## GUIDE FOR FUNCTIONALITIES



How do I know when my subscriptions renew?

## **RENEWAL NOTIFICATIONS**

You can receive notifications when your subscriptions are up for renewal in the following ways:

- 1. Receive email notification.
- 2. Receive an alert on your Six.One dashboard.

## // EMAIL NOTIFICATION

 From the main menu, click the Customer icon and select Customers. Then pick a customer from the resulting list.

≡ SIX.©NE							
Home	Customers						
Dashboard	⊕ Create C Refresh	🛓 Export List 🖉 Column Options					
a Customer							
Customer Type	Company	Y Sales Rep Name					
28 Customers	Marvels Record high						
O Discounts	FI-QA NA						
<ul><li>Credit Terms</li><li>Pricing List</li></ul>	Page 1 of 1 (2 items)						
😋 User 🗸 🗸							

**2.** The Products tab will display showing all of the active subscriptions. Click on one of the product names.

Custome	er : Marv	vels					
PRODUCTS	ORDERS	INVOICES	SUBSCI	RIPTIONS	CLOUD	REGION	CSP ACCOUNTS
• Purchase	e Product	C Refresh	± Exp	oort List	🖉 Colun	nn Options	s Search here
Status	Pro	duct Name	T	Descriptio	on	Ţ C	category
Active	Mic	rosoft Teams Es	sentia	Microsoft	Teams Esse	ntia	DnlineServicesNCE
Active	DA	AS(Basic)	CIII	DAAS lice	inse	E	SixDotOne
Active	Offi	ce LTSC Standar	rd 2021	Office LTS	C Standard	2021	Software



3. From the Product Details Page, Microsoft Teams Essentials With Phone OnlineServicesNCE DETAILS ORDER HISTORY MANAGE LICENSES vou can see a "Auto Renew" toggle switch under the number No Custom discount has been given! 🧪 of licenses. If this switch is active, then the customer will receive an **Subscriptions And Payment Settings** 0/5 renewal notification in their email Term : Billing Frequency : Assigned Annual Annual Subscription Start Date Subscription End Date 7 days prior to expiration. 4/3/2024 4/2/2025 - + Licenses Subscription Id : Auto Renew 3d0d33f6-ef74-47e7-bedf-6e6c4e847434 Renews on : 02 April, 2025 Subscription Status : Active

## // DASHBOARD WIDGET

**1.** You can create a widget that appears on your Dashboard which shows all products with licenses that are about to expire.



 If your Dashboard does not contain this widget, then simply click the "+" in the top right corner.



**3.** Click the "Add Widgets" button, and then check the Pending for Renewals box in the Select Widgets window.



Select Widgets		
License Trend	Purchase Trend	
Discounts	Gross Margin	
Newly Added Customers	Pending For Renewals	
Recent Orders	Sales By Category	
Sales By Product	Top Customer Licenses	
Top Customer Product Licenses	Top Customers	
Top Usage Plans	Total Revenue	
Total Spend	Total Taxes	
		Add



**4.** Click the pencil icon to give your new dashboard a name and don't forget to hit the Save button in the top right corner.

[New Dashboo	ard] 🧪									
Pending For Rene	ewals								C 💠	Z ×
Customer Name T	Product	Т	Produ	ct Catego	ry	Quantity	T	Expir	y Date	т
No records to display.			K	<	1	>	>1	10 -	items pe	r page

≡ SIX.	ÔNE
🞧 Home	
Dashboar	rd
🧏 Custome	· ·
👌 User	~
😑 Marketpla	ice 🗸
🚮 Sales	~
👵 SecureSig	jn 🏹
Helpdesk	E.

If you have any additional questions or need to open a support ticket, then click the Helpdesk button from the main menu to open a ticket or review additional documentation. You can also email us at <u>Support@Six.One</u>

