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## **Plan Switches**

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## **Overview**

Within the CloudBlue Offers section is **Plan Switches** (also known as **Switches**), which is located as an individual tab within a CloudBlue Offer details page. Switches allow Vendors to configure transition paths customers that are looking to upgrade, downgrade, or otherwise change their subscription from one plan to another.

## **Plan Switches**

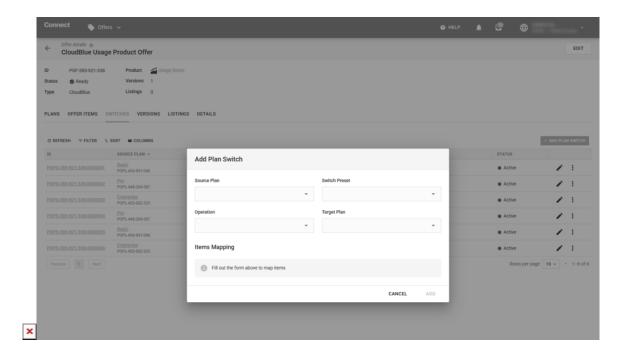
Within the Switches tab of the CloudBlue Offer details page, users can add and manage plan switches that are configured for that specific CloudBlue Offer.



Information

A **Switch Preset** in the Presets section, CloudBlue Offer Plans, and CloudBlue Offer Items should be configured prior to configuring any Plan Switches.

When click the **Add Plan Switch** button, users will be able to set up different configurations in order to map out the subscription plan change paths.



A **Plan Switch** is a vendor-defined, one-way path that specifies:

- Source Plan: The current plan the customer is subscribed to.
- Target Plan: The new plan the customer is moving to.



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- **Switch Preset:** The pre-defined business rules that dictate how the change is executed, particularly concerning **billing**, **prorating**, **and resource adjustments** in the distributor's CloudBlue Commerce system
- Operation: The type of change that can describe the switch from source plan to the target plan.

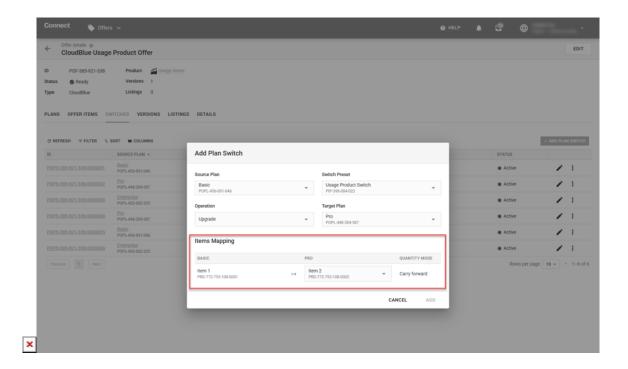


Notice

Individual Plan Switches are **one-directional** and **not defined bi-directionally**. This means that if a Plan Switch was configured for an **upgrade** path for Plan A to Plan B, a **separate** Plan Switch must be configured for a **downgrade** path for Plan B to Plan A

## **Items Mapping with Plan Switches**

Once the source plan, target plan, switch preset, and operation is selected for a Plan Switch, the **Items Mapping** section will be presented to the user. The Items Mapping section displays **all of the items** configured within the **Source Plan** and all of the items configured within the **Target Plan**.



Within this area, users can select the individual items in the source plan that corresponds with the related item in the target plan - creating the logical mapping at the item level. If there is no related item in the target plan, users can select 'No Item' in the mapping section.

Once the Item-to-Item mapping is configured, the customer's subscriptions can logically carry forward the item quantities within their existing (source) plan over to the appropriate items within the new (target) plan.