Place upgrade partner orders

Overview

Purchase upgrades in addition to new licenses and subscription renewals. The 2Checkout platform enables you to offer partners upgrades to:

- A different subscription/product;
- A newer version of the current subscription/product;
- A distinct licensing option of the same subscription/product.

Requirements

- It's mandatory to associate upgrades to the same price list as the original products (subscriptions/licenses), and to assign them to partners to provide access. Products that are not part of price lists assigned to partners will not be available as upgrade options.
- Upgrades are only available for active subscriptions/licenses. As long as expired licenses/subscriptions are still in their grace period (featuring the Past due status), upgrading them is a valid option.
- When defining the product which will act as the upgrade make sure to also generate a subscription under the Renewal tab. Products can only be upgraded to offerings for which a subscription was generated, when ordering on behalf of your partners. If the upgrade is not a subscription, select none as the Renewal interval. This creates a lifetime license.

Place partner upgrade orders

1. Go to Orders & customers -> Place partner order.
2. Select the partner for which you're ordering upgrades, 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.
3. Select Upgrade to move to the next stage.
4. Search for subscriptions/licenses you want to upgrade. The results returned for the search include only active, upgradable subscriptions/licenses previously purchased by the selected partner. Expired or disabled subscriptions/licenses, as well as those for which you haven't defined an upgrade, will not be listed here. Upgrades need to be ordered individually, one at a time, unlike prolonging subscriptions, where you can bulk renew a number of selected items. The reason for this is the fact that each product subscription/license can have different upgrade
options, requiring you to customize each item individually. However, once you add an upgrade to cart, you can continue doing so for more subscriptions/products. You'll be able to add to cart and order as many upgrades as you wish, but you have to do it one by one. The quantity/number of units of the upgrade is locked and cannot be modified, unlike additional options you configured.

5. Editing functionality for upgrade orders involves options such as adding more upgrades, remove added items one by one or all at once, and communicate with your partner through comments. You can even edit the specific details of a subscription/license already added to cart, if you would like to modify the options selected initially, for example.

6. **Step 4:** Add extra margin/discount options to decrease the cost of an upgrade 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 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 discount and partner margin are applied.

7. **Place the order.** Hit the Place order button to place an upgrade order once all the details are final.

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

9. **Attach end user information.** For upgrades, the 2Checkout system is designed to copy the end user information attached to the original subscription/license. However, when such data is not available, you'll need to provide it for the order to move to the delivery/fulfillment stage (if they are required according to the Partner commercial settings). 2Checkout needs at least the email address of partners/shoppers to deliver keys for orders that require end user information.

10. **Attach reseller information.** Reseller information is also copied automatically from the original subscription/licenses as a part of the upgrade process. Similarly, when such data is not available, you'll need to provide it for the order to move to the delivery/fulfillment stage, if the reseller information is required according to that partner's commercial settings.

11. **Pay partner invoices.** Partner invoices can be generated 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 delivery/fulfillment stage. To manually issue a partner invoice, go to Partner invoices under Orders & customers.

12. Click the item in the list of available orders on the left hand side of the page to add them to the partner invoice you're generating, and click Preview.

13. Click Save to create the partner partner invoice. 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.

14. **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 order that are paid in full or placed within available credit. **Fulfillment for partner orders** guidance is available here.

### Error messages

| UPGRADE_PRICELIST_UNAVAILABLE | Upgrade is not available for this license because the product is no longer available in the initial price list. |

https://knowledgecenter.2checkout.com/Documentation/35Reseller_management/08Placing_upgrade_orders_for_your_partn…
Updated: Fri, 13 Mar 2020 06:00:04 GMT
<table>
<thead>
<tr>
<th>Error Code</th>
<th>Message</th>
</tr>
</thead>
<tbody>
<tr>
<td>UPGRADE_TO_PRODUCT_NOT_IN_LIST</td>
<td>Upgrade is not available for this license because the upgrade options set for this product are not part of the initial purchase price list. Please revise the price settings for this product.</td>
</tr>
<tr>
<td>UPGRADE_LICENCE_DISABLED</td>
<td>License is disabled.</td>
</tr>
<tr>
<td>UPGRADE_TO_PRODUCTS_NO_RENEWAL</td>
<td>Upgrade is not available because subscriptions are not being generated for any of the upgrade options.</td>
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