Place renewal partner orders

Overview

When placing an order on behalf of your partners, you can purchase subscription renewals in addition to new subscriptions and upgrades.

Requirements

- It's mandatory that the products remain associated with the same price list as the original subscriptions and assigned to the same partners to provide them with the possibility of ordering renewals or to place renewal orders on their behalf.
- Products that are not part of price lists assigned to partners will not be available as subscription renewal options.
- Renewals are only available for active and expired subscriptions, but not for disabled items. As long as expired subscriptions are still in their grace period (featuring the Past due status), renewing them is also a valid option.
- When configuring a product with recurring billing, make sure to generate a subscription under the Renewal tab. Products can only be renewed only if a subscription was generated when ordering on behalf of your partners.
- Active subscriptions can only be renewed if only 90 days or less remain until their expiration deadline.

Place renewal partner orders

1. Go to Orders & customers.
2. Click Place partner order.
3. Select the partner for which you're ordering the renewal, either by typing the name in the Select partner box or by using the drop-down menu available. Alternatively, provided that you already placed orders on behalf of your partners, a list of Last used partners will be available in this area, and clicking on a name will automatically select it.
4. You'll now get the possibility to order a new subscription, a renewal or an upgrade. Select Renewal to move to the next stage.
5. Click Add order.
6. Find the specific subscription for which you're ordering a renewal, by searching for criteria such as Name/Company, email, order reference, external reference PO, 2Checkout Subscription Reference, subscription code, partner invoice number or SKU. Apply available filters as needed including subscription status and subscription expiration date to narrow down the results.
7. Search for subscriptions you want to renew (this area is designed to list all active and expired subscriptions when you first access it, but you can still enter query parameters and hit the Search button to have the system display
only specific products).

8. The results returned for the search include active and expired subscriptions previously purchased by/for the selected partner. Disabled subscriptions, as well as those for which you haven't generated a subscription, will not be listed here, even if they were acquired by/for the selected partner. Renewals can be ordered individually, one at a time, but you also have the option to bulk renew a number of selected items.

9. Check the boxes next to the products you want to be renewed and hit the **Renew selected subscriptions** button.

10. Add extra margin/discount options to decrease the cost of renewal for your partner. Extra margins and discounts are entirely optional and completely under your control.

   ◦ **Discount.** Apply a discount to the product(s) value in this order. The discount is deducted from the total price of the products before the partner margin is applied.

   ◦ **Extra margin.** Offer an extra margin to your partner only for this order. The extra margin is deducted from the total price of the products after the discount and partner margin is applied.

11. Click **Place order.**

12. **Order confirmation.** Orders placed by you on behalf of your partners are confirmed automatically, regardless of the order confirmation settings of the partner account.

13. **Attach end-user information.** For renewals, the 2Checkout system is designed to copy the end-user information attached to the original subscription. However, when such data is not available, you'll need to provide it for the order to move to the fulfillment stage (if they are required according to the Partner commercial settings). The partner on whose behalf you're placing the renewal order can also provide the end-user details.

14. **Attach reseller information.** Reseller information is copied automatically from the original subscription as a part of the renewal process. Similarly, when such data is not available, you'll need to provide it for the order to move to the fulfillment stage, if the reseller information is required according to that Partner's commercial settings. The partner on whose behalf you're placing the renewal order can also provide the end-user details.

15. **Pay partner invoices.** You can generate partner invoices manually or automatically, depending on your partner account settings. If the order is placed without any available credit, or your partners do not enjoy a credit limit - they will first need to pay the partner invoice that gets generated automatically when the order is confirmed, and only then will the process advance to the fulfillment stage. To manually issue a partner invoice, go to **Orders & customers -> Partner partner invoices.**

16. Click **Save.**

17. On the next screen, you'll have the option to notify your partner of the newly generated partner invoice or to cancel it if necessary.

18. **Delivery/fulfillment.** When delivery/fulfillment is handled by 2Checkout, not required or has been confirmed by you, the system will give green light to deliveries immediately for an order that is paid in full or placed within available credit. When setting up partner accounts, you can configure automated reminders for expiring subscriptions. Email subscription renewal notifications can be sent to partners, to end-user or both. End-user notifications are sent only if email addresses are available. These notifications will be generated when the Subscription is about to expire and will provide the partners' contact details. You also have the option of sending automated subscription renewal emails to partners, providing a “Subscription Expiration report” designed to help them decide which subscriptions to renew. Once a renewal order is logged by the system, the validity of existing subscriptions will be extended and new activation keys will be generated, with 2Checkout proceeding to delivering them to either the partners or directly to end-users, depending on the settings of the partner accounts.

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**Canceling partner orders**

To cancel an order:

https://knowledgecenter.2checkout.com/Documentation/35Reseller_management/06Place_renewal_partner_orders

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1. Go to Order search -> Partner orders.
2. Identify the item you'd like to call off.
3. Click to view the order.
4. Click Cancel.

Canceling orders automatically disables all associated subscriptions.

F.A.Q.

• Can I edit pricing details for placed orders?
  ◦ Yes. If no partner invoice was generated then you'll be able to add extra margin and to increase the discount. When the partner invoice was already issued, you'll need to first cancel it to edit the order's extra margin and discount.