Managing orders, products and subscriptions

- How to publish a product through the portal interface, managing product specifications
- How to set the product pricing model, managing product offerings
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How to publish a product through the portal interface, managing product specifications

Product Specifications represent the product being offered, both digital and physical. To list your product specifications go to *My Offerings* section and click on *Product Specifications*.

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In the same way as catalogues, services and resources, product specifications can be filtered by state by clicking on *Filter by state* and choosing the appropriate properties.

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To create a new product specification click on *Add new product specification*. image.png Image not found or type unknown

The product specification creation form has several steps. In the displayed view, provide the general information of the product spec. including its name, version, and an optional description. In addition, you have to include the product brand (Your brand), and an ID number which identifies the product in your environment. Then, click on *Next*.

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In the next step, you can choose whether your product specification is a bundle or not. Product bundles are logical containers that allow you to sell multiple products as if it were a single one. Once you have selected the right option click on *Next*.

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If you have decided to create a bundle, you will be required to choose 2 or more product specs to be included in the bundle. You can select the products that you want to add to the bundle by clicking the check button next to them.

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The next step in the creation of a product is including its compliance profile.

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For including a certification to the compliance profile you should click the *Add Compliance Profile* button and then the *Plus* button next to the certification that you want to add.

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Once you've selected the certification you should fill its value field by adding a link to the certification archive or, alternatively, you can click the *Upload* button and upload the certification archive from your computer.

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Whenever you've finished adding certifications you should click on *Next* button.

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The next step in the creation of a product is including its characteristics. For including a new characteristic click on *Create new characteristic* and a creation form will be displayed.

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In this form you can select the type of characteristic that you want to create (i.e. String, Number or Number Range) by clicking on the type dropdown button.

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Once you've selected the type of characteristic that you want to create you should fill the name and description fields and add at least one value by filling its fields and clicking on the *Plus* button next to them.

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Additionally you can delete any value you've created by clicking on the *Delete* button next to the value itself and select the default value for the characteristic by clicking on the check button of the specific value (the one with the blue check next to it is the default value).

Whenever you finish filling the characteristic's information you should click the *Save characteristic* button.

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On the characteristic's list preview you can also remove any characteristic by clicking the *Delete* button next to it.

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If you're done with the characteristics you can click the *Next* button.

In the next step you can add as many resources as you want to the product by clicking on the check button next to them and then click *Next*.

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The same way as in the previous step, in this step you can add services to the product.

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In the next step you can include a picture for your product and add as many files (such as images, PDF documentation, etc.) as you want to the product as attachments.

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If you want to add a picture for your product you have two options, providing an URL pointing to the picture or directly uploading it.

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If you want to add other files you can do it by clicking on the *Add new attachment* button. Here you should fill the attachment's name and upload the file. Once provided click *Save attachment*.

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Additionally you can remove added attachments by clicking the *Delete* button next to it.

Whenever you've finished adding attachments click *Next*.

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In the next step, you can specify relationships of the product you are creating with other of your product specs.

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If you want to add any relationship to your product click *Add new relationship*.

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You should select the relationship's type by clicking on the *Relationship Type* dropdown and the product with the product to created will be related by clicking on its row on the table. Once you're done click *Save Relationship*.

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Whenever you've finished adding relationships to the product click *Finish*.

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In the last step a review of the product to create is shown. If everything is okay click *Create product*.

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Providers can update their products. To do that click the *Edit* button next to the product specification to be updated.

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Update the required values, click over *Next* buttons (or directly on the step that you want to go) and once you've finished click on *Update product*. Note that for start selling an offering that includes the product specification you will be required to change its status to Launched.

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Additionally on the update product view you can verify the product's certificates by clicking the *Verify Certificates* button.

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How to set the product pricing model, managing product offerings

Product Offerings are the entities that contain the pricing models and revenue sharing info used to monetize a product specification. To list your product offerings, go to *My Offerings* section and click on *Offer*.

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The existing product offerings can be filtered by state clicking on *Filter by state* and choose the appropriate properties.

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To create a new offering click on *Add new product offer*.

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In the displayed form, include the basic info of the offering. Including, its name, version and an optional description. Once the information has been provided click on *Next*.

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In the next step, you can choose whether your offering is a bundle or not. In this case, offering bundles are logical containers that allow you to provide new pricing models when a set of offerings are acquired together. Once selected click on *Next*.

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If you want to create a bundle you will be required to include at least two bundled offerings.

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In the next step you have to select the product specification that is going to be monetized in the current offering. Once selected click on *Next*.

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Then, you have to select the catalogue where you want to publish you offering and click on *Next*.

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In the next step, you can optionally choose categories for you offering. Once done, click on *Next*.

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Next, it is possible to include the License or terms and conditions to be applied to the offering being created. In order to do that click the *Create License* button, fill the fields and click *Next* once you're done.

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The next step is the most important for the offering. In the displayed form you can create different price plans for you offering, which will be selectable by customers when acquiring the offering. If you do not include any price plan the offering it is considered free.

To include a new price plan the first step is clicking on *New Price Plan*.

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For creating the price plan, you have to provide a name, and an optional description. Then, you have to choose the type of price plan between the provided options.

The available types are: one time for payments that are made once when purchasing the offering, recurring for charges that are made periodically (e.g a monthly payment), usage for charges that are calculated applying the pricing model to the actual usage made of the acquired service and custom for price models that don't fit on any of the price types mentioned before.

Note: Whenever you add a custom price to the offer you'll only be able to add custom price models. On the other hand, if you add any of the other pricing models then you won't be able to add a custom one.

If you choose custom, you only have to add the price name and its description.

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Once you're done click *Save price*.

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If you choose one time, you have to provide the price and the currency. Once you're done click *Save price*.

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If you choose recurring, you have to provide the price, the currency, and the period between charges. Once you're done click *Save price*.

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If you choose usage, you have to provide the unit to be accounted, the currency, and the price per unit. Once you're done click *Save price*.

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In addition to the basic pricing models it is possible to include price alterations using the Price Alteration section. In this regard, it is possible to provide two types of alterations: (1) Price components, enable to extend the model with a complementary pricing (e.g an initial or recurring fixed payment in a usage model). (2) fees and discounts, which are applied to the original model when some condition is satisfied (e.g a 2% discount when more that 10k calls has been made)

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You can update or remove plans by clicking on the corresponding action button.

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Once you have created you pricing model click on *Next*.

In the last step a review of the offer to create is shown. If everything is okay click *Finish*.

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Providers can also edit their offerings. To do that click on the *Edit* button next to the offering to be updated.

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In the displayed form, update the required values, click over *Next* buttons (or directly on the step that you want to go) and once you've finished click on *Update offer*. Note that for start selling you offering you have to update its status to Launched.

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How to publish a service through the portal interface, managing service specifications

Service Specifications represent the services being offered. To list your service specifications go to *My Offerings* section and click on *Service Specifications*.

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Additionally, it is possible to filter the shown services by its state. To do that, click on *Filter by state* and choose the required parameters.

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To create a new service click on the *Add new service* button.

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Service's creation form has three steps. On the first step, related to the service's general information, you should provide the service's name and optionally its description.

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The second step is where you can (optionally) add characteristics related to the service.

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In order to do that you should click on the *Create new characteristic* button and a creation form will be displayed. In this form you can select the type of characteristic that you want to create (i.e. String, Number or Number Range) by clicking on the type dropdown button.

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Once you've selected the type of characteristic that you want to create you should fill the name and description fields and add at least one value by filling its fields and clicking on the *Plus* button next to them.

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Additionally you can delete any value you've created by clicking on the *Delete* button next to the value itself and select the default value for the characteristic by clicking on the check button of the specific value (the one with the blue check next to it is the default value).

Whenever you finish filling the characteristic's information you should click the *Save characteristic* button.

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On the characteristic's list preview you can also remove any characteristic by clicking the *Delete* button next to it.

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If you're done with the characteristics you can click the *Finish* button which will lead you to the service's preview.

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Finally in order to create the service click on the *Create service* button.

Providers can also update their services. To do that, click on the *Edit* button of the service to open the update view.

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Then, update the fields you want to modify, click on *Next* over the steps and then click on *Update Service*.

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How to publish a resource through the portal interface, managing resource specifications

Resource Specifications represent the resource being offered. To list your service specifications go to *My Offerings* section and click on *Resource Specifications*.

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Additionally, it is possible to filter the shown resources by its state. To do that, click on *Filter by state* and choose the required parameters.

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To create a new service click on the *Add new resource* button.

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Resource's creation form has three steps. On the first step, related to the resource's general information, you should provide the resource's name and optionally its description.

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The second step is where you can (optionally) add characteristics related to the resource.

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In order to do that you should click on the *Create new characteristic* button and a creation form will be displayed. In this form you can select the type of characteristic that you want to create (i.e. String, Number or Number Range) by clicking on the type dropdown button.

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Once you've selected the type of characteristic that you want to create you should fill the name and description fields and add at least one value by filling its fields and clicking on the *Plus* button next to them.

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Additionally you can delete any value you've created by clicking on the *Delete* button next to the value itself and select the default value for the characteristic by clicking on the check button of the specific value (the one with the blue check next to it is the default value).

Whenever you finish filling the characteristic's information you should click the *Save characteristic* button.

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On the characteristic's list preview you can also remove any characteristic by clicking the *Delete* button next to it.

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If you're done with the characteristics you can click the *Finish* button which will lead you to the resource's preview.

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Finally in order to create the resource click on the *Create resource* button.

Providers can also update their resources. To do that, click on the *Edit* button of the resource to open the update view.

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Then, update the fields you want to modify, click on *Next* over the steps and then click on *Update Resource*.

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How to publish and manage catalogues

The Catalogues section is the one that is open by default when accessing *My Offerings* section. This section contains the catalogues the provider has created.

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Additionally, it is possible to filter the shown catalogues by its state. To do that, click on *Filter by state* and choose the required parameters.

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To create a new catalogue click on the *Add new catalogue* button.

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Then, provide a name and an optional description for the catalogue. Once you have filled the fields, click on *Next*, and then on *Create Catalogue*.

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Providers can also update their catalogs. To do that, click on the *Edit* button of the catalog to open the update view.

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Then, update the fields you want to modify, click on *Next* and then click on *Update Catalogue*. In this view, it is possible to change the Status of the catalogue. To start monetizing the catalogue, and make it appear in the Home you have to change its status to Launched.

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