Using and Managing Commerce Portal as a Service Provider

VMware Cloud Provider Commerce Portal

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Using and Managing Commerce Portal as a Service Provider

1

As a Service Provider with the appropriate role, you use Commerce Portal to report your VCPP service usage to your Aggregator and process your monthly billing orders based on your contracts and accrued usage. Within Commerce Portal, you can see the status of all your contracts and information about them. You receive notifications about tasks pending your action.

How do I manage user access in my organization

2

You use Commerce Portal from the context of an organization. Your organization has a 1:1 mapping with the PRM ID issued to your entity by the VMware Partner Network (VPN). As a Service Provider user assigned with the **Administrator** role, you add and delete users from your organization, lock or unlock their accounts, modify their access rights or request password resets on their behalf.

Commerce Portal provides your organization with an easy-to-use Identity Access Management (IAM) framework to manage users and their roles. It is your responsibility to ensure that user access to your organization is kept up-to-date.

This chapter includes the following topics:

- Service Provider roles and permissions in Commerce Portal
- How do I add new users to my organization
- How do I remove users from my organization
- How do I deactivate users
- How do I request a password reset for a user

Service Provider roles and permissions in Commerce Portal

You invite users to your organization and give them role-based permissions within Commerce Portal.

To see the permissions each role enables, refer to the table below.

Table 2-1. Service Provider Roles and Permissions

Permission	Administrator	Operations	Auto Report Operations	Read Only
View users in your organization.	✓			
Add new users to your organization.	✓			
Manage the user roles in your organization.	✓			

Table 2-1. Service Provider Roles and Permissions (continued)

Permission	Administrator	Operations	Auto Report Operations	Read Only
Lock or unlock accounts of users in your organization.	☑			
Request password resets for users in your organization.	☑			
Manage support requests.	☑	☑	☑	
View your organization's contracts.		☑	☑	☑
Create, modify, or delete tags.		☑	☑	
View Monthly Billing Orders.		☑		☑
Submit MBOs to Aggregator for processing.		☑		
Submit adjustment requests on closed MBOs.		☑		
Request one-off orders for VCPP Rental.		☑		
Add, update, or delete sites for existing contracts.			☑	
Register, modify, or delete Usage Meter instances.			☑	
Update your Service Provider organization's profile.			☑	

How do I add new users to my organization

You can invite new users to your organization and assign role-based permissions to their user accounts.

You can assign multiple roles to users. For information about roles and their permissions, see Service Provider roles and permissions in Commerce Portal.

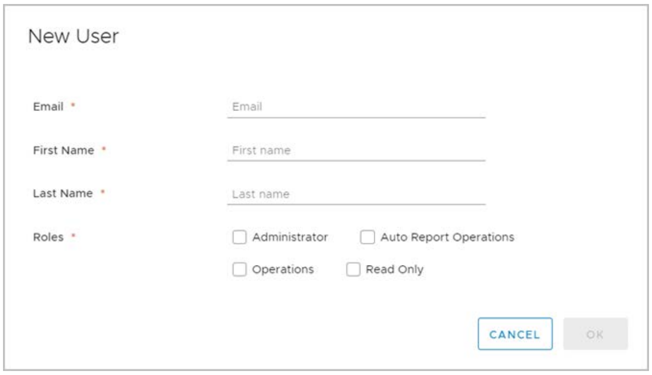
Prerequisites

Verify that you are logged in with an account that has the **Administrator** role assigned.

Procedure

1 On the Commerce Portal toolbar, select **Users**.

2 Click **New User**.



3 Enter the details of the user, select the roles you want to assign to their account, and click **Ok**.

Results

The user receives an invitation email to join your organization with instructions about onboarding.

How do I remove users from my organization

You can remove existing users from your organization.

If you want to deactivate an account temporarily instead of deleting it, see How do I deactivate users.

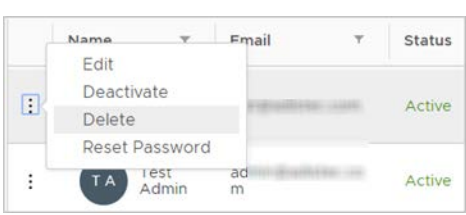
Prerequisites

Verify that you are logged in with an account that has the **Administrator** role assigned.

Procedure

1 On the Commerce Portal toolbar, select **Users**.

2 Click the options button next to a user's name, and select **Delete**.



A pop-up window appears, prompting you to confirm the deletion.

3 Click **Yes**.

Results

The user is deleted from your organization, and can no longer access Commerce Portal.

How do I deactivate users

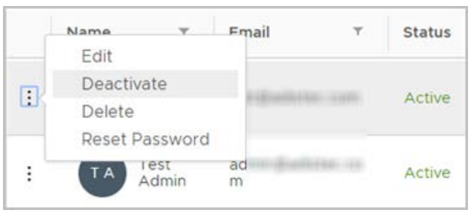
You can deactivate user accounts in your organization without deleting them. Deactivated users remain in the organization but cannot log into Commerce Portal until reactivated.

Prerequisites

Verify that you are logged in with an account that has the **Administrator** role assigned.

Procedure

1. On the Commerce Portal toolbar, select **Users**.
2. Click the options button next to a user's name, and select **Deactivate**.

   A pop-up window appears, prompting you to confirm the deactivation.
3. Click **Yes**.

Results

The user's account is temporarily deactivated and they can no longer log in to Commerce Portal.

What to do next

To reactivate a user, click the options button next to a user's name and select **Activate**.

How do I request a password reset for a user

You can request password resets for users in your organization. Users for which you trigger a password reset receive an email with instructions on setting a new password.

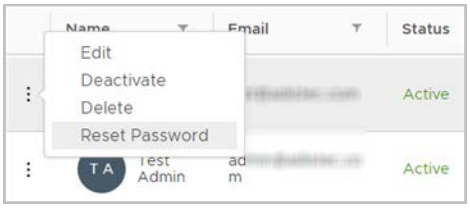
Prerequisites

Verify that you are logged in with an account that has the **Administrator** role assigned.

Procedure

1. On the Commerce Portal toolbar, select **Users**.

2 Click the options button next to a user's name and select **Reset Password**.



A pop-up window appears, prompting you to confirm the password reset request.

3 Click **Yes**.

Results

The user receives an email with instructions for resetting their password.

How do I manage my contracts

3

As a Service Provider user assigned with the applicable role, you can view the contracts of your organization, create sites for contracts, manage Usage Meter instances for automatic reporting of Rental contracts, and request one-off orders for Rental contracts. To aid the categorization and filtering of contracts, you can also add tags to contracts.

This chapter includes the following topics:

How do I view my contracts

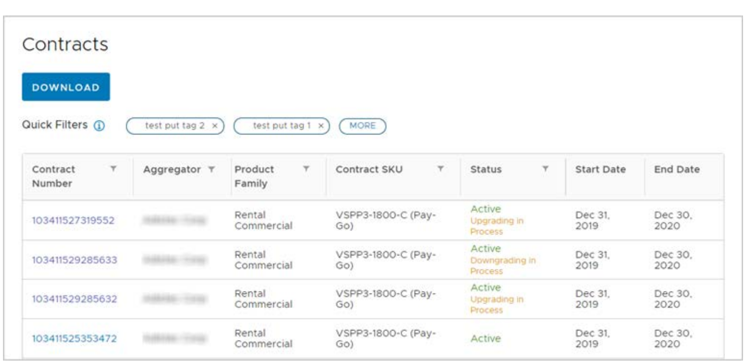
You view your organization's contracts and details about them in the **Contracts** menu.

Prerequisites

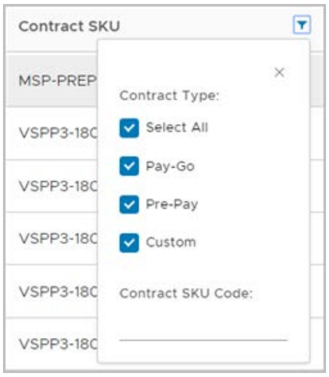
Verify that you are logged in with an account that has the permission to view your organization's contracts. See Service Provider roles and permissions in Commerce Portal.

Procedure

1 On the Commerce Portal toolbar, select **Contracts**.



2 (Optional) Filter displayed contracts using the filter buttons located inside the **Contracts** table's column headers.



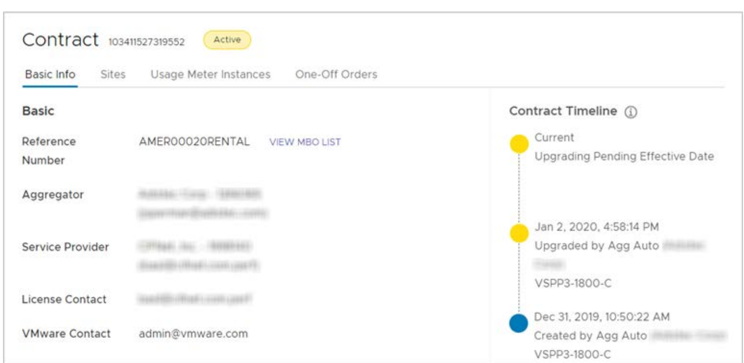
3 (Optional) To download your contracts information as a CSV file, click **Download** above the **Contracts** table.

   If you applied filtering to the table, the CSV file contains only the filtered results.

4 To get more details about a specific contract, click its contract number.

Results

You are redirected to the details page of that contract which contains additional information about the contract and its timeline.



What to do next

- Tag your contracts for additional filtering options. See How do I work with tags.
- Create sites for your contracts. See How do I manage sites.
- If auto-reporting for rental contracts is enabled for your organization, you can register and manage your Usage Meter instances. See How do I register Usage Meter instances for automatic reporting of Rental contracts.

How do I work with tags

Commerce Portal provides you with a tagging functionality to group your contract items. You can tag your contracts with strings to group contracts together and use tag filters in the **Contracts** menu to view only the contracts with the selected tag.

Prerequisites

Verify that you are logged in with an account that has the **Operations** role assigned.

Procedure

1. On the Commerce Portal toolbar, select **Contracts**.
2. Click the contract number of the contract you want to tag.

   You are redirected to the details page of that contract.
3. At the bottom of the page, click **New Tag**.
4. Enter a tag name and press Enter.

Results

The tag appears in the **Associated Tags** list and above the **Contracts** table.

What to do next

- To filter tagged contracts, select tags above the table in the **Contracts** menu. You can select multiple tags at once.
- To remove a tag, click the **x** next to a tag's name.

How do I manage sites

You can create sites to group the usage reporting of your Rental contracts. Using sites, you can break down the usage of a contract into logical parts according to the context of your organization and environment.

You create sites on a contract level. If you enabled automatic reporting for your organization and registered a Usage Meter instance with a site of a Rental contract, the Usage Meter instance reports only the usage of that site.

Prerequisites

Verify that you are logged in with an account that has the **Auto Report Operations** role assigned.

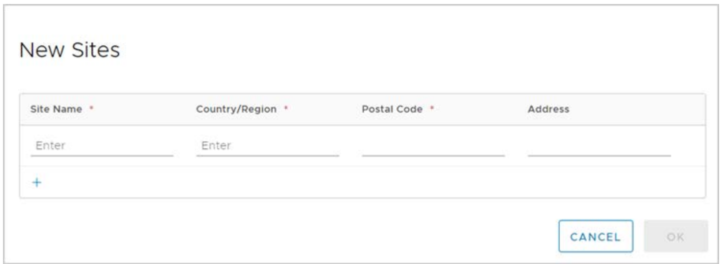
Procedure

1. On the Commerce Portal toolbar, select **Contracts**

2 Click the contract number for which you want to create a site.

3 On the toolbar, select **Sites**.

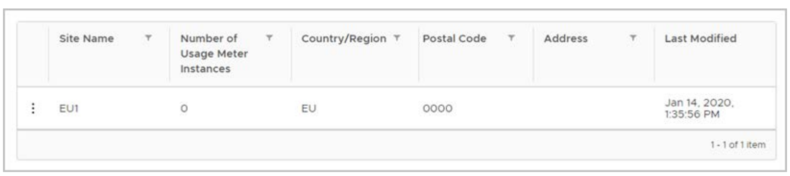
4 Click **New Site**.



5 Enter the required details and click **Ok**.

Results

The site appears in the sites table with options to edit or remove the site.



	Site Name	Number of Usage Meter Instances	Country/Region	Postal Code	Address	Last Modified
⋮	EU1	0	EU	0000		Jan 14, 2020, 1:35:56 PM

1 - 1 of 1 item

What to do next

- To modify or delete a site, click the options button next to a site's name, and select **Edit** or **Delete**.
- Optionally, you can associate your Usage Meter instances with a site. See How do I register Usage Meter instances for automatic reporting of Rental contracts.

How do I register Usage Meter instances for automatic reporting of Rental contracts

You can set up automatic reporting for Rental contracts by registering your Usage Meter instances with a contract.

Registered Usage Meter instances prepopulate collected usage data in your monthly billing order (MBO) reports. If there is an error, you can manipulate reported data before submitting the report.

If you have defined sites for your contracts, you register Usage Meter instances on a site level. If you do not have sites for your contracts, you register Usage Meter instances on a contract level.

You can set Usage Meter instances to **Test** or **Production** mode. When set to **Production** mode, the usage reported by the instance counts towards your monthly billing order. Once you set a Usage Meter instance to **Production** mode, you can no longer change it to **Test** mode.

Prerequisites

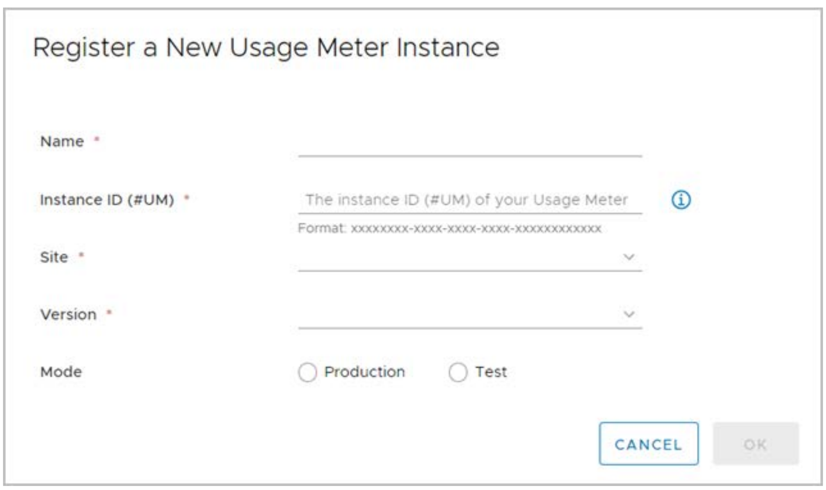
- Verify that you are logged in with an account that has the **Auto Report Operations** role assigned.

- Enable **Auto Reporting for Rental** in the **Profile** settings. If disabled, a user with the **Auto Report Operations** role must enable it first. See How do I opt in for automatic reporting.
- If registering a Usage Meter 4.x instance, verify that you have opted into the Flex Pricing Model from your **Profile** settings. See How do I opt in for Flex Pricing Model.

Procedure

1. On the Commerce Portal toolbar, select **Contracts**.
2. Click the contract number for which you want to enable automatic reporting.

   You are redirected to the details page of that contract.
3. On the toolbar, select **Usage Meter Instances**.
4. Click **Register New**.

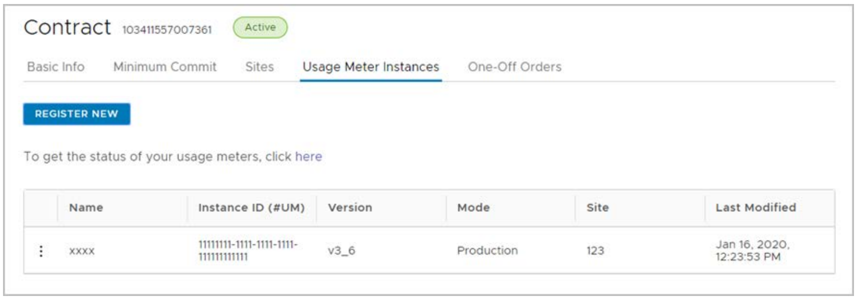
   

5. Enter the name and instance ID of the Usage Meter instance.
6. Select the version and mode.
7. If you have defined sites for the contract, select a site from the **Site** drop-down menu to associate the Usage Meter instance with a site.

   The Usage Meter instance collects only the usage data of the selected site.
8. To register the instance, click **Ok**.

Results

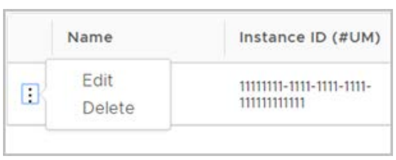
The Usage Meter instance appears in the list of instances.



If set to **Production**, the data collected by the instance is automatically populated in following MBO reports and made ready for submission.

What to do next

- Click the link above the table to check the status of your Usage Meter instances in vCloud Usage Insight.
- To move instances across sites, click the options button and select **Edit**. Use the **Site** drop-down menu to select a new site and click **Ok**.

- To delete an instance, click the options button and select **Delete**.

How do I request one-off orders

If you require additional licenses for software products on top of the ones given to you as part of the initial contract, you can request one-off orders.

One-off order requests for additional software licenses are subject to approval from VMware. For your request to be approved, you must be in a good standing without any delinquent reports against the contract for which you are requesting the one-off order.

Prerequisites

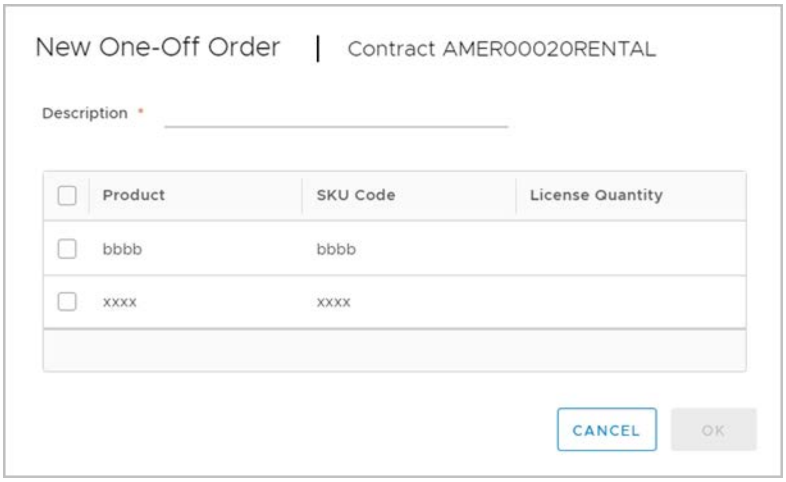
Verify that you are logged in with an account that has the **Operations** role assigned.

Procedure

1. On the Commerce Portal toolbar, select **Contracts**.
2. Click the rental contract number for which you want to request a one-off order.

   You are redirected to that contract's details page.
3. On the toolbar, select **One-Off Orders**.

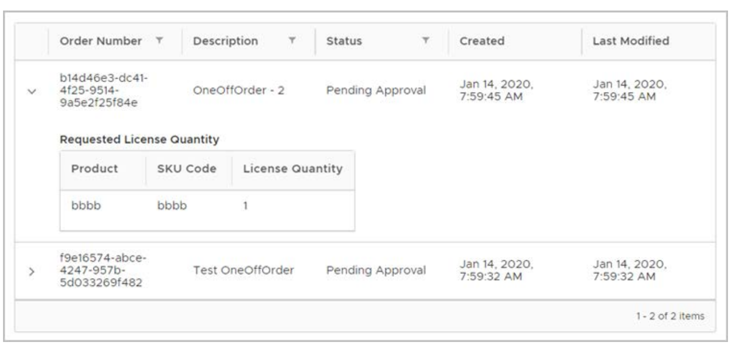
4 Click **New Order**.



5 Enter a description for the one-off order, select the product and license quantity, and click **Ok**.

Results

The one-off order request appears in the list of orders with its status. Click the arrow button next to the order number to expand the order details.



You receive an email when the status of the order changes.

How do I manage my monthly billing orders

4

As a user with the **Operations** role assigned, you use Commerce Portal to view, submit, and raise adjustment requests on your monthly billing orders (MBOs). In the **Monthly Reporting** menu, you can view your closed and current MBOs, and raise adjustment requests on closed MBOs. Reports pending your action and submission are located in your inbox.

This chapter includes the following topics:

How do I view my monthly billing orders

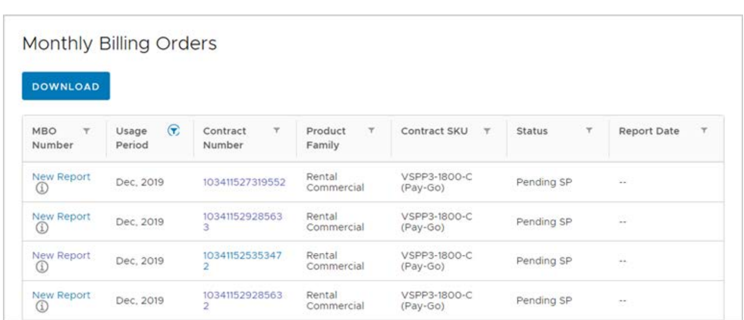
You view your monthly billing orders (MBOs) in the **Monthly Reporting** menu.

Prerequisites

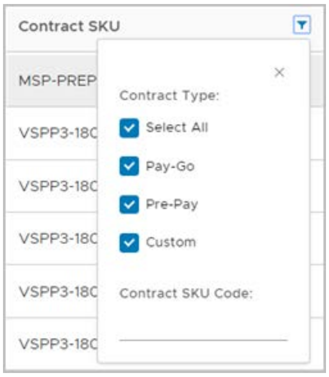
Verify that you are logged in with an account that has the **Operations** role assigned.

Procedure

1 On the Commerce Portal toolbar, select **Monthly Reporting**.



2 (Optional) Filter displayed MBOs using the filter buttons located inside the **Monthly Billing Orders** table's column headers.



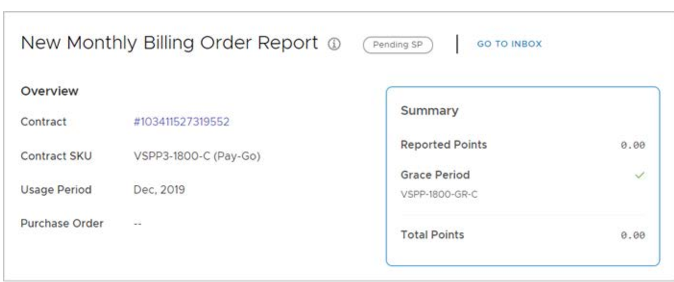
3 (Optional) To download your MBO information as a CSV file, click **Download** above the **Monthly Billing Orders** table.

If you applied filtering to the table, the CSV file contains only the filtered results.

4 To get more details about a specific MBO, click its MBO number.

Results

You are redirected to the details page of that MBO where you see a summary of the reported usage.



If a MBO is pending your action, you can click the **Go To Inbox** button located next to the MBO status to go to your task inbox and submit the report.

The following table lists all MBO status descriptions.

Status	Description
Pending SP	The MBO is awaiting your submission. To submit it, go to the details page of the MBO and click **Go To Inbox** or access your inbox directly and select the MBO from there.
Pending Aggregator	The MBO was sent to your Aggregator and is pending their approval.
Pending Vendor	The MBO has been submitted to VMware for processing and is currently being processed.
Pending Adjustment	The MBO adjustment request is currently being processed.
Overdue	You have not reported the MBO before the first due date and it is now considered overdue.

Status	Description
Delinquent	You have not reported the MBO before the second due date and it is now considered delinquent.
Closed	The MBO is closed.

What to do next

- In the **Monthly Billing Orders** table, click a contract number to see the contract for which an MBO is spooled.
- Submit your pending MBOs from your inbox.

How do I submit my monthly billing orders

You submit your pending monthly billing order (MBO) reports from your inbox. For MBOs of MSP, GSS, or SRV product families, you review the reported usage, provide your purchase order number, and submit the report. For MBOs of Rental product family, you either input the data manually, or given that automatic reporting is enabled, the data is prepopulated from Usage Meter instances in production mode.

If the usage reported by your Usage Meter instances is inaccurate, you can modify it before submission but you have to provide a reason for doing so.

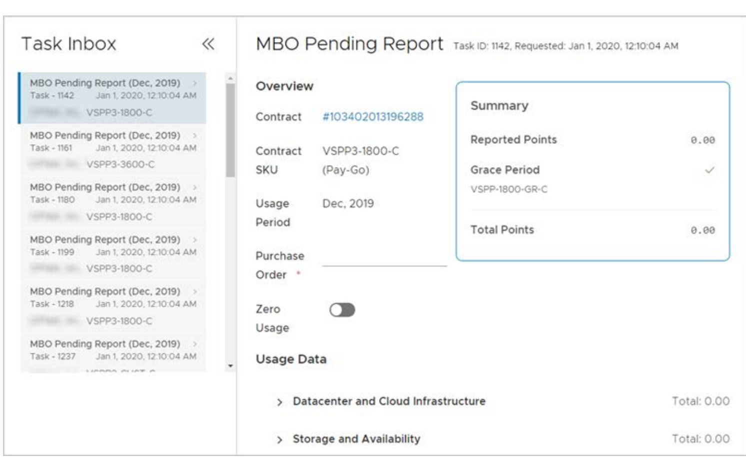
If there is a Usage Meter reporting error, contact your business development manager, if applicable, and modify the usage data accordingly.

Prerequisites

Verify that you are logged in with an account that has the **Operations** role assigned.

Procedure

1 Click the inbox button next to your user name, scroll down the drop-down menu, and select **View all tasks**.



2 On the left side of the menu, click the MBO report you want to submit.

3 In the **MBO Pending Report** section, enter the purchase order number of the report.

4 If you have no usage data to report for the MBO, move the **Zero Usage** slider to the right, and go to step 6. If you have usage data to report, go to step 5.

5 For MBOs of Rental product families, expand the product categories, and enter the number of units consumed of every product.

Datacenter and Cloud Infrastructure — Total: 0.00

Product	UoM	Units	PPU	Points
NSX Enterprise	GB vRAM	0	12.00	0.00
PSO Custom T&M	Milestone	0	1.00	0.00
VCAN-GSS-MCS-150	Point	0	1.00	0.00
vCloud SP Advanced Bundle - Management	GB vRAM	0	10.00	0.00
vCloud SP Advanced Bundle - Networking	GB vRAM	0	9.00	0.00
vCloud SP Advanced Bundle - Networking & Management	GB vRAM	0	13.00	0.00
vCloud SP Standard Bundle - Networking	GB vRAM	0	9.00	0.00

If you enabled automatic reporting for the contract of the MBO, the usage data from production Usage Meter instances is prepopulated in the report. Review the reported usage and make adjustments if necessary.

Note If you are reporting an MBO that belongs to a Manages Services Contract, VMware pre-populates your MBO with any usage accrued for the usage period. You are unable to modify the usage reported against such contracts. If you have any questions about the reported usage, open a support request from the **Support** menu.

6 (Optional) In the **Comments** section, enter a comment for your Aggregator to consider.

If you are reporting zero usage or you modified the automatically reported usage, inserting a comment is required.

7 (Optional) To save your inputs without submitting the report, click **Save**.

8 To submit the report, click **Submit**.

Results

The MBO report is submitted successfully and you receive a notification confirming the submission.

How do I raise adjustment requests on closed monthly billing orders

You can raise adjustment requests on closed monthly billing orders (MBOs) for product families which allow for it. Adjustment requests can be raised only for MBOs that were closed in the last 90 days.

Prerequisites

Verify that you are logged in with an account that has the **Operations** role assigned.

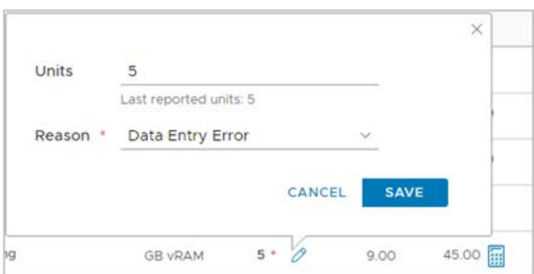
Procedure

1. On the Commerce Portal toolbar, select **Monthly Reporting**.
2. Click the MBO number of the report for which you want to raise an adjustment request.

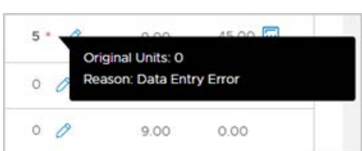
   You are redirected to the details page of that MBO.
3. Click **Adjust** and confirm that you want to trigger the adjustment operation.

   The status of the MBO changes to Pending Adjustment and the report is sent to your inbox.
4. To start editing the MBO in your inbox, click **Go To Inbox**.
5. Expand the product categories and adjust the reported units.
   a. To start adjusting a unit, click the edit button next to it.
   b. Enter the adjusted units and select a reason for the adjustment from the drop-down menu.

   Adjusted units are marked out, allowing you to see the originally reported units and the selected reason for the adjustment.

6. (Optional) To save your inputs without submitting the adjusted report, click **Save**.
7. In the **Comments** section, select a reason from the drop-down menu.
8. (Optional) Enter a comment for your Aggregator.
9. To submit the adjustment request, click **Submit**.

Results

The adjustment request for that MBO is sent to your Aggregator for approval.

What to do next

Wait for your Aggregator to respond with a resolution to your adjustment request.

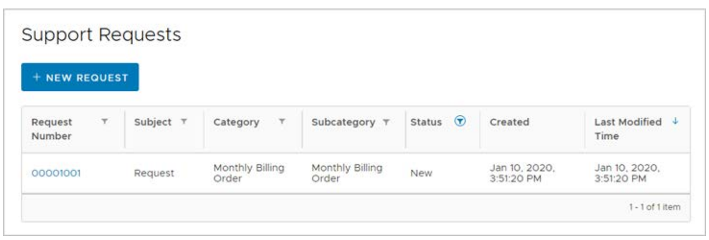
How do I manage support requests

5

You use the **Support** menu to raise support requests for issues that you experience. To facilitate the correct processing of your request, you need to select the relevant category and subcategory of the issue. You can upload attachments to help the support team better understand your issue.

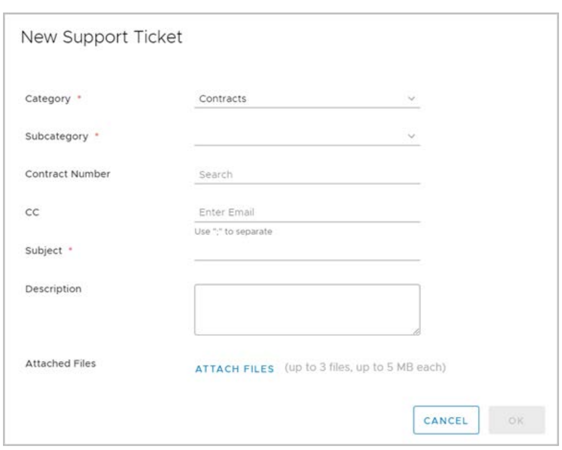
Procedure

1 On the Commerce Portal toolbar, select **Support**.



You see the **Support Requests** table which contains all support requests of your organization.

2 To open a new support request, click **New Request**.



3 From the **Category** drop-down menu, select the relevant category of your issue.

If you select **Contracts**, you get the option to enter the contract number of the affected contract.

4 From the **Subcategory** drop-down menu, select the relevant subcategory of the issue.

5 In the **Subject** text box, enter the subject of the issue.

6 (Optional) Enter the email addresses of users you want to CC and enter a description of the issue.

7 (Optional) To attach files for additional information, click **Attach Files**.

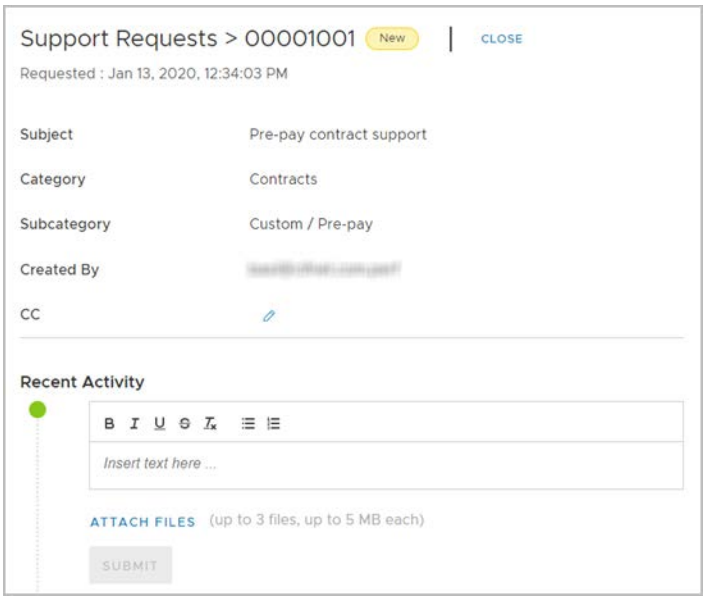
8 To raise the support request, click **Ok**.

Results

The support request is created and appears in the **Support Request** table with its status.

What to do next

- To open the details page of a request, click the request number of a support request.



  In the **Recent Activity** section, you can submit additional comments and attachments, and track previous communication on that request.

  - When submitting additional comments, you can format your text and create ordered or unordered lists.
  - To attach files to the comment, click **Attach Files**.

- To close a support request, navigate to the details page of that request and click **Close**.

How do I manage my Profile settings

6

From the **Profile** settings, you manage your user account information and change your password . You also see your organization's current settings for automatic reporting and Flex Pricing Model for Rental contracts. A user with the **Auto Report Operations** role can manage the automatic reporting and Flex Pricing Model settings of your organization.

This chapter includes the following topics:

How do I edit my account information and password

You can change your displayed full name and password.

Procedure

1. On the Commerce Portal toolbar, expand the drop-down menu next to your user name and click **Profile**.
2. To change your full name, click the edit button next to your name, make the desired change, and click **Save**.
3. To change your password, click **Change Password**.
4. Enter your old password, then your new password twice, and click **Change**.

Results

You have successfully changed your account information and password.

How do I opt in for Flex Pricing Model

Flex Pricing Model is a new consumption licensing model available to VMware Cloud Provider partners. Registering Usage Meter 4.x instances with your Rental contracts is only possible if you opt into the Flex Pricing Model.

Flex Pricing Model simplifies licensing with a single, core bundle and the flexibility to choose individual add-on products as needed. As a result, you can build specific service offerings based on the needs of your customers.

Important You cannot opt out of Flex Pricing Model once you have opted in.

Prerequisites

Verify that you are logged in with an account that has the **Auto Report Operations** role assigned.

Procedure

1 On the Commerce Portal toolbar, expand the drop-down menu next to your user name and click **Profile**.

2 Click **Opt In** next to Flex Pricing Model for Rental.

The **Opt into Flex Pricing Model** window appears.

3 To confirm you understand the consequences of opting into Flex Pricing Model, read the terms and conditions and select the two check boxes.

4 To confirm opting into Flex Pricing Model, click **Accept**.

5 Enter your password.

Results

You have successfully opted into Flex Pricing Model for Rental contracts.

What to do next

If automatic reporting is also enabled for your organization, you can register Usage Meter 4.x instances with your Rental contracts. See How do I register Usage Meter instances for automatic reporting of Rental contracts.

How do I opt in for automatic reporting

To set up automatic reporting for your Rental contracts, you must enable automatic reporting from the **Profile** settings.

Prerequisites

Verify that you are logged in with an account that has the **Auto Report Operations** role assigned.

Procedure

1 On the Commerce Portal toolbar, expand the drop-down menu next to your user name and click **Profile**.

2 To opt in for automatic reporting, click **Opt In** next to **Auto Reporting for Rental**.

3 To confirm your consent for the use of data sent to vCloud Usage Insight, enter your password and select the check box.

4 Click **Opt In**.

Results

You have successfully opted into automatic reporting for Rental contracts.

What to do next

- You can opt out of automatic reporting by clicking **Opt Out**.
- To register your Usage Meter instances with your Rental contracts, see How do I register Usage Meter instances for automatic reporting of Rental contracts.