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SDG Software Access and Order Reporting Procedures for Distributors

The following article describes the steps and procedures required for accessing software (including the SmartOS-to-PlumeOS transition images) and reporting customer orders for Adtran's Service Delivery Gateway (SDG) products. The instructions for each step of the distribution process, including the checklists and particular information used to complete the process, are included in the following sections:

- [Step 1: Receiving Orders](#)
- [Step 2: Addressing Prerequisites for PlumeOS SDG Orders](#)
- [Step 3: Accessing the Latest Device Images](#)
- [Step 4: Flashing the Devices](#)
- [Step 5: Reporting Plume ID and Device MAC Addresses to Adtran](#)
- [Step 6: Reporting SDG Orders to Adtran Sales & Shipping](#)

Step 1: Receiving Orders

The following section outlines the customer ordering processes for SmartOS and PlumeOS SDG devices, as well as those that will use SmartOS-to-PlumeOS transition images and PPPoE software.

Customer Ordering Process for SmartOS and PlumeOS Devices

When customers place an order for SDG devices, they will fill out the ordering spreadsheet with the required part number for the devices they want to order. The part number will indicate the device and operating system desired by the customer, based on the last letter of the part number. An **S** at the end of the part number indicates a SmartOS device, and a **P** at the end of the part number indicates a PlumeOS device.

For example, the part numbers included in [Table 1](#) would be used to indicate the order of a SmartOS or PlumeOS 834-5 SDG, as well as the country in which the device would operate:

Table 1: New 834-5 Part Numbers (with indicated OS)

New Part ID	New Part ID Description
17600021F1S	834-5 SOS (NA)
17600021F1P	834-5 PLUMEOS DHCP (NA)
17600021F2S	834-5 SOS (UK)
17600021F2P	834-5 PLUMEOS DHCP (UK)
17600021F3S	834-5 SOS (EU)

Table 1: New 834-5 Part Numbers (with indicated OS)

New Part ID	New Part ID Description
17600021F3P	834-5 PLUMEOS DHCP (EU)
17600021F4S	834-5 SOS (AU/NZ)
17600021F4P	834-5 PLUMEOS DHCP (AU/NZ)

Once the ordering spreadsheet has been completed, the customer will submit the spreadsheet to their sales engineer, account team, or to the distributor. If the spreadsheet is submitted to the distributor, distributors should accept and use this to fulfill the customer's order.

Ordering PlumeOS SDGs

If a customer orders devices to be uploaded with PlumeOS, and current inventory is on SmartOS, SmartOS-to-PlumeOS transitions will be required to complete these orders. All transition orders will have a new part number structure that will include a **P** at the end of the part number, indicating the device should be shipped with a PlumeOS DHCP build by default. For example, part number **17600021F1P** indicates a request for an 834-5 SDG with PlumeOS DHCP software. More specifics about using the SmartOS-to-PlumeOS transition images are included in [Step 3: Accessing the Latest Device Images](#).

Ordering PlumeOS PPPoE Software

If the customer requires PlumeOS PPPoE software, they must first request the PPPoE build to be added to their firmware page in the Adtran support community via a [support ticket](#). Once the ticket has been submitted, Adtran support will post the requested PPPoE image to the customer's dashboard/firmware page in the support community and will also update the PPPoE customer list on the distributor's firmware page. After updating the customer's firmware page and the distributor's firmware page with the requested PPPoE build, Adtran will notify the distributor.

When customers order devices with PlumeOS, Adtran Operations or the distributor will verify that the customer is included on the PPPoE Customer list. If the customer appears on the list, then the generally available PPPoE PlumeOS software should be provided on the customer's devices, unless the customer specifies needing DHCP. If the customer does **NOT** appear on the list, then the generally available DHCP PlumeOS software should be provided.

Step 2: Addressing Prerequisites for PlumeOS SDG Orders

NOTE: *If you are shipping SmartOS devices, you can skip to [Step 3: Accessing the Latest Device Images](#).*

Once an order requiring PlumeOS on an SDG is received, distributors must ensure that all of these prerequisites have been addressed.

Prerequisites

Before shipping an SDG with PlumeOS on it, or flashing a SmartOS SDG device to PlumeOS with a transition image, several prerequisites must be verified:

1. Ensure that the serial number (and MAC address if possible) of the devices to be transitioned are recorded and that the customer has an active Plume account.

NOTE: *Plume IDs are created when a customer signs a Plume contract either through Adtran or a 3rd party. If the customer does not have a Plume account, direct them to Adtran Sales.*

2. Determine if a transition image is needed. Transition images should only be used for customer orders that request SDG part numbers ending with a **P** (for PlumeOS) and if your inventory is on SmartOS (or some piece of it is). If the device already has PlumeOS on it in inventory, it should only be sent out for **P** orders.

NOTE: *Until the updated part numbers including the **P** at the end are widely used, distribution should maintain good communication with customers, sales engineers, and account managers to ensure requests are properly understood. Sending a device with the wrong image to a customer will result in them being unable to deploy.*

3. There are two PlumeOS software options that can be requested by a customer: PlumeOS DHCP software (the default PlumeOS software), and PlumeOS PPPoE (only supported on select devices, and some customers require a custom image). Distributors must verify with the customer whether they require PlumeOS DHCP or PlumeOS PPPoE. PlumeOS PPPoE software requests should be noted in the customer's account and require further communication with Adtran support to ensure that the proper build is provided.
4. If your device inventories is already on PlumeOS, it can be shipped to the customer as-is unless the customer has a custom build (very rare) or the customer needs PPPoE and the current unit is on PlumeOS DHCP. In this case, the unit will need to be transitioned to a PPPoE build. To do this, work with Adtran support.

NOTE: *If you have questions about requirements for a device inventoried on PlumeOS, please contact Adtran support at www.adtran.com/submitcase to discuss the flashing/upgrading procedure.*

5. Make sure you have good notes of what the customer wanted, the devices that shipped, and the software that was requested on them, as it is required to report this information in [Step 5: Reporting Plume ID and Device MAC Addresses to Adtran](#).

Step 3: Accessing the Latest Device Images

Devices may need to be flashed before being shipped if the customer has a custom version of SmartOS or if they ordered PlumeOS and your inventory is on SmartOS (requiring a transition image). If it is determined that either of these images is required for flashing, verify that the image on the flashing station is the latest by either checking the [PlumeOS software release page](#) in the support community, or by verifying with Adtran Support or Operation teams.

As a distributor, you will have a [software page](#) for your customers in the Adtran support community, and instructions for finding the correct firmware for customers are included on that page.

SmartOS-to-PlumeOS transition images are posted and available on the distributor page. These are not customer-facing images, and are generally used for device flashing. They are different than the released GA images for upgrading PlumeOS to a later version.

NOTE: *You must have an account with the support community and be logged in to access these software images. If you are logged in and cannot access the transition images space, contact the [Adtran Customer Experience](#) team or your Adtran support personnel to gain access.*

In the event that the appropriate transition image is not available in Adtran's support community, then the Adtran Support or Operation teams will supply distributors with the appropriate transition image. A copy of this document will be provided with the requested transition image.

Device Part Numbers for Transitioned Devices

With the introduction of the new SDG part numbers, distributors can transition a device with an existing part number ending in "F1" to a device ending with either "F1S" (SmartOS device) or "F1P" (PlumeOS device) with the software upgrade. This means that if you have a unit with an F1 part number, and an order

comes for an F1S or F1P device, you can use the F1 unit. For rebates, tracking, and other order information, you must report to Adtran any F1 devices that were transitioned to F1S or F1P devices.

SmartOS Software for Distributors

Generally available SmartOS images will also be located in the Adtran support community on the distribution pages for each distributor.

Step 4: Flashing the Devices

Once the correct software needed for flashing has been obtained, distributors can begin flashing devices as part of normal operations. Make sure before, or as you flash, that you have the order data required for [Step 5: Reporting Plume ID and Device MAC Addresses to Adtran](#), including the device serial numbers, MAC addresses (if possible), and what software you flashed on the device. If no flashing is required, this information will still be needed (including whether the inventoried device you shipped was PlumeOS or SmartOS).

Step 5: Reporting Plume ID and Device MAC Addresses to Adtran

Any SDG device shipped (whether SmartOS or PlumeOS) must be reported to Adtran to complete order shipping for the devices. **If this is not done, the device may not work properly when the customer receives it.**

To report the item data to Adtran once a customer order has been placed, follow these steps:

NOTE: All SDGs shipped by distributors must be reported to Adtran within 24 hours of the order, whether they are PlumeOS or SmartOS devices.

1. Complete the [SDG SmartOS and PlumeOS Activation Template](#) with all the required information.
2. Save the file with the name in the following format: **<yy-mm-dd>-<customername>-<ordernumber>**.
3. Once the file is completed, submit it via email to sdg.activations@adtran.com.
4. When the upload template and all relevant information is received by Adtran, the Operations team will provide a confirmation to the distributor that the devices have been allocated to the proper Plume partner portal and/or customer ACS (if applicable) so that the devices are ready to be deployed by the customer. This confirmation signals the completion of the reporting process, and distributors should retain a copy of the confirmation and reporting document for their records, as well as provide the confirmed [SDG SmartOS and PlumeOS Activation Template](#) to the customer for their records.

Step 6: Reporting SDG Orders to Adtran Sales & Shipping

In addition to reporting orders to Adtran as per the current distribution method, you must also make sure to report the accurate device part number that was used, shipped, transitioned to, etc., and also make sure to keep a record of the original device part number for any rebates, etc.

The following section outlines the data required for distributors to report SDG orders (whether SmartOS or PlumeOS) to Adtran Sales and Shipping departments.

Distributors should inventory their hardware based on the hardware part numbers, which indicate the operating system. For example, the part numbers included in [Table 2](#) would be used to indicate the order of a SmartOS or PlumeOS 834-5 SDG, as well as the country in which the device would operate:

Table 2: New 834-5 Part Numbers (with indicated OS)

New Part ID	New Part ID Description
17600021F1S	834-5 SOS (NA)
17600021F1P	834-5 PLUMEOS DHCP (NA)
17600021F2S	834-5 SOS (UK)
17600021F2P	834-5 PLUMEOS DHCP (UK)
17600021F3S	834-5 SOS (EU)
17600021F3P	834-5 PLUMEOS DHCP (EU)
17600021F4S	834-5 SOS (AU/NZ)
17600021F4P	834-5 PLUMEOS DHCP (AU/NZ)

When the distributor receives an order from a customer, the customer will use the needed ordering sheet to indicate what hardware is needed. The distributor will then review the order and comply with what is being requested, following the transition image process as required and adhering to the processes for reporting the device serial number, MAC address (if possible), and Plume ID to Adtran.

Distributors will need to provide order details to Adtran for any rebates, RMAs, inventory additions, etc.