US Avaya Classic Record Corrections FAQ’s
Table of Contents

OVERVIEW ........................................................................................................................................ 3
  Introduction.................................................................................................................................... 3
  Document Mission Statement ........................................................................................................ 3

BASIC RECORD CORRECTIONS QUESTIONS ................................................................................. 4

RECORD CORRECTIONS SCENARIOS AND WHERE TO START ......................................................... 8
  PLDS Records Issues .................................................................................................................... 8
  PLDS License Quantity Validation Process Job Aid ....................................................................... 8
  SAP and PLDS Records Issues ..................................................................................................... 10
  ACS BI Report Records Issues .................................................................................................... 22
  Siebel Issues ................................................................................................................................. 24
  Avaya Access / Delegated Admin Issues ...................................................................................... 25
  RFA and SAP Issues (for CM5 and below) .................................................................................... 27
  Key Records Changes Contacts and Teams .................................................................................. 29

DOCUMENT CONTROL ..................................................................................................................... 29
Overview

Introduction

This document seeks to reduce some of Avaya records complexity by providing a starting point for some of the more common record corrections scenarios.

Partners and SAMs should always check the validity of their customer records at least 120 days before the contract is due to renew/expire to avoid the pressure of having to expedite record corrections on a limited timeline as our tools (ACS, BI, and MSQT) are dependent on the correctness of our records. Once you have identified a records issue, you may refer to your relevant solution and starting point below.

Document Mission Statement

This living document is a FAQ and NOT meant to be used as the official record corrections process documentation for the below scenarios but rather to provide stakeholders with a simplified and appropriate starting and contact point from which to work their record corrections issues.

The Scenarios in this document address corrections in the following systems:
- SAP Equipment Records
- SAP License Records
- PLDS Qty Corrections
- Siebel and Delegated Admin
Basic Record Corrections Questions

1. What are common systems from which “records issues” are identified?

Systems from which records issues could arise:
► MSQT / BI / Polling
► PLDS
► SAP / Install Base
► SAP / Maintenance
► Customer verbal confirmation
► Siebel

2. How do you access the PLDS tool?

You can access the PLDS tool by logging into the following site: www.plds.avaya.com

3. Where do I find which products are supported by PLDS and not RFA?

Release notes for PLDS can be found on the partner portal:

4. Does SAP feed to PLDS?

There is a feed from SAP to PLDS that occurs ONLY at order upload to populate the initial license records in PLDS. Maintenance contracts in SAP are also fed to PLDS that creates support entitlements.

5. If a PLDS license has been modified, does this feed to SAP?

Yes, any changes in PLDS should feed to SAP for license material codes to be modified. The feed is near real time. PLDS will only add/remove the license material code from the SAP install base; it will NOT add or remove maintenance billing.

6. Why do we care so much about PLDS and SAP matching compared to other systems?

More so than other systems, it is critical that PLDS and SAP match to assure that the renewal quote and future billing match the customer’s licensing situation. There is a history of feed issues between PLDS and SAP that have contributed to past issues.
7. Where would a partner go to get training on License Management in PLDS?

You would use the PLDS processes to modify licenses in the PLDS tool:
http://support.avaya.com/licensemanagement

8. What is the difference between Product License Code (order), PLDS License Code, and SAP Install Base Code?

**Product License Code:** The quantity associated with the material on the product order itself. This is located on the product order.

**PLDS License Code:** The quantity associated with the license entitlement in PLDS. In most cases (the bulk scenario mentioned below is an exception, subsequent move/upgrade activity would also cause a mismatch) this should match the product license code quantity. This is located in PLDS.

**SAP Install Base Code:** The license material codes populated in SAP. These quantities will show in the customer equipment records and may show up on reports such as IL03, the All Product Requote Report, and any other report that uses SAP as a source for license codes. This is located in SAP.

9. What is the difference between a bulk license and a bundle license?

**Bundle Licenses** refer to offers that entitle licenses and software for different products. For example: orders for the Communication Manager Offer entitle customers to CM, one-X, EC500, and other products in the same license. In this scenario, all the PLDS relevant license codes entitled by the Offer will flow from SAP orders into PLDS and PLDS sends all the license codes back to the SAP install base for quantities listed on the PLDS entitlements.

**Bulk Licenses** refer to Offers that entitle licenses for bulk quantities. For example: A CM R6 license code for quantity 1 enabling 50 licenses

10. What is the difference between a maintenance entitlement and a license entitlement?

**License Entitlement:** The right to use for the license. This is the right to use on the actual product itself (i.e. AES, CM 5, One-X etc).

**Maintenance Entitlement:** The support associated with the license. This is the entitlement to allow support of the license associated with the product.
Both of these entitlements are available for viewing in PLDS; however, only the license entitlement is eligible for user updates (license moves, activation, etc) directly in PLDS. The maintenance entitlement is updated in SAP through the recast process (which then updates PLDS through an SAP to PLDS feed).

11. Where can I locate the Equipment Change form for a Partner to submit record corrections? *(Updated 01/21/2015)*

All Equipment Changes for partners are handled thru the GRT 4.0 tool. This includes Install base creations and Equipment Removals. Information for GRT can be found at [www.support.avaya.com/registration](http://www.support.avaya.com/registration)

Direct link to GRT – [grt.avaya.com](http://grt.avaya.com)
GRT Install Base/ Equipment Removals Training [https://weconnect.avaya.com/p2bnl40a4io/](https://weconnect.avaya.com/p2bnl40a4io/)

12. Who do I contact about Heritage Nortel record corrections?

You would email [sapftcustmastr@avaya.com](mailto:sapftcustmastr@avaya.com) for any Equipment Record Changes that you would need to make.

If you need changes to the service contract for Heritage Nortel, you would submit those changes to [scontrac@avaya.com](mailto:scontrac@avaya.com).

13. Is there a team who can assist a partner with questions about Avaya’s partner programs, tools and services?

Yes, The Avaya Partner Helpdesk is a single point of contact for Avaya Partners who have questions about Avaya’s Partner programs, tools and services.

They can be reached at [partnerhelp@avaya.com](mailto:partnerhelp@avaya.com) or 720-444-5800

Fast Answers to Non-Technical Questions

The team can assist you with the following program and process related issues:

- **Channel Programs** - Avaya Connect Partner Program, Sales Authorization, onboarding programs, training & certification, Partner Customer Loyalty Program.
• **Applications & Tools** - Single Sign On (SSO) logins, Avaya University Portal

• **Partner Relationship Management (PRM)** - PRM administration and processes, user profiles, Link ID requests, Market Development Funds process and claims, leads and opportunities, Sales and Services Support Requests (SSRs), Avaya Technical Assistance Center (ATAC) and Global Support Services (GSS) access, New Partner Portal issues and questions

• **Marketing Programs** - partner promotions and incentives (e.g., My Avaya Small Business Rewards program), partner locator, Devconnect program

• **Channel Services Programs** - Services programs and tools, co-delivery offers (e.g., PASS, JSD, PSS), web ticketing, Global Registration Tool.

14. **Where can I locate the Global License Portability Policy?**

The Global License Portability Policy can be located at the following link. This link/document should be referenced for any questions regarding license moves:

https://avaya.my.salesforce.com/apex/sp_ViewDetailPage?Id=a3j30000000L6p9AAC

15. **Can Licenses be moved from RFA to PLDS?**

No, the licenses cannot be moved from RFA to PLDS. The way to move it is to upgrade it. PLDS only supports CM6 and above.
Record Corrections Scenarios and Where to Start

### PLDS Records Issues

#### PLDS License Quantity Validation Process Job Aid

<table>
<thead>
<tr>
<th>Do you have a license quantity mismatch?</th>
<th>No – Process Complete</th>
<th>Yes</th>
</tr>
</thead>
</table>

**What are other sources that I can use to validate the license count?**

- Check ACSBI:
  - ZTSB
  - Consolidated Quote Report
  - Installed Base – IL03

**What happens if all of the sources report different quantities?**

**What is the Master Data System of Record?**

<table>
<thead>
<tr>
<th>PLDS/RFA license count is correct, SAP Install Base is not. Primary Data Source: PLDS, RFA</th>
</tr>
</thead>
<tbody>
<tr>
<td>SAP Install Base license count is correct, PLDS has incorrect license count. Primary Data Source: PLDS</td>
</tr>
<tr>
<td>SAP Install Base license count is incorrect. PLDS is showing too few/no licenses. Primary data source: dependent on individual issue scenarios</td>
</tr>
<tr>
<td>PLDS and SAP Installed Base match but are different from existing service agreement license quantities. Primary data source: dependent on individual issue scenarios. No Primary Source.</td>
</tr>
<tr>
<td>Two SW releases for the same product licenses in PLDS. Primary Data Source: SAP</td>
</tr>
</tbody>
</table>

**What if the data needs to be updated?**

- Update PLDS and re-feed to SAP
- Remove Active Licenses
- Remove Duplicate Licenses
Possible scenarios if SAP Install Base license count is incorrect:

1. Licenses are correctly showing on incorrect Sold To.
   Corrective Actions:
   - Sales team member to validate correct Sold To number in PLDS and on associated Order.
   - Validate LAC license has been created.

2. Active order with order block.
   Corrective Action: Sales team member contacts Avaya Order Processing team to remove Order block.

3. PLDS record shows different quantity from SAP Install Base record
   Corrective action: Sales team member opens ITSS case to correct/determine the license quantity mismatch. Once quantities match, if the count is still incorrect please refer to other issues scenarios to aid in troubleshooting.

4. Net license count correct but spread across multiple sites; SW licenses need to be moved from one Sold To to another Sold To.
   Corrective Actions:
   - Sales team member determines if and where licenses have been moved in PLDS.
     - If moves occurred, validate moves are correct.
   - If licenses moved must Recast associated support agreements.
   - License moves can only be made to Sold To’s under the same hierarchy

5. If you do notice too few licenses, please ensure you have proof of original order/license count. You will likely need to purchase more licenses.

6. If none of the above scenarios correct the issue, please open an ITSS case against PLDS for the associated Sold To.
SAP and PLDS Records Issues

1. If I remove equipment with maintenance, will I be charged termination fees?

A Customer purchases support coverage under the terms of a specific agreement; both the Customer and Avaya are obligated to honor the terms of the agreement. Customers that prematurely terminate their support coverage are subject to termination fees unless termination fees are not specified in the applicable agreement or service order under which that coverage was purchased. The permanent removal of PLDS licenses is an example of premature maintenance cancellation and could be subject to termination fees.

Complete contract cancellations (not billing through a Distributor) can be submitted to OEFC at mycontract@avaya.com

Software Support and Wholesale Support Advantage billing through Distributor cancellations should be sent to the Distributor and the Distributor would work with Avaya directly.

A recast of the contract is required if:
- Replacing equipment
- Upgrading equipment
- Reducing license counts
- Performing a reduction in chassis, server, gateway, board, or terminals (not phone telsets or adjuncts)

2. Is there a way to avoid termination fee charges?

A termination fee waiver can be requested by an Avaya Services employee through the Sales Force tool. Avaya Partners would work with their Avaya Account Managers to have a Term fee waiver submitted through Sales force. If an approval is received, the removals can then be submitted.
3. Can equipment be removed after the Sold To is marked for deletion or does equipment have to be removed first?

The equipment and any applicable maintenance coverage should be removed first before a Sold To is marked for deletion. If maintenance is not removed prior to marking an account for deletion, the account will continue to create invoices and bill to the End User. This would create possible billing adjustments and/or cancellation fees if the account continued to bill for any amount of time after the account is marked for deletion. If the location is no longer going to be used and there will be no equipment located at the site, then it would be best to remove the equipment to eliminate any future record corrections issues that might occur from the equipment still being on records.

4. If we are closing a location but keeping the equipment for an alternate location, should the Sold To be marked for deletion?

If you are closing the location but the equipment will be moving to an alternate location, the account would need to stay active until the equipment is moved to the new Sold To or the address is changed on the existing Sold To. If the account is marked inactive before the equipment is moved then the account will not be valid for any changes to be made on it.

5. If a new maintenance contract is being submitted to the OEFC for processing and there are equipment record changes that will need to be done, can they be submitted at the same time?

All Equipment Changes for partners are handled thru the GRT 4.0 tool prior to the package being submitted. This includes Install base creations and Equipment Removals. Information for GRT can be found at www.support.avaya.com/registration

Direct link to GRT – grt.avaya.com
GRT Install Base/ Equipment Removals Training https://weconnect.avaya.com/p2bnl40a4io/
Video: Global Registration Tool 3 – Install Base creations - http://youtu.be/48mD-sIFlcA
6. **How do I get all of my customer’s sites to co-term under SA (Support Advantage)?**

This requires a special bid and can include some manual correction for the maintenance upload team. You would need to submit for a special bid to co-term the end dates for all locations to match. We do allow LSP locations to match the main CM end date “Enterprise Wide” meaning if they added LSP HW maintenance in the SA model we do allow the end dates to co-term per the Main/Remote Policy. Under Support Advantage synchronized billing will only take place for maintenance added to the same product family, otherwise a request is needed to force other locations to co-term with one another, unless it is part of the CM family. The maintenance team will only make these corrections if the information and any required approval is made prior to the upload. If the co-termination is not requested prior to upload a change can no longer be made by the maintenance team and would require a recast to correct. The OEFC maintenance team will not make manual changes to the contract after the upload is completed.

**SalesForce/PRM and Special Bids:**

The process for a Special bid to be submitted by an Avaya partner can be located at [https://avaya.my.salesforce.com/sfc/servlet.shepherd/document/download/069a0000002jdxxAAA](https://avaya.my.salesforce.com/sfc/servlet.shepherd/document/download/069a0000002jdxxAAA)

**Global Special Bids Policy:**

[https://avaya.my.salesforce.com/sfc/servlet.shepherd/document/download/069a0000002i6eXAAQ](https://avaya.my.salesforce.com/sfc/servlet.shepherd/document/download/069a0000002i6eXAAQ)

7. **I have identified equipment records that are not appearing at all in SAP or Siebel, what could be wrong?**

Skipping the install base creation registration step is a significant contributor to records issues and may be a reason that your equipment is not showing up. The Partner would add the install base to the end users SAP records by using the Global Registration Tool (GRT) Phase 1.

[http://support.avaya.com/registration](http://support.avaya.com/registration)

In some scenarios (ex: Very large functional locations) the PLDS to SAP IB updates may not be successful as SAP modules may fail to read, update or add the IB records. Also, please note that only the License codes get updated in the IB.
8. I recently did an upgrade but my records are still showing the old equipment, where do I start?

The most common reason old equipment continues to show on customer records is because of a lack of compliance in completing the Equipment Removal step of registration. The Partner would use the Global Registration Tool (GRT) phase 3. After the Install base Creation is done and the technical onboarding is completed, the third phase, Record Validation, must be completed to have equipment removed. There may also be a duplicate Sold To when sold through the Indirect Channel so this should always be checked as well. If a Direct Customer, this could happen because the Equipment Removal list was not included in the project closure process. In GRT 4.0 Equipment Removal is a separate step, which allows Removals to be done independently of Install Base Creations.

http://support.avaya.com/registration

Direct link to GRT – grt.avaya.com
GRT Install Base/Equipment Removals Training – https://weconnect.avaya.com/p2bnl40a4io/

As mentioned earlier, in some scenarios (ex: very large functional locations) the PLDS to SAP Installed Base (IB) updates may not be successful as SAP modules may fail to read, update or add the IB records.

9. If my partner is moving equipment (NOT Licenses) from one Sold To onto another Sold To, what process would be used?

All Equipment Changes for partners are handled thru the GRT 4.0 tool. This includes Install base creations and Equipment Removals. Information for GRT can be found at www.support.avaya.com/registration

Direct link to GRT – grt.avaya.com
GRT Install Base/Equipment Removals Training – https://weconnect.avaya.com/p2bnl40a4io/
Note, if your equipment has remote connectivity/alarming, another consideration will be ensuring that the SE IDs get appropriately places on the correct Sold To in Siebel.

**If there IS NOT maintenance on the equipment:**
The GRT process mentioned above is all that is needed.

**If there IS maintenance on the equipment AND they are only moving some of equipment on the site but not all:**
The GRT process mentioned above should be used. When submitted the tool will automatically remove the equipment and it will go to an associate to *cancel the associated maintenance*. Termination fees may apply as Avaya maintenance contracts are sold to specific and moving equipment on maintenance involves changing the billing on this contract (Sold To). Please see scenario 1 above regarding fees.

To add the maintenance of the partially removed equipment to the new sold to, a new maintenance contract must be submitted. Alternatively, you may submit the new contract with the associated removals at the same time. See the maintenance contract submittal question above for more detail.

**If there IS maintenance on the equipment AND they are moving all of the equipment on the site:**
If there is an existing sold to for which you would like to move the equipment, a contract cancellation recast is recommended. If there is not an existing sold to for this equipment move, a PRM request can be submitted to change the address of the current sold to.

All Equipment Changes for partners are handled thru the GRT 4.0 tool. This includes Install base creations and Equipment Removals. Information for GRT can be found at [www.support.avaya.com/registration](http://www.support.avaya.com/registration)

Direct link to GRT – [grt.avaya.com](http://grt.avaya.com)
GRT Install Base/Equipment Removals Training [https://weconnect.avaya.com/p2bni40a4io/](https://weconnect.avaya.com/p2bni40a4io/)
10. If my partner is removing equipment not related to an upgrade from an end user's Sold To, what process would be used?

All Equipment Changes for partners are handled thru the GRT 4.0 tool. This includes Install base creations and Equipment Removals. Information for GRT can be found at www.support.avaya.com/registration

Direct link to GRT – grt.avaya.com
GRT Install Base/ Equipment Removals Training https://weconnect.avaya.com/p2bnl40a4io/
Video: Global Registration Tool 3 – Install Base creations - http://youtu.be/48mD-sIFlcA

11. How does IPOSS 8.1 equipment get added to End User’s Install Base?

Process for IPOSS 8.1 can be found on the following site: http://support.avaya.com/registration

12. If I have moved (or need to move) licenses in PLDS, how do I make sure the license contract and billing (and thus associated maintenance coverage) gets updated in SAP to reflect this move?

http://support.avaya.com/helpcenter/getGenericDetails?detailId=C20107111459489010

Distributors and Channel Partners are obligated to inform Avaya of all license entitlement moves. Minimal license entitlement move details should include:

► End-Customer name and Sold To number
► "From" Distributor
► "From" Channel Partner
► "To" Distributor (if different)
► "To" Channel Partner (if different)
► Quantity and type of licenses moved
► Support contract details on "To" and "From" location
► Contact name/email for questions

These details should be e-mailed to the appropriate Avaya theatre contact, along with the supporting distributor purchase authorization, to ensure the "To" location support contract reflects the addition of the moved licenses.

If Software Support or Support Advantage is attached to the licenses being moved, a new order or CSA for like coverage at the “TO” location must be placed. The Partner must also
inform what the “FROM” Sold To is so that the required attach support billing can be removed along with the dates of the move.

USA Partner Dispute: USCare@avaya.com

Americas International: CabcCala@avaya.com
Asia Pacific: apacbillindia@avaya.com
EMEA: emeacc@avaya.com

The license entitlement moved in PLDS will automatically be updated in the SAP Install Base. This is the same for PLDS changes made by Avaya Associates and Avaya Partners.

13. I have moved and/or updated licenses in PLDS. PLDS and SAP show the correct license counts, however, the license contract and billing (and thus associated maintenance coverage) are not billing correctly in SAP?

http://support.avaya.com/helpcenter/getGenericDetails?detailId=C2010711145949010

Distributors and Channel Partners are obligated to inform Avaya of all license entitlement moves. Minimal license entitlement move details should include:

► End-Customer name and Sold To number
► "From" Distributor
► "From" Channel Partner
► "To" Distributor (if different)
► "To" Channel Partner (if different)
► Quantity and type of licenses moved
► Support contract details on "To" and "From" location
► Contact name/email for questions

These details should be e-mailed to the appropriate Avaya theatre contact, along with the supporting distributor purchase authorization, to ensure the "To" location support contract reflects the addition of the moved licenses.

If Software Support or Support Advantage is attached to the licenses being moved, a new order or CSA for like coverage at the “TO” location must be placed. The Partner must also inform what the “FROM” Sold To is so that the required attach support billing can be removed along with the dates of the move.

USA Partner Dispute: USCare@avaya.com

Americas International: CabcCala@avaya.com
Asia Pacific: apacbillindia@avaya.com
EMEA: emeacc@avaya.com
The license entitlement moved in PLDS will automatically be updated in the SAP Install Base. This is the same for PLDS changes made by Avaya Associates and Avaya Partners.

14. Licenses have never been moved and/or updated in PLDS however, the license contract and billing (and thus associated maintenance coverage) are not billing correctly in SAP? We have checked PLDS and SAP and both systems match correctly.

If PLDS licenses were ordered correctly, and quantities match then the maintenance should match from the time of execution of the contract. If the maintenance uploaded was input incorrectly then there are some steps to take to validate the maintenance was submitted correctly.

- Check with your distributor to validate the license count ordered and the maintenance contract submitted to OEFC for processing.
- If the information submitted by the Distributor was correct, but the contract uploaded by OEFC is incorrect then contact the OEFC to validate the contract uploaded to make sure no changes were made.

15. I have made changes to PLDS but the SAP install base does not seem to be updated, where do I start? (You have identified a PLDS to SAP Feed issue)

You would need to input an ITSS ticket and ask for it to be assigned to PLDS Tier 3. Once the PLDS Tier 3 team identifies the issue, they will either initiate a refresh of the account or they will work directly with the Records Correction team for any manual updates or entries required. [https://partner-itss.avaya.com](https://partner-itss.avaya.com)
16. PLDS is showing the correct number of licenses but SAP install base seems to be showing a different number of licenses, where do I start? (You are not sure why the two do not match)

If you are correcting Bulk Licenses:

If the record(s) in question are related to Bulk Licenses, the relevant record in the SAP Install Base should match the product license quantity from the original product order (and should also be a considerably lower quantity than the PLDS value). If this is the case, your records are correct. If not, follow the instructions below to get corrected.

Bulk licenses refer to Offers that entitle licenses for bulk quantities. For example: A CM R6 license code for quantity 1 enabling 50 licenses. In this scenario, the license code ordered for quantity 1 in SAP creates license entitlement for quantity 50 in PLDS and PLDS will update the IB for quantity 50 (not 1, which is what it should be). This is a known defect in our system logic that has caused overbilling for customers and is in the process of being fixed. For the time being, you should follow this process:

Our stated fix to this issue is to send a request to the SAP record corrections team to update the SAP install base records to show a quantity that matches the product license qty on the original order, in the above example this would be changing the quantity from **50 to 1**. This should correct the over-billing.

For this scenario, as long as the requester can show that this is a bulk license and the SAP Install base is different from the product license qty (and matches the PLDS qty), a direct request to the SAP Record Corrections team can be made without the need for an IT ticket.

**Bulk License Scenario: Which Records Should Match**

<table>
<thead>
<tr>
<th>Product License Qty in SAP (From Order)</th>
<th>PLDS License Record</th>
<th>SAP Install Base Record</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>1</strong></td>
<td><strong>50</strong></td>
<td><strong>1</strong></td>
</tr>
</tbody>
</table>

These two quantities must match for billing to be correct
Another example, how to determine if it is a bulk license: Bulk codes can be identified by their description:

189176 IC 7.0 VCE MEDIA 10PK 20-100 USER
225133 AVAYA AURATM R6 STD ED 100 USER BNDL
225139 AVAYA AURATM R6 ENT ED 200 USER BNDL

In the above example, qty 1 of code 189176 is placed, PLDS provides qty 10, IB shows qty 10 against this code, it should show qty 1. In this scenario, the user should go directly to record corrections team if IB is reflecting the bulk qty purchased and not the ordered quantity.

If you are not dealing with Bulk licenses:

Once you confirm that PLDS is correct and SAP is incorrect and also that the right amount of licenses are activated in PLDS, you will need to submit a record corrections form to the US Customer Master Data team. Before this team can work the ticket however, an IT ticket will need to be opened and in hand before records can be corrected. If it is internal, you will also need to provide the PLDS entitlement report as proof. If it is coming from a partner, they will need to provide a screenshot from PLDS.

Link for Partners:
https://avaya.my.salesforce.com/sfc/servlet.shepherd/document/download/06930000001zDBeAAM

17. Where do I start if the license count in SAP is correct but PLDS is showing an incorrect number of licenses?

An IT ticket would have to be submitted through https://partner-itss.avaya.com to the PLDS team (PLDS is its own ticket category) for them to review what is causing PLDS to not show accurately. You would also need to provide the SAP order number or the All Product Requote Report (from BI) that shows the discrepancy.

18. Where do I start if the license counts in PLDS are higher than they should be (and the records are incorrect)?

The first thing to check is any order numbers used for the customer to verify that the correct Sold To number was used. The most common reason for this discrepancy is when a number of licenses were added to the wrong Sold To during order upload.
19. Where do I start if I want to permanently remove licenses from PLDS?

This is considered an exception process that SAMs/Account Managers can follow to permanently remove PLDS licenses (and thus services). Permanent license removal is a form of maintenance cancellation and standard maintenance cancellation policy and fees apply. (Note: If licenses are permanently removed from PLDS the only way to re-add to PLDS would be to re-purchase the licenses). Partners would work with their SAMs/Account Managers for this type of request.

20. Where do I start if the license count in SAP is incorrect but PLDS is showing too few licenses (or nothing at all is showing in PLDS)?

If the licenses are not showing correctly in PLDS then you can use the following verification steps to troubleshoot:

- Double check that all SAP orders have been properly uploaded.
- If the order is closed out or completed but licenses are still not showing up in PLDS, check to make sure that the order does not have some systemic blocks on the orders related to the PLDS licenses in question.
- If the order is closed out and there is no block on the order but the licenses still are not showing up in PLDS, verify that the Sold To # used on the order matches the Sold To # you are checking against in PLDS.
- Verify the end-customer partner FL# listed on the SAP order is available in PLDS.
- Verify the email addresses listed on the order are in correct format.
- Verify the person looking for PLDS records has appropriate access in PLDS.
- Verify your partner GAI was input on the order.
- If you are a partner that was not a party to the sale, verify in Avaya Access that your Link ID is associated to the end-customer’s Sold To. If this association in not in place, see “Avaya Access Request for Delegated Administration” below.
- Verify with the OEFC that there is no license return transaction against the order.
- If you have checked all of the above but the licenses still are not reflected in PLDS, then you would need to [submit an ITSS ticket](#) for the PLDS team to look into it systematically.
21. I have validated PLDS and SAP install base both show the correct number of licenses but my quote is still showing an inaccurate number of licenses to bill, what else can I check?

With Support Advantage coverage, the CM Main/Remote survey becomes very important to ensure correct billing for licenses by matching up customer equipment to their correct billing Sold To’s. If PLDS and SAP both show correct but the quote is still showing an incorrect amount, your CM Main/Remote survey might need to be updated. For partner quotes, you can submit a request to the LOA team for a copy of the CM Main/Remote survey for your review. The LOA form is located here: https://avaya.my.salesforce.com/sfc/servlet.shepherd/document/download/069300000020A7YAAU

*The CM Main/Remote survey is available for Partners to perform their own updates in GRT 3.0 and beyond.*

CM Main/Remote survey training, including a CM Main/Remote survey video, is available here: https://support.avaya.com/registration

22. Should I have two software releases in PLDS for an individual software license?

This scenario is created when a customer’s PLDS licenses are not upgraded but instead customer places new order for the new version of the product. In such cases, technically it is correct for PLDS to show different entitlements for different versions.

If the license records of the older versions in the above scenario require correction:

1. If the next software release was ordered vs. an upgrade:
   a. To correct this issue an Avaya ITSS PLDS case should be opened with the customer’s approval to remove the older SW release from their PLDS records.

2. If the next software release was ordered as an upgrade:
   a. To correct this issue an Avaya ITSS PLDS case should be opened to remove the older SW release from the customer's PLDS records.
ACS BI Report Records Issues

1. I have done an equipment removal in GRT and I am far away from a recast/cancellation event, how do I ensure that my billing gets updated?

   **Records Validation** is the registration step by which Avaya and the Business Partner work together to ensure that, after changes to the customer’s environment (for example an upgrade or replacement), our equipment and license records are accurate. **Records Validation** is utilized to remove unused equipment and to update the CM Main/Remote Survey (formerly EPN survey). Equipment removal (or ERL) is part of this phase of registration.

   If you want to remove records for the **purposes of quoting**, a GRT ERL will suffice. If you want to ensure all **billing is updated**, a recast or cancellation ([mycontract@avaya.com](mailto:mycontract@avaya.com)) should be submitted.

   **Common scenarios where a recast will be required to ensure accurate billing after an equipment removal include:**
   - If replacing equipment
   - If upgrading equipment
   - If reducing license counts
   - If performing reduction in chassis, server, gateway, board, or terminals (not phone telsets or adjuncts)
   - Any time they are doing an ERL for equipment that is under utility maintenance
   - Any time it’s a change of server type, when removing one server type (ERL) but are expecting billing/coverage on another server type (S8500 to S8700 for example)
   - In general, if removing a large number of equipment, any large number of changes being done for equipment, if removing or adding a lot of equipment and the expectation is to see significant change in billing amounts
   - If coverage is being moved to a new service offer (i.e. Support Advantage) but are removing equipment from the old service offer

   Information on the equipment removal process (and all registration processes) can be found via the following link: [support.avaya.com/registration](http://support.avaya.com/registration)
2. Equipment that I expect to show up on an All Product Re-quote report when quoting is not showing up or has never polled.

If a product has never successfully polled, it is quite common that the technical onboarding was not completed (Phase 2 of registration). If you run into this situation, the first thing you should confirm is whether the devices in question completed the technical onboarding phase. For more information go to [http://support.avaya.com/registration](http://support.avaya.com/registration)

Direct link to GRT – [grt.avaya.com](http://grt.avaya.com)
GRT Install Base/ Equipment Removals Training [https://weconnect.avaya.com/p2bnil0A4io/](https://weconnect.avaya.com/p2bnil0A4io/)

If the partner or internal Avaya associate confirms the technical onboarding was completed, there could be a connectivity/polling issue. If this is the case you can call -800-242-1361 extension 15364 to open a ticket.
Siebel Issues

1. The information and entitlements for an End user in SAP do not match Siebel (i.e. Name, Address, Equipment, Entitlements, etc.), what do I do?

   This often occurs when the system feed between SAP and Siebel does not successful take place. If you feel that this is the case, you can submit an IT ticket through https://partner-itss.avaya.com. When opening the ticket, it is critical to clearly describe the issue you are experiencing. For example, if maintenance entitlements are in SAP but do not show in Siebel, a refresh for the feed between SAP and Siebel will be required. Alternatively, if the SAP Customer Master Data (such as the customer’s address, name, etc.) does not match Siebel, a “data push” from SAP to Siebel will be required.

2. The customer’s install base and/or Support Contract shows in SAP but does not show in Siebel, how is this corrected?

   Sometimes the feed from SAP to Siebel does not successfully happen. When this happens, a Siebel refresh is needed. To fix this, you can submit an IT ticket through https://partner-itss.avaya.com. You will need to provide the Sold to# or FL# (Functional location #) and that you need Siebel to be refreshed. As a best practice, it is best to include a brief explanation of the issue for the refresh team to use in their validation steps (for example “VCM is missing entitlements”, “Siebel entitlements are expired”, or “MM assets missing”, etc.)
Avaya Access / Delegated Admin Issues

1. I need to have an end user’s Sold To number linked to an Avaya Partner’s Link ID to gain access to GRT or other Avaya systems, how is this done?

A customer may request an Authorized Avaya partner to access their location-specific Sold To account information on their behalf.

Avaya Access Request for Delegated Admin

Avaya Access Help on support.avaya.com:
https://support.avaya.com/helpcenter/getGenericDetails?detailId=C201231910250720076

Access form:
https://support.avaya.com/css/P8/documents/100078299

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<tr>
<th>Request</th>
<th>Action</th>
<th>Responsibility</th>
</tr>
</thead>
<tbody>
<tr>
<td>Customer wants their authorized Avaya Partner to be able to request access to their Sold To accounts.</td>
<td>Submit a Delegated Administration request, click <a href="https://support.avaya.com/css/P8/documents/100078299">here</a> to submit an e-mail request; or complete the &quot;Avaya Access Request for Delegated Administration&quot; form.</td>
<td>Customer completes and submits the &quot;Avaya Access Request for Delegated Administration&quot; form.</td>
</tr>
<tr>
<td>Customer wants to cancel their current authorized Avaya Partner access to their Sold To accounts.</td>
<td>Submit a Cancel Delegated Administration request, click <a href="https://support.avaya.com/css/P8/documents/100078299">here</a> to submit an e-mail request; or complete the &quot;Avaya Access Request to Cancel Delegated Administration&quot; form.</td>
<td>Customer completes and submits the &quot;Avaya Access Request to Cancel Delegated Administration&quot; form.</td>
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</table>

**IMPORTANT:** By permitting either a Single Sign-On (SSO) User or a Partner’s LinkID to access your Sold To location(s), you are providing a third party with access to otherwise unavailable information about your Avaya supported installed equipment. Granting this access will provide the third party rights to Support Web site tools such as Create Service Request, Case Status, Parts Replacement, Manage Alarms, Administer Site Contacts, Downloads, Check Upgrade Entitlements and HealthCheck.
It is your responsibility to obtain assurances regarding the identity or identities of the individual(s) to whom you provide access through this tool. Please note that Partner LinkIDs are group-based, affording access to your information by any individual with that Partner's LinkID.

It is your responsibility to validate the identity or identities of the individual(s) to whom you grant access. It is also your responsibility to manage that access. TO THE MAXIMUM EXTENT PERMITTED BY LAW, AVAYA WILL NOT BE LIABLE FOR ANY DAMAGES OF ANY KIND, INCLUDING WITHOUT LIMITATION ECONOMIC DAMAGES, INDIRECT, SPECIAL, INCIDENTAL, PUNITIVE OR CONSEQUENTIAL DAMAGES OF ANY KIND (INCLUDING LOST PROFITS) RELATED TO ACCESS GRANTED TO YOUR ACCOUNT INFORMATION.

2. A customer has a Delegated Administrator set up for their Sold To but now needs to change it, where would they go?

Avaya Access Change Request for Delegated Administration

https://support.avaya.com/css/P8/documents/100078298

3. A customer has a Delegated Administrator set up for their Sold To but now needs to cancel it, where would they go?

Avaya Access Request to Cancel Delegated Administration

https://support.avaya.com/css/P8/documents/100155897

4. Is Delegated Admin (Avaya Access) permission necessary for an Authorized Avaya Partner to view a customer’s information in PLDS?

Yes, you would have to have Avaya Access permissions in order to access a customer’s account in PLDS. See Delegated Admin FAQ’s above for more information.
RFA and SAP Issues (for CMS and below)

1. I have a general question/issue with the RFA system itself (not the install base records), where do I go?

You will need to open an IT Ticket specifying the issue with RFA at https://partner-itss.avaya.com

2. RFA is showing the correct number of licenses but SAP install base seems to be showing a different number of licenses.

In this case you will need to get the SAP install base corrected. You can do this by adding licenses through a new request in GRT (if RFA is correct and showing more than SAP) or through a standard record corrections update through the following link:

For Partners:
https://avaya.my.salesforce.com/sfc/servlet.shepherd/document/download/06930000001zDBeAAM

NOTE: RFA records can be added to install base through GRT requests, PLDS records cannot.

3. How does a partner complete an RFA transaction and download a license file in relation to a specific order as advised by the Distributor?

The Tier 2 Dealer Partner RFA Job Aid can be located on the Partner Portal at:
CAT Tool Queries

The Customer Authorization Tool (CAT) automates permissions requests to end customers for Delegated Administration to grant Business Partners permissions for Quoting, Registration, Delegated Administration, and Right to Terminate Orders via an electronic authorization request process.

1. How do I associate my BP link ID with the sold to or End-user FL?

   This was earlier processed by submitting a delegation form to Avaya access team. Now The Customer Authorization Tool (CAT) is available globally to Business Partners to submit and track Delegated administration (Global) requests to end customers via an automated electronic authorization request process.

2. How to access the CAT tool?

   To access the Customer Authorization Tool, users must first sign in to the Avaya Support Site, and then select the Customer Authorization Tool link located under the Tools section of the support site footer or from the All Tools page.

3. What happens once the partner submits the request using CAT tool?

   Once the Business Partner submits the request, the end customer will receive an email notification that allows the customer to digitally sign and return the request. After which, the Customer Authorization Tool automatically updates Avaya Systems to add and expire permissions for access to: Quoting Tools and ACS Business Intelligence, Registration Tools, License Management, and Web Ticketing. Additionally, CAT allows partners to generate self-service reporting as a result of the approved permissions.

   Below are useful links to assist you with understanding the new CAT process details:
   [http://support.avaya.com/cat](http://support.avaya.com/cat)

Policies and User Guides:
CAT Customer Quick Reference - Approve/Decline Electronic Authorization Request
► Link: [https://downloads.avaya.com/css/P8/documents/100177749](https://downloads.avaya.com/css/P8/documents/100177749)

CAT BP Quick Reference - Initiating Electronic Authorization Request
► Link: [https://downloads.avaya.com/css/P8/documents/100177845](https://downloads.avaya.com/css/P8/documents/100177845)

CAT BP Quick Reference - Accessing Request Reports
► Link: [https://downloads.avaya.com/css/P8/documents/100177658](https://downloads.avaya.com/css/P8/documents/100177658)

Avaya Customer Authorization Tool - Business Partner User Guide
Key Records Changes Contacts and Teams

**NOTE:** Please follow the guidance provided in the scenarios documented below. Contacting the listed teams directly is not advised and will not speed up the corrections process.

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<th>Team</th>
<th>Responsibility/Scope</th>
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<td>Indirect: <a href="mailto:threestarmtc@avaya.com">threestarmtc@avaya.com</a></td>
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<td>OEFC</td>
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<td>Maintenance only cancellations (SAP)</td>
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<td>OEFC</td>
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<td>Distributor Support Advantage ordering and corrections (SAP)</td>
<td>Distributor SA orders: <a href="mailto:Bpccexpress@avaya.com">Bpccexpress@avaya.com</a> Corrections/Moves/Changes/ Returns: Partner would work with their distributor</td>
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<td>IT</td>
<td>PLDS Help Desk</td>
<td>PLDS Tier 2/3 Support</td>
<td>Partner: <a href="https://partner-itss.avaya.com">https://partner-itss.avaya.com</a> Phone: 1-866-AVAYAIT</td>
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<tr>
<td>GSS</td>
<td>Siebel Data Team</td>
<td>Siebel data corrections, and manual feeds/refreshes</td>
<td><a href="https://partner-itss.avaya.com">https://partner-itss.avaya.com</a></td>
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<td>Guidance and consultation on quoting</td>
<td><a href="mailto:ATAC@avaya.com">ATAC@avaya.com</a></td>
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