

## Enterprise Software Management Tool FAQ

**Q: What is the Enterprise Software Management Tool?**

A: Enterprise Software Management Tool is a new tool that allows Tridium customers easy access to Enterprise SMA management and ordering in Niagara Licensing.

**Q: How does a customer get access to ESMT?**

A: Tridium will extend the ESMA provider service to our direct customers.

**Q: How can I create a new proposal using ESMT?**

A: The user needs to go log into their Niagara Licensing account and go to Orders/Enterprise SMA and start the proposal creation.

**Q: What information do I need to create a proposal?**

A: As the new proposal can be created directly in Niagara Licensing you will need to know the customer that you are generating the proposal for, the start date that they require, the duration of the program, the list of host id's to be included in the proposal and portfolio name.

**Q: What is the minimum number of licenses that can be used to create a proposal?**

A: The minimum number of licenses to create a proposal is 5. The licenses can be chosen from the customer folders or their partners folders in Niagara Central.

**Q: Can I pick the start and end date of my ESMA plan?**

A: Yes. A single renewal date for 5 or more enrolled devices will be based on the anticipated start (order) date and the 1, 3, or 5 years SMA plan chosen.

**Q: How can the licenses be added to a proposal?**

A: There are 3 ways to add licenses to a proposal. Licenses can be imported from a project or a folder, to upload the hosts directly to the proposal and upload a CSV file with the licenses.

**Q: How can I see my submitted proposals?**

A: User can see their submitted proposals in the tab called Submitted Proposals.

**Q: Can I edit a submitted proposal?**

A: Yes, a user can edit a submitted proposal, add more licenses, change the duration of the proposal, and the start date.

**Q: Why is the Place Order button greyed out in Submitted Proposal?**

A: The Place order button is greyed out on a submitted proposal if there are no purchasable parts. The customer will not be able to submit a zero-dollar proposal.

**Q: Does Tridium still offer Grace period for proposal?**

A: Tridium offers up to a 364-day grace period per license. This only applies to licenses that are being enrolled in their initial proposal.

**Q: Is the Program Start Date a fix date?**

A: No. The customer can select a program start in advance up to 60 days.

**Q: Are any licenses NOT eligible for ESMT?**

A: Yes, AX JACEs, DEMO licenses, licences that are outside of Active status, and previously enrolled licenses are not eligible.