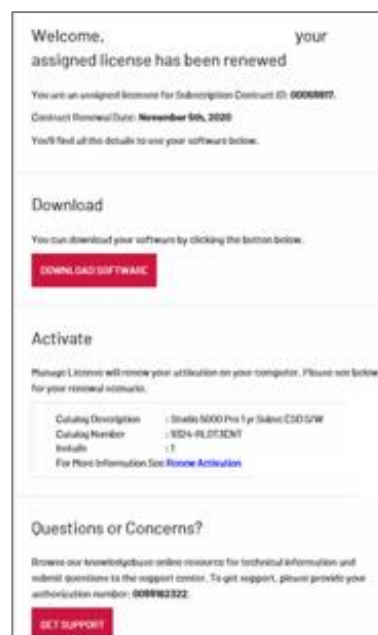
- Unknown is displayed when a software user activated their software using FactoryTalk® Activation Manager.
- Before contract expiration, the contract owner or administrator can populate the Unknown licenses with a user email to align and enable a renewal email. On the renewal start date the user will receive an Existing User Notification which has instructions on automatic, manual activation and disconnect activation
- If no email is provided for Unknown, the email notification will not be sent.

Note: If CodeMeter® and FactoryTalk® Activation Manager version is less than 4.04, “130-xxx” will display instead of Unknown.

Notification Email

The notification email contains a 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.

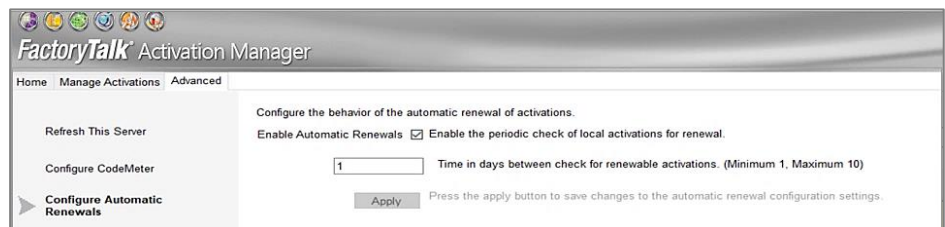
1. Click the **Renew Activation** link.



- Click the red link that applies to your renewal scenario. Each scenario will provide instructions for activation in FactoryTalk® Activation Manager. (See Scenario descriptions below.)



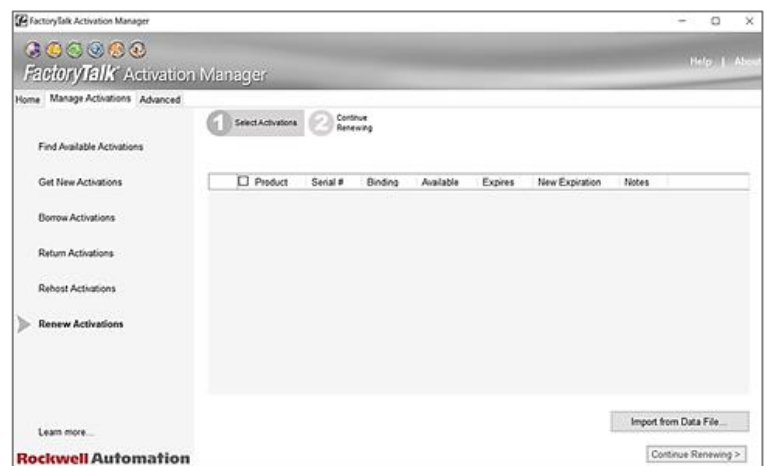
- Use the **Advanced** tab in FactoryTalk® Activation Manager to configure automatic renewals. By default, automatic renewal is enabled.



If automatic renewal is enabled, a computer with a time limited activation and a connection to the internet will periodically check for updates. Renewals are downloaded to the computer and a notice displays information about the renewed activations. FactoryTalk® Activation Manager checks every 24hours for renewed activations.

Scenario Options:

- If the software user in the plant is connected to the internet and has automatic renewal configured in FactoryTalk® Activation Manager, no action is needed, activation will be automatic.
- If the software user in the plant is connected to the internet and does not have automatic renewal configured in FactoryTalk® Activation Manager, select **Renew Activations** on the Manage Activations tab to activate the license.
- If the software user is **disconnected** from the internet, use a removable storage device to move the activation to the device. Follow the instructions on the activation page.



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

Software Support & Maintenance

Software purchased through the Commerce Portal includes Software Maintenance & 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 & 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	<ul style="list-style-type: none"> ✓ 8x5 Phone ✓ Chat ✓ Submit a Question ✓ Software Updates ✓ Knowledgebase ✓ Genius Webinars ✓ Live View Support 	<ul style="list-style-type: none"> ✓ 8x5 Phone ✓ Chat ✓ Submit a Question ✓ Software Updates ✓ Knowledgebase 	<ul style="list-style-type: none"> ✓ Submit a Question ✓ Software Updates ✓ Knowledgebase
Upgrades	<ul style="list-style-type: none"> • 24x7 Phone 	<ul style="list-style-type: none"> • 24x7 Phone 	<ul style="list-style-type: none"> • 8x5 Phone and Chat • 24x7 Phone
Coverage	Hardware and Software	Software	Software



Included with a standard software Subscription:

- 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 to software update downloads. 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, by upgrading to our 24x7 support option.

Support options are shown in the Commerce Portal when selecting your subscription.

Studio5000 Mini Edition		
 \$USD 376.80 /user/year		
The Studio 5000 Mini Edition is used to program and configure the CompactLogix standard control family of controllers. Studio 5000 Mini Edition includes Ladder programming only. Mini Edition does not support ControlLogix platform controllers. This Studio5000 offering provides an activation for versions 20.05 and above.		
For detailed selection information, click here		
	Perpetual With Maintenance	Subscription
License Flexibility 	N/A	Yes
Intelligent Activation 	N/A	Yes
Customizable Bundles	N/A	Yes
Reinstatement Fees	Yes	No
Phone Support	Optional	Included(8-5,M-F)
Software Updates	Included	Included
Knowledgebase	Yes	Yes
System Support	No	No
One Time Cost	\$USD 914.80 /license	-
Annual Cost	\$USD 183.59 /user/year	\$USD 376.80 /user/year
Product Selection	<input type="checkbox"/>	<input checked="" type="checkbox"/>

2. Customize your Package

 Support 


Selection Included in Price

☒ Studio 5000 Mini 8x5 support

Add \$USD 93.69 /user/year

☐ Studio 5000 Mini 24x7 support




Your CART will display support and maintenance for subscriptions is part of the annual cost.



	Studio5000 Mini Edition	
	ID: 9324C.RLD761	
	DS: N3/94F	
Annual Cost		\$USD 376.80/year
Studio 5000 Mini		Included in price
Studio 5000 Mini 8x5 support		Included in price
Studio 5000 Mini Update		Included in price
One Time Cost		\$USD 0.00
No. of Licenses		<input type="text" value="1"/>
Bundle Total		\$376.80

Included with Perpetual Software with Maintenance (choose one option when ordering):

- 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 Commerce Portal when selecting your perpetual license. The support level of 8x5 is selected as the default.

Studio5000 Mini Edition  \$USD 376.80 /user/year The Studio 5000 Mini Edition is used to program and configure the CompactLogix standard control family of controllers. Studio 5000 Mini Edition includes Ladder programming only. Mini Edition does not support ControlLogix platform controllers. This Studio5000 offering provides an activation for versions 20.05 and above. For detailed selection information, click here		
	Perpetual With Maintenance	Subscription
License Flexibility 	N/A	Yes
Intelligent Activation 	N/A	Yes
Customizable Bundles	N/A	Yes
Reinstatement Fees	Yes	No
Phone Support	Optional	Included (8-5, M-F)
Software Updates	Included	Included
Knowledgebase	Yes	Yes
System Support	No	No
One Time Cost	\$USD 914.80 /license	-
Annual Cost	\$USD 183.59 /user/year	\$USD 376.80 /user/year
Product Selection	<input checked="" type="checkbox"/>	<input type="checkbox"/>


2. Customize your Package
  Support 

Selection Included in Price
☐ Studio 5000 Mini Perpetual Self support

Selection Included in Price
☒ Studio 5000 Mini Perpetual 8x5 support

Add \$USD 91.80 /user/year
☐ Studio 5000 Mini Perpetual 24x7 support

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

 Studio 5000 Mini Perpetual ID: 9924M RLD761 DT: 03/090		Annual Cost \$USD 183.59/year	
Studio 5000 Mini Perpetual 8x5 support		Included in price delete	
Studio 5000 Mini Perpetual Update		Included in price	
One Time Cost \$USD 914.80			
Studio 5000 Mini Perpetual		Included in price	
No. of Licenses		<input type="text" value="1"/>	
Bundle Total		\$1,098.39	

*List Prices shown are for demonstration only.

OEM & SI Software Contract Management Options

Know these key points to ensure a smooth transaction:

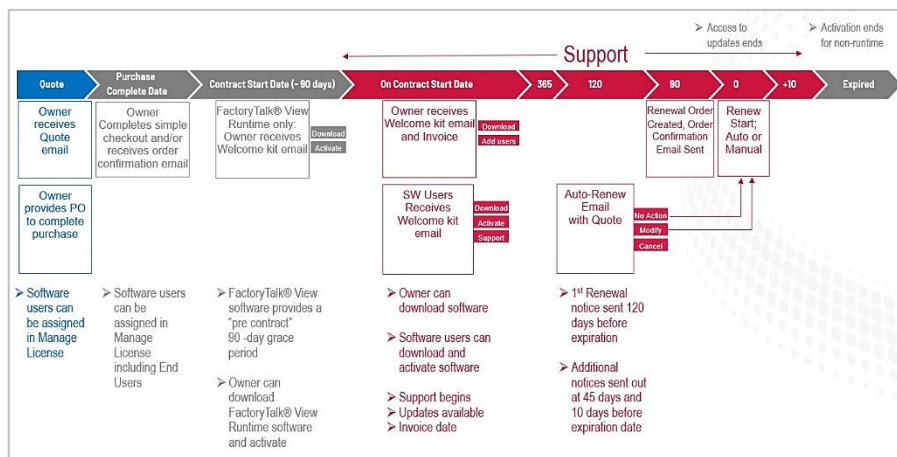
1. Either you or your distributor can create a quote for the software you wish to purchase in the Commerce Portal.
2. At time of purchase, the Commerce Portal quote will be assigned to you, not your end user. You will be the initial owner of the quote and/or contract.
3. Complete your order by clicking the “Complete Order” button in your Order Request email. If you are a repeat customer, and have transacted through the Commerce Portal previously, no action is required. An email acknowledgement 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. Therefore, ninety (90) days before the contract start date, owner Welcome Kit emails with FactoryTalk® View runtime software download and activation links are sent to owners.

Example: If June 1st is the agreement start date in the Commerce 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.



Contract Management Options

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

1. **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 contract owner and you will receive the contract renewal notices.
2. **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 contract ownership on the start date and you will lose all visibility to the contract.
3. **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 contract ownership at the time of renewal.

Commerce Portal Help & Support Page

Selecting **Help & Support** in the Commerce Portal menu launches the Incident Management and Ticketing page.

The page provides several areas to request or receive help:

- Video tutorials provide a quick overview of the most common functionality in the Commerce Portal
- Incident/ticketing submittal and management
- Email addresses field to allow for additional emails of those to be copied in the responses
- Ability to attach files or images with ticket
- Link to the Commerce Portal Getting Started and Reference Manual in Literature Library
- FAQ section provides links to answers of the most common questions asked

The screenshot shows the Rockwell Automation Commerce Portal Help & Support page. The navigation bar includes links for PRODUCTS, MY SUBSCRIPTIONS, MY ORDERS, HELP & SUPPORT (highlighted), MY TICKETS, and MY CART (2). The page content is divided into three main sections: Video Tutorials, FAQ, and a form to submit a question to the support team. The Video Tutorials section lists various topics such as 'Getting Started with the Software Portal', 'How to Login as a First Time User', 'How to Create a Quote', 'How to Complete the Checkout Online or Manually', 'How to add Customer to Address Book', 'How to add Recommended Products and Add-ons', 'How to Activate Your Software License', 'How to Upgrade a Contract', 'How to Assign a User to an Activation/License', 'How to Change the Role of a Software User', 'How to Request Temporary Activations', 'Welcome to the myRockwell Software Portal for OEMs and SIs', 'How to Search Contracts by Serial Number', 'How to Search Contracts by Customer PO', 'How to Filter Contracts by Contract End Date', 'How to Import Bulk Users to Assign Licenses', and 'How to Export Data to Excel'. The FAQ section includes questions like 'Where do I update or reset my account?' and 'Is documentation available for using the Software Portal?'. The form to submit a question includes fields for Category, Sub-category, Subject, and Question/Description, along with an option to attach documents or images and a 'Submit Your Question' button.

Ticketing Submittal and Incident Management

To ask a question or submit an incident to the support team:

1. Select a category and a sub-category
2. Enter a subject to describe your issue
3. Type your question or issue in the box provided
4. Attach any files as needed to support your issue
5. Enter emails of those who should be copied on the response from the Rockwell support team
6. Click **Submit Your Question**

This close-up shows the 'Submit a question to our support team' form. It includes a dropdown menu for 'Category' with options like Account, Quote / Pricing, Order / Invoice, License, Downloads, Activations, Partners / Toolkits, Renewals, and Other. Below it is a dropdown for 'Sub-category' with options like Cancel order request, Change future Contract Start Date, Credit request / invoice issues, Order Query/Update, and Other order related issues. There is also a text field for 'Subject' and a 'Submit Your Question' button.

Help Category and Sub-category Selections

Category	Sub-category
Account	Account Creation, update, login or reset issue Add or modify TechConnect/anniversary date for alignment Address Book/ BPID Issues Update account addresses and territories Update my role to administrator Other account issues
Quote/Pricing	Complex quote inquiries Currency Issues Implementing approved concession request Pricing issues Unable to find location in Transaction Settings or Address Book Unable to see customer agreements Other quote and pricing issues
Order/Invoice	Cancel order request Change future contract start date Credit request/invoice issues Order query/update Other order related issues
License, Downloads, Activations	Deactivate or rehost license Extend subscription date on user's computer License or subscription certification issues Product download and activation issues Registration transfer related issues Request "Lock User" (Lock serial number to named user) Resend Welcome Kit/user activation Software image download issues Other license, download and activations issues
Partners/Toolkits	Distributor Goldmaster Partner benefits/incentives Partner status/level Request product Temporary Activation Toolkit pricing issues Toolkit product questions Other partner or Toolkit issue
Renewals	Align and merge contracts Opt-out of all automatic renewals for customer site Pricing issues Other renewal issue
Other	Report an anomaly/defect Report site performance issue Submit suggestions User training Other

Once you submit your ticket you will receive both an automatic acknowledgement on the page and an email providing an incident number for tracking purposes.

You should expect to receive a resolution response within 48 hours.

Viewing your Help Tickets

View your submitted incidents, ticket history and resolution details by clicking **My TICKETS** from the Commerce Portal menu.

Current users using Rockwell Automation hardware services and products that have a Knowledgebase account will see all their tickets/incidents in one place

To add attachments, more information or updates as needed to your ticket, click the incident number link.

EXTERNAL: 210713-000110 - How do I renew a toolkit?

RA Rockwell Automation Customer Care <rockwellautomation_cc_tst0@mailph.custhelp.com>
Retention Policy: 1.5 Year Delete (Mailbox Default) (1 year, 6 months) Expires: 1/12/2023
Click here to download pictures. To help protect your privacy, Outlook prevented automatic download of some pictures in this message.

Reference #210713-000110 - How do I renew a toolkit?

Your satisfaction is very important to us. We aim to respond to your email within 1 business day, however, at busier times it may take slightly longer.

If your enquiry is urgent, please call your local Commerce Support team for further assistance and reference this incident number.

Thank you for contacting Rockwell Automation Commerce Support.

To improve our service, Rockwell Automation has implemented an interaction management system to manage customer interactions, monitor service levels and enable customer feedback. To achieve this, we create a unique contact record for each customer containing name, position, company and contact details. This data is used by Rockwell Automation only for the purpose of managing interactions regarding filed enquires and collecting feedback to improve our services, and is subject to compliance with our [Privacy & Cookies Policy](#).

Rockwell Automation

PRODUCTS MY SUBSCRIPTIONS MY ORDERS HELP & SUPPORT MY TICKETS MY CART (2)

Rockwell Automation Industries Capabilities Products News Events Sales & Partners Support

Support Center Get Support Training & Webinars Online Forum My TechConnect Customer Care **rauatcustom...**

03-Feb-2022 - Important product notice regarding Microsoft vulnerability patch (MS.KS800442)

Create a new incident through our Electronic Support page and Submit a Question feature.

Filter by Name: Choose a value...

Service Ticket	Subject	Status	Date Created	Next Contact Date	Full Name
22130-005037	Ticket Creation	Unresolved	2022-11-30 11:50:02		RAUATCUSTOMERS RAUATCUSTOMERS

Total records found: 1
Export entire list to CSV

Rockwell Automation Industries Capabilities Products News Events Sales & Partners Support

Support Center Get Support Training & Webinars Online Forum My TechConnect Customer Care **rauatcustom...**

03-Feb-2022 - Important product notice regarding Microsoft vulnerability patch (MS.KS800442)

- Ticket Creation -

Update this question

Do you want a response?
Yes, please respond to my question

Add additional information to your question *

Attach additional documents to your question
Choose File No file chosen

Submit

Communication History

Customer (RAUATCUSTOMERS RAUATCUSTOMERS) via channel 'Web' 11/30/2022 11:50 AM

Appendix A

Multi-Site and Multi-Start Contracts

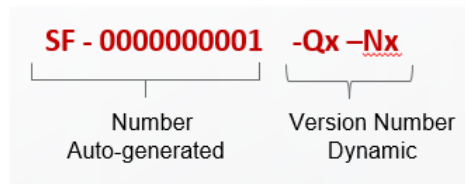
Use the Help & Support page to create a ticket request. Select the category **Quote/Pricing** and sub-category **Complex quote inquires**. This will route the request to the Rockwell Automation Complex Deal team who will be able to assist you in the process.

Contract Numbers

Transactions created after the December 10th, 2021 release use a new pervasive contract number format. The pervasive contract number is maintained throughout the agreement cycle with version information throughout your transaction and will be displayed in Commerce Portal pages, documents, invoices, and emails.

In My Subscriptions your transactions will be displayed with either the old contract number style or the new pervasive number.

The pervasive contract number format contains an auto-generated number field and two versioning fields. The first field is the quote version, and 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)

Where:

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)

Note: Toolkits and transactions placed by RA support groups (i.e., superseded transactions) do not have pervasive contract numbers. The original contract style will be displayed.

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