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Partner Center announcements

6/19/2020 • 3 minutes to read

Learn about important Partner Center updates. We update this information frequently, so be sure to check back often!

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June 2020 announcements

6/19/2020 • 4 minutes to read

This page details the announcements for Microsoft Partner Center for June 2020.

2020 announcements: January 2020 | February 2020 | March 2020 | April 2020 | May 2020 | June 2020

Billing frequency default changing from annual to monthly

Categories

- Date: 2020-06-17
- Type: Capabilities
- Status: Coming Soon

Summary

Billing frequency default is changing from annual to monthly in the Partner Center purchase experience.

Impacted audience

Cloud Solution Provider (CSP) direct providers and indirect providers

Details

Billing frequency setting determines how often the partner is billed for the services they have purchased. Partners see this setting in the **review** step when purchasing in the Partner Center catalog. This setting has defaulted to **annual** since annual billing was introduced for license-based services. Based on partner feedback the Partner Center team is changing this default starting June 17 from **annual** to **monthly** so it better aligns with what partners expect. Partners can change this before submitting a transaction on the review page or after a transaction from the manage subscription page. Realize that offers supporting only annual billing will continue to default to annual. This default change is only applicable to the Partner Center portal user experience, there are no changes to how the Partner Center APIs function.

We are hoping this change reduces the potential for partner to accidentally purchase annually billed subscriptions unintentionally.

Changes to Microsoft 365 F1

Categories

- Date: 2020-06-15
- Type: Offers/Markets
- Status: Now available

Summary

Microsoft 365 F1 will be updated with new services. A new offer will be released to replace the previous F1 on June 15.

Impacted audience

Cloud Solution Provider (CSP) direct providers and indirect providers

Details

Microsoft 365 F1 has been available in partner center since April 2020. Enhancements are being made by adding support for new services: Exchange Kiosk and MS Search capabilities. The new services will be provisioned automatically on any existing subscriptions based on the original F1 offers by the end of June. The original F1 offers will be replaced on June 15 with the new F1 offers (below) for new subscription purchases.

Original F1 offers:

OFFER NAME	OFFER ID	MATERIAL ID	PROVISIONING ID
Microsoft 365 F1	1ce4a4ba-65f7-49e7-bb28-d92d07d58b86	1PI-00005	M365_F1
Microsoft 365 F1 Trial	dd97e36a-f0df-4a9a-b461-625420656511	1PI-00006	M365_F1

Partners who wish to purchase new F1 subscriptions should use the below offer ids as of June 15. Partners can see these IDs in the Partner Center catalog. Partners leveraging the Partner Center APIs can use the below information as well.

New F1 offers:

OFFER NAME	OFFER ID	MATERIAL ID	PROVISIONING ID
Microsoft 365 F1	17b4a1d6-2c65-478e-a046-51cf40d25d76	1PI-00012	M365_F1_COM
Microsoft 365 F1 Trial	2e4e9424-06db-4d35-b2d8-3a1b0ef1dc63	1PI-00013	M365_F1_COMM

Call to action

Partners with the current Microsoft 365 F1 product have no action. Service plans for Exchange Kiosk and MS Search will be backfilled by the end of June on their existing service plans.

Partners who want to purchase Microsoft 365 F1 after June 15 should use the New F1 offers information to ensure they are purchasing the correct offer. The New F1 offers ID and other information will be updated in the July CSP price list update on July 1.

Next steps

Please share this information with appropriate contacts in your organization and familiarize yourself with the preview price list.

Windows Server software subscriptions Media Refresh for CSP

Categories

- Date: 2020-06-11
- Type: Capabilities
- Status: Now available

Summary

Microsoft announces the release of updated media to CSP on June 12, 2020 for Windows Server software subscriptions.

Impacted audience

All partners participating in the CSP Program

Details

Microsoft announces the release of updated media to CSP on June 12, 2020 for Windows Server software subscriptions. Updated Windows Server software subscriptions products include:

- Windows Server Standard, version 2004

Next steps

Share this information with the appropriate contacts in your organization.

New and end of life Microsoft Dynamics 365 and Power Platform offers and products

Categories

- Date: 2020-06-11
- Type: Offers/Markets
- Status: Coming Soon

Summary

On July 1, 2020, Microsoft will release new Dynamics 365 and Power Platform offers and products, and retire applicable Fraud Protection products.

Impacted audience

Partners offering Dynamics 365 through the Cloud Solution Provider (CSP) program worldwide, unless specified otherwise

Details

New Dynamics 365 Fraud Protection products:

- Microsoft Dynamics 365 Fraud Protection – Account Protection: This product helps merchants protect their online customer accounts by detecting and preventing fraudulent activities.
- Microsoft Dynamics 365 Fraud Protection – Loss Prevention: With this product, retailers can reduce shrinkage in their brick-and-mortar stores.
- Microsoft Dynamics 365 Fraud Protection – Purchase Protection: This product helps merchants protect their online transactions by detecting and preventing fraudulent activities.
- Microsoft Dynamics 365 Fraud Protection – Account Protection: This product helps merchants protect their online customer accounts by detecting and preventing fraudulent activities.

End of life Microsoft Dynamics 365 Fraud Protection products:

The following offers for Microsoft Dynamics 365 Fraud Protection will be removed from the July 1, 2020 price list:

- Microsoft Dynamics 365 Fraud Protection
- Microsoft Dynamics 365 Fraud Protection Addl Assessments

Microsoft Dynamics 365 Nonprofit fraud protection offers removed:

The following Microsoft Dynamics 365 Nonprofit Fraud Protection offers were removed from the price lists because they were added in error:

OFFER NAME	OFFER ID
Dynamics 365 Fraud Protection Addl Assessments (Nonprofit Staff Pricing)	867e1e4d-9338-41e8-9b6b-65ee01f3db8d
Dynamics 365 Fraud Protection (Nonprofit Staff Pricing)	b7743de8-1640-41a0-84b6-1da6e1d4d9db

Additional resources

- Microsoft Dynamics 365 Licensing Guide
- Microsoft Dynamics 365 Fraud Protection

Next steps

Please share this information with appropriate contacts in your organization, and familiarize yourself with the preview price list. Review the Dynamics CSP Offer – July 2020 Excel file for details on the impacted SKUs.

May 2020 announcements

6/19/2020 • 11 minutes to read

This page details the announcements for Microsoft Partner Center for May 2020.

2020 announcements: January 2020 | February 2020 | March 2020 | April 2020 | May 2020

Microsoft 365 A3 – Unattended License offer for Education correction

Categories

- Date: 2020-05-28
- Type: Offers/Markets
- Status: Coming Soon

Summary

Microsoft 365 A3 – Unattended License offer for Education was included in the preview price list that was published in error.

Impacted audience

Cloud Solution Provider (CSP) direct providers, indirect providers, and indirect resellers

Details

The following Microsoft 365 A3 – Unattended License offer for Education was included in the preview price list that was published on May 1, 2020 in error. The offer will be removed from the price list on August 1, 2020.

- Product family: M365 A3 Unatnd License EDU
- Offer display name: M365 A3unattended License for students use benefit
- Offer ID: e6b0a7bb-b33b-41b9-91df 1d31f182ab41

Next steps

Please share this information with the appropriate contacts in your organization, and familiarize yourself with the preview price list.

Active customers can renew their Enhancement Plan (EP) through the Cloud Solution Provider (CSP) program and receive online licenses

Categories

- Date: 2020-05-26
- Type: Offers/Markets
- Status: Coming Soon
- Learn more

Summary

Microsoft has enabled existing customers who are active on their EP to renew their EP through the CSP program and receive Dynamics 365 Business Central online licenses.

Impacted audience

CSP partners

Details

After careful consideration of the current environment and the potential business impact of COVID-19 on our Dynamics Price List (DPL) on-premises customers, Microsoft has created an offer enabling existing customers who are active on their EP to renew their EP through the CSP program and receive Dynamics 365 Business Central online licenses. Customers who choose to renew their EP through the CSP-EP renewal offer will receive the following benefits:

- A price point that is equal to the EP renewal quote Dual use and downgrade rights to their current on-premises DPL product (Dynamics 365 Business Central, on-premises, Dynamics NAV, Dynamics GP, and Dynamics SL)
- A monthly billing option (subject to CSP partner approval)
- Enhancement Plan benefits
- Dynamics 365 Business Central (cloud) licenses for migration to the cloud

Take note that the CSP-EP renewal offer is a new option for customers to renew their EP. Customers will continue to have the option to annually renew their EP via DPL for their on-premises solution.

These offers are available on the June 1, 2020 price list.

Customer eligibility

- **Licensing requirement:** Customers must purchase Dynamics 365 Business Central (cloud) licenses with an annualized total that is greater than or equal to their EP renewal amount.
- **Minimum license requirement:** Customers must meet and maintain the licensing requirement for the term of their CSP subscription to prevent a lapse or the expiration of their EP in DPL. Those who either fail to meet the eligibility requirements or who cancel their CSP subscription must pay their prior year's EP costs in addition to lapsed fees (as stated in the Customer Services and Support Policy) to continue to receive EP benefits for their on-premises DPL solution. Microsoft will conduct monthly reviews to ensure customer compliance. If the customer is not compliant, their partner will be contacted to work with their customer to resolve deviations from eligibility requirements.
- **Lapsed exception:** To account for the challenges that businesses are facing due to the current global health crisis, Microsoft is allowing exceptions for customers who lapsed on their EP between January 1, 2020 and May 31, 2020. They can re-enroll their EP through the CSP-EP renewal offer without penalty but must license the CSP-EP renewal offer by July 31, 2020.

Offer details

- **Licensing program:** CSP
- **Product:** Dynamics 365 Business Central (online)
- **Segment:** Commercial/Public Gov only
- **Offer length:** June 1, 2020 to June 30, 2021
- **Offer duration:** one-year initial agreement and two optional one-year renewals (three years total), or one-year subscription with one-year auto-renewal option
- **Offer availability:** Offer subject to CSP country availability
- **Price:** The CSP-EP renewal offer provides a price point that is 60% lower than the standard commercial list price. For example, the CSP-EP renewal offer list price for Dynamics 365 Business Central (online) Premium user is $40 compared to the $100 list price for the CSP standard commercial price list.
- **Licensing requirement:** Customers must purchase Dynamics 365 Business Central (online) licenses with an annualized total that is greater than or equal to their EP renewal amount. Partners must ensure their customers' continued compliance throughout the year. Customers who don't remain active on CSP will revert to EP and will be responsible for all lapsed fees.
- **Additional users:** Customers who meet the licensing requirement and require additional licenses to cover all their named users may request for additional users. No-cost licenses will be provided via Microsoft Online Subscription Program promotional codes. When redeeming those codes, customers must provide a credit card for identification purposes but the card will not be charged. The request for additional users must be made

within 60 days of initial CSP license purchase.

Partner discount

For this promotion, Microsoft has provided the customer's partner an additional discount from the partner's net price. The partner is required by Microsoft to pass on the additional discount to the customer by reducing the Microsoft product resale price by an amount equal to or greater than the discount. Please take note of the following:

- Partners will not receive a margin for the additional user licenses provided at no charge.
- Current PartnerSource Business Center (PSBC) partners need to opt their customers out of autobill to prevent automatic renewal of the next year's EP plan.

Order process

To take advantage of this offer, the following CSP and EP steps are required:

1. Purchase Dynamics 365 Business Central online services SKU(s).

OFFER NAME	OFFER ID	PFAM
Dynamics 365 Business Central Premium Cloud Add-on from DPL	80031106-370e-4090-af6c-48d8394c3357	Dynamics 365 Business Central Premium
Dynamics 365 Business Central Essentials Cloud Add-on from DPL	8742366a-c26a-4bf0-86e8-6e2c72d9b919	Dynamics 365 Business Central Essential
Dynamics 365 Business Central Device Cloud Add-on from DPL	ce497fb2-0764-4761-b07a-081b85a390c9	Dynamics 365 Business Central Device
Dynamics 365 Business Central Team Members Cloud Add-on from DPL	5d628802-49ce-4c84-954f-1a2170de1ac7	Dynamics 365 Business Central Team Members

2. For Solution Provider Agreement (SPA) partners: Submit a case to Operations to add the EP to the customer’s account. Cases for Operations can be created through PSBC. The following case information is needed:

   - Copy of CSP order confirmation
   - Customer’s authorized number, account number, or Top Parent Identifier (TPID) that’s needed to identify the correct account
   - Partner organization’s PSBC account number (if applicable) and the Partner One ID

   For those who are not SPA partners (with no access to PSBC): Submit the case information to one of the following email addresses based on your customer’s country location:

   - US, Canada, or Latin America: mbsorder@microsoft.com
   - Europe, Middle East, or Africa: mbsquery@microsoft.com
   - Asia Pacific Operations Center (APOC), China, Japan, or India: mbslques@microsoft.com

At the end of the CSP-EP renewal offer period

Customers have two options:

- They can discontinue their online transition to Dynamics 365 Business Central online services, pay for their EP renewal, and remain on the DPL version of their product.
- Those who have not fully migrated to Dynamics 365 Business Central online services, if eligible, may choose to continue to renew the CSP-EP renewal offer for two additional years (three-year total).

Next steps

Review the following resources for additional information:

- Dynamics 365 Business Central product information
- Dynamics 365 Business Central Licensing Guide (general licensing information/dual use rights)
- Dynamics 365 Business Central online availability

Refer to these resources for additional information on moving to online services:

- Transform your business by migrating to the cloud
- Transitioning to Microsoft Dynamics 365 Business Central
- Migrate on-premises data to Business Central cloud
- Upgrade to Dynamics 365 Business Central

Questions?

If you're an SPA partner, you can submit a case to Operations via PSBC. If you're an SPA partner (with no access to PSBC), you can submit a case to one of the following email addresses, according to your customer's country location:

- US, Canada, or Latin America: mbsorder@microsoft.com
- Europe, Middle East, or Africa: mbsquery@microsoft.com
- APOC, China, Japan, or India: mbslques@microsoft.com

Americas Operations Center address change

Categories

- Date: 2020-05-15
- Type: Capabilities
- Status: Now available
- Learn more

Summary

The Americas Operations Center has a new address effective today, May 15, 2020.

Impacted audience

Anyone communicating and transacting with the Americas Operations Center

Details

Effective today, May 15, 2020, the Americas Operations Center has a new address. Please see the table for the address change.

Make sure to update existing material with the previous Reno address. Because this is only an address change, there's no need to re-sign existing contracts.

Always check the Microsoft portals for the latest templates, as these might have been updated.

PREVIOUS CONTACT INFORMATION	CONTACT INFORMATION EFFECTIVE MAY 15, 2020
6100 Neil Road Reno, NV 89511	6880 Sierra Center Parkway Reno, NV 89511

This is an address change only, and there's no need to resign existing contracts. You should always refer to the latest templates on Microsoft portals as these may have been updated.

Next steps

Please ensure all systems, correspondence, and documentation are updated with the new contact information by May 15, 2020.

Questions?

Please contact Support for questions, queries, or more information.

Microsoft is ending sales of the Microsoft Kaizala Pro standalone SKU

Categories

- Date: 2020-05-07
- Type: Capabilities
- Status: Coming soon
- Learn more

Summary

Effective July 1, 2020 the Microsoft Kaizala Pro offering will not be available to new or renewing customers. The service will continue to be accessible through other Microsoft365 and Office365 licenses.

Impacted audience

Partners selling Microsoft Kaizala Pro standalone SKU

Details

Microsoft is in the process of adding Kaizala Pro capabilities into Microsoft Teams, ultimately replacing the Microsoft Kaizala service. You can find information on the Kaizala features coming to Microsoft Teams here.

Effective July 1, Microsoft is ending sales of the Kaizala Pro standalone SKU for new or renewing customers. Existing customers can continue to access the service through their current license.

Kaizala and Teams will continue to be accessible as part of the Microsoft365 and Office365 SKUs listed below:

Microsoft 365 for Business including:

- Microsoft 365 Business Basic
- Microsoft 365 Business Standard
- Microsoft 365 Business Premium

Microsoft 365 for Frontline including:

Microsoft 365 F3 (formerly Microsoft 365 F1) and Office 365 F3

Microsoft 365 for Enterprise including:

- Office 365 E1
- Microsoft 365 E3 and Office 365 E3
- Microsoft 365 E5 and Office 365 E5

Microsoft 365 for Education, including:

Microsoft 365 A1 and Office 365 A1 Microsoft 365 A3 and Office 365 A3 Microsoft 365 A5 and Office 365 A5

This change is being implemented to assure new and renewing customers are licensed to easily transition from Kaizala to Teams.

Below is a list of impacted SKUs. There will be no new sales of these SKUs. Current customers can remain on the SKU and continue to access the service and will not be charged in the next business cycle.

PRODUCT FAMILY	SKU	DESCRIPTION	PROGRAM
Microsoft Kaizala Pro (KAIZALA_STANDARD)	AAA-51195	Microsoft Kaizala Pro	CSP
Microsoft Kaizala Pro (KAIZALA_STANDARD)	AAA-51196	Microsoft Kaizala Pro (Government Pricing)	CSP
Microsoft Kaizala Pro (KAIZALA_STANDARD)	AAA-51191	Microsoft Kaizala Pro	Direct
Microsoft Kaizala Pro (KAIZALA_STANDARD)	AAA-51193	Microsoft Kaizala Pro (Government Pricing)	Direct
Microsoft Kaizala Pro (KAIZALA_STANDARD)	AAA-52249	Microsoft Kaizala Pro (Government Pricing) Trial	Direct
Microsoft Kaizala Pro (Office 365 Offer) (KAIZALA_STANDARD_EAP)	AAD-28929	Microsoft Kaizala Pro (Office 365 Offer)	CSP
Microsoft Kaizala Pro (Office 365 Offer) (KAIZALA_STANDARD_EAP)	AAD-28928	Microsoft Kaizala Pro (Office 365 Offer)	Direct
Microsoft Kaizala Pro for faculty (KAIZALA_FACULTY)	AAA-51201	Microsoft Kaizala Pro for faculty	CSP
Microsoft Kaizala Pro for faculty (KAIZALA_FACULTY)	AAA-51197	Microsoft Kaizala Pro for faculty	Direct
Microsoft Kaizala Pro for faculty (Office 365 Offer) (KAIZALA_FACULTY_EAP)	AAD-28931	Microsoft Kaizala Pro for faculty (Office 365 Offer)	CSP
Microsoft Kaizala Pro for faculty (Office 365 Offer) (KAIZALA_FACULTY_EAP)	AAD-28930	Microsoft Kaizala Pro for faculty (Office 365 Offer)	Direct
Microsoft Kaizala Pro for students (KAIZALA_STUDENT)	AAA-51202	Microsoft Kaizala Pro for students	CSP
Microsoft Kaizala Pro for students (KAIZALA_STUDENT)	AAA-51198	Microsoft Kaizala Pro for students	Direct

Next steps

We will announce this change to Kaizala customers on June 1.

In the meantime, you can learn more about the Microsoft365 and Office365 offerings that Kaizala and Teams will continue to be accessible in at these sites: Microsoft 365 for Business, Microsoft 365 for Enterprise, Microsoft 365 for Education.

Questions?

Please contact Partner Center Support for questions, queries, or more information.

New Robotic Process Automation (RPA) offers available in Education programs

Categories

- Date: 2020-05-01
- Type: Capabilities
- Status: Now Available
- Learn more

Summary

New offers for RPA in Education programs released on May 1, 2020.

Impacted audience

Partners offering Dynamics 365 through the Cloud Solution Provider (CSP) program worldwide (unless otherwise specified).

Details

On May 1, 2020, Microsoft released and expanded the availability of the new RPA offers into the Education programs. Visit the landing page to learn more about RPA. Review the Dynamics CSP Offer Updates–May 2020 for new SKU information. Visit the Changes to Authorized Education partner program in CSP to learn more about the changes to the Authorized Education partner program in CSP.

Additional resources

FY20 PowerApps and Flow Licensing Updates Microsoft Dynamics 365 Licensing Robotic Process Automation (RPA) FY20 What's New Webinar Series FY20 Technical Readiness Webinar Series

Next steps

Please share this information with appropriate contacts in your organization.

Questions?

Please contact Support for questions, queries, or more information.

April 2020 announcements

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This page details the announcements for Microsoft Partner Center for April 2020.

2020 announcements: January 2020 | February 2020 | March 2020 | April 2020 | May 2020

Updated promotions for Office 365

Categories

- Date: 2020-04-30
- Type: Capabilities
- Status: Coming Soon
- Learn more

Summary

On May 4, 2020 (12:01am UTC), Microsoft will introduce new promotions for Office 365 E1 and Microsoft 365 Business Basic, replacing the current 6-month trial of Office 365 E1 for new customers.

Impacted audience

All partners transacting through the Cloud Solution Provider (CSP) program. This promotion is available for net new commercial customers only.

Details

As part of Microsoft's commitment to customers during these unprecedented times, a 6-month trial of Office 365 E1 was made available in CSP for new customers (see definition below). On May 4, 2020, Microsoft will introduce new discount promotions for Office 365 E1 and Microsoft 365 Business Basic to offer these products at no cost for the first 6 months of their monthly-billed annual subscription, for new customers.

These promotions will replace the current Office 365 E1 trial offer, and differ in the following ways:

- Partners will transact annual Office 365 E1 or Microsoft 365 Business Basic SKUs leveraging a CSP Promo that applies a 100% discount for the first 6 months, rather than a unique 6-month trial SKU. Learn more about CSP promotions.
- Ordering will be technically restricted to "new customers only", rather than the Office 365 E1 trial, which was restricted to new customers through written policy only. Learn more by reviewing the Microsoft Partner FAQ.
- For SMB customers, Microsoft 365 Business Basic will be included in this promotion. This ensures that partners can start customers with less than 300 seats in the right product family with Microsoft 365 for business. Customers currently licensed with the Office 365 E1 trial (available until May 4, 2020) will remain on their current plan – this change impacts net new customers only.

Definition of New customers

New customers eligible for this promotion are:

1. Net new customer tenants
2. Existing customers who don't have a currently paid or recently canceled (within the last 30 days) subscription in their tenant for any of the products defined in Microsoft Partner Frequently Asked Questions (FAQ) guide.

Additional resources

- Visit the Partner Remote Work Resources Center to learn more about Secure Remote Work.
- Learn more about these changes in the related Partner FAQ.

Next steps

Please familiarize yourself with the above changes, the May 2020 price list, and share this information with all appropriate contacts in your organization.

Questions?

For any further question about these offers, please check your relevant Yammer communities and contact your representative in the Microsoft account team.

Azure Reservations New Customer Self-Serve Capability with Partner Permission

Categories

- Date: 2020-04-29
- Type: Capabilities
- Status: Now Available
- Learn more

Impacted audience

Partners in the Cloud Solution Provider program

Summary

Microsoft strives to provide flexibility and options to make it easier for customers to buy and consume products and services from both Microsoft and our partners.

As part of our continued commitment, we are introducing a new customer self-serve capability for Azure reservations that simplifies the customer purchase experience and further enhances the usage of Azure reservations through partners in CSP.

Azure reservations are a great way to buy Azure services at a discounted rate. With this new capability, partners have the choice to give customers permission to buy their own resources with agility within the existing Azure subscriptions that they have already purchased for their customers.

Here are some details on how the capability works:

- Partners can choose to enable the capability at the individual customer account level and give purchase control to the customer.
- By default, the capability is set to "off" and partner chooses to enable and grant customer permission.
- Partners will be able to verify and manage the customer's purchase within Partner Center.
- APIs can be used to enable customer permission at scale to automate the process.

Next steps

1. Start to help your customers to buy their own Azure reservations using the new capability.
2. Review the resources available in this collection that provide more information – including technical documentation, a partner experience walkthrough, and a customer experience walkthrough.

Microsoft reversed the CSP EUR price for Microsoft 365 E3.

Categories

- Date: 2020-04-24

- Type: Offers/Markets
- Status: Now Available
- Learn more

Summary

Microsoft fixed an error in the EUR pricing for Microsoft 365 (M365) E3 on April 1, 2020. However, on April 22, 2020, Microsoft reverted the price temporarily to help partners during these extraordinary circumstances.

Impacted audience

All partners transacting M365 E3 through the EUR price list in the Cloud Solution Provider program.

Details

Earlier in 2020 we discovered an error in the EUR pricing for Microsoft 365 E3 in CSP: the net price was lower than it should have been. We scheduled a system update to correct the price, amending the price point for the offer on April 1, 2020.

Although the pricing is in error, making the correction and increasing prices at this time isn't appropriate given the extraordinary circumstances. Therefore, we are temporarily returning to our previous, lower net pricing, effective April 22, 2020. All invoices will immediately reflect the previous lower pricing, whereas the price list will display the lower pricing from the May 2020 price list, for the foreseeable future.

Partners should not use the M365 E3 EUR pricing listed on the April 2020 price list; rather, please refer to the pricing listed on the March 2020 price list.

We appreciate all the great work that our partner community is doing during this unprecedented time.

Next steps

Share this information with all appropriate contacts in your organization.

Questions?

If you need support with your operations with Microsoft, please contact Support for questions, queries, or more information.

REMINDER: Activation of Security Safeguards for Partner Center Transactions in CSP

Categories

- Date: 2020-04-23
- Type: Capabilities
- Status: Coming Soon
- Learn more

Target partner audiences

- All partners participating in the Cloud Solution Provider (CSP) program
- All Control Panel Vendors (CPV)
- All Advisor partners

Summary

Greater and ongoing security and privacy safeguards are among our top priorities, and we continue to help partners protect their customers and tenants. In 2019, we introduced mandatory security requirements. All partners participating in the Cloud Solution Provider program, Control Panel Vendors, and Advisors should implement the requirements to stay compliant.

Recently, we successfully completed activating security safeguards for admin-on-behalf-of (AOBO) capabilities for all partner tenants, protecting their businesses and customers from identity-theft related incidents.

To further help defend partners and customers, **starting May 1, 2020, we will begin the activation of safeguards for Partner Center transactions in CSP**. The activation of the additional security safeguards will mean that partners will be requested to use multi-factor authentication (MFA) for any transactions in CSP using Partner Center user experience or APIs, preventing unauthorized access and protecting their customers and tenants from security incidents related to identity theft. Learn more details here.

Next steps

- **If you haven't activated the recommended security requirements to protect your tenant and users**, please do so immediately to stay compliant and avoid any business disruptions in managing customers or transacting in CSP. Partners who do not implement the security requirements may put their participation in the CSP program at risk.
- Indirect providers must implement these security requirements for their own businesses and work with resellers to ensure they implement the requirements as well using this email template. We will also directly reach out to your resellers via email communications.
- Visit the Partner Center security requirements status page to identify your progress and key actions to take. Work with your global admin to check the progress of your security requirements regularly for each of your tenants.
- If you are using a Control Panel Vendor (CPV) solution, please consult with your CPV.

Additional resources

Review these resources to assist you with implementing the security requirements.

- Check out the step-by-step guide to implement partner security requirements.
- See the frequently asked questions and answers regarding partner security requirements.
- View the Security requirement status checking guide.
- Access additional resources at the Implement partner security requirements collection.
- Bookmark the Partner Center Security Guidance community group.

For additional assistance with technical issues, please submit a support ticket. Please forward this email to other individuals in your organization who may need to take action to implement these security requirements.

Thank you for your partnership and commitment to ensuring our ecosystem runs on trust.

> **NOTE**
>
> If you are using baseline policies and haven't transitioned to the security defaults policy or other MFA implementation options, please transition as soon as possible referencing the key resources here.

Change log

- April 3, 2020: Original announcement.
- April 23, 2020 Update: Microsoft will be directly reaching out to resellers via email.

Microsoft Customer Agreement Standard Amendments have moved

Categories

- Date: 2020-04-21
- Type: Capabilities
- Status: Now Available

Impacted audience

- All CSP partners.

Summary

Microsoft Customer Agreement Amendments previously available on the pricing and offers page in Partner Center have moved. The Amendments are now available for Partners to download from the Microsoft Customer Agreement support topic in Partner Center (via secure login only) and do not require prior Microsoft approval to be presented to customers. This includes the FSI Amendment and other standard Amendments to the Microsoft Customer Agreement.

Although the location has changed, the Amendments themselves have not changed.

Microsoft Customer Agreement Standard Amendments

- WW (English) - Financial Services Amendment
- Argentina (English) - Data Processing Amendment for Argentina
- Argentina (Spanish) - Data Processing Amendment for Argentina
- Germany (English) - Professional Secrecy Amendment for Germany
- Germany (German) - Professional Secrecy Amendment for Germany
- USA (English) - Microsoft Online Services HIPAA Business Associate Amendment

How can a partner access the Amendments? To access the Amendments, follow these steps:

- Step 1: From the left-hand navigation, select Support and create a support request
- Step 2: Type in "Microsoft Customer Agreement" to find the topic
- Step 3: Select it, click "Review Solutions"
- Step 4: Click on the amendment you need

Alternatively, sign into partner center and go to this URL.

Additional resources

For more information on the Microsoft Customer Agreement, visit the collection here.

Announcing Microsoft Defender Advanced Threat Protection (MDATP) for Servers offer available for CSP on April 1, 2020.

Categories

- Date: 2020-04-17
- Type: Offers/Markets
- Status: Now Available

Summary

The Microsoft Defender ATP for Servers SKU will be available for CSP on April 1, 2020 priced at $5/OSE/month.

Impacted audience

This new SKU will be available for Microsoft Defender Advanced Threat Protection (ATP) customers with a minimum number of 50 licenses (MDATP, Win E5, M365 Security, M365 E5) who want Microsoft Defender ATP for server endpoint protection.

Details

Microsoft's offer for endpoint protection on servers (on-premises and in Azure) has been Azure Security Center Standard. Azure Security Center Standard costs $15 per Server Operating System Environment per month. We have heard from customers that they would like to have an option for reduced functionality at a lower price point that can be purchased in a manner consistent with E5 for endpoint server protection. In response to customers' needs, we are introducing the new Microsoft Defender ATP for Servers SKU to address the customer demand and we expect the majority of customers using this SKU to be covering servers on-premises, however it is not restricted to that use-case. Azure Security Center Standard remains the hero SKU with an extended set of threat protection capabilities and partners should lead conversations with customers with the Azure Security Center Standard hero SKU particularly for those with Azure workloads. However, now Microsoft can offer endpoint protection at a lower price point to enable Microsoft partners to be more competitive in the endpoint protection market with the Microsoft Defender ATP for Servers SKU.

Microsoft Defender ATP customers with a minimum number of 50 licenses can use the new Microsoft Defender ATP for Servers SKU for server endpoint protection at $5 per Server Operating System Environment per month. For enhanced cloud workload protection for servers, Microsoft Defender ATP for Servers SKU customers can upgrade to Azure Security Center Standard SKU for an additional $10 per Server OSE per month and benefit from features like adaptive application controls, just in time virtual machine access, file integrity monitoring, and unified experience for protecting Azure resources and additional value such as future integration with Azure Arc.

There are no changes to Azure Security Standard currently. Azure Security Center Standard continues to provide an integrated user-experience to protect not just server virtual machine end-points but also the broad set of Azure resources including IoT, Azure Kubernetes Services (Preview), Azure Container Registry (Preview), Key Vault (Preview), App Services, SQL, and Storage.

MDATP for Servers SKU owners need to upgrade to Azure Security Center (ASC) Standard with the $10 step-up SKU to benefit from ASC Standard features.

Product Offer

MDATP for Servers 350158a2-f253-4ea3-988e-eef9d1b828cf

Next steps

Please share this information with the appropriate contacts in your organization. This could be shared 1:1 with customers where appropriate.

We will have more public information later in the year to share with your customers.

Additional resources

- Visit the Microsoft Defender Advanced Threat Protection page for more information.
- Read the Azure Security Center documentation for more information regarding Azure Security Center.

Questions?

If you have questions related to your operations with Microsoft, please contact support through your Partner Dashboard.

Change log

- March 23, 2020 Original Publication date: Pre-Launch Communication
- April 17, 2020 Update: Reflect Now Available

Americas Operations Center address change

Categories

- Date: 2020-04-14
- Type: Capabilities
- Status: Coming Soon
- Learn more

Summary

The address for the Microsoft Americas Operations Center in Reno, Nevada is changing, and all systems, correspondence, and documentation will require an update.

Impacted audience

Anyone communicating and transacting with the Americas Operations Center

Details

Effective May 2020, the Microsoft Americas Operations Center will have a new address.

Any existing material with the current Reno address will need to be updated. All partners, customers, and suppliers should immediately update their systems with the new address and ensure that all updates are complete by May 2020.

Please see below for details of the change of address.

EXISTING CONTACT INFORMATION	NEW CONTACT INFORMATION
6100 Neil Road Reno, NV 89511	6880 Sierra Center Parkway Reno, NV 89511

This is an address change only, and there's no need to resign existing contracts. You should always refer to the latest templates on Microsoft portals as these may have been updated.

Next steps

Please ensure all systems, correspondence, and documentation are updated with the new contact information by May 15, 2020. Other actions may be required closer to this date.

Questions?

Please contact Support for questions, queries, or more information.

Commercial Microsoft 365 E3 - Unattended License will be relaunched on May 1, 2020

Categories

- Date: 2020-04-10
- Type: Capabilities
- Status: Coming Soon

Summary

To ensure the best partner and customer experience, Microsoft will relaunch Commercial M365 - Unattended License offers on May 1, 2020. There will be no impact on price and capabilities.

Impacted audience

All partners transacting through the Cloud Solution Provider worldwide.

Details

Microsoft planned to launch Commercial M365 - Unattended License offers on April 1, 2020, as per the preview price list. After extensive testing, we learned that users may encounter unexpected behaviors during provisioning.

Therefore, we're relaunching on May 1, 2020. The relaunch won't impact pricing, or the value included in the offer. We're also actively planning to extend this offer to Education and Government customers on May 2020, allowing you to expand your business and find new opportunities to keep delivering great value propositions.

Offer IDs impacted

The original offer ID created for this launch was: Microsoft 365 E3 for unattended license: ec3ac2d1-dd66-475a-

95c8-59c32c472778

Please check our announcements in May and our production price list on May 1, 2020, to find the updated offer ID.

Additional background on Unattended License

Microsoft 365 E3 Unattended License enables the use of Office applications with service or other non-user accounts, as is typical during automation process execution.

This new license can provide a new option for working with productivity data and tools, when even product APIs like Microsoft Graph are not meeting your automation needs.

Next steps

Please share this information with all appropriate contacts in your organization and check your announcements on partner.microsoft.com for future updates.

Questions?

For any further question about these offers, please contact your representative in the Microsoft account team or check your relevant Yammer communities.

New opportunities for your Microsoft 365 Education customers with Microsoft 365 A5 Compliance

Categories

- Date: 2020-04-10
- Type: Offers/Markets
- Status: Now Available
- Learn more

Summary

On April 1, 2020, Microsoft A5 Compliance add-on received additional value with no change in pricing. Additionally, we introduced three mini suites to address new user scenarios

Impacted audience

All partners transacting Education offers through the Cloud Solution Provider (CSP) program.

Details

Greater value, same price

On April 1, 2020, Microsoft added new value to Microsoft 365 A5 Compliance offers with no change in pricing. The additional value includes

- Advanced Auditing
- Insider Risk Management
- Communication Compliance
- Records Management
- Microsoft Cloud App Security (MCAS)

Please refer to the following offer IDs in the price list:

- Microsoft 365 A5 Compliance for faculty | 9f8f1756-f56f-421e-901a-e80e857cadb8
- Microsoft 365 A5 Compliance for students | f0f9f37a-539f-4f44-aef6-e37070149499

Microsoft 365 A5 Compliance mini suites

As of April 1, 2020, Microsoft partners can also offer the following mini-suites. These add-on offers provide specific subsets of Microsoft 365 A5 Compliance value, providing additional customer growth opportunity for specific use cases and customer needs.

- Microsoft 365 A5 Information Protection and Governance
- Microsoft 365 A5 Insider Risk Management
- Microsoft 365 A5 eDiscovery and Audit

Please refer to the following offer IDs in the price list:

- Microsoft 365 A5 Information Protection and Governance for faculty | 0514821c-f7d8-41fc-8c94-59e59d3d6034
- Microsoft 365 A5 Information Protection and Governance for students | a91941ff-79a2-4476-a064-c5a6922e0bbd
- Microsoft 365 A5 Insider Risk Management for faculty | 2ed867d7-fd08-474f-8353-502b500d1c9b
- Microsoft 365 A5 Insider Risk Management for students | 2ba72571-c0f0-4373-b999-d08cc1bb5edd
- Microsoft 365 A5 eDiscovery and Audit for faculty | 5d7c0030-c2e9-4a8c-bed3-5a6dbf1e4449
- Microsoft 365 A5 eDiscovery and Audit for students | 6c6e2e9c-2156-4f7c-9c78-f94393b750fe

Sunsetting Office 365 Advanced Compliance and Azure Information Protection (AIP) Plan 2

In addition to the changes above, Microsoft is sunsetting Office 365 Advanced Compliance and Azure Information Protection (AIP) Plan 2. From April 1, 2020, these offers are no longer available on the price list for net new customers, and auto-renew has been turned off for existing customers.

Please discuss the offers with your customers to understand the best solution for them, either through the mini-suites, or the broader Microsoft 365 A5 Compliance offer.

You may find below a list of offer IDs impacted:

- Office 365 Advanced Compliance Buy_CSP_CRTY_e6860eee-5288-46ec-811b-d8900785fc90
- Office 365 Equivio Analytics for eDiscovery Buy_MSP_6b648c1e-f472-46c0-8379-09f50a3315e0
- Office 365 Advanced eDiscovery Buy_MSP_FAC_4d1f0e32-0972-499c-b1fc-673576d54f12
- Office 365 Advanced eDiscovery Buy_MSP_STU_4d30d083-68d4-454d-9fc0-8fd42281564b
- Azure Information Protection Premium P2 Buy_CSP_CRTY_03c4a7a5-d45d-4a7e-8225-f32c87ab916f
- Azure Information Protection Premium P2_Buy_MSP_0962a210-418f-4d36-ba9c-4f01c673f57c
- Azure Information Protection Premium P2_Buy_MSP_FAC_d10fa413-a055-4196-b18f-a014908c7208
- Azure Information Protection Premium P2_Buy_MSP_STU_edf471ca-1ff8-4378-a057-276ef3b430ba

Next steps

Please familiarize yourself with the price list and share this information with all appropriate contacts in your organization.

Questions?

For any further questions about these offers, please contact your representative in the Microsoft account team If you have any issues with your Microsoft operations, please open a Service Request.

Office 365 E1 Trial now available to CSP partners

Categories

- Date: 2020-04-07
- Type: Offers/Markets
- Status: Now Available

Summary

As of April 1, 2020, a new Office 365 E1 Trial is available to purchase in CSP. The offer has been made available on the price list to address the recent increase in remote working.

Impacted audience

All partners transacting in the Cloud Solution Provider (CSP) program.

Details

People and teams around the world are moving to remote working arrangements. Partners are quickly adjusting to support their customers and in turn, we're adjusting too.

We're excited to announce a new Office 365 E1 Trial in CSP, created specifically to support the partner response to the growing needs for remote and smart working. This trial offer is available from April 1, 2020 until further notice.

CSP Office 365 E1 Trial is now available in addition to the current Microsoft Teams CSP Trial (which has no Exchange and 2 GB of storage). The new trial will have equivalent functionality to the Office 365 E1 trial, and it will provide 6 months of free use for up to 3,000 users. Available through CSP, this offer allows partners to initiate and manage the trial experience.

Offer ID

- Display name: Office 365 E1 Trial
- Trial offer ID: c0c1386f-4a95-466b-8974-cefd71414def

This offer has been made available immediately to purchase on the production price list from April 1, 2020.

Next steps

- Review the CSP Office 365 E1 trial FAQ
- Learn more about Microsoft Teams trials and offers
- Explore the latest remote work guidance for partners
- Check out additional trial assets for partners

Check the Partner Center and partner resources regularly as we will be publishing more guidance in the coming week.

Questions?

If you have questions about these offers, check your relevant Yammer communities. For other issues, please submit a ticket at Partner Center Support.

Dynamics 365 - New products released

Categories

- Date: 2020-04-06
- Type: Offers/Markets
- Status: Now Available
- Learn more

Summary

On April 1, 2020, Microsoft released additional Dynamics 365 products. Additional new offers for Dynamics 365 will be released on May 1, 2020. Impacted audience

Partners offering Dynamics 365 through the Cloud Solution Provider (CSP) program. These updates relate to all locations worldwide, unless otherwise specified.

Details

On April 1, 2020, Microsoft released new products for Dynamics Business Central Online, and Dynamics Biz Apps and Power Platforms. Additional new offers for Dynamics 365 will be released on May 1, 2020.

Dynamics Business Central Online Offers

On April 1, 2020, the following changes were made to the Dynamics Business Central Online offers.

- New Dynamics Business offers for Business Central in CSP
- Update Sales Pro and Customer Service Pro Attach SKUs

Dynamics Biz Apps and Power Platform Products

On April 1, 2020, the following changes were made to the Dynamics Biz Apps and Power Platform products.

- First-party Robotic Process Automation (RPA) offers
- New BOT product for RPA offers

Please see the specific changes in the Dynamics CSP Offer Updates-Mar 2020 file here.

Robotic Process Automation

On May 1, 2020, Microsoft will be expanding the availability of new RPA offers into the Education programs. To learn more about changes to the Authorized Education Partner Program in CSP click here. This is a link to an existing collection on Partner Center).

Please review the attached **Dynamics CSP Offer Updates-May 2020 file** here in the related download section for new SKU information.

eCommerce changes

Effective April 1, 2020, eCommerce offers have display name and/or PFAM changes on the final price sheets. The changes are outlined in the table below.

DISPLAY NAME AND/OR PFAM CHANGE	MARCH 1, 2020	APRIL 1, 2020
Display Name	eCommerce Ratings and Reviews	Commerce Ratings and Reviews
Display Name	eCommerce Recommendations	Commerce Recommendations
Display and PFAM	Dynamics 365 Commerce Cloud Scale Unit Basic	Dynamics 365 Commerce Scale Unit Basic – Cloud
Display and PFAM	Dynamics 365 Commerce Cloud Scale Unit Standard	Dynamics 365 Commerce Scale Unit Basic - Cloud
Display and PFAM	Dynamics 365 Commerce Cloud Scale Unit Premium	Dynamics 365 Commerce Scale Unit Premium - Cloud

Additional resources

- Dynamics 365 Home Page
- Mixed Reality Apps Guide Home Page
- Biz Apps Fraud Home Page
- FY20 PowerApps and Flow Licensing Updates
- Microsoft Dynamics 365 Licensing
- Dynamics 365 and Power Platforms-Availability, data location, language, and localization content
- FY20 What's New Webinar Series
- FY20 Technical Readiness Webinar Series

- Robotic Process Automation (RPA)

Next steps

Please share this information with appropriate contacts in your organization. For more details on the licensing updates and the value proposition, please familiarize yourself with our readiness content in the "Additional resources" section, and on PartnerSource.

Questions?

For help strictly relating to your operations with Microsoft, please reach out to support.

Now available - Operations readiness resources in one place

Categories

- Date: 2020-04-03
- Type: Capabilities
- Status: Now Available
- Learn more

Impacted audience

- All CSP partners

Summary

The Operations Readiness resource location is now live, providing partners with one location for operations readiness resources, making it easier than ever to find the latest updates and key operational readiness resources across all Microsoft channels and programs. The CSP Program Updates Resource gallery and Microsoft Readiness content has been moved to the Operations Readiness resource location and the URL pointing to the CSP Program Update Resource Gallery (https://partner.microsoft.com/resources#/) has been updated to point to the Operations Readiness resource location.

Please review the updated FAQ here for further details on this new experience and some areas that will continue to evolve over the next few weeks.

Your feedback is important to us! As you use the new Operations Readiness location, we invite you to leave feedback so we can continue to improve your experience. You can do this by using the **Was this page helpful? Yes | No** feedback tool available at the bottom of each page.

Microsoft is streamlining the way we communicate and provide readiness materials across all Microsoft programs. We are introducing one Operations Readiness resource location on the Microsoft partner website at https://partner.microsoft.com that will combine assets from the CSP Program Updates Resource Gallery and the Microsoft Readiness site.

With one location for operations readiness resources, it will be easier than ever for partners to find the latest updates, critical announcements, and key operational readiness resources across all Microsoft channels and programs. With a single sign-on experience and enhanced search, filter, and sort capabilities partners can easily access, consume, and prepare their businesses to successfully transact and do business with Microsoft in the way that works for them.

Expanding on the success of the CSP Program Updates Resource Gallery:

The operations readiness resource location on partner.microsoft.com will function much like the current CSP Program Update Resource Gallery with some notable enhancements and modifications, including:

- **Program Pages:** Finding the most recent document updates for a specific program will be made easy with pages that are pre-filtered to content only for that program.
- **Powerful gallery search:** Content filters will make finding content across programs and content faster and

simpler, for example, CSP.

- **Announcements:** Finding the latest announcements and most recent document updates for a specific program will be easier with pages that are pre-filtered to content only for that program. There will be a program page for CSP as well however CSP announcements will continue to be posted in Partner Center.
- **New location:** Once the new location for operations resources is live on partner.microsoft.com, the Microsoft Readiness site and the CSP Program Updates Resource Gallery will no longer be accessible and will redirect users to the new operations resource location. Partners will be able to leverage content program filters to filter to CSP or other specific program resources.
- **Content expanded:** All recent and relevant content from the Microsoft Readiness site and the CSP Program Updates Resource Gallery will be relocated to the new operations readiness location meaning content for more programs will now be housed in one location.

Next steps

What should you do to prepare?

- **Learn more** about the new Microsoft partner website location for operations readiness resources by reviewing the updated readiness materials at the gallery collection Coming soon - Operations readiness resources in one place.
- **Attend an April partner community call** where you can learn more about the new experience and ask questions: https://globalpbocomm.eventbuilder.com/GlobalCSP

Questions?

Please contact Support for questions, queries, or more information.

Change log

- April 3, 2020: Updated to Now Available
- March 23, 2020: CSP Program Updates Resource Gallery transition to Operations Readiness resource location updated to April 3, 2020
- March 9, 2020: 30-Day notice, updated readiness materials
- February 14, 2020: Original publication date

Microsoft 365 Business Voice available to CSP partners from April 1, 2020

Categories

- Date: 2020-04-01
- Type: Offers/Markets
- Status: Now Available
- Learn more

Summary

Microsoft 365 Business Voice, a cloud-based phone system built for small and medium businesses, will be available in the countries listed here from April 1, 2020.

Impacted audience

- All CSP partners operating in these countries.
- Partners in Australia should check our guidance below.

Details

On April 1, 2020, Microsoft will introduce Microsoft 365 Business Voice to additional geographies. Two offers will be available: Microsoft 365 Business Voice, and Microsoft 365 Business Voice Without Calling Plan (using direct routing). Both offers will be available in the U.S.

Customer value proposition

Microsoft 365 Business Voice is a cloud-based phone system for businesses of up to 300 users. It provides the ability to make and receive calls from any phone number in Microsoft Teams. Together with Teams, it delivers an all-in-one communication solution combining calling, chat, and meetings.

Microsoft 365 Business Voice simplifies and streamlines productivity and communications into a single application that works wherever businesses do: on computers, smart phones, and desk phones. The benefits of Microsoft 365 Business Voice include:

- All-in-one communication. Transform how work gets done by unifying calling, chat, meetings, calendar, and email.
- Easy and intelligent calling. Communicate with more flexibility, ease, and intelligence, so you can stay connected.
- Delivered from the Microsoft cloud. Work confidently with a reliable and secure cloud-based solution.

Microsoft 365 Business Voice is available as an add-on to the following plans:

- Office 365 Business Essentials, Business Premium, F1, A1, E1, A3, E3
- Microsoft 365 Business, F1, A3, E3

Partner value proposition

Partners can monetize this opportunity by:

- Enabling the phone system with Call Queues/Auto-Attendant, assessing the network quality, or configuring Direct Routing and audio conferencing.
- Offering user adoption/training services to secure organization readiness and start using the modern communication tool, Microsoft Teams.
- Supporting and monitoring the customer environment with managed services like quality reporting, device management, and user support.

Microsoft 365 Business Voice (United States, Canada, United Kingdom)

On April 1, 2020, Business Voice with calling plans will be available for purchase in the United States, following our launch in the United Kingdom and Canada in November 2019.

An add-on offer will also be available for those customers seeking international calling capabilities.

- Microsoft 365 Business Voice: 9f9f2c7b-c961-402b-9421-8e3c9207eeb3
- Microsoft 365 International Calling Plan for SMB: c01a89e5-d246-42d6-b21a-f4a1e9b04f56

Microsoft 365 Business Voice Without Calling Plan (70+ countries)

Alternatively, from April 1, 2020, you can purchase the Business Voice Without Calling Plan offer, which includes phone system and audio conferencing. This offer is available in all countries listed here.

- **United States only:** Microsoft 365 Business Voice Without Calling Plan: 39d77d0f-eb8f-4ebc-b618-692e1cc59c8f
- **Rest of the world:** Microsoft 365 Business Voice Without Calling Plan: cc69a07c-8c51-457f-bb2a-f21a62d6bede

Please engage with your local subsidiary to understand how to benefit from this offer.

Additional guidance for partners in the United States and Puerto Rico

In the US and Puerto Rico, Business Voice is a tax-inclusive offer. The price billed to Partners and paid by Partners to Microsoft includes applicable US telco taxes and fees. In other markets, taxes will be applied per the normal invoicing process. Please talk to your legal counsel about remitting taxes, before deciding to mark-up Business Voice. If Business Voice is marked up, the Partner needs to a way to remit the telco taxes. Otherwise, partner would not be paying the incremental tax on the mark-up, resulting in tax violations. Microsoft provides additional CSP incentives to partners for Business Voice in the US, to compensate for potential lack of margin.

Guidance for partners in Australia

Partners in Australia should be aware that the offer Microsoft 365 Business Voice Without Calling Plan will not be available on the production price list on April 1, 2020 – despite being available on the preview price list in March 2020. Thank you for your understanding.

Further countries

Over time, we hope to bring Microsoft 365 Business Voice to all countries where Office 365 and Microsoft 365 are available.

Next steps

- Check our partner gallery to know more about the value proposition of this offer, as well to establish, and consolidate your Microsoft Teams practice: Microsoft 365 Business Voice availability in CSP
- Please familiarize yourself with the preview price list and share this information with all appropriate contacts in your organization.
- Please engage with your local One Commercial Partner team to know more about this offer and how to go to market effectively

Questions?

For any further questions about these offers, please contact your representative in the Microsoft One Commercial Partner team.

Change log

- M365 Business Voice available for US customers: April 1, 2020
- M365 Business Voice without calling plan launch: April 1, 2020
- Original publication date: November 5, 2019

Act now: Partners are now required to have accepted the Microsoft Partner Agreement.

Categories

- Date: 2020-04-01
- Type: Capabilities
- Status: Now Available
- Learn more

Impacted audience

All CSP partners.

April 1, 2020 Update As of 31 January 2020, all partners in the Cloud Solution Provider (CSP) Program should have accepted the agreement for all of their transacting CSP tenants. We previously communicated that the next phase of implementation for the agreement would begin in April 2020. To help prevent any disruption to business, we have decided to extend the next phase of implementation beyond April 2020. We have received feedback from some of our Cloud Solution Provider Partners that they have experienced issues accepting the MPA. Based on these circumstances, we are working toward ensuring Microsoftresources are in place to support partners who have been having trouble accepting the agreement.

Summary

As of January 31, 2020, all partners in the Cloud Solution Provider program should have accepted the Microsoft Partner Agreement, including Indirect Resellers, to ensure no disruption of their ability to create new customers or place new orders for existing customers in the CSP program. Acceptance of the Microsoft Partner Agreement is now required for all partners in the CSP program.

Starting in April, 2020:

- Direct Bill partners and Indirect Providers who have not accepted the Microsoft Partner Agreement will not be able to place new orders and will be limited to managing existing subscriptions only.
- Indirect Resellers who have not accepted the Microsoft Partner Agreement will no longer be eligible to act as partner of record on new orders.

If you have not done so already, please complete the following actions immediately.

Actions for direct bill partners:

1. Inform key stakeholders in your organization to review the Microsoft Partner Agreement.
2. Accept the Microsoft Partner Agreement on the CSP Overview page on Partner Center using Global Admin credentials.

More information and resources are available via the CSP Gallery page here.

Actions for indirect providers

1. Inform key stakeholders in your organization to review the Microsoft Partner Agreement.
2. Accept the Microsoft Partner Agreement on the CSP Overview page on Partner Center using Global Admin credentials.
3. Use the API to verify your indirect reseller's signing status.
4. Assist your indirect resellers with completing their actions below.

More information and resources are available via the CSP Gallery page here.

We are aware of technical issues encountered by Indirect Providers testing the transactional enforcement capabilities. Those issues will be resolved by April, 2020.

Actions for indirect resellers

1. Onboard to Partner Center as an indirect reseller and accept the Microsoft Partner Agreement as part of the onboarding process.
2. If you have previously onboarded to Partner Center as an indirect reseller, accept the Microsoft Partner Agreement on the Partner Center dashboard page using Global Admin credentials. Indirect reseller specific information and resources are available via the reseller CSP Gallery page here.

Change log

- January 14, 2020: Original announcement published.
- January 24, 2020: Webinar Series invites updated for w/c 27th January 2020.
- January 31, 2020: Webinar Series invites updated for February 2020.
- February 5, 2020: Microsoft Partner Agreement acceptance is now required.
- March 4, 2020: Webinar Series invites updated for March 2020.
- April 1, 2020: ** Update** - To help prevent any disruption to business, we have decided to extend the next phase of implementation beyond April 2020.

March 2020 announcements

6/19/2020 • 11 minutes to read

This page details the announcements for Microsoft Partner Center for March 2020.

2020 announcements: January 2020 | February 2020 | March 2020 | April 2020 | May 2020

Microsoft will rename Office 365 small and medium business (SMB) offers from April 21, 2020

Categories

- Date: 2020-03-30
- Type: Offers/Markets
- Status: Coming Soon

Summary:

On April 21, 2020, Microsoft will rename all Office 365 SMB offers. This is a great opportunity to communicate our value and lineups more consistently to our customers.

Impacted Audience:

All Cloud Solution Provider (CSP) partners.

Details

On April 21, 2020, we will be changing the names of our Office 365 SMB offerings:

- Office 365 Business Essentials will become **Microsoft 365 Business Basic**. This is our entry-level offering for customers looking for basic cloud services.
- Office 365 Business Premium will become **Microsoft 365 Business Standard**. This is our core offering for SMBs, including cloud services and cloud-connected desktop apps.
- Microsoft 365 Business will become **Microsoft 365 Business Premium**. This remains our Hero SKU for high-end SMBs looking for additional security, device and identity value.

We will also adopt **Microsoft 365 Apps** as the new name for our two Office client subscriptions:

- Office 365 Business will become Microsoft 365 Apps for business
- Office 365 ProPlus will become Microsoft 365 Apps for enterprise

Impact on your operations

There are no changes to prices, features or business model. There are also no naming changes to Office 365 Enterprise SKUs and Microsoft 365 Enterprise SKUs. All SKU and offer renaming will automatically flow into subscription names in the Partner Center.

Partner opportunity

This renaming allows customers to better understand the incremental value included in each offering, allowing you to better position upsell opportunities for your accounts.

It also addresses name inconsistencies in the Office 365 / Microsoft 365 Business plans. Similarly, this renaming clearly separates core Office applications, sold through the new Microsoft 365 Apps for business / enterprise, from broader plans.

Additional resources

Please visit our M365 Partner landing page to know more.

Next Steps

Please familiarize yourself with the price list and share this information with all appropriate contacts in your organization.

Pay particular attention to your colleagues in Sales Operations and Marketing, as they may need to update product collaterals to reflect the new names.

Questions?

For any further question about these offers, please check your relevant Yammer communities and contact your representative in the Microsoft account team. Let's do great work together.

New Partner Center capabilities to help direct bill partners complete their transition to indirect reseller

Categories

- Date: 2020-03-20
- Type: Capabilities
- Status: Now Available
- Learn more

Summary:

New capabilities are available to help customers transfer their CSP subscriptions from direct bill tenants to indirect provider tenants.

Impacted Audience:

Direct bill partners transitioning to indirect resellers, and indirect providers.

Details

As of August 31, 2018, Microsoft updated the enrollment requirements for direct bill partners in the Cloud Solution Provider (CSP) program. As the CSP program continues to grow, we want to ensure that all partners are positioned to address increasing customer demand accordingly.

New capabilities to transfer customers' CSP subscriptions from direct bill tenants to indirect provider tenants are available. This new functionality will ease the transition for direct bill partners to indirect resellers, helping to accelerate business growth within the program.

Review the CSP offers page for more information.

> **NOTE**
>
> Transfers will only support Licensed-based subscriptions and Azure subscriptions. You will need to manually transfer your Azure plan and Commercial marketplace purchases. Please note this involves canceling and renewing the subscriptions outlined in the following documents: Azure plan and Commercial marketplace. Since server subscriptions and Azure reservations are a one-time purchase, these will not need to be transferred to an indirect provider tenant. Visit the CSP offers page for more information.

Additional Resources:

- Transition from Cloud Solution Provider (CSP) direct bill partner to CSP indirect reseller help article
- Direct bill to indirect reseller deck

Next Steps

Review the available resources and share with the appropriate stakeholders in your organization.

Questions?

Please contact Support for questions, queries, or more information.

New Microsoft 365 entry-level SKU for Firstline Workers - CSP

Categories

- Date: 2020-03-10
- Type: Offers/Markets
- Status: Coming Soon

Summary:

On April 1, 2020, Microsoft will introduce new offers in the Microsoft 365 F-SKU line-up, providing better value to Firstline Workers and growth opportunities for our partners.

Impacted Audience:

All partners transacting through Enterprise Agreement (EA), Enterprise Agreement Subscription (EAS), and the Microsoft Products and Services Agreement (MPSA).

This change impacts Commercial and Government users only.

Details

On April 1, 2020, Microsoft will introduce a new entry-level SKU and reposition the Microsoft 365 Enterprise SKU line-up.

Rebranding O/M365 F1: What are currently known as Office / Microsoft 365 F1 will become Office / Microsoft 365 F3. All customers will be backfilled with additional value.

New entry-level SKU: The new entry-level SKU will be called Microsoft 365 F1 and will offer value tailored to Firstline Workers, extended security and identity value to all workers. This offer includes Teams, SharePoint Online, Yammer Enterprise, Stream, EMS E3, and read-only access for Office Web / Mobile Apps.

These changes will provide better value for First line Workers and allow partners to tap into a significant user growth opportunity. **Check our additional documents here to know more about the value proposition and your next steps.**

CHANGE TIMELINE	CHANGE
March 1, 2020	The new entry-level SKU is published in the preview price list, with the temporary name of Microsoft 365 F0
Throughout March	Microsoft will publicly disclose this change. Meanwhile, you should create your marketing collaterals and ready your internal sales teams.
April 1, 2020	- On the production price list, the new entry level-SKU has been renamed Microsoft 365 F1 (was M365 F0). - On the production price list, what was previously known as O/M365 F1 has been renamed O/M365 F3. - On our backend, customers that were on Office 365 F1 and Microsoft 365 F1 up to March 31, 2020, have been automatically transitioned to Office and Microsoft 365 F3 plans. - Additional value is backfilled in the plans, as per section below.

Additional value will be backfilled in your M365 F1, O/M365 F3 plans on April 1, 2020.

Office:

- Microsoft Teams now includes full A/V and meeting rights in F-SKUs (to be reflected in the Product Terms in March)
- Power Platform increases to 2000 steps and ability to create – only available in M/O365 F3
- Microsoft Planner will be included in O/M365 F-SKUs by default

Windows:

- Rights to Key Management System activation included in the default Product terms
- Rights to previous versions of Windows included in the default Product terms
- Rights to on-prem virtualization included in the default Product terms

EMS:

- E3 in both Microsoft 365 F1 and F3 SKUs

Next steps

Please familiarize yourself with the preview price list. Please keep in mind that on April 1, 2020, Microsoft 365 F0 will be rebranded Microsoft 365 F1. Conversely, Microsoft 365 F1 will be rebranded Microsoft 365 F3.

Check our content here to know more about the value proposition and create all marketing collaterals you may need to accelerate sales and create new opportunities.

Share this information with all appropriate contacts in your organization.

Questions?

For any further question about these offers, please contact your representative in the Microsoft account team.

Updated: Changes to Education Customer Validation in CSP

Categories

- Date: 2020-03-10
- Type: Capabilities
- Status: Now Available
- Learn more

Impacted Audience:

Direct bill and indirect provider CSP partners transacting Education/Academic offers

Summary:

New functionality notice: Partners now can correct customer account information and resubmit for vetting for cases where the customer was denied. For full details see step-by-step instructions on how to do this in the updated Creating an education customer in Partner Center guide.

As part of our continued commitment to compliant business practices for customers and partners, Microsoft introduced an automated validation of all new Education customer account submissions to verify customer eligibility. Since we launched the automated validation capability, we have noticed an increasing number of vetting issues because incorrect or invalid customers data was entered. To help streamline the process and minimize any delays in the vetting process, please follow the instructions below:

- To reduce any delays in the investigation of vetting failures for legitimate entries, please ensure to enter customer data that is as **accurate** and as **complete** as possible. Do not enter in test/dummy data.
- Review the **Creating an education customer in Partner Center guide** and **Add new customer page** documenting what is required when creating a new education customer in Partner Center. Both be found in the resource gallery below.

> **NOTE**
>
> The **Creating an education customer in Partner Center guide** now includes step-by-step instructions for how to correct customer information and resubmit if the customer has failed vetting.

Next Steps/Additional Resources:

CSP Program Updates Resource Gallery collection: Changes to Authorized Education Partner program in CSP

Change Log:

- Original publication date: December 19, 2019
- To contact support if new partner selling education offers removed (no longer required): January 13, 2020
- Added February 2020 update: February 10, 2020
- Notice of new ability to correct customer account information and resubmit for vetting: March 10, 2020

Microsoft 365 Cloud Service Provider updates – April 2020

Categories

- Date: 2020-03-09
- Type: Offers/Markets
- Status: Coming Soon

Summary:

In April 2020, Microsoft is expanding the breadth and value of Microsoft 365 plans.

Impacted Audience:

All partners transacting through the Cloud Solution Provider (CSP) program.

Details

On April 1, 2020, Microsoft is expanding the breadth and value of Microsoft 365 plans, providing further customer opportunities and enhancing the partners' go-to-markets.

Microsoft 365 F-SKU line-up: New offers and repositioning

Microsoft will introduce a new level-entry SKU for Frontline Workers, providing a massive user growth opportunity to partners. Consequently, we are also repositioning the old M365 F1 plan. It will now be called M365 F3 and will provide extra value by default.

Learn more by checking other resources here

Microsoft 365 for unattended scenarios

Microsoft 365 E3 - Unattended license enables the use of Office applications with service or other non-user accounts, as is typical during automation process execution. We still recommend automation processes should leverage product APIs like Microsoft Graph when possible. However, this new license can provide a new option for working with productivity data and tools.

Please check the following offer in the preview price list: Microsoft 365 E3 for unattended RPA: ec3ac2d1-dd66-475a-95c8-59c32c472778

Teams Premium Messaging

A new Premium Messaging SKU will be available as an add-on to Microsoft 365 and Office 365 offers that include paid Teams.

Premium Messaging enables:

- Unlimited priority notifications for users. Teams messages tagged as **urgent** will notify recipients every 2 minutes, for a period of 20 minutes.
- Targeted communications in chats, channels and tasks.

Please check the following offer in the preview price list: Advanced Collaboration, 61fde0d0-4b08-4900-b30a-e2e70e0447ba.

Next Steps

Please familiarize yourself with the preview price list and share this information with all appropriate contacts in your organization.

Questions?

For any further question about these offers, please contact your representative in the Microsoft account team.

New Dynamics 365 products will be released on April 1, 2020

Categories

- Date: 2020-03-02
- Type: Offers/Markets
- Status: Coming Soon

Summary:

Effective April 1, 2020, Microsoft will release additional Dynamics 365 products.

Impacted Audience:

Partners offering Dynamics 365 through the Cloud Solution Provider (CSP) program worldwide

Details

Effective April 1, 2020, Microsoft will release new products for Dynamics Business Central Online, and Dynamics Biz Apps and Power Platform.

Dynamics Business Central Online offers

The following changes will be made to the Dynamics Business Central Online offers, effective April 1, 2020:

- New database (DB) offers for Business Central in CSP
- Update Sales Pro and Customer Service Pro attach SKUs

Dynamics Biz Apps and Power Platform products

The following changes will be made to the Dynamics Biz Apps and Power Platform products, effective April 1, 2020:

- First-party Robotic Process Automation (RPA) offers
- New bot product for RPA offers

Please see the specific changes in the file called "Dynamics CSP Offer Updates–Mar 2020" here

Additional resources:

- Dynamics 365 home page
- Mixed Reality Apps Guide home page
- Biz Apps Fraud home page
- FY20 PowerApps and Flow Licensing updates
- Microsoft Dynamics 365 Licensing
- Dynamics 365 and Power Platform–availability, data location, language, and localization content

Next Steps

- Please share this information with the appropriate contacts in your organization.
- If you want more details on the licensing updates and the value proposition, please familiarize yourself with our readiness content listed in the **Additional resources** in the previous section and on PartnerSource.
- If you need support relating to your operations with Microsoft, please reach out to Support.

Now Available Microsoft Defender Advanced Threat Protection (MDATP) Standalone for CSP.

Categories

- Date: 2020-03-02
- Type: Offers/Markets
- Status: Now Available
- Learn more

Summary:

Microsoft is removing the Windows E3 license pre-requirement from Microsoft Defender Advanced Threat Protection (MDATP), allowing MDATP for all supported client devices.

Impacted Audience:

- All partners participating in the CSP program

Details

Microsoft is removing the Windows E3 license pre-requirement from Microsoft Defender Advanced Threat Protection (MDATP). CSP partners will be able to purchase MDATP for all their supported client devices, regardless of their Windows E3 license ownership.

To enable this business model, Microsoft has launched a standalone offer for CSP, and it is now available.

In addition, there is no change to existing Windows E5, Microsoft 365 E5 Security, and Microsoft 365 E5 offers as those offerings will continue including MDATP.

Product Offer:

- Microsoft Defender Advanced Threat Protection e2dcab13-1365-417a-b624-4901e2b252f5
- Microsoft Defender Advanced Threat Protection for Education 1a7a1bcc-c7bf-4c6b-b55d-d79a6e3bb3ee

Next Steps

- Please share this information with the appropriate contacts in your organization.
- For more information regarding Microsoft Defender Advanced Threat Protection, please read: https://www.microsoft.com/microsoft-365/windows/microsoft-defender-atp?ocid=cx-blog-mmpc

Questions?

If you have questions related to your operations with Microsoft, please contact support through your Partner Dashboard at: https://partner.microsoft.com/en-us/pcv/servicerequests/create.

Change Log

- February 6, 2020 Original publication date: Pre-Launch Communication
- March 2, 2020 Updated publication date: GA Launch (Go Live)

February 2020 announcements

6/19/2020 • 14 minutes to read

This page details the announcements for Microsoft Partner Center CSP for February 2020.

2020 announcements: January 2020 | February 2020 | March 2020 | April 2020 | May 2020

New process for submitting tax withholding credit requests

Categories

- Date: 2020-02-25
- Type: Offers/Markets
- Status: Now Available
- Learn more

Impacted audience

- CSP Partners submitting tax withholding credit requests.

Summary:

A new process for submitting tax withholding credit requests is now available. This process enables partners who owe a remaining balance on past invoices to submit clearance requests if they have already paid taxes to their local tax authorities. Partners can now do submit tax withholding credit requests from the Billing page in Partner Center. Previously, tax withholding credit requests were submitted by contacting Support on Partner Center.

If after submission further edits are required, Microsoft will send requests back to the partner for resubmission and the status of the request will be updated on the Billing page. At this point, a partner may choose to edit the existing request or submit a new one. Once a request has been approved, the next invoice will be updated to reflect the amount is no longer owed.

Additional resources:

Documentation and further details can be found in the CSP Gallery collection.

Change Log

- February 25, 2020: Original announcement published

New Microsoft Customer Agreement acceptance capability available now.

Categories

- Date: 2020-02-25
- Type: Capabilities
- Status: Now Available
- Learn more

Impacted Audience:

- Direct bill and indirect providers in the CSP program

Summary:

Partners can now invite both new and existing customers to review and accept the Microsoft Customer Agreement directly in an authenticated Microsoft portal (Microsoft 365 Admin Center).

This new capability means partners now have two options when presenting the Microsoft Customer Agreement to their customers:

- **Option 1:** Partners can present the new Microsoft Customer Agreement to customers in much the same way that they previously did for the Microsoft Cloud Agreement. After a customer has reviewed and accepted the agreement, partners must attest to the customer's acceptance with Microsoft. The Partner Center Dashboard, Partner Center API, and .NET SDK have been updated to support a partner confirming customer acceptance of the Microsoft Customer Agreement in this way.
- **Option 2 (New feature):** Partners can invite customers to an authenticated Microsoft portal (Microsoft 365 Admin Center) to view and sign the agreement. This option enables simplified agreement management, faster implementation, and less work for partners as once the customer accepts directly within the Microsoft 365 Admin Center, it confirms approval of terms.

Partners can learn if customers have accepted the new agreement using new functionality available in the Partner Center Dashboard or through this new API.

As of February 1, 2020, a partner's confirmation of their customers' acceptance of the Microsoft Customer Agreement is required to make new orders for any CSP offers in all regions under Microsoft Public Cloud. CSP partners are no longer able to make new purchases, including changes to seats or renewals of existing purchases, without confirming their customer has accepted the Microsoft Customer Agreement via one of these options.

> **NOTE**
>
> Auto-renewals are not impacted.

Next steps:

- If a customer has not accepted the Microsoft Customer Agreement, it is mandatory as of February 1, 2020, for new orders. Partners must either attest. Option 1: that customers have accepted the agreement, or Option 2: invite customers to accept the agreement directly through Microsoft 365 Admin Center.
- Partners using APIs for the existing Microsoft Cloud Agreement attestation need to revise their existing implementation with updated API.
- Train your agents and resellers on the new agreement terms, and on presenting the new agreement and validating customer acceptance.

Additional Resources:

Partners can view the Microsoft Customer Agreement content available on this CSP Gallery page. Including:

- A Microsoft Customer Agreement in CSP guide (updated)
- Microsoft Customer Agreement FAQs (updated)

Change Log:

- February 11, 2020: Original announcement posted
- February 25, 2020: Announcement updated with this new API for getting the status of a customer's direct acceptance.

License-based price list March preview updated

Categories

- Date: 2020-02-19
- Type: Offers/Markets

- Status: Now Available

Summary:

To support the up and coming release of Microsoft Defender recently announced, we have updated the license-based March preview pricing file to include these two offers, previously left off the March preview file posted on 2020-01-31:

Offer: Microsoft Defender Advanced Threat Protection Offer ID: e2dcab13-1365-417a-b624-4901e2b252f5

Offer: Microsoft Defender Advanced Threat Protection for Education Offer ID: 1a7a1bcc-c7bf-4c6b-b55d-d79a6e3bb3ee

These two new offers are the only changes made to the preview file. The March preview was updated on 2020-02-14, 1PM PST.

February license-based pricing issues

Below are the known issues in the February price list and offer list matrix. I will have an update Monday 2/10 on the ERP issues previously reported and also on when the below issues can be addressed. But for February:

Below are offers in the February license-based price list but not the offer list matrix.

The following offer is not available and will be removed from future price lists:

Offer: Microsoft 365 Phone System - Virtual User Trial Offer ID: `b9a1d576-43fd-464b-8ad9-4b1eafc5db77`

These offers are available but not in the offer list matrix, please consult previous offer list matrix from January 2020 for offer matrix details.

Offer: Pro Direct Support for Dynamics 365 Unified Operations Offer ID: `09dc6202-bfbb-44fb-9c87-b12c90084010`

Offer: Pro Direct Support for Dynamics 365 Unified Operations for Faculty Offer ID: `c3b23a21-76e2-46e7-ae4f-60e1bdb96bea`

Offer: Pro Direct Support for Dynamics 365 Unified Operations for Students Offer ID: `1835808d-06a2-42c5-9f09-82c2e7ed5c72`

These offers were not in the Price List but should be. Consult the December 19 price list, as prices have not changed for this offer.

Offer: Microsoft 365 A1 Offer ID: `778a4dce-0014-4d53-8647-314ef2b091d2`

Offer: Dynamics 365 Remote Assist Attach Trial Offer ID: `7ce81df9-f10c-49a3-843d-e9de6fdc779f`

Offer: Dynamics 365 Remote Assist Trial Offer ID: `545484f9-1c3e-426d-a387-0aa029146443`

ERP issues

Previously reported discrepancies between CSP price list and other Microsoft sites is still under investigation. There were some slight differences reported for some currencies, notably NZD, where estimated retail prices (ERP) in the CSP price lists were different than prices posted on the Microsoft public web sites. The team is still investigating these issues. These ERP values have no impact on how much partners are billed; they are used however by partners to determine how to set their prices for customers.

Reminder - Action Required: Transition from baseline policies to security defaults before Feb 29, 2020

Categories

- Date: 2020-02-12

- Type: Capabilities
- Status: Now Available
- Learn more

Target audiences

- All partners in the CSP program
- Advisors
- Control panel vendors

Summary:

This important update regarding the mandatory partner security requirements. Effective **February 29, 2020**, Azure Active Directory (Azure AD) "baseline" policies will be removed and replaced with "security defaults", a more comprehensive set of protection policies for you and your customers. Security defaults in Azure AD can help protect your organization with pre-configured security settings for common attacks.

Our system indicates that your organization currently uses baseline policies, but have not yet transitioned to security defaults. **If you do not transition to security defaults before February 29, you will lose multi-factor authentication (MFA) enabled with baseline policies on your partner tenants. Enable security defaults as soon as possible to avoid any business disruptions**.

Key considerations

Security defaults policy is one of the options that partners can choose to implement MFA for the security requirements depending on their business needs. It offers a basic level of security enabled at no extra cost. Review how to enable MFA for your organization with Azure AD and the key considerations below:

- For the partners who are using conditional access, security defaults will not be available.
- Security defaults enforce all policies at once including the required MFA for admins policy, end user protection policy, and required MFA for service management.
- Blocking legacy authentication will not be enforced for partners at this time. However, as most events related to compromised identities come from sign-in attempts using legacy authentication, partners are encouraged to move away from these older protocols.
- Security defaults automatically excludes the Azure AD Connect Sync account.
- Security defaults are the general availability replacement of the preview baseline policies. Once a partner enables the security defaults, they will no longer be able to enable baseline policies.

Next steps and resources for security defaults

Partners who are currently using the baseline policies:

- Learn more about security defaults and enabling MFA for your organization.
- Plan the transition from baseline policies to security defaults.
- Enable security defaults with one-click for each partner tenant as soon as possible. If security defaults do not meet your needs, consider other options.

Indirect providers:

- Inform your resellers in the Microsoft CSP program about the change (use this email template). Ensure that your resellers enable the security defaults if they are currently using baseline policies.

> **NOTE**
>
> Microsoft will also directly communicate to your resellers who are currently using the baseline policies and have Partner Center contact information.

If you have any questions for the partner security requirements, check out additional resources here.

We sincerely appreciate your partnership and commitment to ensuring our ecosystem runs on trust.

Change Log

- January 8, 2020: Original announcement published
- February 12, 2020: Reminder announcement published

Audio Conferencing offers introduced to multinational customers with users in India on February 1, 2020

Categories

- Date: 2020-02-05
- Type: Offers/Markets
- Status: Now Available
- Learn more

Summary:

Microsoft introduced Audio Conferencing offers to multinational customers with users in India on February 1, 2020. You can use the offers for net new and renewing customers.

Impacted Audience:

Cloud Solution Provider (CSP) partners with customers using Audio Conferencing who might have users in India.

Details

Microsoft introduced a new user Audio Conferencing offer to multinational companies with users based in India.

Who needs to purchase the new offer

You should purchase this offer only if your customers located outside of India have assigned subscriptions to users physically located in India. In this case, you should buy as many add-on offers as there are users physically located in India.

You shouldn't purchase the offer if your customer's legal entity is based in India. Check with the local Microsoft account team on how to best proceed.

When to purchase

Current users can keep the USD4 offer until renewal. Net new and renewing multinational customers with users in India will need to quote the new offer going forward.

New offers

Refer to the offer list 0aa62437-b86a-48bd-ae51-85c8dcec5e6d.

Next steps

Familiarize yourself with the price list. Also share this information with all appropriate contacts in your organization, particularly your sales team.

Questions?

If you have any questions about these offers, check your relevant Yammer partner group.

New price sheet and foreign exchange rate APIs available for Azure plan pricing

Categories

- Date: 2020-02-04

- Type: Capabilities
- Status: Now Available
- Learn more

Impacted Audience:

Direct bill and indirect providers in the CSP program who are transacting and reselling Azure plan consumption meters and reservations and use partner center APIs in their integration with Microsoft Partner Center.

Summary:

The new commerce experience for Azure in CSP can help you acquire more customers and drive higher profitability with streamlined buying and selling experiences.

As part of the new experience, we are excited to announce the availability of new pricing APIs that programmatically retrieve **Azure plan pricing for consumption and reservations** and **foreign exchange rates indexes** for billing currencies supported by Microsoft. With the new pricing API, partners can automate and simplify the process of retrieving pricing information.

The new pricing APIs provide the following capabilities:

- Enables partners to programmatically retrieve pricing for Azure services and exchange rate data
- Helps partners get pricing information including meter pricing in USD for Azure resources and reservations when applied to Azure plan
- Enables partners to retrieve monthly exchange rates for the supported billing currencies under the new experience (Azure plan)
- Offers the ability to retrieve either pricing or foreign exchange rates for the current month or previous months

> **NOTE**
>
> This is a net-new API resource specific to Azure plan pricing.

- The existing RateCard API should still be used for existing Azure resources or reservations deployed to previous Azure subscriptions not part of the Azure plan.
- These APIs are on a different end point (a domain hosting the API) to the Partner Center APIs.

Partner next steps and resources:

- Review the developer documentation
- Implement automated process using the new API
- Refer to the Azure plan pricing documentation for pricing related questions.
- Learn more about Azure plan and the new commerce experience in CSP

Change Log

- February 4, 2020: Original announcement published

Changes to partner center support experience

Categories

- Date: 2020-02-04
- Type: Capabilities
- Status: Now Available

Impacted Audience:

- All users who create support requests in Partner Center.

Summary:

Partner Center is streamlining the support request flow for all Partner Center programs.

Details

Selecting a support topic that best describes the partner's issue enables Partner Center to collect all the required information for the issue and more quickly get it to the right support engineers. We are making changes to simplify how partners find the best place to log their service requests:

- The quick search makes it easier to find the topic that best describes the issue.
- Users can also "show filters" to navigate available support topics.
- Redundant topics have been removed and other topic descriptions have been updated to be clearer.

These changes will start to be available to you the week of 3 February.

Additional resources:

- More information on creating support requests in partner center.

Change Log

- February 4th, 2020: Original announcement published

Now required: Microsoft Customer Agreement acceptance in CSP

Categories

- Date: 2020-02-04
- Type: Capabilities
- Status: Now Available
- Learn more

Impacted audience:

- Direct bill and indirect providers in the CSP program

Summary:

The new Microsoft Customer Agreement in the Cloud Solution Provider (CSP) program became available effective October 2019, replacing the existing Microsoft Cloud Agreement. The new, simplified customer agreement provides consistent purchase terms for customers – regardless of the way customers choose to buy.

Starting February 1, 2020, direct bill and indirect providers in CSP are required to confirm customer's acceptance of the Microsoft Customer Agreement for any CSP offers under Microsoft Public Cloud. Without confirming the customer's acceptance for the new agreement, partners will not be able to make a new purchase for the customer including changing seats and renewal of existing purchases from that date (auto-renewal will not be impacted).

Partners can present the new agreement to customers in the same way they did for the existing Microsoft Cloud Agreement. After a customer reviews and accepts the agreement, partners must confirm the customer's acceptance on Partner Center. The Partner Center web user interface, API, and .NET SDK have been updated to support the new agreement.

For more information, review the resources about the Microsoft Customer Agreement in CSP located on this page.

Next steps

- Confirm customer's acceptance using the Partner Center web user interface or API.
- Partners using APIs for the existing Microsoft Cloud Agreement need to revise their existing implementation with updated API.
- Train your agents and resellers on the new agreement terms, and presenting the new agreement and validating

customer acceptance.

> **NOTE**
>
> Customer acceptance of the Microsoft Customer Agreement is also required for purchasing via the new commerce experience in CSP for Azure that was released in November 2019. In Q1 CY2020, partners in CSP will also start to see the additional option on Partner Center that will enable partners to invite customers to an authenticated Microsoft portal (Microsoft 365 Admin Center) and have customers view and sign the Microsoft Customer Agreement directly.

Change Log:

- Jan 28, 2020: Original reminder posted.
- Feb 4, 2020: Announcement updated to reflect the Microsoft Customer Agreement is now required.

Microsoft has released additional Dynamics 365 products, effective February 1, 2020

Categories

- Date: 2020-02-03
- Type: Offers/Markets
- Status: Now Available

Summary:

Microsoft released additional Dynamics 365 products on February 1, 2020.

Impacted audience:

- Partners offering Dynamics 365 through the Cloud Solution Provider (CSP) program worldwide (unless advised differently)

Details

Microsoft released new products for Dynamics Biz Apps and Power Platform Products on February 1, 2020.

Biz Apps and Power Platform

On February 1, 2020, the following new and updated offers for Biz Apps and Power Platform offers were released:

Human Resources (new offers)

- Dynamics 365 HR users can purchase Dynamics 365 Unified Ops Additional DB/File Capacity USL offers.
- Dynamics 365 HR Self-Serve offers
- Dynamics 365 Human Resources (user, tenant)

IoT Intelligence for Supply Chain Management (new offers)

- IoT Intelligence Scenario (tenant level)—includes entitlement up to six scenarios and ten machines (prerequisite: Supply Chain/Unified Ops Management user base or attach SKU)
- IoT Intelligence Additional Machine (tenant level) add-on for the add-on that licenses the customer for ten additional machines (prerequisite: IoT Intelligence Scenario SKU)

eCommerce name change

- Dynamics 365 Retail offer has been changed to Dynamics 365 Commerce.

Customer Insights license update. The following SKUs have had the licensing type changed from AddOn to NON:

- Dyn365ECstmrInsights ShrdSvr ALNG SubsVL MVL

- Dyn365ECstmrInsightsEDU ShrdSvr ALNG SubsVL MVL

The following offers are no longer available for Dynamics 365 Human Resources:

- Dynamics 365 Talent
- Dynamics 365 for Talent from SA
- Attract, Onboard, and Comprehensive Hiring

On February 1, 2020, Microsoft changed the names of some product families and offers to align the naming for existing Dynamics and Power Platform offers in other channels and regions. See the specific changes in the file titled "Dynamics CSP Offer Name Changes—Feb 2020" here.

Additional resources

- Dynamics 365 home page
- Mixed Reality Apps Guide home page
- Biz Apps Fraud home page
- FY20 PowerApps and Flow Licensing Updates
- Microsoft Dynamics 365 Licensing

Next steps

Share this information within your organization and with your customers.

If you want to dig deeper into the licensing updates and the value proposition, familiarize yourself with our readiness content in the **Additional resources** section and on PartnerSource.

If you need support strictly relating to your operations with Microsoft, contact support.

January 2020 announcements

6/19/2020 • 14 minutes to read

This page details the announcements for Microsoft Partner Center for January 2020.

2020 announcements: January 2020 | February 2020 | March 2020 | April 2020 | May 2020

Windows Server and SQL Server subscriptions available to Cloud Solution Provider (CSP) partners in Russia from February 1, 2020

Categories

- Date: 2020-01-31
- Type: Offers/Markets
- Status: Now Available

Summary

From February 1, 2020, Windows Server and SQL Server subscriptions will be available for purchase to CSP partners in Russia.

Impacted audience

All CSP partners transacting in Russia

Details

We're excited to announce that following our release of Azure reservations in December 2019, Windows Server and SQL Server subscriptions will be available for purchase in Russia from February 1, 2020. With Azure reservations and these server subscriptions, which include Azure Hybrid Benefit, partners in the CSP program can better address the fast-growing customer demand for more cost-effective solutions to support highly predictable and persistent cloud workloads.

Partners can now acquire, provision, and manage Azure reservations and Windows Server and SQL Server subscriptions on behalf of commercial customers through Partner Center and the Azure portal.

> **NOTE**
>
> All impacted offers can be found in the Partner Center price list.

Additional resources

- CSP program resources on the partner gallery page: Windows Server and SQL Server subscriptions available in Russia to CSP partners
- Learn more about Partner Center

Next steps

- Please share this information within your organization and with your customers.

Questions?

- Please contact Support for questions, queries, or more information.

Meeting Room and Meetings Add-on for Microsoft 365 F1 are now

available in the Government Community Cloud (GCC)

Categories

- Date: 2020-01-29
- Type: Offers/Markets
- Status: Now Available
- Learn more

Summary

As of January 7, 2020, Microsoft has introduced Meeting Room and Meetings Add-on for Microsoft 365 F1 for the GCC. Please check the price list to know more.

Impacted audience

All partners transacting GCC offers in the Cloud Solution Provider (CSP) program

Details

Microsoft is excited to announce that both Meeting Room and Meetings Add-on for Microsoft 365 F1 are available for the CSP GCC, as of January 7, 2020.

This launch further improves our Teams offering for Microsoft 365 F1, which is our advanced government suite that enhances productivity, security, and innovation for our government customers.

Microsoft Teams Rooms is Microsoft's native conference solution for Microsoft Teams and Skype for Business meetings. Meeting Room and Meetings Add-on for Microsoft Teams Rooms enable your GCC customers' meeting rooms and huddle spaces to be able to join Teams and Skype for Business meetings, host meetings where participants can dial in to conference calls, and connect to telephony using phone systems.

Offer List

d2e1a29f-e6b7-424b-82a4-191b58678da1 (GCC High)

Additional resources

- Microsoft 365 Government product page
- Teams in GCC-High page on Docs
- Setting up Meeting Rooms in Microsoft Teams

Next steps

Please familiarize yourself with the price list and share this information with all appropriate contacts in your organization—particularly your sales team.

Questions?

For any further question about these offers, please contact your representative in the Microsoft account team or check your relevant Yammer partner community.

Meeting Room and Meetings Add-on for Microsoft 365 F1 are now available in the Government Community Cloud (GCC)

Categories

- Date: 2020-01-28
- Type: Capabilities
- Status: Now Available
- Learn more

Impacted audience

All partners selling online services to commercial customers.

Summary

On January 14, 2020 Microsoft released **self-service purchase, subscription, and license management capabilities** for Power BI for commercial cloud customers in the United States. Then on **January 28, 2020** these capabilities became available for **Power Apps** and **Power Automate** in the United States.

Later in Q3 FY20, we are making self-service purchase for Power Platform available to commercial customers in several additional countries. As we release to these countries, we will update the Customer Frequently Asked Questions documentation to reflect their availability. The Customer Frequently Asked Questions is included the readiness resources noted below. Be sure to check this often over the next few months.

Review all resources in the resource gallery (see Additional Resources below) for further details regarding self-service purchasing, including instructions for implementing PowerShell if customers wish to opt out of self-service purchasing.

The **PowerShell** script enabling IT admins the ability to control (turn on or off) the self-service purchasing capability on a per product basis is **now available**. Please see the Additional Resources section below for technical documentation.

UPDATE: Over the past week, we've been listening to your feedback regarding the rollout of our self-service purchase capabilities for Power Platform products. To those of you who provided your input, thank you! Based on your feedback, we've adjusted our approach to better address the needs of both IT admins and end users within organizations. We're making the following changes to our plan:

- On November 19, we will provide IT admins a way to turn off self-service purchasing on a per product basis via PowerShell. More details will be forthcoming.
- To provide more time to prepare for this change, we are updating the launch for self-service purchase capabilities for Power Platform products to start with Power BI on January 14 for all commercial cloud customers. More details on PowerApps and Power Automate will be forthcoming.

Thank you again for taking the time to provide your feedback. We look forward to a continued partnership to help empower organizations to achieve more.

As the world advances down the path of digital transformation, end users and business units are increasingly adopting and purchasing a-la-carte Software as a Service solutions on their own. We're introducing self-service purchase, to enable users to buy one to many licenses, giving greater flexibility and freedom to departments, teams, or across an entire enterprise to create their own solutions.

We're following a phased roll out for Microsoft Power Platform products (Power BI, PowerApps, Power Automate):

- Availability through self-service begins with **Power BI on January 14**.
- Rollout will start with customers in the United States then expand to other geographies.
- This capability will not be available for government, nonprofit, or education customers at this time.
- Details on PowerApps and Power Automate coming soon.

Partners can benefit from self-service purchases by building solutions that span Azure and Power Platform. Partners with administrative access will see individual Power Platform purchases in the Microsoft 365 admin center and can treat them as sales leads for their cloud solutions.For example, a partner that sees a work group adopting Power BI will have the opportunity to build and sell sophisticated Power BI dashboards that pull data from Azure SQL databases or other business applications. As adoption spreads virally within organizations from self-service purchases, partners could also sell broad Power Platform coverage to central IT.

Partners who do not have administrative access can still drive proof of concept projects and can build custom solutions for individuals buying Power Platform services. These partners benefit from the agility of working directly with end users and not having to go through a centralized IT purchasing motion. A successful partner engagement to ramp Power BI adoption would give the partner credibility within the company and could easily lead to other opportunities.

Additional resources

- CSP Program Updates Resource Gallery: Customer self-serve purchase capability

Change log

- Original publication date: October 21, 2019
- Updated Power BI launch date and introduced PowerShell date: November 1, 2019
- PowerShell script now available for IT Admins. Microsoft Flow updated to Power Automate: November 19, 2019.
- Launch of self-service purchase for Power BI and launch details for Power Apps, Power Automate, and other countries: - January 14, 2020
- Launch of self-service purchase for Power Apps and Power Automate: January 28, 2020

Announcing a new reporting dashboard (beta) in Partner Center

Categories

- Date: 2020-01-27
- Type: Capabilities
- Status: Now Available

Impacted audience

Announcing a new reporting dashboard (beta) in Partner Center

Summary

We are introducing a new unified reporting dashboard in Partner Center for partner organizations that are members of the Microsoft Partner Network. Through this dashboard, you have access to a unified, 360-degree view of your partner organization's key performance indicators (KPI) across cloud products such as Office 365, Azure, Dynamics 365, and licensing models such as Cloud Solution Provider (CSP) and Enterprise Agreement (EA). Intelligent insights are delivered to you so you clearly understand your business with Microsoft and can make data driven decisions with confidence.

To see this dashboard, select **INSIGHTS** from the Partner Center left-hand navigation menu. This dashboard uses the same underlying data as the current MyInsights reporting tool but offers richer visuals and more insightful reporting capabilities and KPIs covering customers, subscriptions, license usage, competencies, and benefits. The version of this insights dashboard offered today is a beta version and will continue to be augmented with new reports and capabilities as we approach general availability, which is planned for later in H2 FY20.

We invite you to start using this new insights dashboard where you would have used MyInsights before, and share your feedback with us using the feedback mechanism within each of the reports available through the **INSIGHTS** tab.

Additional resources

- Review all Insights resources covering access, navigation, report overviews & usage, how to leave feedback, and more here: Announcing a new reporting dashboard (beta) in Partner Center
- Questions? Please contact Partner Support.

Change log

- Original publication date: January 27, 2020

Action required: Remember to confirm the acceptance of Microsoft

Customer Agreement by January 31, 2020

Categories

- Date: 2020-01-27
- Type: Capabilities
- Status: Now Available
- Learn more

Impacted audience

- Primary: Direct bill and indirect providers in the CSP program under the Microsoft Public Cloud
- Secondary: CSP indirect resellers under the Microsoft Public Cloud

Summary

The new Microsoft Customer Agreement for all product offers in the Cloud Solution Provider (CSP) program became available on October 1, 2019.

Starting February 1, 2020, a partner's confirmation of Microsoft Customer Agreement acceptance will be required to make new orders for any CSP offers in all regions under Microsoft Public Cloud. From that date, a partner in CSP will not be able to make a new purchase including changing seats and renewal of existing purchases without the acceptance of the Microsoft Customer Agreement from the customer.

> **NOTE**
>
> Microsoft Customer Agreement and the new commerce experience in CSP for Azure:** Customer acceptance of the Microsoft Customer Agreement is required for purchasing via the new commerce experience in CSP for Azure that became available November 1, 2019.

The Microsoft Customer Agreement is a simplified purchase agreement that provides consistent purchase terms for customers, regardless of the way customers choose to buy. Since October 1, 2019, the new Microsoft Customer Agreement is available in the CSP program and replaces the existing Microsoft Cloud Agreement.

Partners can present the new Microsoft Customer Agreement to customers in much the same way that they previously did for the Microsoft Cloud Agreement. After a customer has reviewed and accepted the agreement, partners must confirm the customer's acceptance with Microsoft. The Partner Center Dashboard, Partner Center API, and .NET SDK have been updated to support a partner confirming customer acceptance of the Microsoft Customer Agreement.

Next steps

- Confirm the acceptance of the new Microsoft Customer Agreement before January 31, 2020.
- Train your agents and resellers on the new agreement terms, and in presenting the new agreement and validating customer acceptance. Indirect providers need to work with indirect resellers to validate a customer's acceptance.
- Direct bill and indirect providers who are using APIs will need to update existing implementation to accommodate the new Microsoft Customer Agreement using Updated API.
- Direct bill and indirect providers can also use the Partner Center web UI to confirm customer acceptance.

Additional resources Partners can view content available on the CSP Gallery page, including:

- A Microsoft Customer Agreement in CSP guide Microsoft Customer Agreement FAQs
- A link to the Microsoft Customer Agreement
- API information for partners using APIs to confirm customer acceptance of the agreement.

NOTE

Coming later in Q1 CY20, partners will have the additional option to invite customers to an authenticated Microsoft portal to view and sign the Microsoft Customer Agreement. Microsoft will own the responsibility to confirm customer acceptance of the Microsoft Customer Agreement.

Change log

- January 15, 2020: Original announcement published.

Price list and offer update schedule for January 2020

Categories

- Date: 2020-01-07
- Type: Capabilities
- Status: Coming soon

Impacted audience

- All partners participating in the CSP program

Summary

Per the holiday lockdown schedules, the January 2020 price lists will be available January 6 at 6:00 PM Pacific Standard Time (PST) instead of the typical availability schedule.

Details:

Because of holiday scheduling, the price list updates posted to the Partner Center sales page for January 2020 will be available January 6 at 6:00 PM Pacific Standard Time (PST) instead of the typical availability, which is at 6:00 PM Pacific Standard Time (PST) on the last day of each month. The catalog updates will also be available on January 6 to align with the price list updates. The January 2020 schedule is for all price lists posted on the Partner Center sales page:

- License-based price lists and offers
- Usage-based price lists
- Reservations price lists
- Software subscriptions price lists

The Azure plan price lists on the Marketplace page will be up to date throughout, as those price lists are dynamic and are continually updated.

License-based price list issues

The January license-based price list has the following known issues we expect to address in next month's price list updates for February.

These offers should not be in the price list and will be removed next month:

- Offer: Microsoft 365 Phone System - Virtual User Trial ID: b9a1d576-43fd-464b-8ad9-4b1eafc5db77
- Offer: Forms Pro Addl Responses for GCC Offer ID: ac14473c-8e5d-4e44-aff1-6087109be980
- Offer: Microsoft Forms Pro USL for GCC Offer ID: 1e9dab89-7a71-4aa9-a3e5-9b8be2f296ba

These offers should not be in the price list and will be removed next month:

- Offer: PowerApps per app plan for Students Offer ID: e1f379e8-cf22-4a7d-97fd-dcf9d62fc132

These offers were incorrectly removed from the price list in January but are still available; please consult the

December price lists for their pricing. Plans are to add these offers back to next month's price list:

- Office 365 A1 for faculty (for Device) Offer ID: `0757d14e-7c57-456f-8dab-47d164f2ff1f`
- Office 365 A1 for students (for Device) Offer ID: `bae285a9-d56b-4384-b02f-38adc61a6f12`
- Microsoft 365 A1 Offer ID: `778a4dce-0014-4d53-8647-314ef2b091d2`
- Dynamics 365 Remote Assist Trial Offer ID: `545484f9-1c3e-426d-a387-0aa029146443`
- Dynamics 365 Remote Assist Attach Trial Offer ID: `7ce81df9-f10c-49a3-843d-e9de6fdc779f`

Change log

- December 20, 2019: Original announcement published
- January 7, 2020: Added license-based price list issues section

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Microsoft has now released additional Dynamics 365 products, and more will be coming on February 1, 2020

Categories

- Date: 2020-01-02
- Type: Offers/markets
- Status: Now Available

Impacted audience

- Partners offering Dynamics 365 through the Cloud Solution Provider (CSP) program (These updates relate to all locations worldwide, unless advised differently.)

Summary

Microsoft has released additional Dynamics 365 products today, January 2, 2020. New products will also be released on February 1, 2020.

Details

Today, January 2, 2020, Microsoft released new products for Dynamics 365 Power Virtual Agent, as well as Biz Apps and Power Platform. On February 1, 2020, additional new products will be released for Dynamics 365 Biz Apps and Power Platform.

Dynamics 365 Power Virtual Agent

On January 2, 2020, the following Power Virtual Agent offers were released:

- Dynamics 365 Virtual Agent for Customer Service

Please see the detailed SKU information in the file "Dynamics CSP Offers 1-1-20" here.

Biz Apps and Power Platform

On January 2, 2020, the following Biz Apps and Power Platform offers were released:

- Introduction of student offers for existing PowerApps per-app plan

Please see the detailed SKU information in the file "Dynamics CSP Offers 1-1-20" here.

On February 1, 2020, the following new and updated offers for Biz Apps and Power Platform will be released:

Human Resources new offers

- Dynamics 365 HR users can purchase Dynamics 365 Unified Ops Additional DB/File Capacity USL offers
- Dynamics 365 HR Self-Serve offers
- Dynamics 365 Human Resources (user, tenant)

IoT Intelligence for Supply Chain Management new offers

- IoT Intelligence Scenario (tenant level)—includes entitlement up to six scenarios and ten machines (prerequisite is Supply Chain/Unified Ops Management user base or attach SKU)
- IoT Intelligence Additional Machine (tenant level)—add-on to the IoT Intelligence Scenario (the prerequisite of this offer) which provides licensing for 10 additional machines

eCommerce name change

- Dynamics 365 Retail offers will be changed to Dynamics 365 Commerce.

Customer Insights license update

The following SKUs will have the licensing type changed from AddOn to NON:

- Dyn365ECstmrInsights ShrdSvr ALNG SubsVL MVL
- Dyn365ECstmrInsightsEDU ShrdSvr ALNG SubsVL MVL

The following offers will no longer be available for Dynamics 365 Human Resources:

- Dynamics 365 Talent, Dynamics 365 for Talent from SA, Attract, Onboard, and Comprehensive Hiring offers

Pending SKU information

On February 1, 2020, Microsoft will change the names of some product families and offers to align the naming for existing Dynamics 365 and Power Platform offers to that used in other channels and regions.

Please see the specific changes in the file "Dynamics CSP Offer Name Changes – Feb 2020" here.

Additional resources

- Dynamics 365 home page
- Mixed Reality Apps Guide home page
- Biz Apps Fraud home page
- Power Platform Products home page
- FY20 PowerApps and Flow Licensing Updates
- Microsoft Dynamics 365 Licensing

Next steps

- Please share this information with the appropriate contacts in your organization.
- Should you want to dig deeper into the licensing updates and the value proposition, please familiarize yourself with our readiness content in the Additional resources section and on PartnerSource.

Questions?

- If you have any questions strictly relating to your operations with Microsoft, please reach out to Support.

Change log

- January 2, 2020: New communication.

Partner with Microsoft - discover benefits, how to help customers, & how to drive business growth

6/19/2020 • 2 minutes to read

Appropriate roles

- Global admin
- MPN partner admin
- User admin
- Admin agent

When you join a Microsoft partner program, you become part of a global community that connects you to the relationships, insights, tools, resources, and programs you need to amaze your customers and drive business growth.

See Why Microsoft? for more information about the benefits of partnering with Microsoft.

Join the Microsoft Partner Network

The Microsoft Partner Network gives you the widest range of products in the industry as well as program options to differentiate your business, go to market, and sell your solutions. Join at no cost, then choose how to invest in your partnership with a Microsoft action pack, starter kit, or competency.

An action pack or starter kit provides software and support to build Microsoft-based solutions and a competency demonstrates your proven expertise to customers and other partners.

For more information about the Microsoft Partner Network (MPN), visit the MPN website.

How to join

To join the Microsoft Partner Network, go to the **Membership** page on the MPN website and select **Enroll** or **Join now**.

Make the Microsoft Partner Network membership work for you

As you achieve your business goals, participate in the program at the level that suits your unique needs to access more benefits, and develop your relationship with us and other partners in the network.

Action Pack

Action Pack offers software, support, and benefits for businesses that want to begin, build, and grow their Microsoft practice in a cloud-first, mobile-first world.

Review the resources below to learn more about Action Pack:

- Move your cloud business forward with Microsoft Action Pack
- Get the Action Pack

> **IMPORTANT**
>
> You manage your Action Pack subscription in Partner Center. If your company has not yet moved to Partner Center from Partner Membership Center, read Prepare for your move to Partner Center

- Renew your MPN offers

Competencies

Demonstrate your proven expertise in delivering quality solutions in a specialized area of business. Microsoft competencies are designed to meet your current customers' needs and be recognizable to prospective ones. Join the elite tier of Microsoft partners and stand out from your peers.

Review the resources below to learn more about competencies:

- Competency partners

Microsoft Partner Network benefits and requirements

When you join the Microsoft Partner Network, you receive a set of core benefits that can help you save time and money while you strengthen your capabilities, better serve customers, and build connections to reach your full business potential.

Review the resources below to learn more about network benefits and requirements:

- Core benefits
- Manage your MPN benefits on Partner Center
- Core requirements

Next steps

Grow your Microsoft partner business

Create a Partner Center account to manage network benefits and competencies

6/19/2020 • 3 minutes to read

Appropriate roles

- Global admin
- Admin agent

Before you can create an account on Partner Center, your company must be a member of the Microsoft Partner Network. If you're not already a member of the network, you can join now. After you create a Partner Center account, watch this short video Discover your dashboard.

Before you begin

To create an account on Partner Center, you'll need to have on hand the following information. You may want to take a few minutes to gather these items before you get started:

- Global administrator work email.
- If you're not sure what your company's work account is, see Your company work account and Partner Center If your company doesn't have a work account, you can create one during the account creation process.
- Your company's legal business name and address.
- Authority to sign legal agreements. Ensure that you are authorized to sign legal agreements on your company's behalf as you'll be asked to do so during the enrollment process.
- Name and company email of the person you want to act as your primary contact. To help ensure your company's security and privacy, we'll email your primary contact to verify that (1) he or she signed up for a Partner Center account, and that (2) this email address belongs to your company. After the primary contact verifies his or her email address, we'll continue our review of the information you provided.

We'll verify this information during the account creation process.

Create a Partner Center account

1. Review the information on the **Welcome** page and then select **Next**.
2. Sign in as a global admin to your company's work account. If you're not sure what your company's work account is, see Your company work account and Partner Center.

   Select **Sign in** if you know your company has a work email account. On the next page, enter global admin credentials for your company's work account.

   If your company doesn't have a work account, select **Create one** to set one up now. After creating a work account, sign in using your global admin credentials for the work account you just created.
3. Provide or update your company's legal business profile and primary contact information and then select **Enroll now**.

   The primary contact should be the person in your company we can contact about your application (this can be you or another person in your company). We'll also use this information to verify that this person works at your company and has signed up for a Partner Center account.

> **IMPORTANT**
>
> To help ensure your company's security and privacy, we'll email your primary contact to verify that (1) he or she signed up for a Partner Center account, and (2) that this email address belongs to your company. After the primary contact verifies his or her email address, we'll continue our review of the information you provided.

4. Read and accept the terms and conditions in the Microsoft Partner Network agreement.

5. Verify that you've been added to the admin agent group. To finish setting up your account, including adding other users, you must have admin agent permissions. Follow these steps to view or update your permissions:

   a. From the Partner Center dashboard, select the **Settings** icon and then select **User management**.

   b. Select your name from the users list and then select **Admin agent** if it's not already selected. Select **Update**.

Next steps

- Add account users and assign permissions to them
- Purchase or renew a subscription to Microsoft Action Pack
- Manage your membership benefits
- Learn about competency requirements for Gold and Silver membership
- Create a business profile to get sales leads from Microsoft
- Get and manage sales leads from Microsoft

How to get a work email address before you set up your Partner Center account

6/19/2020 • 2 minutes to read

Your company needs to purchase an email domain in order for you to be able to set up work email addresses for your employees. Work with your IT department to buy an email domain since this is a technical process. Use the new email to set up your Azure AD tenant and your Partner Center account.

Partner Admin Center is moving to the Partner Center

6/19/2020 • 2 minutes to read

Applies to

- Partner Center

Appropriate roles

- Global admin
- User admin
- Admin agent
- Sales agent

> **NOTE**
>
> All dates have been updated since the initial posting of this article.

The Office 365 Partner Admin Center (PAC) is moving to the Microsoft Partner Center.

We are evolving Microsoft the Partner Center into the single place where you will manage your partnership with Microsoft and with your customers. In the Partner Center you can manage membership, customer referrals, incentives, and all other aspects of the Cloud Solution Provider (CSP) Program. We will retire the PAC starting mid-April 2018.

The Office 365 Partner Admin Center (PAC) will be retired

During April 2018, PAC will be retiring, and CSP partners will start being automatically redirected to the Microsoft Partner Center. The redirection will happen in stages, and once you are redirected to the Partner Center, you will not be able to work in PAC.

Cloud Solutions Provider partners If you are a CSP partner, we will automatically redirect you to the Partner Center starting in April 2018.

Advisor partners (if you don't transact via CSP and use PAC to provide trials/quotes for your customers) As soon as we decide on the timeline for your automatic redirection to Partner Center, we will announce it here.

Start using the Microsoft Partner Center now!

Start using the Microsoft Partner Center now to get ready for the move from PAC. You'll use the same credentials for the Partner Center that you use for PAC.

> **IMPORTANT**
>
> Some features and functions that were available in PAC will not be available in the Partner Center.

Read the Side-by-side comparison to understand and familiarize yourself with these changes. You will find additional information on account management, customer management, licenses and subscriptions, pricing and offers, and more in Microsoft Partner Center Help.

Moving from Partner Admin Center (PAC) to the Partner Center

6/19/2020 • 2 minutes to read

Applies to

- Partner Center
- Partner Admin Center

Appropriate roles

- Global admin

Partner Center is evolving into the single place where you will manage your partnership with Microsoft and with your customers. In the Partner Center you can manage membership, customer referrals, incentives, and all other aspects of the Cloud Solution Provider program (CSP).You will be able to do most of the work you did in PAC in the Partner Center though some of the features or actions will work differently.

ACTION	PAC	PARTNER CENTER
The high-level overview of your account activity and customers	Home Screen	Partner Center
Acquire new customers and provide quotes for paid and trial services	Build your Business -> Send quote	Paid quotes are unavailable.CSP Trials are available if Advisor partner converts to a CSP indirect reseller and associates with a CSP indirect provider that supports trials.
Request relationships	(Resellers and Advisors) Build your Business -> Send DAP request	(Resellers and advisors) Customers -> Request a reseller relationship (See note below)
Manage your customers	Client Management -> Client list	Partner Center -> Customers
Manage customer subscriptions	Client Management -> Client list -> select customer	Partner Center -> Customers -> select customer or add your customer to the **Favorites** list by toggling the star in the customer list - then select the **Favorites** slideout and go directly to **Manage subscriptions** for your customer.
Administer on behalf of your customer	Client Management -> select customer -> select Administer button	Partner Center -> Customers -> select Administer services from drop-down list -> select service or add your customer to the **Favorites** list by toggling the star in the customer list - then select the **Favorites** slideout and go directly to **Administer services** for the required service.

ACTION	PAC	PARTNER CENTER
Create service requests for your customer	Service requests -> select customer -> select + button	Partner Center -> Service requests -> Customer requests -> select customer -> New request
Manage customer service requests	Service requests -> select customer	Partner Center -> Service requests -> Customer requests -> select customer or add the Service Request to the **Favorites** list by toggling the star in the customer requests view for the customer - then select the **Favorites** slideout, select the **Support requests** tab and go directly to the service request - or view updates directly from **Favorites**.
View health of the Microsoft Online Services you manage	Service health -> Aggregated health	Partner Center -> Service health

> Important
> You will not be able to send paid and trial quotes to customers through the Partner Center. In addition, to search for customers in the Partner Center either use the customer name or the customer domain/s available when you established the partner relationship with the customer.

Office 365 partner admin center partners - Get ready to move business operations to Partner Center

6/19/2020 • 2 minutes to read

Applies to

- Partner Center
- Office 365 partner admin center

Appropriate roles

- Global admin
- User admin
- Admin agent
- Sales agent

We're bringing Office 365 partner admin center features into Partner Center to help you manage your customers throughout the business lifecycle. In addition to the features you're used to, you'll now be able to:

- Grow your business through referrals, and manage your new customers as they come in.
- Send relationship invitations to customers on behalf of both yourself and your provider
- Manage individual users and assign licenses more easily

You can start using Partner Center right away for many of the tasks you currently use Office 365 partner admin center for.

For now, both sites are supported, so while you're making the transition to the new site, you'll still be able to use Office 365 partner admin center. Any changes you make in one location will appear in both.

Find Office 365 partner admin center features in Partner Center

Completing tasks in Partner Center is done differently to what you're used to in the Office 365 partner admin center. Here's how to complete them in Partner Center.

OFFICE 365 PARTNER ADMIN CENTER FEATURE	WHERE IS IT IN PARTNER CENTER?
Build your business: Create purchase offer	Work with your provider to sell offers to your customers
Build your business: Request delegated admin permissions	Partner Center: Customers > Request a reseller relationship
Build your business: Create trial invitations	Not available. You can still use Office 365 partner admin center for this
Service requests: Client list: Office 365 admin center	Partner Center: Customers > Administer services
Service requests: Client list: Service requests	Partner Center: Service request > Customer requests
Service requests: Flagged	Dashboard: Customers: select the star next to the company name

OFFICE 365 PARTNER ADMIN CENTER FEATURE	WHERE IS IT IN PARTNER CENTER?
Service request > Client administration > Admin on behalf of (AOBO)	Partner Center: Customers > select a customer > select a subscription > select the designated product reseller

Prepare for your move from Partner Membership Center (PMC) to Partner Center

6/19/2020 • 9 minutes to read

Appropriate roles

- Global admin
- User admin
- Sales agent
- Admin agent

We are moving membership management from Partner Membership Center (PMC) to the partner center - the single destination to manage your business relationship with Microsoft. We want your move to Partner Center to be as efficient and easy as possible. We've identified some areas where the Partner Center differs from PMC, and we think you will want to understand and prepare for them before you make the move.

Account and identity setup

What is an Azure Active Directory (Azure AD) work account?

An Azure work account is a dedicated and isolated virtual representation of your company in the Azure public cloud, created for you when you subscribe to a Microsoft cloud service such as Azure, Microsoft Intune, or Office 365.

Your work account hosts your Azure AD users and the information about them - their email, passwords, profile data, permissions, and so on. The work account also contains groups, applications, and other information pertaining to a company and its security.

Your work email is part of your Azure active directory tenant. To have an account in Partner Center, you need to have an AAD tenant. For more information on Azure Active Directory, read Create your directory in Azure AD.

In Partner Center, you will use your work email to sign into your account not your personal email.

- Your work account: john@contoso.com
- Your personal account: John@outlook.com

What account should you sign into Partner Center with if you have an AAD tenant with Microsoft (for Office 365 for example) and you also have a tenant for your CSP business?

You can sign into Partner Center with either the CSP account or your MPN work email account. If you choose to sign in using your CSP work email, the left navigation on your dashboard will display both MPN and CSP program information. If you sign in with your MPN Azure AD tenant work email, you will see only your MPN program information.

If you don't want to use your existing Office 365 Azure AD tenant for Partner Center, you can create a new tenant prior to migrating from PMC.

There may be many reasons you don't want to use an existing Azure AD tenant to set up your Partner Center account. Before you begin migrating to Partner Center, go to the Azure portal to create a new Azure AD tenant. Follow the guidance in Create a new tenant in Azure Active Directory. Use the new AAD tenant to set up your Partner Center account. You must be a global admin to create the tenant.

User roles including guest user roles in Partner Center

Partner Center has different types of roles depending on the types of work needed to be done. There are roles such as global admin that are Azure AD roles. Some of the roles are specific to programs such as the Cloud Service Provider program or incentives, and there are roles that are specific to MPN. To find out what all the Partner Center roles are, read Assign users roles and permissions.

What happens to my users' roles when they move from PMC to Partner Center?

Except for the MPN global admin or primary program contact who conducts the migration, all users in PMC will lose their admin roles. The individual who completes the migration will need to assign roles in Partner Center. The roles in Partner Center differ from the roles in PMC. Read [Assign users roles and permissions](permissions-overview.md and Moving from PMC to Partner Center for more on user roles in Partner Center.

What's the difference between my company profile and my business profile?

Your company profile is the information about your company that includes address, locations, primary contact, bank, and tax details.

Your business profile is how you present yourself to customers and is a marketing page that displays your logo, details on your business focus, your expertise, etc.

What does account consolidation mean for my account?

If you use the same Azure AD tenant to migrate multiple MPN accounts into Partner Center, the system will automatically recognize that and ask you to consolidate your accounts. This is true even if you have multiple domains associated to the same Azure AD tenant.

You could still decide to migrate to Partner Center using separate AAD tenants, but note this results in isolated evaluation of your competencies and extra purchase costs. For more information about account consolidation, read Consolidate your company accounts

If I have multiple AAD tenants and a single MPN account, is it possible to link them in Partner Center?

Yes, in Partner Center you can link multiple Azure AD tenants to single Partner Center account. For more information about account consolidation, read Consolidate your company accounts

Are there restrictions to adding multiple Azure AD tenants to a single Partner Center account?

If the Azure AD tenant is already associated to an existing Partner Center account, it can't be associated to new Partner Center accounts using the multi-tenancy feature. Another way to think of it is, an Azure AD tenant can only be associated to one Partner Center account, but a Partner Center account can have multiple tenants associated to it.

Microsoft Partner Network (MPN) membership migration

Who can perform the move from PMC to Partner Center?

Your company MPN global admin or the primary program contact (these two roles are often held by the same person) can initiate and perform the move.

Will the person completing the migration become the primary contact on the company legal profile in Partner Center?

Not necessarily, however, the primary contact needs to be someone who has authorization to sign agreements.

Can Microsoft migrate my MPN membership for me?

No. Microsoft cannot help you move your membership account to partner center. You will need to move your account by signing into PMC with your work account (sign in credentials)to begin the migration process. After you've completed the steps to move your account, you can start managing your membership and assign user roles and permissions to your team so they can access benefits and help manage the membership.

Microsoft will automatically migrate the current competencies, benefits, location information, bank/tax information for incentives, and MCP associations including Partner University access.

How will the renewal policy change?

In Partner Center, the renewal window is from your anniversary date through the following 30 days.

Will our competencies remain unchanged after we move to Partner Center?

Yes, competencies will not be affected by the move to Partner Center. If you notice discrepancies, contact Support.

Will my benefits (including cloud benefits, technical support, software benefits, Visual Studio) change after we move?

Your eligible benefits will not change. If you notice discrepancies, contact Support.

Will our Microsoft accounts that have Visual Studio benefits allocations be honored?

Yes. Visual Studio benefits allocated to MSAs will be honored and retained. They will also be preserved after renewal in Partner Center. However, if you remove an MSA allocation once migrated in Partner Center, it can't be added back into Partner Center.

In Partner Center, a partner can add work accounts and guest user accounts, which are MSA from the same tenant where the partner is MPN admin in the Azure AD tenant. If the partner is a global admin in multiple Azure AD tenants and all these tenants are associated to the same Partner Center account, then the partner is allowed to add users across all these tenants into the Visual Studio benefits and Azure usage-based allocations.

Although guest users can be assigned usage-based subscriptions of Visual Studio by the MPN admin or global admin, guest users can't sign in to Partner Center using their MSA. Guest users can, however, sign in to Azure and Visual Studio to validate and use their assigned benefits.

How should we manage our MCP associations and our Partner University access?

There are no changes to MCP associations that move from PMC. However, any new new employees after you move to Partner Center will need to be associated in Partner Center. All your Partner University permissions for existing users will remain but any new employees should go to the training center for information on how to gain access to Partner University.

How do I view MCP information once I move to Partner Center?

Select **Competencies** from the left nav on the dashboard. From the **Competencies** page, you are able to download the skills report. The skills report will list your users who have acquired skills relevant to the competencies and programs in Partner Center. If your users have gained skills but those skills are not relevant to the competencies you're working toward, they will not be listed in the report.

Are customer references used in Partner Center?

No, you don't need customer references to meet competency requirements in Partner Center.

Will Partner of Record associations move to Partner Center?

Yes, there is no change to Partner of Record. Find out more about linking your partner ID to your customers.

Is there an impact to incentives because of the move to Partner Center?

No, there is no impact to incentives if you have moved your account without consolidating locations. If your business has multiple accounts in PMC and, when you move to Partner Center you decide to consolidate into a global account, there will be no loss to incentives but there may be a delay in incentive payout. If you don't move all your PMC accounts that have been involved in incentives programs, you may stop earning incentives that are tied to those accounts.

What are the incentive roles in Partner Center?

Incentive roles in Partner Center are location-based and include Incentives admin and Incentives user. For more information on what those roles can do, see Assign users roles and permissions.

Can incentives admins be assigned at the global and location level?

Yes. You can assign an incentives admin to be the incentives admin for all locations or each location can have its own incentives admin.

Can incentives be paid at the global or location level?

Incentives are paid only at the location level.

Regarding referrals, how many business profiles can we create?

Your company can create as many business profiles as you need to fully represent your company's interests. In each business profile, you can list up to five locations, one location per country. Each of the business profiles can receive referrals for each of its locations.

How will referrals be assigned, what changes can I expect? For example, if I have a global company in one market and locations in other markets, how will referrals be assigned?

Referrals are assigned based on the search parameters that the customer defines. Regardless of whether you have one location or many, if the customers specifies a desired location and you have a business there that meets the other parameters, then the referral would go to that location.

Guide to migrating from PMC to Partner Center

6/19/2020 • 3 minutes to read

Appropriate roles

- Global admin

The Microsoft partner website at partner.microsoft.com is a unified digital experience for partners. From the partner website, you will be able to explore your opportunities and engage in guided experiences that help your company build and sell your apps and services with Microsoft. Using the Dashboard link that's available across the partner website, members of the Microsoft Partner Network can sign in to the partner center where you manage your relationship with Microsoft, enroll in programs, and sign up for offers.

Partner Membership Center (PMC) is being decommissioned. Your company has been invited to transition your Microsoft Partner Network membership management to Partner Center. This guide will prepare you for what to expect as you make the move from PMC to Partner Center.

> **NOTE**
> Even if your company has more than one account or location, the move to Partner Center begins by moving one (your first) account into Partner Center.

Get started

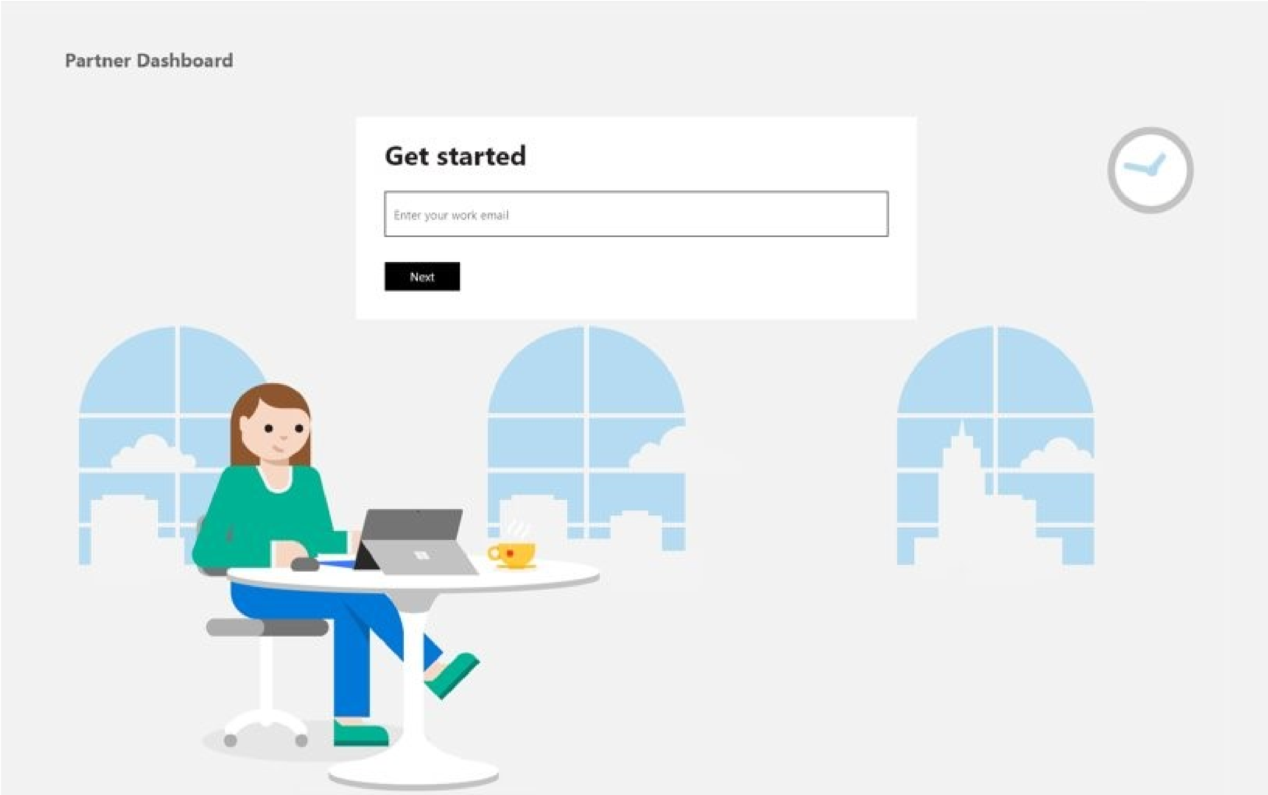
The move begins in PMC. Your global admin will get an invitation to begin the move.

Prepare in PMC

- Verify your company details
- Verify primary program contact
- Verify business locations
- Update your approved users

When you're ready

Select **Get started** on your invitation. You will be taken to the Partner Center sign-in page.

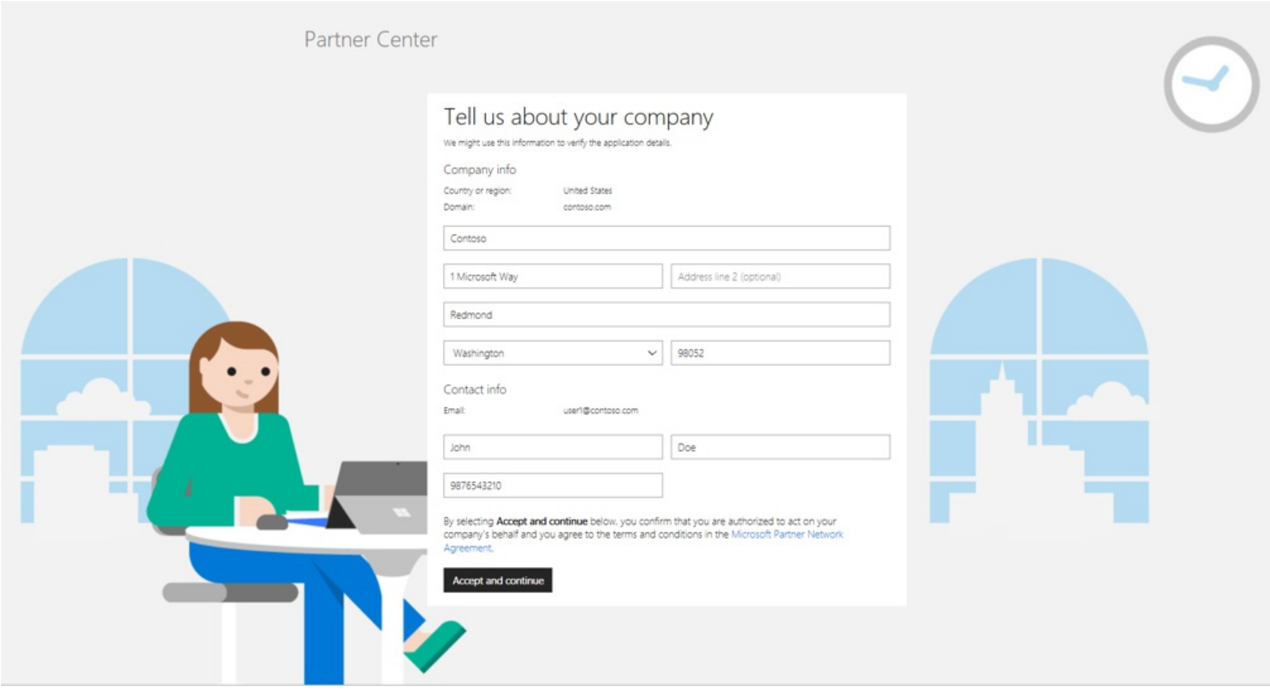


Start with your work email

If your company doesn't have a work email and AAD tenant, we can help you set one up during the Partner Center sign-in process. When you try to sign in with an email account that is not a work email, such as your personal account, you will be directed to provide information about your company so that we can set up an AAD tenant and work email. These company details will be used to finalize your account in Partner Center, so make sure they're accurate.

NOTE

If you are a partner in China and enrolled in both the Microsoft Partner Network and Cloud Solution Provider (CSP) Program you will have a separate tenant for each account. Your account with the Cloud Solution Provider Program is managed on the national cloud and your Microsoft Partner Network account is managed on the global cloud. The two accounts cannot be linked.



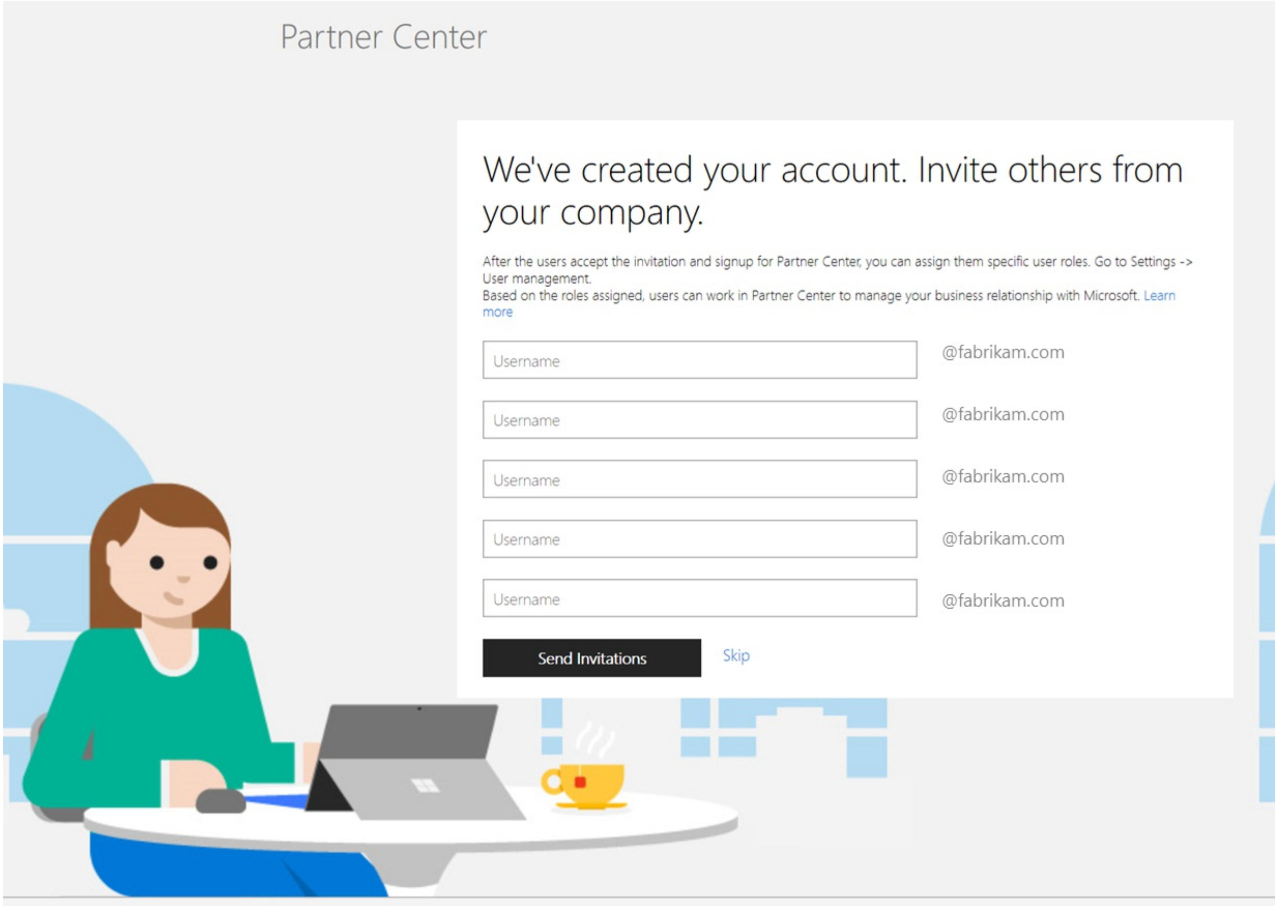
Once you have verified or updated the information, select **Accept and continue**. The Terms and Conditions on this page are **exactly the same** as the agreement which your company already signed in PMC.
This step initiates the creation of your Azure AD tenant and provides your with the work account.

Selecting **Accept and continue** also does the following:

- Migrates your account along with ALL its locations to Partner Center
- Migrates any competencies or MAPs you might have purchased in PMC
- Migrates any marketing resources, offers, and programs (MAPs, Silver, Gold) which you had in PMC

Invite employees to join you

When your new Azure AD tenant is created, you can invite your employees to sign into Partner Center.



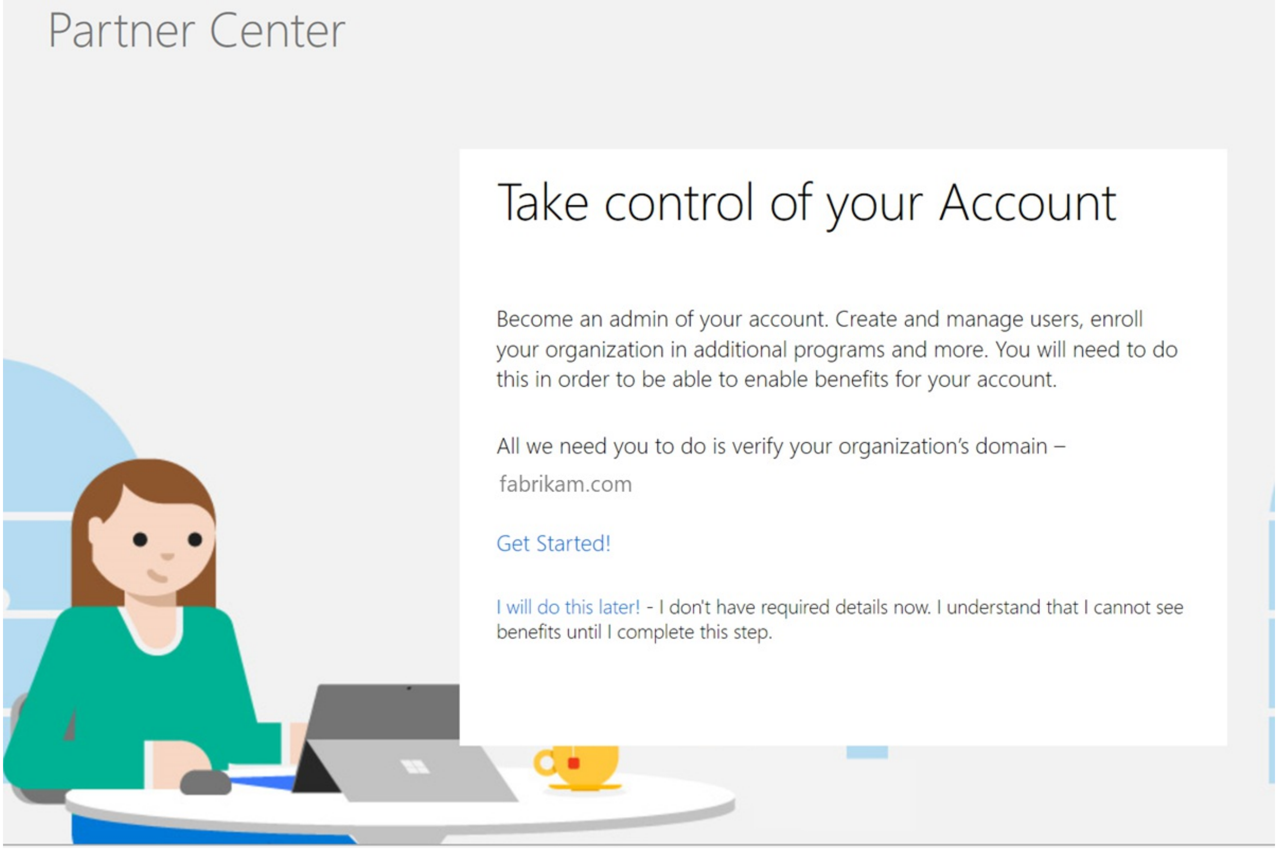
If you signed in with an existing AAD tenant, your employees will have moved with you. In this case, assign your employees roles which determine what they can do in Partner Center.

> **NOTE**
> Roles in Partner Center are different than roles in PMC. For more information see Moving from PMC to Partner Center.

Verify your domain and become a global admin

If your AAD tenant is new, no one is assigned the role of global admin. To become the global admin, you need to verify your domain ownership. You may need the domain admin to help you with this.

While you can use the offers you've already purchased, you will not be able to purchase any new offers until you complete the step of assigning a global admin.



When you select get started, you will see the following screen:

Verify domain ownership to become a global admin for trommleronline.com

As the global admin, you'll manage how everyone in your company uses the service. For example, you can set password policies, add or remove users, and more.

To become the global admin, you have to prove you're eligible to manage the trommleronline.com domain by creating a special record in DNS.

Only the domain owner can update DNS records, so we ask you to add this TXT record. Adding this TXT record won't affect your current email or other services.

To add the record:

- Go to Namecheap.
- Copy the values from the following table and add them at Namecheap.

TXT records (Step-by-step instructions for adding a TXT record)

TXT name	@ Copy
TXT value	MS=DA0F4BA880CFE8128C5E18E273E3BD935A4E5FD8 Copy
TTL	3600 Copy

Wait a few minutes before you select Okay I've added the record. The DNS record changes usually take a few minutes to update though sometimes it takes longer.

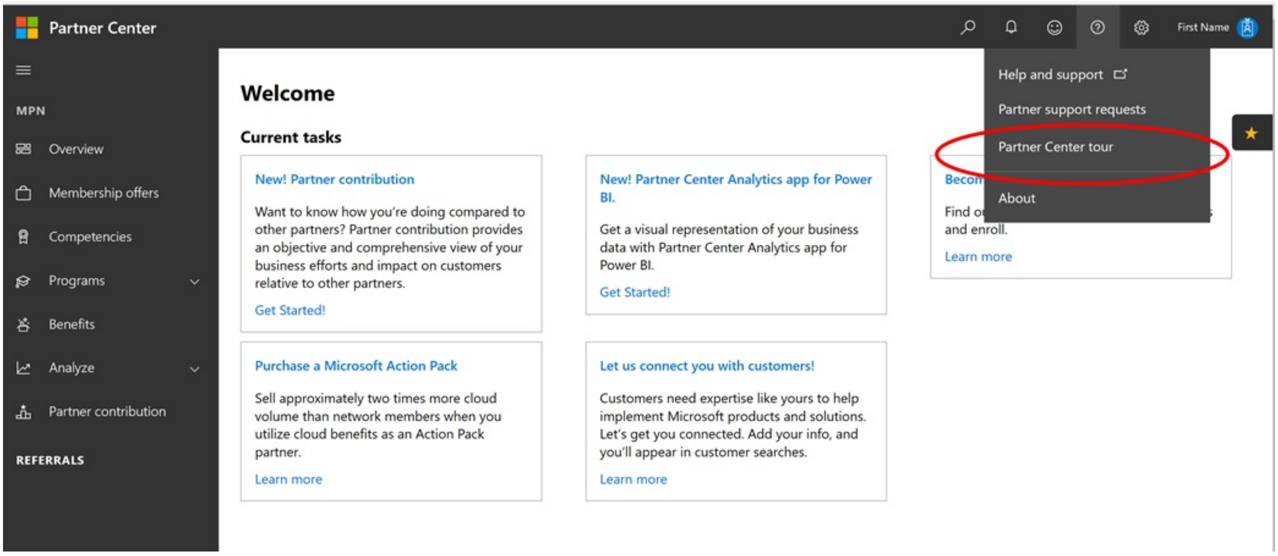
Once we've verified your domain ownership, we will refresh your Partner Center session. Once you sign back in your global admin role will take effect.

Okay, I've added the record | Cancel

Your Domain registrar will already be filled in for you. Only the domain owner can update the DNS file, so by copying and adding the text file to your DNS record, we can verify that you are the owner. It will take a few minutes for the update to occur. You will need to sign out of Partner Center and then sign back in. Your role will have been changed to global admin.

Get acquainted with your dashboard and Partner Center

Take the tour of your dashboard. Here is where you can manage your membership, add a business profile for referrals, enroll in the Cloud Solution Provider program, and see notifications and offers relevant to your business at any time by selecting **Dashboard**. You can also manage incentives, purchase at the marketplace, sign up for go-to-market services, and more.



Next steps

- Create user accounts
- Assign user roles and permissions
- Manage your membership programs
- Create your company's business profile
- Connect with customers through referrals
- Guide to migrating multiple companies from PMC to Partner Center

Moving from Partner Membership Center (PMC) to Partner Center

6/19/2020 • 5 minutes to read

Appropriate roles

- Global admin

We are making it easier for you to do business with us by introducing a single website (Partner Center) that serves as a central point of engagement. You will find everything you did in Partner Membership Center (PMC) can be accomplished from your dashboard in Partner Center.

You can also accomplish much more and all without leaving the one web site. Some of the terminology and features may look different though. To mitigate any initial concerns about where and what things are, be sure to take the site tour of your dashboard.

This table presents some of the differences between PMC and Partner Center.

Renewing your Microsoft Partner Network membership

PMC	PARTNER CENTER
Renewals started 90 prior to anniversary and must have been completed by the anniversary date	Partners can renew starting the day after anniversary and up to 30 days after anniversary.

Account structure

PMC	PARTNER CENTER
Headquarters plus locations - each evaluated separately. Evaluation of competencies were done at local level	One global company, your Partner Global Account (PGA), including locations, evaluated as a whole; performance and skills data aggregated at PGA level; includes several profile views for programs such as Partner profile and business profile for referrals and marketing, for more information read The account structure in Partner Center.

Sign in

PMC	PARTNER CENTER
Could use your Microsoft account (MSA) or personal account credentials joe@outlook.com	You must use your work account credentials, (joe@joescompany.com). For more information, read Your company work account and Partner Center.

User roles

PMC	PARTNER CENTER

PMC	PARTNER CENTER
Many roles in PMC are not used in Partner Center	The admin who performs the move to Partner Center is automatically assigned the MPN Admin, Account Admin, and Referrals Admin roles. They can then assign other users to user roles.
Users were managed at location level	Users are managed at the company level (PGA) rather than the location level. The exception is the Incentives admin which works at the location level.
	Partner Center has two broad sets of roles: the roles that administer the Azure AD tenant, and the roles that administer the company's business. Organize the roles in the way that makes sense for your company. One person can do everything or many people can be assigned separate roles and permissions. For more information, read Assign users roles and permissions.

How competencies and benefits are accounted for

PMC	PARTNER CENTER
Accrued per location and administered per location	Benefits are per entire company including benefits administration, however, you can manage the benefits in the way that best suits your company
Could have Additional Benefits tool kits (ABTKs) until they were retired in October 2018.	No ABTKs; one MAPS per company; one silver competency per company; one gold competency per company
	As long as you don't already have MAPS, you can purchase it. MAPS ownership is not tied to competencies.
Benefits were accessed at Partner Digital Download (PDD)	All benefits are accessed in Partner Center
Competencies and benefits spread and divided across multiple locations	Your competencies and benefits from all your locations are consolidated at the company (PGA) level and will be retained until your anniversary date. At that time, you will need to purchase or renew at the company level. Performance and skills, as well as competencies, are aggregated globally
Software Assurance voucher claims are made in the Voucher Validation and Redemption (VVR) tool	You can now access and manage Software Assurance Training Vouchers (SATV) and/or Deployed Planning Services (DPS) within Partner Center. The legacy VVR tool will be decommissioned on October 1, 2019.

Associating MCP IDs to Partner Center

PMC	PARTNER CENTER

PMC	PARTNER CENTER
You could associate the same MCP ID to multiple companies.	Only one MCP ID can be associated to a single Partner Center account. You must manually make the association. From the Partner Center dashboard, select the **Your account** icon in the right corner of the dashboard, and then select **My profile**. Under **Your learning** you will be able to associate your Microsoft Learning account and also connect your Microsoft account to Partner University.

Visual Studio benefits and MSA

PMC	PARTNER CENTER
Allocation of Visual Studio benefits to MSA	Visual Studio benefits allocated to MSAs will be honored and retained.
	MSA allocations of Visual Studio will be preserved after renewal in Partner Center.
	In Partner Center, a partner can add work accounts and guest user accounts which are MSA from the same tenant where the partner is MPN admin in the Azure AD tenant. If the partner is a global admin in multiple Azure AD tenants and all these tenants are associated to the same Partner Center account, then the partner is allowed to add users across all these tenants into the Visual Studio benefits and Azure usage-based allocations. Although guest users can be assigned usage-based subscriptions of Visual Studio by the MPN admin or global admin, guest users can't sign in to Partner Center using their MSA. Guest users can, however, sign in to Azure and Visual Studio to validate and use their assigned benefits.

Programs now located and managed in Partner Center

PMC	PARTNER CENTER
PDD	Benefits
CHIP, ICP, PIE	Incentives
	Referrals
Partner Insights	Analytics
Voucher Validation and Redemption tool	Voucher Validation and Redemption tool
	Cloud Solution Provider programs

Visual Studio benefits allocated to MSAs will be honored and retained. They will also be preserved after renewal in Partner Center. However, if you remove an MSA allocation once migrated in Partner Center, it can't be added back into Partner Center.

In Partner Center, a partner can add work accounts and guest user accounts, which are MSA, from the same tenant where the partner is MPN admin in the Azure AD tenant. If the partner is a global admin in multiple Azure AD tenants and all these tenants are associated to the same Partner Center account, then the partner is allowed to add users across all these tenants into the Visual Studio benefits and Azure usage-based allocations.

Although guest users can be assigned usage-based subscriptions of Visual Studio by the MPN admin or global admin, guest users can't sign in to Partner Center using their MSA. Guest users can, however, sign in to Azure and Visual Studio to validate and use their assigned benefits.

Moving multiple companies to Partner Center from Partner Membership Center (PMC)

6/19/2020 • 2 minutes to read

Appropriate roles

- Global admin
- User admin
- Admin agent
- Sales agent

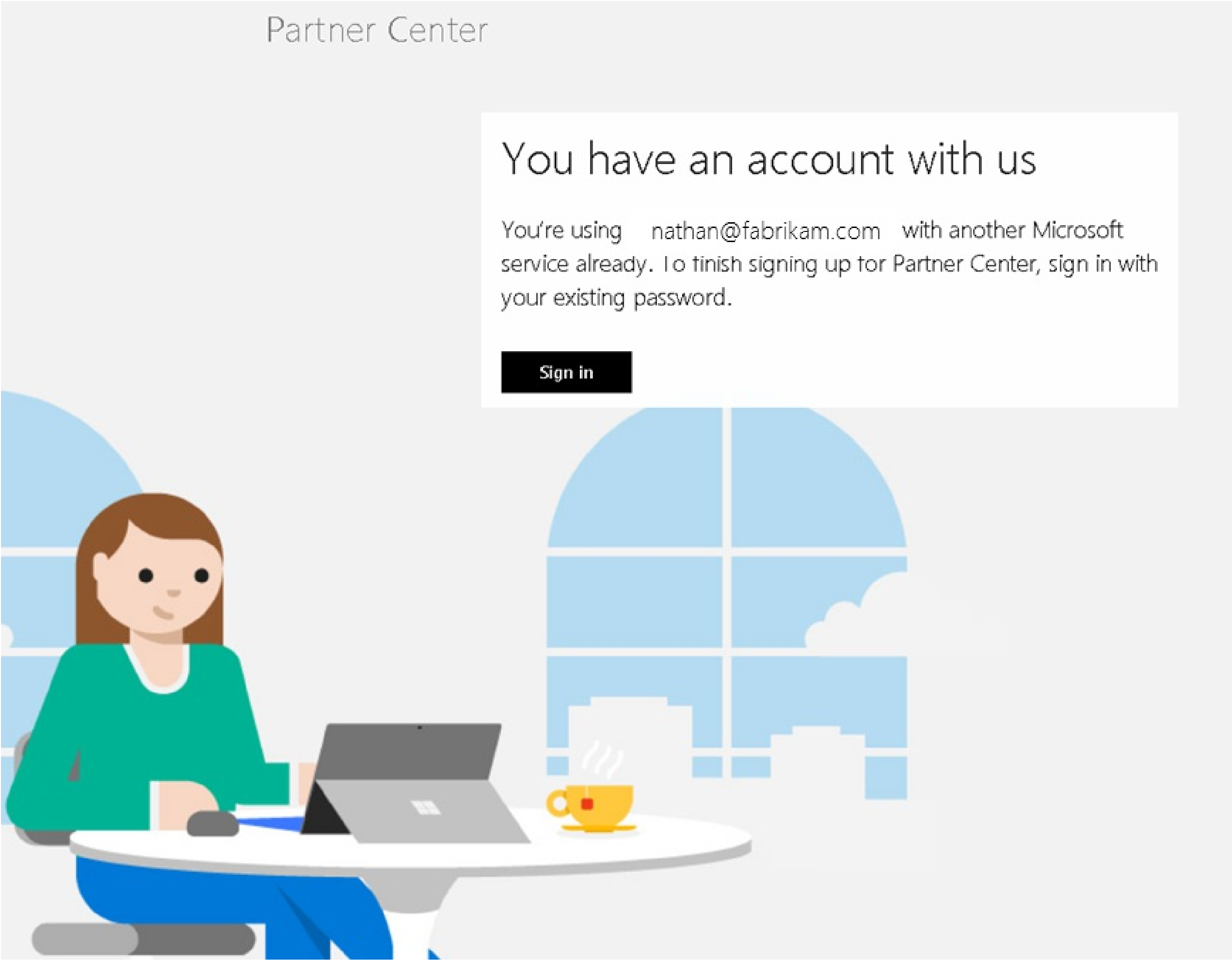
When you move your company account from PMC to Partner Center, you may be moving several accounts. In Partner Center, these accounts will be consolidated into one global account (PGA). The first account you move will be considered the Partner global account and all subsequent accounts will be consolidated into the first account as locations. Start the move with the PMC account for your company headquarters. For more information, see Guide to migrating from PMC to Partner Center or watch this short video Multi-location accounts made easy.

Move your additional accounts into Partner Center

Because you've moved one company account already to Partner Center, when you sign in, we'll let you know which account is already in Partner Center.

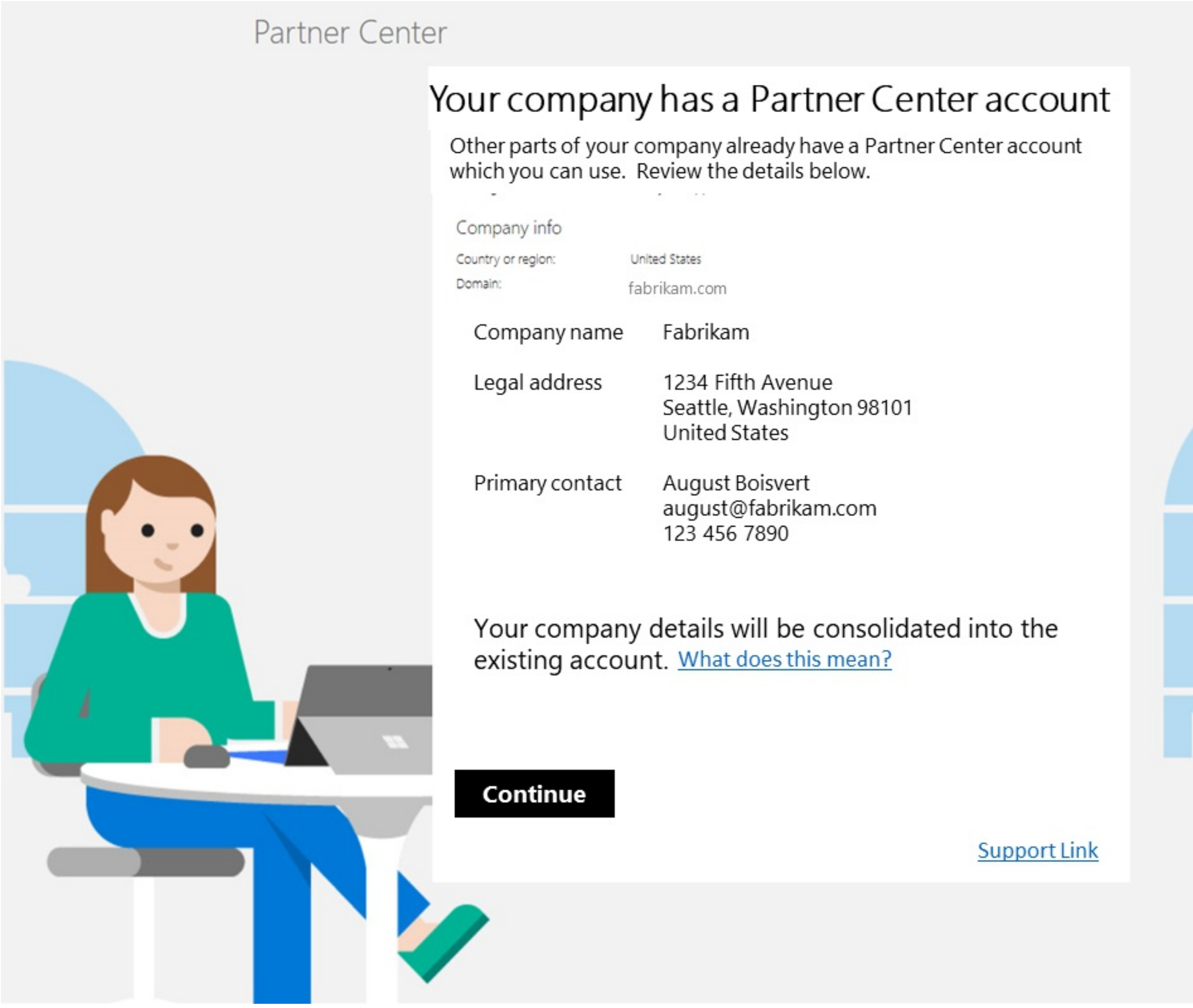
After you have migrated, if you discover that the wrong company account was designated as the Legal business, you can change that designation.

1. Go to your **Partner profile.**
2. Make sure the location you want to designate as Legal business is in your list of locations. If it isn't, add it.
3. Select **Update legal business profile.**
4. Select the business and region and save it.



Your Company has an account in Partner Center

You will see your existing account and a note telling you that your company details (the account you are currently signing in with) will be consolidated into this account.



This screen shows you the details of the existing account (Name and address) that has already been created in Partner Center along with the details of the primary contact.

Select **Continue**.

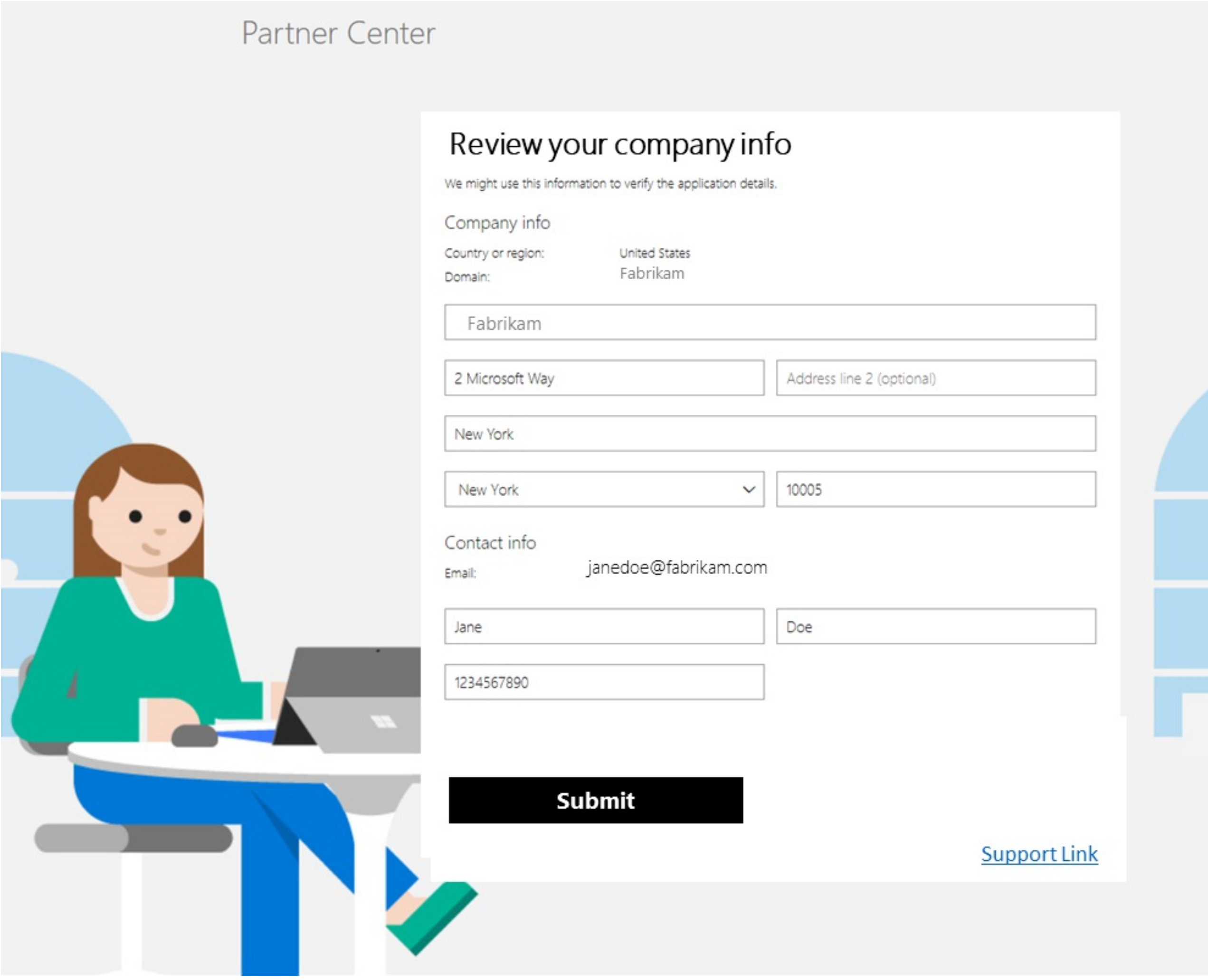
What happens during consolidation of accounts

- You cannot change any details on this screen.
- The account in PMC (which you are currently moving) will be consolidated into this existing account
- Your HQ and all locations in PMC will be moved into this existing Partner Center account as locations
- Once consolidation is complete, you will see all your account details as locations within the existing Partner Center account
- All MPN IDs are preserved during this consolidation
- All your existing competencies (Gold/Silver), purchases (MAPS/Gold/Silver), and associated benefits are preserved during consolidation
- You (the user who logged in with the work email ID) will automatically be added as an MPN Admin and an Account admin to the existing Partner Center account so that you can administer the account as needed

Review your company information

Verify the information about your company, and edit if necessary. These details will be used to migrate your account to Partner Center, so make sure the details are correct.

The details are based on the information in PMC and will be verified to ensure the company is legitimate.



If the account you are moving is in the same country or region as the existing account, you can decide if you want to use that address or add another. If you decide to use a different address, that address will be verified. If you want to use the same address, then the existing address and primary contact will be used.

Once you have verified/edited the information on this screen, click Submit and your accounts will be consolidated.

Partner Profile

When you view your profile, you will see the information for your Legal business (in PMC this was headquarters) and the information for all additional locations.

Next steps

- Moving from PMC to Partner Center
- Create user accounts
- Assign user roles and permissions
- Manage your membership programs
- Create your company's business profile
- Connect with customers through referrals

Consolidate your company accounts when migrating from PMC to Partner Center

6/19/2020 • 2 minutes to read

Appropriate roles

- MPN partner admin
- Account admin

In PMC, your company may have had many accounts and locations. Each location had its own account. When you migrate to Partner Center, all of the accounts and locations will be consolidated into one Partner global account with several locations. The following things will move with you: Your MPN IDs, competencies, purchases, marketing resources, programs, and offers. Nothing will be lost.

When you sign into Partner Center for the first time, you will be added as an MPN admin for your Partner Center account. This role lets you administer the account, add users, assign permissions, and perform other administrative tasks.

Why should you consolidate your multiple accounts in PMC into one account in Partner Center?

1. With everything under one account, you should find it easier to manage your Microsoft Partner Network account.
2. Co-sell management and solution publishing are easier under one account structure.
3. Microsoft will recognize you as one company, which will result in consolidated revenue recognition making it easier to get the full picture across all locations.
4. You'll need to pay for competencies and MAPs only once, annually.
5. After consolidating your accounts, you may be eligible for more competencies. You may also now be eligible for other incentive programs.

What happens during consolidation of accounts

- You cannot change details on the company details screen. These details are for the Partner global account.
- The account(s) in PMC will be consolidated into the Partner global account.
- All locations in PMC will be moved into this existing Partner Center Partner global account as locations. You can add additional locations as well. For more information on locations, read Manage your partner account - Locations.
- Once you complete the consolidation process, you will not be able to reverse it. All your companies' details will now appear as locations within the existing Partner global account.
- All MPN IDs are preserved during this consolidation.
- All your existing competencies (Gold/Silver) and purchases (MAPS/Gold/Silver) are preserved during consolidation. Also preserved are any related marketing resources, programs, and offers.
- You (the user who logged in with the work email ID) will automatically be added as an MPN admin and an

account admin to the Partner global account. This lets you administer the account as needed.

Consolidating your Go-To-Market offers, programs, and competencies

In PMC, it was possible for each location to have its own competencies, its own MAPs, and other marketing offers specific to a location.

In Partner Center, all location accounts are consolidated into one global account. This means all Go-To-Market offers, programs, and competencies are consolidated as well. Additional benefits tool kits (ABTKs) will not be available. You can, however, organize the distribution of marketing resources, offers, programs, and competencies as required for your company. When you consolidate, an extension is provided. This extension allows your company to enjoy the marketing resources, offers, and programs it used in PMC for an additional year.

For more information on the differences between PMC and Partner Center, read Moving from PMC to Partner Center.

Buy or renew a Microsoft Action Pack subscription or silver and gold competencies

6/19/2020 • 3 minutes to read

Applies to

- Partner Center
- Partner Membership Center
- MPN program partners

Appropriate roles

- Global admin
- User admin
- MPN partner admin
- Admin agent
- Sales agent

Now, from the Partner Center dashboard, members of the Microsoft Partner Network (MPN) can buy or renew your benefit offers. Such offers include the Microsoft Action Pack subscription and silver and gold competencies.

Buy Microsoft Action Pack for the first time

If you're new to partnering with Microsoft, the first step is to join the Microsoft Partner Network. If you're not already a member of the partner network, go to the membership page on the partner network site and select **Join now** when you're ready to sign up.

After you've successfully joined the partner network, follow the instructions on the partner network site (sign-in required) to buy your first Action Pack subscription.

You can find more details about Action Pack on the Microsoft Partner Network site.

Become a competency partner.

Renew a Microsoft Action Pack subscription

> **IMPORTANT**
>
> You now manage your Action Pack subscription on Partner Center.

Check your renewal eligibility

> **IMPORTANT**
>
> If you are invited to renew your subscription in the Partner Center, please note that we've changed our renewal window policy and you can renew your subscription only after it expires. For example, if your subscription expires on June 22, you can renew it starting June 23 and for 30 days after.
> You can find your subscription's expiration date on your **Membership offers** page (sign-in required). When you are eligible to renew in the Partner Center, follow the steps below.

To renew a Microsoft Action Pack subscription in the Partner Center

1. Go to your Membership offers page. Locate the **Microsoft Action Pack Subscription** tile.

2. Select **Renew subscription** and then select your payment method. You can pay using a credit card or an electronic bank transfer.

   > **NOTE**
   >
   > If **Renew subscription** isn't displayed or is greyed out, you're not yet eligible to renew your Action Pack subscription. We've changed our renewal window policy and you can renew your subscription only after it expires. For example, if your subscription expires on June 22, you can renew it starting June 23 and for 30 days after.

3. If paying by credit card, follow the instructions for adding your credit card information. If paying by electronic bank transfer, provide a contact name, phone number, and email address and then select **Submit**.

4. Review your order details and then select **Buy** when you're ready to buy Action Pack. Your credit card is charged immediately.

5. Your order is confirmed. Select **Close**.

Your Action Pack subscription will renew automatically each year on this date. You can turn off automatic renewal at any time from your **Purchased** offers list; however, you won't be able to turn automatic subscription renewal back on until you renew your subscription again.

Turn off automatic Action Pack subscription renewal

1. Go to your Membership offers page. Select **Microsoft Action Pack Subscription** to view your subscription details.

2. Select **Turn off automatic renewal** if you don't want your Action Pack subscription to renew automatically each year.

   > **NOTE**
   >
   > If you turn off automatic subscription renewal, you won't be able to turn it back on until you renew the subscription again. We'll remind you to renew before your subscription expires.

Cancel your Action Pack subscription

To cancel your Microsoft Action Pack subscription, you may need to contact Partner Support.

1. Go to your Membership offers page. Select **Microsoft Action Pack Subscription** to view your subscription details.

2. Select **Cancel subscription**. Follow the instructions for creating a support request.

3. On the support request form, select the following values to properly route your request:

   - Select **Report problems with Partner Center**, and then select **New request** on the next page.

   - Expand the **Type of problem** list and select **Help with partner invoice, payment, or reconciliation file**.

4. Finish filling in the required information and then select **Submit**. The Partner Center Support team will contact you to help you cancel your subscription.

To check on the status of your service request, select **Partner Center requests** from **Support**, and then select

Open. Choose the appropriate service request from the list.

Download your Action Pack invoice

1. Go to your **Membership offers** page. Select **Microsoft Action Pack Subscription** to view your subscription details.

2. Select **Download invoice**.

Next steps

- Start using your Action Pack benefits
- Competencies
- Learn about Silver and Gold competency membership levels
- Add users and assign permissions to them
- Create a business profile to get sales leads from Microsoft

Renew your MPN offers for Microsoft Action Pack and competencies during the renewal window

6/19/2020 • 2 minutes to read

Applies to

- Partner Center

The Microsoft Action Pack and competencies are offers for members of the Microsoft Partner Network that require annual renewal. Your renewal window begins on the anniversary of your purchase date plus one day. For example, if you purchased the Microsoft Action Pack on September 1, 2018, your renewal window begins on September 2, 2019. You can renew Microsoft Action Pack and competencies in Partner Center. Under Membership offers, you'll find your purchased offers and can locate the anniversary date for your offers under the renewal start date column. Membership in the Microsoft Partner Network itself does not require an annual renewal.

To learn more, select the appropriate link below:

- Competencies
- Microsoft Action Pack
- How to manage your benefits

Renewal reminders

You have 30 days after your anniversary date to renew. Your benefits continue during that time. Fifteen days before your anniversary date, Microsoft will remind you of your upcoming anniversary. You will receive another reminder 23 days after your anniversary date. When you renew during that anniversary plus 30-day window, your benefits remain intact. If you don't renew within your renewal window, you'll lose your benefits and competencies.

When you renew during the renewal window, your new anniversary date will be 365 days after your current anniversary.

Responding to COVID-19:

To help you focus on supporting your customers, **if your competency anniversary date is between January 1 and June 30, 2020**, we are extending your existing competency or competencies through your next anniversary date in 2021. Your competency renewal reminders will be updated to reflect this new offer.

- **If your competencyis coming up for renewal**, you'll see in Partner Center that your requirements have been met. To renew, you'll need to payyour competencyfeewithin your renewal windowon the Membership offers page.
- **Ifyou'vealreadymissed your renewal window**, you canreactivateyour competencyand regain access to resources and benefitsby payingyourfeeon the Membership offers page.This extension is available untilJune 30, 2020.

How to view this information

1. From the Partner Center menu on your dashboard, select **Competencies**.
2. In the list of competencies that are available, your competencies should be marked as Complete.
3. Select the competency name. You'll see a notice that you have been given an exemption from meeting the

requirements until your next renewal date.

4. To take advantage of this offer, go to **Membership offers**. You may need to pay the competency fee to complete the process, depending on your competency purchase or renewal status.

To take advantage of the extension, you must have moved your membership from Partner Membership Center (PMC) to Partner Centerto renew your competency and pay the fee. If you have not moved your membership, learn moreandmake the transitiontoday.

Information about Microsoft silver and gold competencies and advanced specializations

6/19/2020 • 3 minutes to read

Appropriate roles

- Global admin
- User admin

Demonstrate your proven expertise in delivering quality solutions in one or more specialized areas of business. Microsoft competencies are designed to prepare you to meet your customers' needs, and to help you attract new customers who are looking for Microsoft-certified solution providers. Join the elite tier of Microsoft partners and stand out from your peers.

- Earn a **Silver membership** to demonstrate your consistent capability, expertise, and commitment
- Earn a **Gold membership** to demonstrate your best-in-class capability within a specific Microsoft solution area
- As a gold partner member, you can add advanced specializations to your portfolio, too.

Earning **Silver membership** or **Gold membership** competencies also unlocks powerful Go-To-Market offers and programs to help you expand and grow your business.

Check your status as you earn a competency

You can see requirements and what your company has achieved from the competency area of your Partner Center dashboard.

1. Sign in to the Partner Center dashboard.
2. Under the MPN section on the Partner Center menu, select **Competencies**.
3. Select the competency name and specific competency option to view details. You can see what you have completed and you can also see the full requirements and links to the specific exams and retired exam validation dates.

Competency areas

To acquire silver or gold membership, you are asked to demonstrate expertise in various areas of business and technology.

AREA	SUBAREAS
Applications and Infrastructure	Application development; App integration; Cloud platform;devops; datacenter
Business applications	Cloud business applications; Enterprise resource planning; Cloud customer relationship manager
Data and AI	Data analytics; data platform

AREA	SUBAREAS
Modern workplace	Collaboration and content; communications, cloud productivity;enterprise mobility management; messaging; project and portfolio; security; small and midmarket cloud solutions; windows and devices

Silver and gold competency levels have different requirements for each of the areas. Within each area are classes and exams that employees in your company can take to achieve the competency level you want.

Learn about what's required to earn Silver and Gold membership

Learn about specific Go-to-market benefits available to Silver and Gold memberships

Learn about invoices and taxes for competencies

Advanced specializations

Go beyond your gold competency with an advanced specialization. These provide a means for you to showcase proven, verifiable expertise in a product, solution area, or service. Customers will be able to see both your Gold competency and your advanced specialization in your business profile on the partner directory. To receive an advanced specialization tag, your business must fully meet a set of published criteria and be validated by Microsoft. Learn more.

The current advanced specializations

- SAP on Azure Partners who demonstrate deep knowledge, extensive experience, and proven success in implementing SAP on Azure solutions may seek the SAP on Azure Advanced Specialization.
- Windows Server and SQL Server Migration to Microsoft Azure Partner has a depth of knowledge to provide guidance on the various SQL migration options within Azure, and demonstrates expertise in migrating and optimizing Windows Server and SQL Server-based workloads to Microsoft Azure.
- Linux and Open Source Database Migration to Microsoft Azure Partner is highly knowledgeable in open source technologies and demonstrates expertise in migrating and optimizing production workloads running on Red Hat Enterprise Linux (RHEL) or SUSE virtual machines and/or MariaDB, PostgreSQL, MySQL, CassandraDB, MongoDB databases to Azure.
- Data Warehouse Migration to Microsoft Azure Partner has experience in successfully migrating data warehouses from Teradata, Netezza, or Oracle Exadata to Azure and demonstrates expertise in analyzing existing workloads, generating schema models and performing extract, transform, and load (ETL) operations to migrate data to cloud-based data warehouses.
- Kubernetes on Microsoft Azure Partner employs DevOps practices for AKS implementations and demonstrates expertise in deploying and managing production workloads in the cloud using containers and managing hosted Kubernetes environments in Microsoft Azure. Modernization of Web Applications in Microsoft Azure Partner ensures customer success in application development, and familiarity with content management systems. Demonstrate expertise in migrating and deploying production web application workloads, applying DevOps practices, and managing application services in Microsoft Azure.

Advanced specializations help your business profile stand out to customers

6/19/2020 • 2 minutes to read

Go beyond your Gold competency with an advanced specialization. Advanced specializations help you showcase proven, verifiable expertise in a product, solution area, or service. Customers can see both your Gold competency and your advanced specialization in your business profile on the partner directory. To receive an advanced specialization tag, your business must meet a set of published criteria and be validated by Microsoft. Learn more.

The current advanced specializations

- **Adoption and Change Management** Showcase your extensive experience and proven success in providing adoption and change management services while driving Microsoft 365 usage and organizational change.
- **Teamwork Deployment** Earn recognition for your experience and proven success deploying Microsoft 365 Teamwork workloads.
- **Calling for Microsoft Teams** Prove your expertise in deploying and managing Microsoft 365 Phone System to drive customer business value.
- **SAP on Azure** You have deep knowledge, extensive experience, and proven success in implementing SAP on Azure solutions.
- **Windows Server and SQL Server Migration to Microsoft Azure** Demonstrate your depth of knowledge by providing guidance on the various SQL migration options within Azure, and demonstrate expertise in migrating and optimizing Windows Server and SQL Server-based workloads to Microsoft Azure.
- **Linux and Open Source Database Migration to Microsoft Azure** Demonstrate you skill in open source technologies and demonstrates expertise in migrating and optimizing production workloads running on Red Hat Enterprise Linux (RHEL) or SUSE virtual machines and/or MariaDB, PostgreSQL, MySQL, CassandraDB, MongoDB databases to Azure.
- **Data Warehouse Migration to Microsoft Azure** You have deep experience successfully migrating data warehouses from Teradata, Netezza, or Oracle Exadata to Azure and demonstrates expertise in analyzing existing workloads, generating schema models and performing extract, transform, and load (ETL) operations to migrate data to cloud-based data warehouses.
- **Kubernetes on Microsoft Azure** You employ DevOps practices for AKS implementations and demonstrates expertise in deploying and managing production workloads in the cloud using containers and managing hosted Kubernetes environments in Microsoft Azure.
- **Modernization of Web Applications in Microsoft Azure** You ensure customer success in application development, and familiarity with content management systems. Demonstrate expertise in migrating and deploying production web application workloads, applying DevOps practices, and managing application services in Microsoft Azure.

Next steps

Learn about Microsoft competency requirements for Gold and Silver membership

Azure Expert Managed Services Provider program

6/19/2020 • 2 minutes to read

Applies to

- MPN partners

Appropriate roles

- Account admin
- Business profile admin
- Global admin
- MPN partner admin

If your company is a superstar at selling and managing Azure services to customers, look into applying to the Azure Expert Managed Services Provider program. Azure Expert MSP partners earn an exclusive badge differentiating them from other Microsoft partners and gain top priority in the referral engine, They are prioritized for co-sell engagements, receive support when developing new practices, and can attend exclusive events.

To begin the process of applying to the Azure MSP, from the left nav. select **Competencies and programs** and then select **Azure Expert MSP**. Learn more about the prerequisites and application process.

If you don't qualify yet, you can still build your Microsoft partnership through membership enhancements, training, and other growth opportunities. Learn about steps you can take to develop your business and expertise.

Manage your Microsoft Partner Network membership benefits and offers in Partner Center

6/19/2020 • 6 minutes to read

Applies to

- Partner Center

Appropriate roles

- Global admin
- User admin
- Admin agent
- MPN partner admin

> **IMPORTANT**
> This article explains how to start using your Microsoft Partner Network (MPN) membership benefits in the Partner Center - this site. If you haven't received an invitation to move your company information from Partner Membership Center (PMC) to the Partner Center, you should continue to manage your MPN membership benefits in PMC. Sign in to PMC now.

When you join the Microsoft Partner Network (MPN), you gain access to membership benefits that can help you build and grow your business. If you're not already a member of MPN, you can join on the MPN site.

Manage your membership benefits in the Partner Center

After you purchase a membership benefit package, you'll need to get software keys and assign licenses, subscriptions, and other benefits to employees to start using them.

> **IMPORTANT**
> While you don't have to be a global admin in your organization to purchase benefits, you do need to be the global admin to assign benefits to employees. If necessary, you can become a global admin by following the instructions on your **Benefits** page (sign in required). Your company may already have a global admin so be sure to check with your team.

Benefit packages include allocations of licensed software, cloud services, Visual Studio subscriptions, and support. Benefits packages can also include certain Go-To-Market resources, offers, and programs. You can get Action Pack subscription details on the Microsoft Partner Network site.

To view and manage all of your membership benefits, go to your **Benefits** page (sign in required). Alternately, you can sign into the Partner Center dashboard, select the [**Benefits option**] from the left-hand menu, then select any benefits options displayed.

Manage software benefits

1. Select **Software** to see your list of software benefits.

2. Find the product you want to start using, and then select the down arrow at the far right of the row to expand the product's details.

3. For each software product you want to start using:

   a. Select **Get keys** to reveal the product license keys. Be sure to follow any special instructions listed.

   b. Select the language you want the product to be displayed in.

   c. Select the operating system (OS) type of the computers you plan to install the software on.

   d. Follow the links to download and install the software installation packages.

Manage cloud services benefits

1. Select **Cloud** to see your list of subscriptions to cloud-based services.

2. Find the subscription or product you want to start using, and then select the down arrow at the far right of the row to expand the subscription's or product's details.

3. To activate Microsoft Azure usage-based subscriptions, assign yourself as a user. Go the Microsoft Azure portal to manage the subscription.

   To activate license-based subscriptions, select **Get keys** to copy the product license key(s), and then follow any special instructions to activate the subscription.

Manage Visual Studio subscriptions

1. Select **Visual Studio subscriptions** to see your list of Visual Studio subscriptions.

2. Find the subscription you want to start using, and then select the down arrow at the far right of the row to expand the subscription's details.

3. To activate a Visual Studio subscription, select a user from the list and then select **Assign user**.

   > **IMPORTANT**
   >
   > If the user you want to assign is not in the list, you can add new users in **Account settings**.

4. Repeat this process for each subscription you want to assign. Users can manage their subscriptions in the Visual Studio portal.

   You can reassign subscriptions anytime by removing an assigned user and then assigning a different user.

Manage technical benefits

1. Select **Technical benefits** to see your list of Microsoft technical benefits.

   Technical benefits may include Microsoft product support incidents, partner advisory hours, and technical presales and deployment services.

2. Find the support benefit you want to start using, and then select the down arrow at the far right of the row to expand the benefit's details.

3. To activate your support benefit, assign a user to it.

   a. Select a user from the list. If the user you want to assign is not in the list, you can add new users in **Account settings**.

   b. Provide an email address for the user that's different from the email address associated with your company's Partner Center account.

As a safeguard, we'll email instructions for accessing Microsoft Product Support to this email address in addition to the user's Partner Center account email. It can take several days to activate this benefit and email instructions to the assigned user.

c. After you finish entering the alternative email address, select **Assign user**.

4. You can use your technical presales assistance or advisory hours benefit to request technical assistance during the presales, design, deployment, and app development phases of your cloud and hybrid solutions. To request assistance, fill in the request form and then select **Submit request**.

Manage Go-To-Market offers

Appropriate roles to perform this task:

- Global admin
- MPN Partner admin

1. Select **Benefits**, then **Go-To-Market** to see your list of offers associated with the Go-To-Market with Microsoft program.

   Go-To-Market features offer additional marketing resources, offers, programs, and assistance that may be available to you. The types of offers available depend on your specific partner level and any competencies you may have already obtained.

2. To activate any go-to-market offer or program, you must first assign a company marketing contact. This contact will receive follow-up communications about your active Go-To-Market offers.

3. To add or update your marketing contact information, go to the top of the Go-To-Market page, then select **Add**, **Update**, or **Change**. Now, do the following steps:

   a. Select a user from the list. If the user you want to assign is not in the list, you can add new users in **Account settings**.

   b. Provide an email address for the user that's different from the email address associated with your company's Partner Center account.

   We will email instructions for using your Go-To-Market offer to your designated marketing contact's email address.

   c. Provide the contact phone and preferred language for this marketing contact. After you finish entering this information, select **Assign user**.

4. After you update your marketing contact, find the Go-To-Market offer you want to start using, then select the down arrow at the far right of the row to expand the offer's details. The list will display each type of offer available below the Benefit name (such as, **Silver Core**, **Gold Core**, or **ISV Co-sell ready**).

5. Select **Activate** to activate the offer.

> **NOTE**
>
> It can take several days to email instructions to the assigned marketing contact and activate a Go-To-Market offer. Once the offer is activated, you will see changes on the Go-To-Market page. In the **Status** column, you will see the offer change to **Active**. In the **Expires** column, you will see the date the offer expires. You can use this offer until its expiration date. Learn more about the different types of Go-To-Market resources, offers, and programs available.

Cancel a membership benefit or offer

In order to cancel a benefit or offer and receive a refund, you must make the request within 30 days of purchase and not have activated the software benefits. Request the cancellation through a service request.

Next steps

- Add users and assign permissions to them
- Purchase or renew a subscription to Microsoft Action Pack
- Learn about MPN Go-To-Market offers and resources

Explore your Go-To-Market with Microsoft offers

6/19/2020 • 2 minutes to read

Applies to

- Partner Center
- Microsoft Partner Network members

Appropriate roles

- Global admin
- MPN partner admin

When you become a Microsoft Partner Network member, you gain access to membership benefits that can help you build and grow your business. Go-To-Market with Microsoft resources, offers, and programs are among the many benefits you receive as a Microsoft Partner Network member.

Go-To-Market offers give you access to exclusive sales and marketing resources that can help you accelerate your time to market, generate leads, and expand your business.

> **NOTE**
> If you're not already a member of the Microsoft Partner Network, join on the Microsoft Partner Network site.

Go-To-Market resources, offers, and programs available by membership level

Your Go-To-Market offers differ based on your specific level of MPN membership, your specializations, and any competencies you achieve.

All MPN members have access to certain standard GTM resources. These include access to ready-to-go marketing assets, a sales enablement platform, and on-demand digital marketing. There are also even more Go-To-Market offers and programs available to partners who achieve Silver or Gold competencies and/or ISV partners with a co-sell ready solution.

> **NOTE**
> Go-To-Market resources, offers, and programs are subject to additions and changes. Go to the Microsoft Partner Network Go-To-Market page to learn about the latest Go-To-Market resources and offers available for partners who achieve different competency levels and/or ISV partners with a co-sell ready solution.

Additional Go-To-Market offers available to those with **Silver** competency levels and/or ISV partners with a co-sell ready solution:

- All MPN standard Go-To-Market resources
- Business profile optimization and referral management
- How to market with Microsoft

Additional Go-To-Market offers available to partners with **Gold** competency levels and/or ISV partners with an IP co-sell ready solution:

- All MPN standard Go-To-Market resources
- All Silver/ISV co-sell ready Go-To-Market offers
- Co-branded one-pager
- Co-branded presentation
- Co-branded case study
- Press release with Microsoft executive quote
- Co-branded social marketing

View Go-To-Market membership offers in Partner Center

To view your Go-To-Market offers:

1. Sign into the Partner Center dashboard.
2. From the left-hand menu, select **MPN**. Then, do one of the following steps:
   - Select **Overview**. Scroll to the **Quick Links** section, then select the **Go-to-market** tab.

     or

   - Select **Benefits** followed by **Go-To-Market**.

You will see a list of Go-To-Market offers that are either already active or that are available to activate.

Manage or activate Go-To-Market offers in Partner Center

To activate or manage your Go-To-Market offers, see how to manage your Go-To-Market offers. Part of this process requires you to assign a marketing person as the contact for follow-up emails and communications regarding the Go-To-Market offers you activate.

> **IMPORTANT**
>
> You need to be the global admin or MPN partner admin to activate specific Go-To-Market offers and assign a related marketing contact. If necessary, you can become a global admin by following the instructions on your **Benefits** page (sign in required). Your company may already have a global admin so be sure to check with your team.

Next steps

- Manage your partner network benefits
- Purchase or renew a subscription to Microsoft Action Pack
- Learn about competencies
- Sell with Microsoft

Benefits FAQ

6/19/2020 • 4 minutes to read

Applies to:

- Partner Center
- Partner Center for Microsoft Cloud for US Government

General questions

Q. What does "Benefit Expiry Date" mean

Benefit expiry date means the last date to activate your benefits.

You have until your renewal date to redeem the benefits available during your one-year enrollment period. You can find your renewal start date from the Membership Offers page in the MPN dashboard.

However, you can use product keys for one year from the day you redeem the keys on their respective cloud portals.

For example, if your benefit expiry date January 31, 2021, then you need to redeem the keys in the appropriate cloud portal before January 31, 2021. And if you redeem your product key on December 1, 2020, you can use that key until December 1, 2021, even though your benefit expiry date is January 31.

> **NOTE**
>
> If you have benefits that require a user assignment (such as Visual Studio subscriptions), you can activate and use those benefits for an additional 30 days after the enrollment renewal date.

Q. How do I renew my benefits

Use the following procedure to renew your benefits:

1. Sign into the Partner Center dashboard.
2. In the left nav, select **MPN**.
3. On the **MPN** tab, select the **Benefits** option.
4. Activate the benefit you want.

If the benefit you want is not available, you'll need to renew your Partner Center membership and repeat the process above.

Q. I received a notification informing me that my subscription is expiring soon - what should I do

Sign into the cloud portal that generated the notification, review the expiry date of your existing subscription(s), and then add licenses to the expiring subscription or extend the existing subscription for the next year of enrollment.

Q. When can I renew my membership

Existing membership can be renewed any day after the beginning of renewal start date.

Azure and cloud activation benefits

Q. How does adding, extending/renewing licenses work on Azure

When you add licenses, you increase the number of total licenses for your existing subscription.

When you renew or extend subscriptions, the number of licenses remains the same, but you extend the amount of time for these subscriptions.

> **IMPORTANT**
>
> If you choose to add licenses on an existing subscription, the subscription will expire in less than 12 months, depending on the number of existing and added licenses. Once you've redeemed a key, you can't redeem it again. Before you redeem your key, make sure you understand whether you need to add licenses or renew/extend the subscription.

Q. Why don't I see the renew or extend options when I activate my product key

If the renew/extend option does not appear, it probably means you already have more licenses on your existing subscription than are provided by the new product key.

To access the renew/extend option, you'll need to remove licenses in your current subscription until the number of licenses you have is the same or less than the number of licenses your new key has.

Q. Can I activate the license on my customer's account

No. Product licenses are issued for demonstration purposes. Your sales and marketing employees can use this software to showcase products to your customers, but demonstration products cannot be installed on customer hardware or infrastructure, and must be used with partner supervision.

Q. I'm having trouble assigning users in Azure Bulk Credit. What should I do

You can't combine Azure Bulk Credit offers with other offers. If a user assignment is not working, it probably means the user you want to assign is already using other licensing, prepaid, or credit offers such as Microsoft Enterprise Agreement, Cloud Solution Partner, Azure in Open, Azure Pass, Action Pack, etc. If the user is not subscribed to any of these agreements or plans and you still can't assign them, contact Microsoft Support.

Visual Studio Benefits

Q. How does Visual Studio Activation work in Partner Center

You can assign subscriptions to anyone in your User Management list in Partner Center or in your Azure Active Directory (AAD) tenant, by doing the following steps:

1. Sign into the Partner Center dashboard.
2. In the left nav, select **MPN**.
3. Select **Benefits**, and then select **Visual Studio**.
4. Assign the desired users to your existing Visual Studio subscriptions available.

After you've assigned the subscription, the user needs to log into Visual Studio to manage it.

Technical benefits and support

Q. I can't install the software I downloaded from Partner Center. How do I get help

Installation, activation, and other product-related help are provided through Microsoft Support. To get assistance, do the following steps:

1. Sign into the Partner Center dashboard.
2. In the left nav, select **MPN**.

3. Select **Benefits**, and then select **Technical Benefits**.

4. Use the Technical Benefits section to activate and receive an Access ID/Contract ID.

5. Log into Microsoft Support.

6. Select the product you're trying to install, and then create a technical support ticket.

Manage Marketplace Rewards in Partner Center & activate marketing, sales, and technical benefits

6/19/2020 • 2 minutes to read

Appropriate roles:

- MPN partner admin
- Global admin
- Admin agent

If you publish software offers to our commercial marketplace, Marketplace Rewards provides targeted support for all your offers with marketing, sales, and technical benefits.

Marketplace Rewards eligibility is calculated based on all publisher profiles linked to the PGA MPN company. To check your eligibility for the Marketplace Rewards program, go to the Partner Center Marketplace Rewards page.

Sales and marketing benefits

1. From the Partner Center dashboard, select **Sales and Marketing benefits** tab on Marketplace Rewards page to see your list of benefits.

2. To activate any sales and marketing benefit, you must first assign a company marketing contact. This contact will receive follow-up communications about your Marketplace Rewards.

3. To add or update your marketing contact information, go to the top of the Sales and Marketing benefits tab on Marketplace Rewards page, then select **Add, update, or change**.

   Next, do the following:

   - Select a user from the list. If the user you want to assign is not in the list, you can add new users in Account settings.

   - Provide an email address for the user that's different from the email address associated with your company's Partner Center account. We will email instructions for using your Marketplace Rewards benefit to your designated marketing contact's email address.

   - Provide the contact phone and preferred language for this marketing contact. After you finish entering this information, select **Assign user**.

4. After you've updated the marketing contact, select **Activate** for the benefit you want to start using. Once you activate a benefit, your marketing contact will be contacted by a member of the Rewards team within a week.

Technical benefits

1. You can use your technical benefit to request technical assistance during the presales, design, deployment, and app development phases of your cloud and hybrid solutions. To request assistance, fill in the request form and then select **Submit request**.

2. How to make use of Azure sponsorship benefits will be shared via an email as you unlock these benefits.

Why can't I see the Commercial Marketplace Rewards program on my

dashboard?

The marketplace rewards information is available through the Azure AD tenant and MPN ID that was used to create your Partner Center account. This account is called the Partner Global Account (PGA) of your company. If your Azure AD tenant is different from the one used for MPN onboarding, in order for you to see the Commercial Rewards Marketplace menu, you will need to associate it with your company's PGA.

To associate an Azure AD tenant with the PGA of your company

1. As either the global admin or account admin, sign into the PGA in Partner Center.
2. Select **Settings** (on top-right), **Partner settings**, **Tenants**.
3. Select **Associate another Azure AD tenant** and select the Azure AD tenant you want to associate with the PGA.
4. Add user name and password of any user in the Azure AD tenant you want to associate and select **Submit**.
5. Sign out of Partner Center and then sign in using the user name and password for the tenant you just associated to the PGA.
6. You will now be able to see the Commercial Rewards Marketplace program information in the left navigation menu.

Participate in Software Assurance programs, including training vouchers and planning services

6/19/2020 • 2 minutes to read

Participation in Software Assurance programs, including Software Assurance Training Vouchers (SATV) and Planning Services, provides you an opportunity to grow your business with Microsoft enterprise customers. As a Software Assurance Training Vouchers partner, Microsoft will compensate you to provide instructor-led, technical classroom training developed by Microsoft experts. As a Planning Services partner, Microsoft will compensate you to lead pre-defined implementation planning engagements. Through both programs, you gain the opportunity to set your business apart from the competition, become a trusted advisor, and offer follow-on services to your customer. Enrollment in the programs and management of related Software Assurance vouchers is done through the Partner Center.

TO LEARN ABOUT	READ THIS
Enrolling in the Software Assurance Training Vouchers (SATV) program	Software Assurance Training Vouchers (SATV) program in Partner Center
Enrolling in the Software Assurance Planning Services	Software Assurance Planning Services in Partner Center

Software Assurance Training Voucher (SATV) program in Partner Center

6/19/2020 • 2 minutes to read

Grow your business by enrolling in Software Assurance partner programs. Microsoft compensates partners for delivering training, planning, and other services to enterprise customers who have Software Assurance.

As an approved software assurance Training partner, Microsoft compensates you for providing technical training to enterprise customers in exchange for vouchers they get with Software Assurance. Participating in this program can help you attract more customers and become their trusted learning partner.

Get started

If you're new to Software Assurance training services, follow all the steps below. If you're already active in the training voucher program, start at step four (4) below.

1. Confirm program eligibility
2. Enroll in the training program
3. Confirm course eligibility
4. Have customer create and assign voucher
5. Validate and reserve customer voucher
6. Deliver training and activate product
7. Redeem voucher
8. Request payment

This article explains how to complete each step.

Confirm program eligibility

Before you can enroll in the SATV program, you must first complete the requirements for the Microsoft Partner Network Learning option, which replaces the Microsoft Learning competency. Learn how to get started in the Learning option.

You can verify your company's eligibility including applicable competency and assessment requirements in Partner Center. Follow the instructions at step 1 of the SATV workflow for more details and screenshots.

Enroll in the training program

After your company meets the eligibility requirements and your program participants have passed the compliance training course, you're ready to sign the Software Assurance Training Voucher program agreement and enroll. Be sure to review all SATV program policies, then follow the instructions in step 2 of the workflow to complete the SATV enrollment process in Partner Center.

Confirm course eligibility

Once enrolled in the SATV program, partners can offer training sessions for SATV-eligible courses, for which customers can use their training vouchers. Eligible courses are listed in the SATV course eligibility catalog. Review step 3 of the workflow to understand which types of courses are SATV-eligible.

Have customer create and assign voucher

Before conducting a training, your customer must first activate their SATV benefit and then assign it to your organization. For detailed instructions with screenshots showing the steps your customer must take in order to create a voucher and assign it to you, refer to step 4 of the workflow.

Validate and reserve customer vouchers

You are now able to reserve and redeem vouchers and begin training your customers. Your company's MPN admin has access to the voucher management tool in Partner Center and can add users who need to work in the tool. For instructions on validating and reserving vouchers, refer to step 5 of the workflow.

Deliver training and activate product

Once a voucher is reserved, you may deliver the training to your customer. See step 6 of the workflow for training engagement guidelines and instructions for the activation and purchase of Microsoft Official Courseware (MOC), exams, and Microsoft Course Certificate vouchers (LaaS) for MOOC courses.

Redeem voucher

Once you complete a training, you must redeem the voucher. Follow the instructions in step 7 of the workflow to ensure all requirements are met so that you can request payment.

Request payment from Microsoft

Payments are handled through Software Assurance Voucher Benefit (SAVB) Online Payment Tool. Follow the instructions in step 8 of the workflow to submit an invoice to Microsoft through SAVB.

For additional information read the FAQ and review SATV program policies.

See also:

- Software Assurance Training Vouchers (SATV) Workflow
- Software Assurance Training Vouchers (SATV) FAQ
- Software Assurance Training Vouchers (SATV) Policies

Software Assurance Planning Services in Partner Center

6/19/2020 • 3 minutes to read

Appropriate Roles

- Global Admin
- MPN Partner Admin

As an approved Planning Services partner, Microsoft compensates you for providing pre-deployment planning engagements for enterprise customers. Participating in this program may help you attract more customers, become their trusted planning partner, and lead to additional customer engagements.

Get started

If you're new to Software Assurance Planning Services, follow all the steps below. If you're already active in the Planning Services program(s), begin each new engagement at step four (4) below.

1. Verify eligibility (new partners)
2. Enroll (new partners)
3. Create or update your company's business profile (new partners)
4. Customer creates and assigns voucher (existing partners)
5. Validate and reserve voucher (existing partners)
6. Complete engagement and provide deliverables to your customer (existing partners)
7. Redeem voucher in Partner Center (existing partners)
8. Request payment from Microsoft (existing partners)

This article explains how to complete each step.

Verify eligibility (new partners)

Before partner companies and consultants can enroll in one of the Planning Services offerings, they must satisfy both compliance training requirements and competency requirements:

- **Compliance training requirements.** The program's compliance training requirements must be satisfied at the company level.
- **Competency requirements.** Competency requirements are specific to the engagement to be delivered. For example, your company might be enrolled in the Desktop Deployment Planning Services (DDPS) offering. However, you will only be eligible to deliver a specific engagement within the DDPS offering if your company also holds a qualifying competency for that specific engagement.

> **NOTE**
>
> To learn more about eligibility requirements for specific engagements, view eligibility requirements for Planning Services engagements.

To help verify your company's eligibility to enroll in a specific Planning Services engagement:

1. Sign into the Partner Center dashboard.

2. Select **MPN** from the menu, then select **Programs**.
3. Select **Software assurance enrollment**.
4. Select the **Planning Services program enrollment** tab at the top of the page. You will see a green check mark next to any requirements or competencies you have already completed.

Enroll (new partners)

After your company meets the eligibility requirements, you're ready to sign the Software Assurance Planning Services program agreement and enroll in one or more program offerings.

First, be sure to review all Planning Services program policies. Then, follow the instructions in step 2 of the workflow to complete the Planning Services enrollment process in Partner Center.

> **NOTE**
>
> You will need to renew your requirements and re-enroll in the Planning Services programs each year.

Create or update your company's business profile (new partners)

Maximize your exposure to potential customers. Follow instructions and guidance to create or update your company's business profile within Partner Center.

Customer creates and assigns voucher (existing partners)

Before you can begin a Planning Services engagement, your customer must take the following actions:

1. Customers must first activate their Planning Services benefit.
2. Customers must then create a Planning Services voucher and assign it to a project manager in their company.

For detailed instructions the customer must take to create the voucher and assign it to you, see step 4 of the workflow. For an overview of the customer experience, see the VLSC Software Assurance Guide.

Validate and reserve voucher (existing partners)

After a customer assigns a voucher to your company in the Volume Licensing Service Center (VLSC), the customer receives an email that includes the voucher ID. The customer needs to forward this email to you so that you have the information you need to reserve the voucher.

When you have the voucher details, you can reserve the voucher and schedule the planning engagement. See step 5 of the workflow for detailed guidance about how to do this within the Partner Center dashboard.

Complete engagement and provide deliverables to your customer (existing partners)

To be eligible to deliver a Planning Services engagement, the consultant must have completed one or more of the technical assessments or exams required for the engagement's qualifying competency. (To learn more about the assessments or exams required, view eligibility requirements for Planning Services engagements.)

After your company has completed the engagement and provided the final, completed deliverable(s) to the customer, you need to fill out and submit the online completion report.

See step 6 of the workflow for detailed guidance.

Redeem voucher

Before you can invoice Microsoft for the delivered engagement, you must first redeem your voucher. See step 7 of the workflow for detailed guidance.

Request payment from Microsoft (existing partners)

After redeeming Planning Services vouchers, you must invoice Microsoft for payment. Payments are handled through the Software Assurance Voucher Benefit (SAVB) Online Payment Tool.

To submit an invoice to Microsoft through SAVB, follow the instructions in step 8 of the workflow.

Next steps

- Software Assurance Planning Services workflow
- Software Assurance Planning Services FAQ
- Software Assurance Planning Services policies
- Software Assurance Planning Services retired engagements

View eligibility requirements for Planning Services engagements

6/19/2020 • 2 minutes to read

Appropriate Roles

- Global Admin
- MPN Partner Admin

This topic helps you learn about the eligibility requirements you need to satisfy before your company can enroll or deliver Software Assurance Planning Services engagements for Microsoft.

NOTE

Beyond satisfying an engagement's eligibility requirements, you must also follow several other steps before you can deliver Software Assurance Planning Services engagements. For an overview of all steps required, see Software Assurance Planning Services in Partner Center.

Learn more about each engagement

Each Planning Services engagement has its own, specific eligibility requirements. To learn more, see the following table.

TO LEARN ABOUT ELIGIBILITY REQUIREMENTS FOR THESE ENGAGEMENTS	GO TO THE DATA SHEET FOR THIS OFFERING
Windows and Office Deployment Planning Mobile Productivity Deployment Planning Modern IT Enterprise Security Proof of Concept	Desktop Deployment Planning Services (DDPS) engagements
Upgrading Microsoft Dynamics 365 for Customer Engagement Migrating to Microsoft Dynamics 365 for Customer Engagement Upgrading Microsoft Dynamics 365 for Finance and Operations	Dynamics Deployment Planning Services (DYDPS) engagements
Modernizing Your Windows Server Platform	Private Cloud, Management and Virtualization Planning Services (PVDPS) engagements
SharePoint Deployment Planning	SharePoint Deployment Planning Services (SDPS) engagements
Exchange Deployment Planning Skype for Business Deployment Planning	Skype for Business and Exchange Deployment Planning Services (S-EDPS) engagements

TO LEARN ABOUT ELIGIBILITY REQUIREMENTS FOR THESE ENGAGEMENTS	GO TO THE DATA SHEET FOR THIS OFFERING
Data Estate Modernization	SQL Server Deployment Planning Services (SSDPS) engagements

Next steps

- Software Assurance Planning Services workflow
- Software Assurance Planning Services FAQ
- Software Assurance Planning Services policies
- Software Assurance Planning Services retired engagements

Invoices and taxes in the Microsoft Partner Network

6/19/2020 • 2 minutes to read

Applies to

- Partner Center

Appropriate roles

- Global admin
- User admin
- MPN partner admin
- Billing admin
- Admin agent

View or download your MPN membership invoice

Use the steps below to view or download the final invoice for an order related to your membership in the Microsoft Partner Network. Invoices are generally available ten days after payment is complete. For additional information, contact your Regional Service Center.

You must be a Global administrator or MPN Partner administrator to perform this procedure.

1. Sign into Partner Center with your work account, and select **MPN** on the left menu.
2. In the dropdown list, select **Membership offers** to see the offers available for purchase, as well as the invoices available for the current year of enrollment. To view invoices for previous years, select **Expired**.
3. Select the invoice you want, and then select **Download invoice**.

File a tax exemption

1. In Partner Center, select **Settings**.
   - To find your MPN ID, select **Partner Profile**.
2. Create a new support ticket. In Partner Center, select **Service requests**, select **Partner Center requests**, and then select **New request**.
3. Fill out the form. For the **Type of problem**, select **Cannot manage my profile**. In the description, include your MPN ID.
4. After you submit the ticket, Microsoft will email you to get more information. When you reply, attach the appropriate supporting documentation for your tax exemption certificates.

Send Microsoft your VAT ID number

1. From the Partner Center dashboard, select **Membership offers**, and then select **Available**.
2. Select **Add your VAT ID**.
3. Enter the VAT ID for your company, select **Add**, and then select **Next**.

Next steps

- Overview of Partner Center billing
- Get credited for withholding tax

Test drive new Partner Center features and help shape the future of Partner Center

6/19/2020 • 2 minutes to read

Applies to

- Partner Center

Help shape the future of Partner Center!

We're continually releasing new features and capabilities to Partner Center and we want your feedback!

We invite you to try out new features before they're released to the worldwide Partner Center community and share your thoughts about them. Check out the Partner Center Announcements page for information about upcoming features so you can start planning how to use them to grow your business. There may be several features available for you to test drive at a given time.

Test drive a feature

1. From **Account settings** select **Test drive new features**.
2. Select **Feature releases**. You will be able to see which features are being released for test and if you are interested in participating.
3. If you are interested in testing a particular feature slide the button to **On**.

> **NOTE**
>
> Only global admins and admin agents can turn on feature preview releases. However, any of your Partner Center users can see and use preview features if they have the applicable permissions.

> **IMPORTANT**
>
> We continue to fix errors and enhance feature performance during the preview phase of any feature releases, which may result in changes to how the final feature works. For these reasons and others, preview releases may behave unpredictably, and do not convey an actual or implied warranty from Microsoft.

- See our target date for making a feature available for preview and our target go-live date for when we'll release the feature to the worldwide Partner Center community

> **NOTE**
>
> By *target go-live date*, we mean the date we're planning to make the feature available to all worldwide Partner Center users. However, several things could impact the go-live date, including a decision to incorporate feedback that improves the feature, and we may decide to reschedule the go-live date or to not release a commercial version of the feature.

Tell us what you think

Our mission in everything we develop for Partner Center is to empower you to achieve more. We want to focus our efforts on features and capabilities that help you grow your business, so we invite you to try new features and share your feedback about them before they're released to the worldwide Partner Center community.

We encourage you to share your ideas and thoughts about a specific preview release or about Partner Center as a whole, and to suggest new features you'd like to see added to the site. To give us feedback, you can:

- Use the feedback form in the bottom right-hand corner of the Partner Center window to send your feedback directly to us.
- Request support if you encounter any issues with a feature preview. To create a support request, select **Support requests > Partner Center requests** from the **Partner Center** menu and then select **New request** on the **Partner Center requests** page.

Cloud Solution Provider program benefits and different models

5/13/2020 • 3 minutes to read

Applies to

- Partner Center
- Partners in the CSP program

The Cloud Solution Provider program (CSP) helps you go beyond reselling licenses to being more involved in your customer's business.

- Deeper engagement with your customers - meeting regularly with your customers means you will develop a better understanding of their business and needs.
- Increase your profits - Offering increased support and billing services, whether on your own or through an indirect provider, opens up new revenue streams.
- Add value - You'll be able to offer customers industry-specific solutions bundled with Microsoft products.
- Provide managed services - You'll be well positioned to meet customer demand for managed services.

Which CSP model is best for me?

Direct bill model

In the direct bill model, partners purchase Microsoft products and subscriptions directly from Microsoft and sell them directly to their customers through their in-house sales staff. Partners who already operate with, or are willing to develop, the appropriate sales, billing, and support infrastructure may choose the CSP direct model. The requirements to become a direct partner have recently been changed and will take effect as of August 31, 2018. Direct partners will need to meet the new requirements as of their next enrollment period after August 31, 2018.

New expanded requirements:

Support

- Expand your support capabilities by purchasing one-on-one, prioritized cloud support with a Microsoft Advanced Support for Partners package. Or, choose a Microsoft Premier Support for Partners package to access the complete catalog of proactive services, 24/7 elevated break/fix support, and technical account management across cloud, hybrid, and on-premises.

Services

- Demonstrate that you provide at least one managed service, IP service, or customer solution application. Learn more about adding managed services

- Meet the minimum infrastructure capabilities, such as billing and provisioning. We are monitoring annual performance to confirm that direct bill partners who meet these requirements are demonstrating steady business growth. There are no specific performance goals in place at this time, but Microsoft may implement a performance bar in the future.

- An active Microsoft Partner Network (MPN) ID for the location you want to sell in

Indirect model

In the indirect model, providers (also known as distributors) purchase Microsoft products and subscriptions directly from Microsoft, but sell to customers through a network of indirect resellers. The prerequisites for enrolling in CSP as an indirect reseller include:

- An active Microsoft Partner Network (MPN) ID for the location you want to sell in
- The ability to sign legal agreements on behalf of your organization
- A relationship with an official Microsoft provider

Where can I sell through the CSP program?

Your company's location determines your market. Your market includes the regions and/or countries where you can sell CSP offers. See Cloud Solution Provider program regional markets and currencies for the complete list of CSP markets and currencies.

Before you can order CSP offers on behalf of a customer, the customer must sign the Microsoft Customer Agreement. You can find the applicable Microsoft Customer Agreement for your customer's location here.

What can I sell through the CSP program?

You can sell the full range of Microsoft cloud services, as well as a variety of additional offers that change frequently. To see the CSP offers for the current month, sign in to the Partner Center and then go to the **Pricing and offers** page.

Next steps

- Requirements for each CSP model Cloud Solution Provider program|
- Selling in Microsoft's national clouds: Apply to sell in Microsoft national clouds
- Microsoft Customer Agreement customer templates: Microsoft Customer Agreements by region and language
- Indirect provider tasks on the Partner Center Partner with indirect resellers in the Cloud Solution Provider program
- Indirect reseller tasks on the Partner Center Partner with indirect providers in the Cloud Solution Provider program

Enroll in the Cloud Solution Provider program and build a profitable cloud solution business

6/19/2020 • 4 minutes to read

Applies to

- Cloud Solution Provider program

Appropriate roles

- Global admin

Get started

The rapidly growing demand for cloud-based solutions and services provides many opportunities for Microsoft partners of all sizes to build profitable cloud solution businesses. Partners who are ready to enter the market, but who don't want to have to manage multiple vendors, or who may not have an end-to-end customer relationship management infrastructure in place, can enroll in Microsoft's Cloud Solution Provider (CSP) program as indirect resellers.

To enroll in the Cloud Solution Provider program, you first need an MPN ID. Don't have one yet? Join here.

To complete the CSP application, you'll need your company's MPN ID, complete business address, bank information, and the work email for the employee who will act as the admin for the Partner Center.

1. Sign in to Partner Center with your work email (i.e., your Azure AD tenant credentials).
2. Create your partner profile and associate your MPN ID to your profile. It can take us several days to review and verify the information you've provided. We'll email you when we've completed our review.
3. After we've verified your information, accept the Microsoft indirect reseller terms agreement.

> **IMPORTANT**
> A partner in the CSP program cannot resell online services to another partner in the CSP program currently. Microsoft continuously reviews the policies and capabilities of all programs. Any news about feature releases or policy changes will be announced through the usual communications channels, including Partner Center announcements.

Enroll as an indirect reseller

If you're enrolling in the CSP program as an indirect reseller, you won't purchase products directly from or be invoiced directly by Microsoft. Instead, you'll work with indirect providers (also known as distributors) who transact directly with Microsoft.

Partnering with an indirect provider means you don't have to have the infrastructure in place to go to market or to buy directly from Microsoft, but can instead work with an experienced technology provider to help ensure your success. In the provider-reseller model, the provider buys cloud solutions and services from Microsoft and relies on you to deploy and service the products.

Different indirect providers offer different support and services, so you should evaluate the providers in your area to determine which ones best meet your needs. Generally, most providers will:

- Provide you with technical training and assistance
- Help you market your products and services
- Help you establish financing and credit terms

If you're not already working with a provider (also known as a distributor), you can search the list of official Microsoft providers to find one.

For more information about what's required to participate in the CSP program as an indirect reseller, see Get started as an indirect reseller on the Microsoft Partner Network website.

Enroll as a direct bill partner

As a direct bill partner, you own the end-to-end relationship with your customer and with Microsoft. We have updated enrollment requirements for direct bill partners as of August 31, 2018. These new requirements will help you accelerate your business growth with the right CSP enrollment model and strengthen your customer relationships with value-added services and support.

Minimum requirements

REQUIREMENT	
MPN ID	An active Microsoft Partner Network (MPN) ID for your business location.
Endorsement	The authority to accept and sign legal agreements on behalf of your organization.
Support	The ability to provide the first level of cloud product support to your customers. A Microsoft support plan, either Advanced Support for Partners (ASfP) or Premier Support for Partners (PSfP), depending on your needs. Compare support plans. IMPORTANT: You must pass a credit check before purchasing a support plan. We'll email you when you've passed the credit check.
Managed Service	At least one managed service, IP service, or customer solution application. Learn more about adding managed services.
Accounts receivable	The organizational infrastructure in place to manage customer billing and provisioning.

Verify direct bill eligibility

If you haven't already done so, review the minimum requirements above to make sure you can meet them, and then complete the Cloud Solution Provider questionnaire.

We use your answers to the questions in the form to help us determine your eligibility to enroll in the CSP program as a direct bill partner.

After we've verified that your company meets the eligibility requirements to enroll as a direct bill partner, and you've completed the enrollment application, we'll review and verify the business information you provided in the enrollment process. As part of this review, we'll check your company's credit. We'll let you know by email when your company has passed the credit check.

> **IMPORTANT**
>
> Checking your company's credit can take us several days or more to complete. During this time, it's important that you NOT purchase a Microsoft support plan. You should purchase a Microsoft support plan only after we've informed you that you've passed the credit check.

Transition from direct bill to indirect reseller

As the CSP program continues to evolve and grow, you might prefer to participate in it as an indirect reseller instead of a direct bill partner. You can transition your direct bill tenant to the indirect reseller model in Partner Center.

See Transition from Cloud Solution Provider (CSP) direct bill partner to CSP indirect reseller for information about transitioning from a direct bill partner to an indirect reseller.

CSP regional markets and currencies

Your company's location determines your market. Your market includes the regions and/or countries where you can sell CSP offers. See Cloud Solution Provider program regional markets and currencies for market locations and currencies.

Learn about the Microsoft Partner Agreement (MPA) for CSP program partners

6/19/2020 • 2 minutes to read

Appropriate roles

- Global admin

The Microsoft Partner Agreement provides Microsoft partners with a unified, digitally accepted partner agreement. The Microsoft Partner Agreement contains a core set of perpetual terms that help Microsoft, partners, and customers support data privacy and security, promote compliance, and encourage sound business practices.

All Cloud Solution Provider program partners (including indirect providers, indirect resellers, and direct bill partners) can sign the MPA online in Partner Center. Direct bill and indirect provider partners who operate in the government cloud can also sign the MPA from within Partner Center.

To continue to participate in the CSP program, you need to sign the Microsoft Partner Agreement before January 31, 2020. Partner Center will remind you that you can now easily sign the agreement from within Partner Center.

How to verify if I have signed the MPA

To see if you have signed the MPA:

1. As the global admin for your company, sign in to Partner Center dashboard.
2. Go to your **CSP Overview** page.
3. If you have a notification telling you that you have **Pending actions**, click on the notification. You will be given the option to sign the MPA.

> **NOTE**
> Only the global admin in your company can view and sign the MPA. If you aren't the global admin, you will need to ask your global admin to verify the MPA.

Microsoft Customer Agreement

Customer acceptance of the Microsoft Customer Agreement (MCuA) will be required in CSP for purchases of Azure services through an Azure plan, and for all other offers in CSP purchased after January 31, 2020. For more information, read Confirm customer acceptance of the Microsoft Customer Agreement.

Requirements to enroll as a CSP direct bill partner

5/13/2020 • 2 minutes to read

Applies to

- Direct bill partners in the Cloud Solution Provider program

Enroll as a direct partner

As a direct bill partner, you own the end-to-end relationship with your customer and with Microsoft. We have updated enrollment requirements for direct bill partners as of August 31, 2018. These new requirements will help you accelerate your business growth with the right CSP enrollment model. They will also help you strengthen your customer relationships with value-added services and support.

Minimum requirements

REQUIREMENT	
MPN ID	An active Microsoft Partner Network (MPN) ID for your business location.
Endorsement	The authority to accept and sign legal agreements on behalf of your organization.
Support	The ability to provide the first level of cloud product support to your customers. A Microsoft support plan, either Advanced Support for Partners (ASfP) or Premier Support for Partners (PSfP), depending on your needs. Compare support plans. IMPORTANT: You must pass a credit check before you can purchase a support plan. We'll email you when you've passed the credit check.
Managed Service	At least one managed service, IP service, or customer solution application. Learn more about adding managed services.
Accounts receivable	The organizational infrastructure in place to manage customer billing and provisioning.

Verify direct bill eligibility

If you haven't already done so, review the minimum requirements above to make sure you can meet them, and then complete the Cloud Solution Provider questionnaire.

We use your answers to the questions in the form to help us determine your eligibility to enroll in the CSP program as a direct bill partner.

After we verify that your company has met the eligibility requirements to enroll as a direct bill partner, and that you've completed the enrollment application, we'll review and verify the business information you provided in the enrollment process. As part of this review, we'll check your company's credit. We'll let you know by email when your company has passed the credit check.

> **IMPORTANT**
>
> Checking your company's credit can take us several days or more to complete. During this time, it's important that you NOT purchase a Microsoft support plan. You should purchase a Microsoft support plan only after we've informed you that you've passed the credit check.

Transition from direct to indirect reseller

Current direct bill partners must meet the new requirements to remain in the CSP direct bill partner program. Otherwise, their access to direct bill capabilities will eventually be restricted and can longer perform specific tasks, such as making new purchases for their customers.

If you decide to move from a direct bill business to indirect reseller business, there are several steps you'll need to take. To learn more about transitioning, read Transition from Cloud Solution Provider (CSP) direct partner to CSP indirect reseller.

Next steps

- Additional information on becoming an indirect reseller
- Direct bill to indirect reseller fAQ

Microsoft Customer Agreements by region and language

6/19/2020 • 4 minutes to read

Applies to

- Cloud Solution Provider program partners

Appropriate roles

- Global admin
- User management admin
- Admin agent
- Sales agent
- Helpdesk agent

Before you can place an order on a customer's behalf, the customer must accept and sign the Microsoft Customer Agreement.

> **IMPORTANT**
> You must confirm that a customer has accepted the Microsoft Customer Agreement by providing information about the person who signed it. See Confirm a customer's acceptance of the Microsoft Customer Agreement for more details.

The Microsoft Customer Agreements are region-specific and available in multiple languages. Find the customer's location and preferred language in one of the lists below to download the correct agreement.

If you're not sure which regions and markets you can sell in, find your company's location in this list: Cloud Solution Provider program regional markets and currencies.

North America, Central America, South America, and the Caribbean

- American Samoa: English
- Anguilla: English
- Antarctica: English
- Antigua and Barbuda: English
- Argentina: English, Spanish
- Aruba: English
- Bahamas: English
- Barbados: English
- Belize: English, Spanish
- Bermuda: English
- Bolivia: English, Spanish

- Bonaire, Saba, and Sint Eustatius: English
- Brazil: English, Portuguese (Brazil)
- British Virgin Islands: English
- Canada: English, French
- Cayman Islands: English
- Chile: English, Spanish
- Colombia English, Spanish
- Costa Rica: English, Spanish
- Dominica: English
- Dominican Republic: English, Spanish
- Ecuador: English, Spanish
- El Salvador: English, Spanish
- Falkland Islands: English
- French Guiana: English
- Grenada: English
- Guadeloupe: English
- Guam: English
- Guatemala: English, Spanish
- Guyana: English
- Haiti: English
- Honduras: English, Spanish
- Jamaica: English
- Martinique: English
- Mexico: English, Spanish
- Montserrat: English
- Nicaragua: English, Spanish
- Panama: English, Spanish
- Paraguay: English, Spanish
- Peru: English, Spanish
- Puerto Rico: English
- Saba: English
- Saint Barthelemy: English
- Saint Lucia: English

- Saint Martin: English
- Saint Pierre and Miquelon: English, French
- Saint Vincent and the Grenadines: English
- Saint Maarten: English
- Sint Eustatius: English
- South Georgia and South Sandwich Islands: English
- Suriname: English
- Trinidad & Tobago: English
- Turks and Caicos Islands: English
- United States: English
- Uruguay: English, Spanish
- Venezuela: English, Spanish
- Virgin Islands, U.S.: English

Microsoft Cloud for US Government

- United States: English

Europe

- Aland Islands: English
- Albania: English
- Andorra: English
- Armenia: English
- Austria: English, German
- Azerbaijan: English
- Belarus: English, Russian
- Belgium: English, Dutch
- Bosnia & Herzegovina: English
- Bouvet Island: Norwegian
- Bulgaria: English, Bulgarian
- Croatia: English, Croatian
- Cyprus: English
- Czech Republic: English, Czech
- Denmark: English, Danish
- Estonia: English, Estonian
- Finland: English, Finnish

- France: English, French
- Georgia: English
- Germany: English, German

  In Germany, the Criminal Code (Section 203) and the professional codes of conduct require that certain client relationships are to be kept confidential, for example, the relationship between patients and their medical doctors and the relationship between attorneys and their clients. These occupational groups have to ensure professional secrecy. For these and other professions to buy cloud-based services from cloud solution providers, the cloud service provider must conclude a written agreement with the customer that ensures professional secrecy.

  If you do business in Germany, you may need to provide this professional secrecy amendment to your customers there in addition to the Microsoft Cloud Agreement.

  - Microsoft Cloud Agreement Professional Secrecy Amendment for Germany (EN)
  - Microsoft Cloud Agreement Professional Secrecy Amendment for Germany (DE)
- Gibraltar: English
- Greece: English, Greek
- Greenland: English
- Guernsey: English
- Hungary: English, Hungarian
- Iceland: English
- Ireland: English
- Isle of Man: English
- Italy: English, Italian
- Jan Mayen: Norwegian
- Jersey: English
- Latvia: English, Latvian
- Liechtenstein: English, German
- Lithuania: English, Lithuanian
- Luxembourg: English, French
- Macedonia, FYRO: English
- Madagascar: English
- Malawi: English
- Mali: English
- Malta: English
- Mayotte: English
- Moldova: English, Romanian
- Montenegro: English

- Netherlands: English, Dutch
- New Caledonia: English
- Norway: English, Norwegian
- Poland: English, Polish
- Portugal: English, Portuguese
- Romania: English, Romanian
- Russia: English, Russian
- San Marino: English
- Serbia: English, Serbian Latin
- Slovakia: English, Slovak
- Slovenia: English, Slovenian
- Spain: English, Spanish, Basque, Galician
- Svalbard: Norwegian
- Sweden: English, Swedish
- Switzerland: English, French, German, Italian
- Ukraine: English, Ukrainian
- United Kingdom: English
- Vatican City: English

Middle East and Africa

- Algeria: English, French, Arabic
- Angola: English, Portuguese
- Bahrain: English, Arabic
- Benin: English
- British Indian Ocean Territory: English
- Burkina Faso: English
- Burundi: English
- Cameroon: English, French
- Cabo Verde: English, Portuguese
- Central African Republic: French
- Chad: English, French
- Comoros: English
- Congo: English, French
- Congo (DRC): English, French

- Côte d'Ivoire: English, French
- Djibouti: English, French
- Egypt: English, Arabic
- Equatorial Guinea: Spanish
- Eritrea: Arabic
- French Polynesia: English
- Gabon: English, French
- Gambia: English
- Ghana: English
- Guinea: English, French
- Guinea-Bissau: Portuguese
- Iraq: English, Arabic
- Israel: English
- Jordan: English, Arabic
- Kenya: English
- Kosovo: English
- Kuwait: English, Arabic
- Lebanon: English, Arabic
- Lesotho: English
- Liberia: English
- Libya: English, Arabic
- Mauritania: Arabic
- Mauritius: English, Arabic
- Mongolia: English
- Morocco: English, French, Arabic
- Mozambique: English
- Niger: English, French
- Nigeria: English
- Oman: English, Arabic
- Pakistan: English
- Qatar: English, Arabic
- Reunion: English
- Rwanda: English, French

- Saudi Arabia: English
- Senegal: English, French
- Seychelles: English
- Sierra Leone: English
- Somalia: Arabic
- South Africa: English
- Swaziland: English
- Togo: English
- Tunisia: English, French, Arabic
- Turkey: English, Turkish
- UAE: English
- Yemen: English, Arabic
- Zimbabwe: English

Asia and Pacific

- Australia: English
- Bangladesh: English
- Brunei: English
- Bhutan: English
- Cambodia: English
- Christmas Island: English
- Cocos (Keeling) Islands: English
- Cook Islands: English
- Fiji: English
- Heard Island and McDonald Islands: English
- Hong Kong SAR: English, Chinese Traditional
- India: English, Hindi
- Indonesia: English, Indonesian
- Japan: English , Japanese
- Kazakhstan: English, Kazakh
- Kiribati: English
- Kyrgyzstan: English, Russian
- Laos: English
- Macau SAR: English, Chinese Traditional

- Malaysia: English, Bahasa Malay
- Maldives: English
- Marshall Islands: English
- Micronesia: English
- Myanmar: English
- Nauru: English
- Nepal: English
- New Zealand: English
- Niue: English
- Norfolk Island: English
- Northern Mariana Islands: English
- Palau: English
- Papua New Guinea: English
- Philippines: English
- Pitcairn Islands: English
- Samoa: English
- Singapore: English, Chinese Simplified
- Solomon Islands: English
- South Korea: English, Korean
- Sri Lanka: English
- Taiwan: English, Chinese Traditional
- Thailand: English
- Timor-Leste: English
- Tokelau: English
- Tonga: English
- Tuvalu: English
- Uzbekistan: English, Russian
- Vanuatu: English
- Vietnam: English, Vietnamese
- Wallis and Futuna: French

Restricted direct bill capabilities and the requirements needed for CSP direct bill partners

6/19/2020 • 2 minutes to read

Overview

Direct bill partners must meet the new requirements to remain in the CSP direct bill partner program. Otherwise, their access to direct bill capabilities will eventually be restricted and can longer perform specific tasks, such as making new purchases for their customers.

> **NOTE**
> Direct bill partners who do not meet the new requirements for CSP direct bill partner program will be informed by Microsoft when their direct bill capabilities will be restricted. This applies to all direct bill partners, whether they have opted for transition from direct bill partner to indirect resellers or not.

How to tell if your direct bill capabilities has been restricted

To confirm whether access from the direct bill partner tenant to direct bill capabilities has been restricted, follow these steps.

1. Sign in to the Partner Center dashboard.
2. Go to **Partner settings** -> **Partner Profile**.
3. Under **Program info**, look for **Microsoft Cloud Solution Provider status**.
4. If the program status has value **restricted**, it means that your direct bill partner tenant's access to direct bill capabilities has been restricted.

Affected direct bill capabilities

If your direct bill capabilities have been restricted, you can no longer make new purchases for your customers in Partner Center. This restriction includes:

- Azure subscriptions
- Seat-based subscriptions
- Add new add-ons to existing seat-based subscriptions.
- Make one-time purchases of software and reservation products (for example, software subscriptions, perpetual software, and Azure Reserved Virtual Machine instances).

You also cannot use the Azure partner shared services offer under the CSP program to purchase new Azure subscriptions for your own use.

Existing direct bill subscriptions are not affected. They remain valid and are autorenewed. You will continue to be billed directly by Microsoft until they are canceled. You can still manage existing subscriptions in the following ways:

- Suspend existing subscriptions

- Adjust seat count of existing seat-based subscriptions
- Adjust seat count of existing add-ons to a subscription.

> **NOTE**
>
> You cannot add new add-ons to existing subscriptions as it is treated as new purchase.

- Deploy new Azure resources and manage existing Azure resources under existing Azure subscriptions. This includes resources, which are available through Azure marketplace and Visual Studio subscriptions.

In addition to new purchases, you cannot access the following direct bill capabilities in Partner Center:

- You cannot create new customer tenants. The **Create customer** option under **Customers** page in Partner Center will not be available.
- You cannot generate invitation to customer requesting for direct reseller relationship. The **Request a reseller relationship** option under **Customers** page in Partner Center will not be available.

> **NOTE**
>
> As part of transitioning from direct bill partner to indirect reseller, if you have already enrolled your direct bill partner tenant as indirect reseller, you can generate invitation to customer requesting for indirect reseller relationship instead.

- You cannot create new sandbox tenant. Each direct bill partner tenant can create one sandbox tenant for the purpose of direct bill API integration. If you haven't created one previously, you are not allowed to do so after you direct bill partner capability has been restricted.

Next steps

- Additional information on becoming an indirect reseller
- CSP direct partner new requirements

Transition from Cloud Solution Provider (CSP) direct bill partner to CSP indirect reseller

6/19/2020 • 14 minutes to read

Applies to:

- CSP partners

NOTE

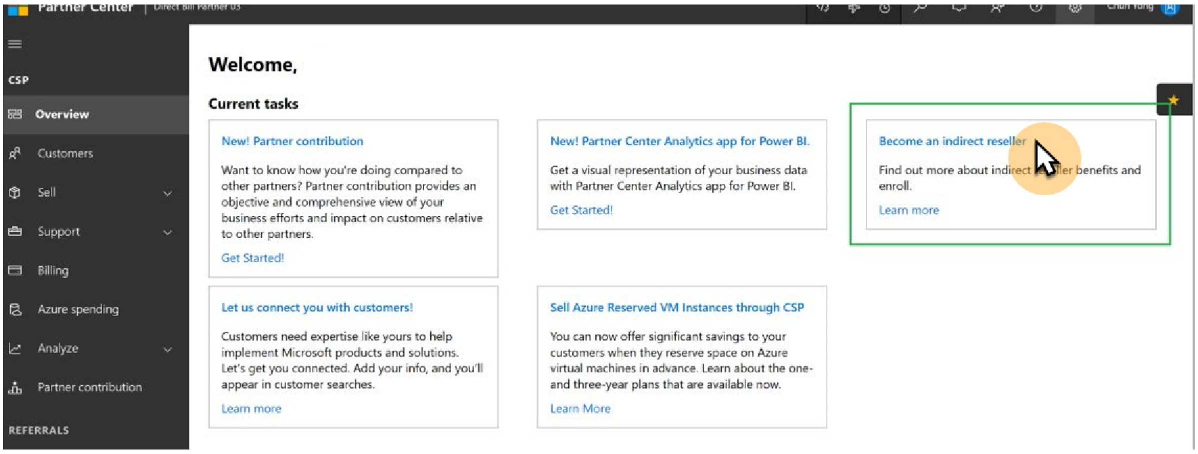
This article is intended for direct bill partners who have decided to transition to indirect resellers. However, even if you have not made an explicit decision yet to enroll as an indirect reseller, direct bill partners who do not meet the new requirements for the CSP direct bill partner program will be informed by Microsoft when their direct bill capabilities will be restricted.

You will be able to enroll in the indirect reseller program using your existing direct bill tenant.

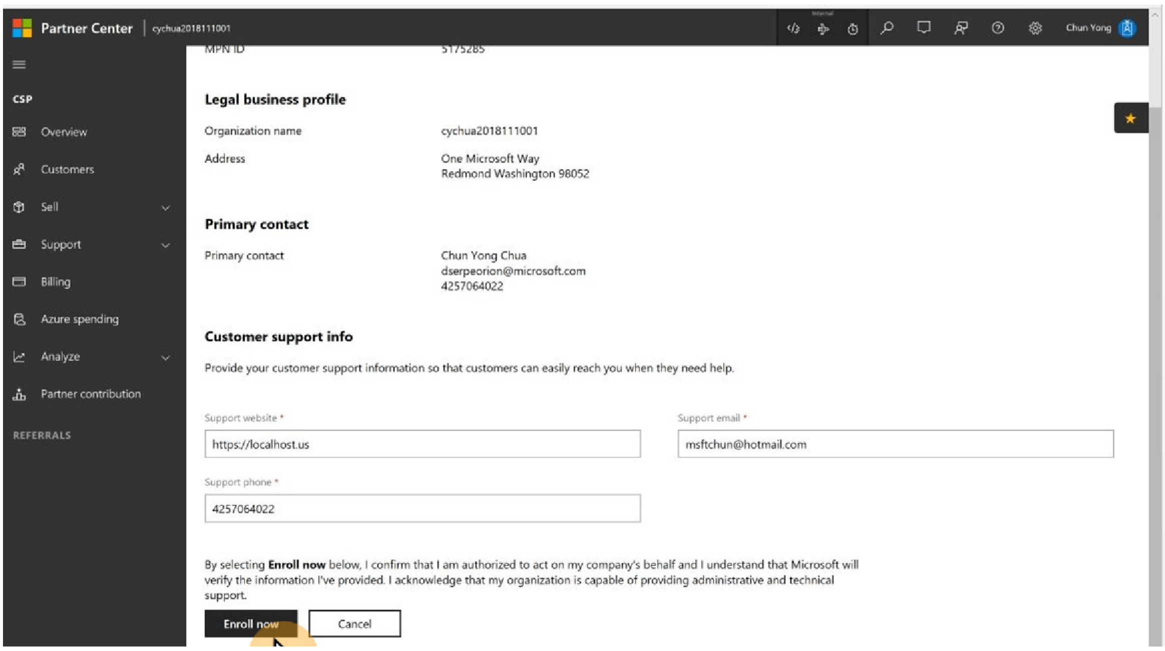
Get started

1. Make sure your partner profile in Partner Center and MPN ID are current.

2. Sign in to Partner Center as the global admin for the direct bill tenant you are transitioning to indirect reseller.



3. Review your partner details on the enrollment form.



4. Select Enroll now. Your indirect reseller business will use the same AAD tenant you use for your direct business.

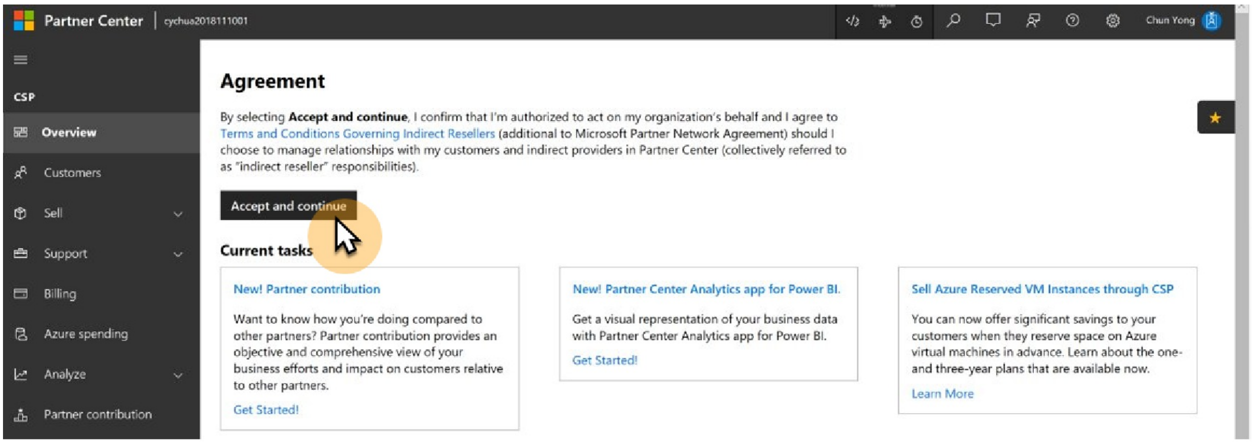
> **NOTE**
>
> Initially, this new transition capability will be available for partners with September to December anniversary dates. If you don''t have an anniversary date between September and December, you won't see the capability at this time. Partners with anniversary dates after December 2018 will be notified later once the feature is enabled for the partners.

5. When your enrollment is approved, sign in to Partner Center again.

> **NOTE**
>
> While approval is usually immediate, it can take up to five business days. Once approved, you will receive a notification to the email address you have specified under primary contact in the enrollment form. You can also check your enrollment status under **Settings** > **Partner Settings** > **Partner Profile** > Program info.

6. On your **Overview** page, you will see the indirect reseller agreement. Select **Accept and continue**. This action enables the indirect reseller capabilities.

When you have accepted the indirect reseller agreement, notice that your Partner profile identifies you as **both** a direct bill and indirect reseller.

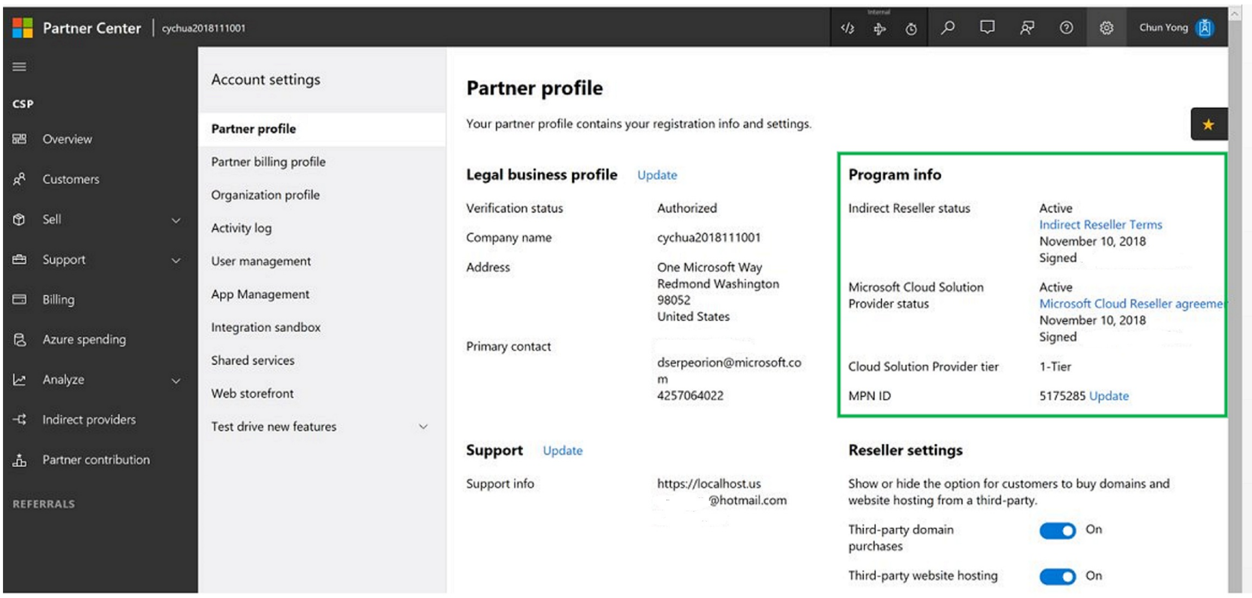


IMPORTANT

Once you enroll as an indirect reseller using the new capability, there is no option to roll back to a direct bill- only tenant. Please make sure that you fully evaluate your business needs before enrolling as an indirect reseller.

While you transition from direct to indirect reseller

During this phase, you will continue to manage your direct customers' subscription needs including the billing process. You can also begin accepting customers from your Indirect provider and operating as an indirect reseller.



Find an indirect provider

After enrolling, a link to Indirect providers will appear in your left nav. As an indirect reseller you will establish a relationship with an indirect provider who then can handle your billing, purchase products for your customers, and support infrastructure.

Different indirect providers offer different support and services, so you should evaluate the providers in your area to determine which ones best meet your needs. Generally, most providers will:

- Provide you with technical training and assistance
- Help you market your products and services
- Manage your financing and credit terms

Search the list of official Microsoft indirect providers.

Learn more, read Partner with indirect providers

Accept a partnership invitation from your indirect provider

When you find an indirect provider to partner with, establish a partnership with the indirect provider in Partner Center.

The indirect provider you select will send you in email a partnership invitation link that will take you to their invitation in Partner Center. Be sure your global admin signs in to Partner Center and follows the invitation link. When you accept the invitation, the provider's name will appear in your indirect provider list.

Acquire new customers as indirect reseller

Both you and your indirect provider need to have reseller relationships with customers. These reseller relationships enable you to manage a customer's subscriptions and services on their behalf. To acquire a new customer who has an existing Azure AD tenant, you can invite the customer to establish a reseller relationship with both you and your provider at the same time.

To create an indirect reseller invitation:

1. Select **Indirect providers** from your Partner Center left nav.
2. Select **Invite new customers** to invite a customer to establish a reseller relationship with both you and the indirect provider at the same time. The provider needs to have a reseller relationship with your customer, so they can submit orders on your customer's behalf when the customer wants to buy new subscriptions or add new licenses to existing subscriptions.
3. On the next page, review the draft email message. You can open the draft message in email, or you can copy the message to your clipboard and paste it into an email.
4. Edit the text in the email to say what you need but be sure to include the link as it is personalized to connect the customer directly to both your account and your provider's account. Then select **Done**.
5. After the customer authorizes you and your provider to be their resellers of record, you'll have administrator permissions to manage their subscriptions, licenses, and users on their behalf, and your indirect provider will be able to submit orders on their behalf.
6. To manage the customer's account, services, users, and licenses, expand the customer's record by selecting the down arrow near their name.

Unlike direct bill partners, indirect resellers can't create Azure AD tenants for their new customers in Partner Center. Your provider will create the tenant and will specify you as the indirect reseller for this customer. This ensures that the customer will appear in your customer list in Partner Center.

> **NOTE**
>
> You will not be able to use your direct bill capability to create purchases for customers you acquire as an indirect reseller.

Managing your direct bill customers and your indirect reseller customers

You manage your direct bill customers and your indirect reseller customers differently.

Direct bill customers (things you won't do as an indirect reseller)

- Create orders for products
- Manage Azure reservations
- Manage their order history
- Purchase software
- Bill customers directly

Indirect reseller customers

- Your indirect provider orders products for your customers
- Manage customers' licenses and users
- Handle subscription renewals

To identify customers that you acquired as a direct bill partner

1. Select **Customers**

2. Select a customer to view their details

3. If this customer is one you acquired as a direct bill partner, you will see options to **add** or **view products** and you will see their subscriptions.

4. If the customer has an indirect reseller relationship with you, those options will not be available.

Move your direct bill customers to your indirect provider

Your indirect provider cannot submit orders or existing subscription transfers for your existing direct bill customers until they have a reseller relationship with them. To establish the reseller relationship between your indirect provider and your existing direct bill customer, you can use one of the following methods:

- Reseller relationship extension
- Send an indirect reseller invitation to the customer

You can find a detailed overview of the step-by-step process in the Direct to indirect transition document

Reseller relationship extension

You can use the reseller relationship extension feature to establish reseller relationship between your existing direct bill customers and your indirect provider using Partner Center Dashboard. Before using the feature, note the following:

- This feature is only available to direct bill partners who are transitioning to become an indirect reseller have completed the indirect reseller enrollment.

- You can only apply this feature to existing direct bill customers. It is not applicable to indirect reseller customers.

- You can only select an indirect provider for which you have accepted a partner invitation from your indirect provider.

- A copy of the bill-to info you have for this customer will be made available to the indirect provider. You can access the bill-to info by accessing the Account page for this customer in Partner Center Dashboard.

  > **NOTE**
  >
  > By using the reseller relationship extension feature, you consent to sharing the bill-to info you have for this customer with the indirect provider.

- Your indirect provider will not be provided with delegated administration privileges to the customer tenant. If your indirect provider requires delegated administration privileges, you must send an indirect reseller invitation to the customer instead.

- Once the reseller relationship is established, the indirect provider will appear as a CSP partner to the customer under the Partner Relationships page in M365 Admin Center and Microsoft Store for Business.

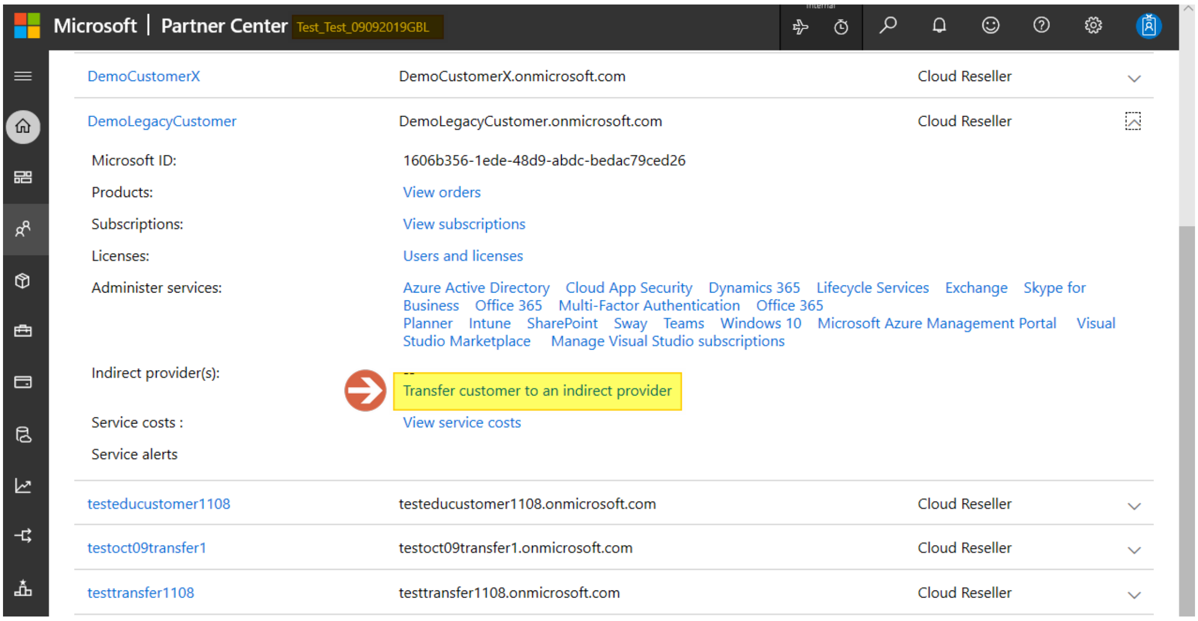
  > **IMPORTANT**
  >
  > To avoid confusion and misunderstanding, you are contractually obliged by your partner agreement to inform and obtain consent from the direct bill customer before you use the relationship extension feature to establish reseller relationship between an existing direct bill customer and an indirect provider.

To use this feature on an existing customer tenant:

1. Log in to Partner Center as an **Admin Agent**.

2. In the **Customers page**, select an existing customer and click on its **Quick links** icon to expand the summary view of the customer.

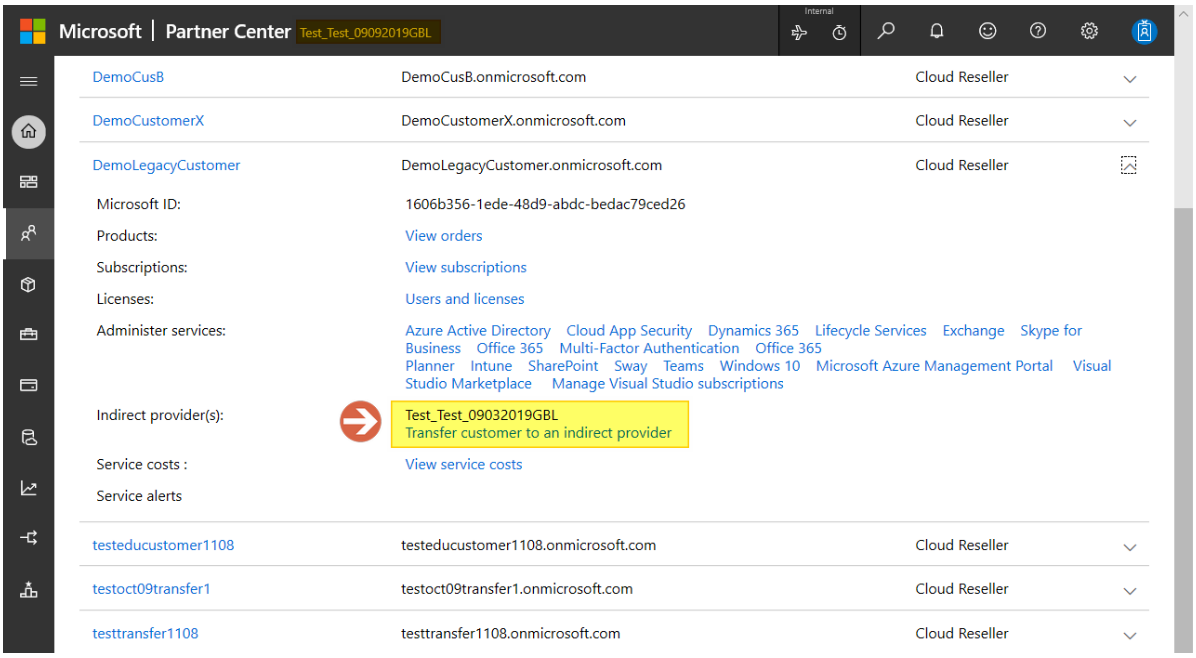
3. Under **Indirect provider(s)**, click **Transfer customer on an indirect provider**.



4. In the pop-up dialog, select the **Indirect Provider** you would like to have reseller relationship with the customer.

5. Click **Save and continue**.

6. Verify the selected indirect provider shows up under **Indirect provider(s)**.



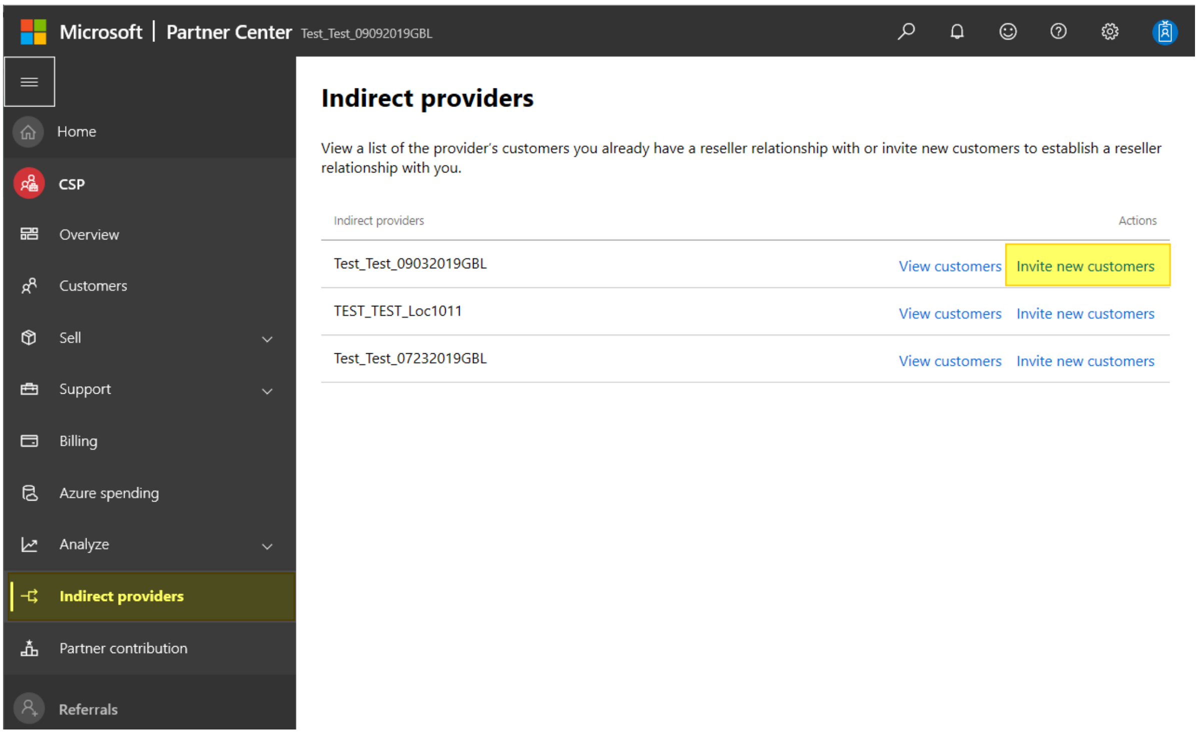
Send an indirect reseller invitation to the customer

Your indirect provider cannot submit orders for your existing direct bill customers until they have a reseller relationship with them. To establish the reseller relationship between your existing customers and your indirect provider, invite the customer using an indirect reseller invitation.

1. Select **Indirect providers** from your Partner Center left nav.

2. Select **Invite new customers** to invite a customer to establish a reseller relationship with both you and the indirect provider at the same time. The provider needs to have a reseller relationship with your customer, so they can submit orders on your customer's behalf when the customer wants to buy new

subscriptions or add new licenses to existing subscriptions.



3. On the next page, review the draft email message. You can open the draft message in email, or you can copy the message to your clipboard and paste it into an email.

4. Edit the text in the email to say what you need but be sure to include the link as it is personalized to connect the customer directly to both your account and your provider's account. Then select **Done**.

5. After the customer authorizes you and your provider to be their resellers of record, you'll have administrator permissions to manage their subscriptions, licenses, and users on their behalf, and your indirect provider will be able to submit orders on their behalf.

6. To manage the customer's account, services, users, and licenses, expand the customer's record by selecting the down arrow near their name.

Microsoft Customer Agreement acceptance

Microsoft Cloud Agreement is valid until January 31, 2020. After that date, all customers, existing and new, must sign the new Microsoft Customer Agreement. For transitioning customers, if:

- **Customer has not accepted Microsoft Customer Agreement yet**

  Please work with Indirect Provider to have customer accept the Microsoft Customer Agreement.

- **Customer has accepted Microsoft Customer Agreement with you through the Microsoft 365 Admin Center**

  The acceptance will be retained once the reseller relationship is established with the Indirect Provider. There is nothing you need to do.

- **Customer has accepted Microsoft Customer Agreement with you through partner attestation**

  The acceptance will not be retained. Please work with Indirect Provider to update the customer's acceptance in Partner Center.

Transfer existing direct bill subscriptions to indirect provider

Under CSP indirect model, indirect resellers do not have billing relationships with Microsoft. Instead, indirect resellers obtain subscriptions for their customers through their indirect providers. While transitioning from direct bill partner to indirect reseller, you need to transfer the existing subscriptions you have as the direct bill partner to your indirect provider. You can use the self-served subscription transfer feature in Partner Center Dashboard to do so.

Pre-requisites

- This feature is only available to transitioning partners who have completed the indirect reseller enrollment using their existing direct bill partner tenants
- Before transferring subscriptions associated with a given customer, the transitioning partner must move the customer to an indirect provider.
- Customer must have accepted Microsoft Customer Agreement through the Indirect Provider.

How to transition to indirect reseller status

The feature is a 4-step process, where:

- The transitioning partner creates a subscription transfer request. The request contains one or more existing subscriptions associated with the same customer and is addressed to an indirect provider.
- The indirect provider reviews and accepts (or reject) the transfer request.
- The indirect provider verifies that the transfer request is complete.
- The transitioning partner verifies that the transfer request is complete.

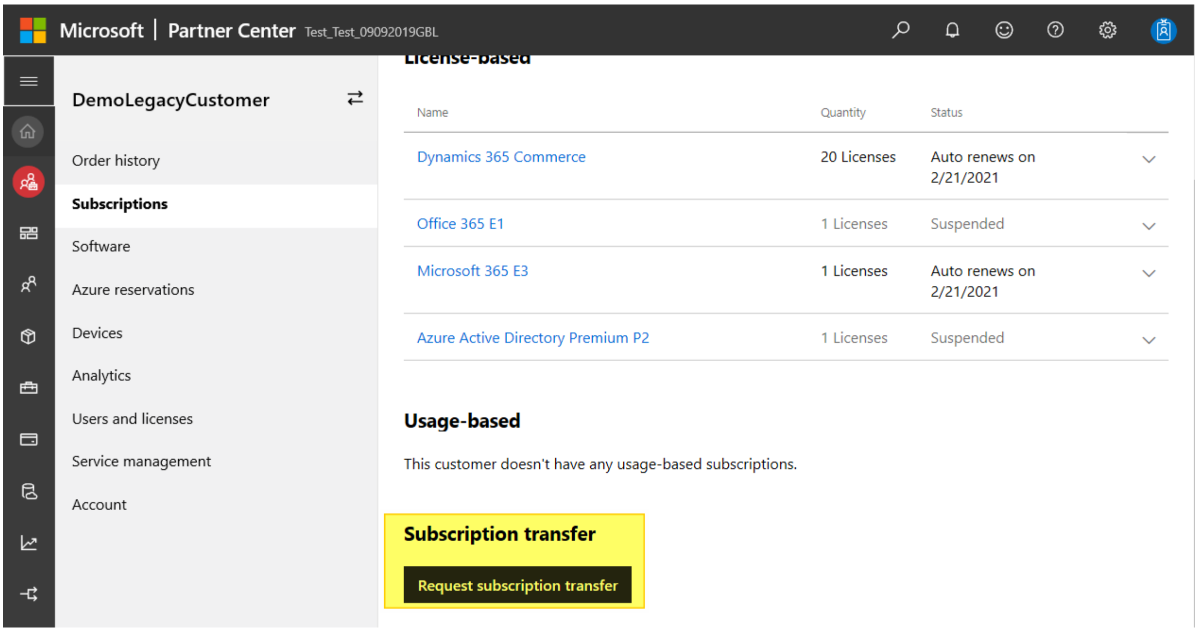
Transitioning partner

> **NOTE**
>
> You can also use Partner Center API/SDK to transfer the existing subscriptions to your indirect provider.
>
> - Get a customer's subscriptions transfer eligibility
> - Create a customer's transfer
> - Withdraw a customer's transfer
> - Accept a customer's transfer
> - Reject a Customer's transfer
> - Get a customer's transfers
> - Get transfer details by id

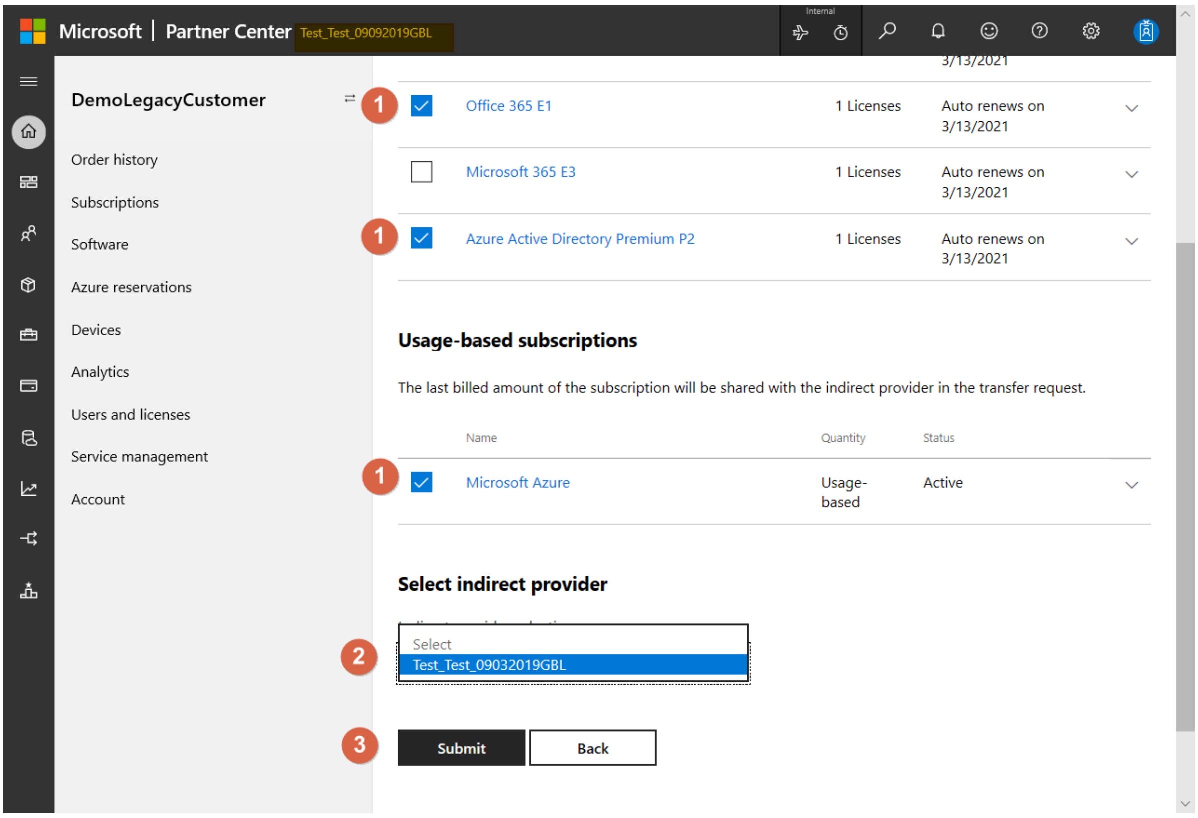
Transitioning partner - create transfer request

To create a transfer request as the transitioning partner:

1. Log in to Partner Center as an **Admin Agent**.
2. In the **Customers** page, select the intended customer and click on the Quick links icon to expand the summary view of the customer.
3. Under **Indirect provider(s)**, confirm that the intended indirect provider is listed.
4. Click **View Subscriptions**.
5. In the **Subscriptions** page, look for **Subscription Transfer**.
6. Under **Subscription Transfer**, click **Request subscription transfer**.

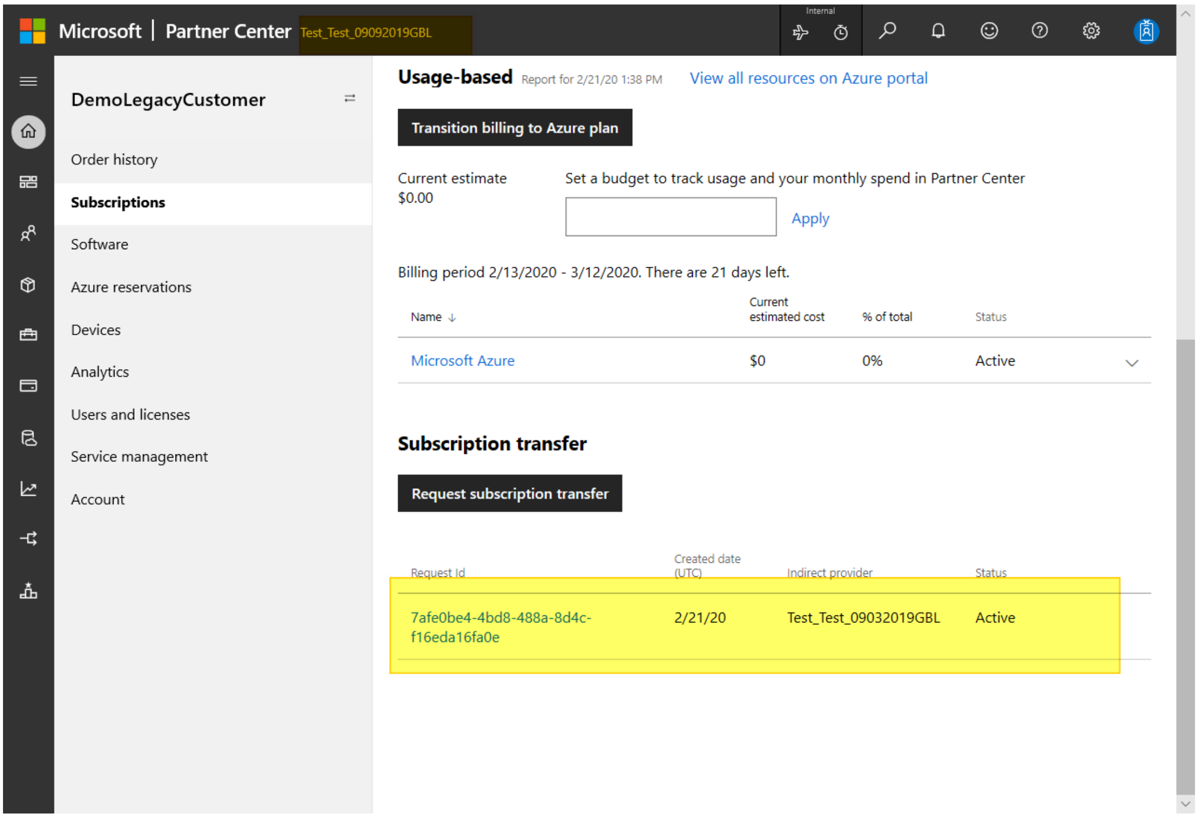


7. In the transfer request dialog, select one or more subscriptions to be transferred.



8. Click **Create**.

9. An active subscription transfer request will appear under **Subscription Transfer**.

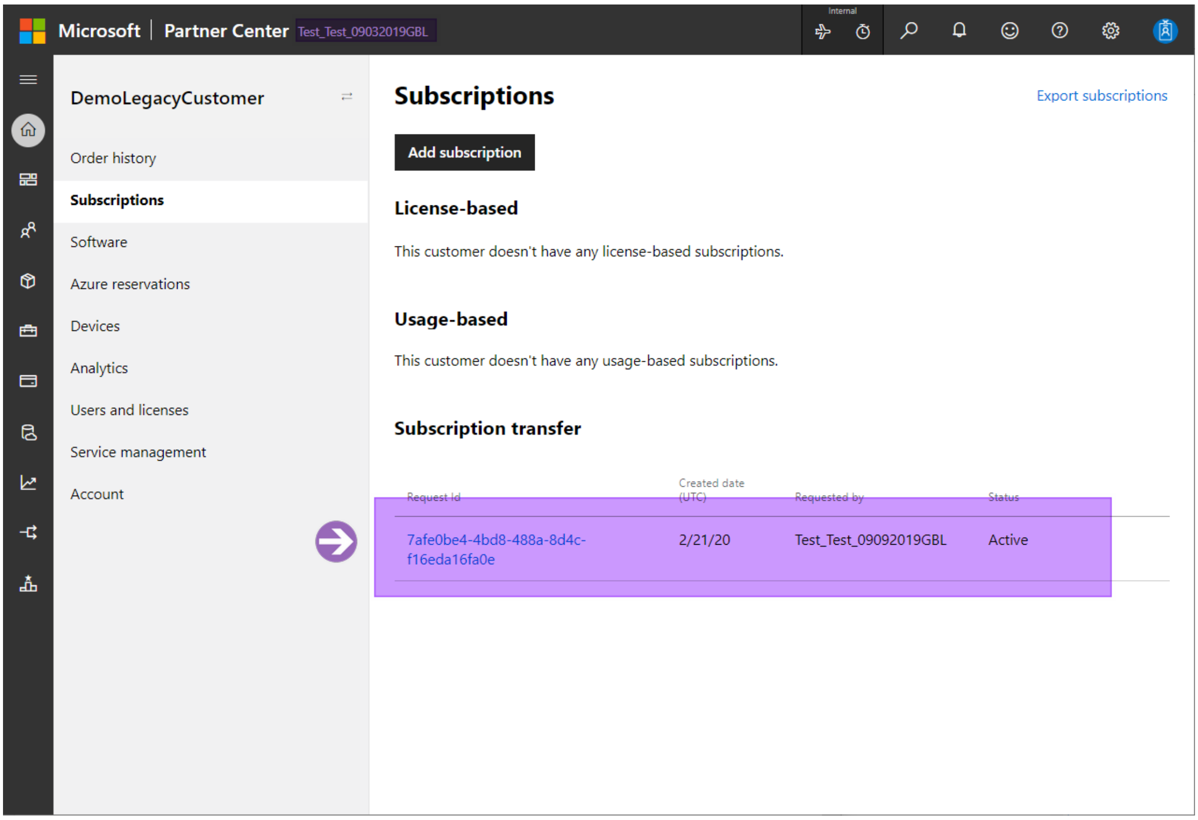


10. Inform your indirect provider that you have created a subscription transfer request to them.

Indirect provider - accept transfer request

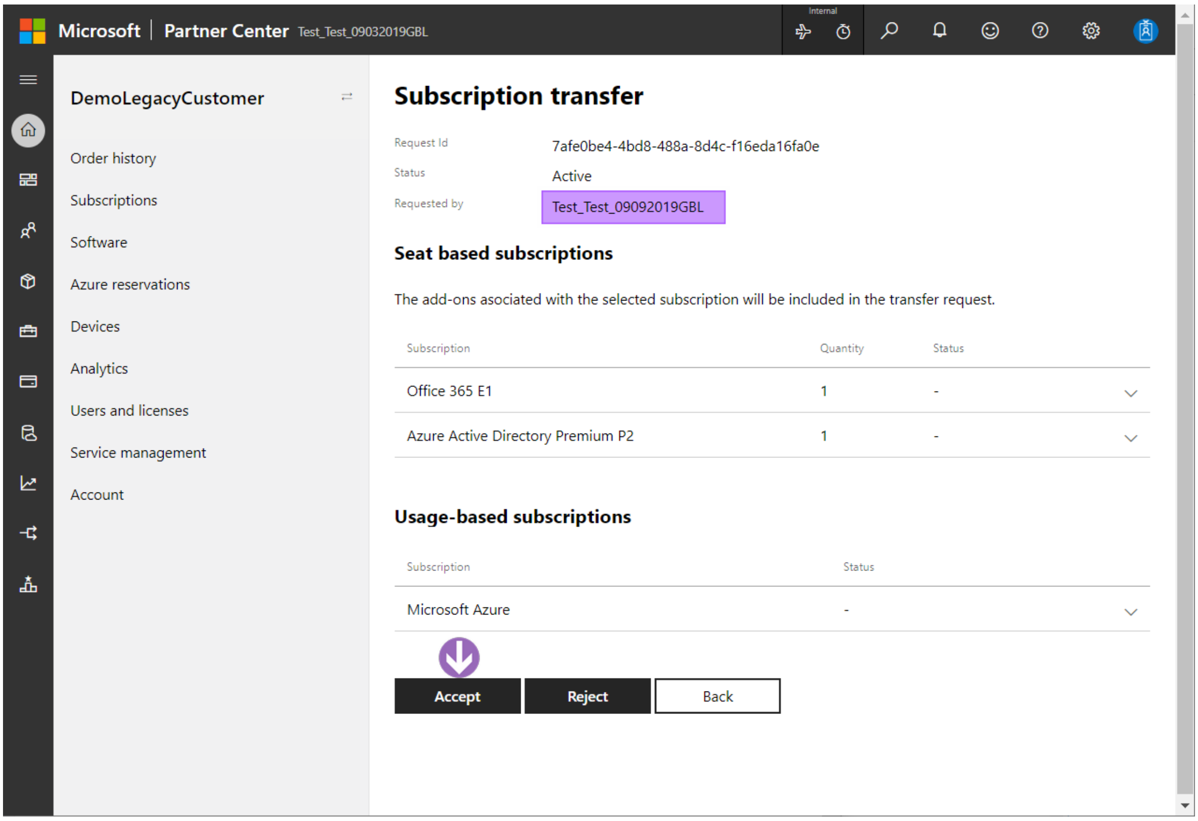
To review and accept a transfer request as the indirect provider:

1. Log in to Partner Center as an **Admin** Agent or **Sales Agent**.
2. In the **Customers** page, select the intended customer and click on its Quick links icon to expand the summary view of the customer.
3. Under **Indirect reseller(s)**, confirm the transitioning partner is listed.
4. Click **View Subscriptions**.
5. In the **Subscriptions** page, look for **Subscription Transfer**.



6. Under **Subscription Transfer**, click on the transfer request to review.

7. Click **Accept** (or **Reject**) as appropriate.



8. Wait for the transfer request to complete.

Indirect provider - verify transfer request is complete

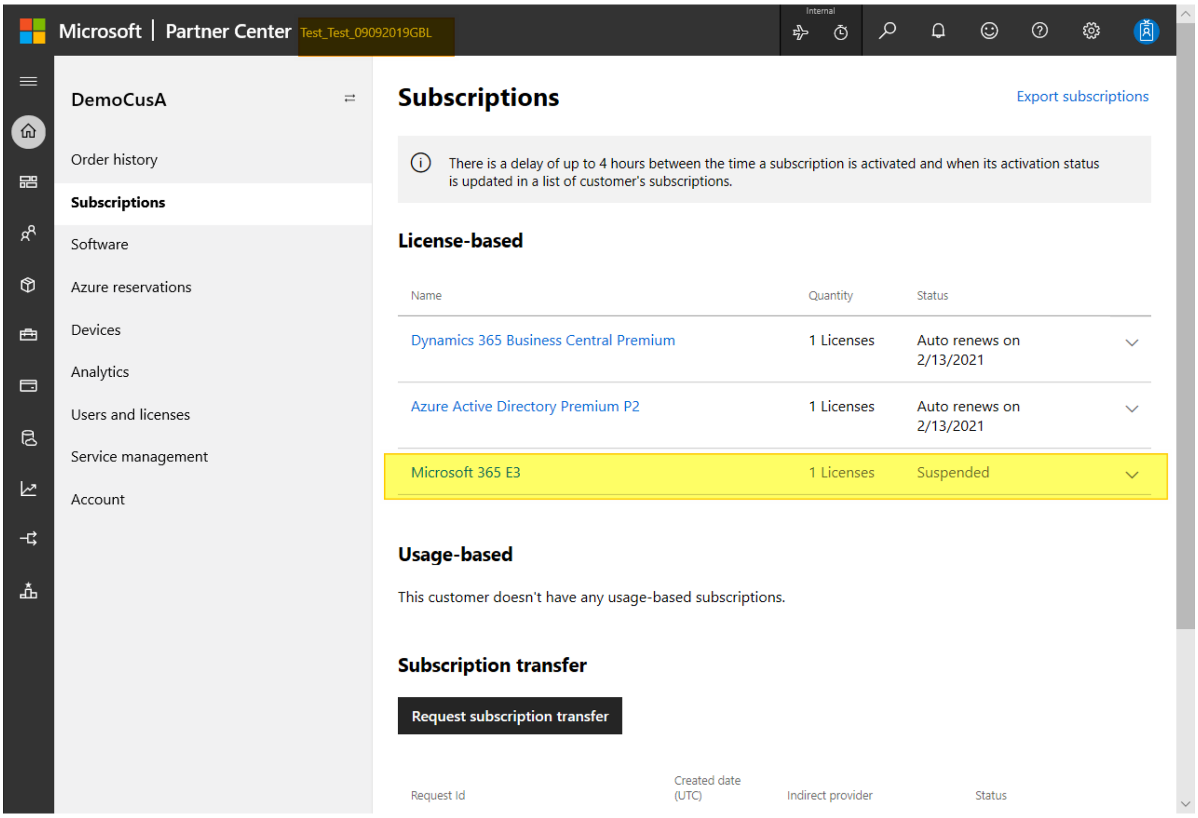
1. After the transfer request is completed successfully, verify that you can see the subscriptions appear under **Subscriptions**.

2. Inform the transitioning partner.

Transitioning partner - verify transfer request is complete

The transitioning partner should do the following:

1. Sign into Partner Center as an **Admin Agent** or **Sales Agent**.
2. In the **Customers** page, select the intended customer and click on the **Quick links** icon to expand the summary view of the customer.
3. Click **View Subscriptions**.
4. In the **Subscriptions** page, look for **Subscription Transfer**.
5. Verify that the transfer request is marked as **Complete**.
6. Verify that the subscription(s) no longer appear as active in the **Subscriptions** page:
   a. If this is an Azure subscription (MS-AZR-0145P), it will no longer be listed.
   b. If this is a seat-based subscription (Office 365, Dynamics, Intune), it will be listed with state as **Suspended**.



Considerations

- **Subscription ID will be different after transfer.** If it is an Azure subscription (MS-AZR-0145P), additionally, it will have an Azure Subscription ID, which is retained from the previous owner, and will appear in the Azure management portal.
- **The same subscription cannot be referenced by multiple transfer requests.** After you have created a transfer request, which includes an existing subscription, you cannot create additional transfer requests including the same subscription, until the first transfer request is canceled.
- **Add-ons for seat-based subscriptions must be transferred along with their base subscription.** When creating a transfer request, if you pick an existing subscription with one or more add-ons, the add-ons will automatically be included in the transfer request.
- **Seat count changes to a subscription will not be reflected in existing transfer request.** After you have created a transfer request which includes an existing subscription, you should avoid updating the seat

quantity of the subscription (or associated addons). If you do so, the new quantity will not be reflected in the transfer request. After the indirect provider accepts the transfer request, the resultant subscription will have the old quantity. If you wish for the new quantity to be transferred to the indirect provider, you must cancel the existing transfer request and recreate a new one.

- **Not all purchases can be transferred using self-served subscription transfer.** Currently, you can only transfer O365 subscriptions and Azure PAYG subscriptions (MS-AZR-0145P) using this feature. Other purchases including Azure Plans, Azure Reserved Instances, Term-based Subscriptions and SaaS subscriptions for Azure Marketplace are not supported. You will see a reason why a subscription cannot be transferred in the submit transfer request page. To transfer these subscriptions, you will need to cancel the existing subscription and purchase new offer for customer through Indirect Provider.

- **Cannot be tested using sandbox environment.**

Enroll for indirect reseller incentives

After you have successfully enrolled as an indirect reseller on your existing direct bill partner tenant, you will receive an invitation to enroll for indirect reseller incentive within 30 days. The invitation is based on the partner MPN account that is currently associated with your CSP partner tenant. The invitation will be sent to the email address associated with the partner MPN account.

You are also eligible to enroll for direct bill incentive programs with that same partner tenant. You must manage the programs separately.

Next steps

- Additional information on becoming an indirect reseller
- CSP direct partner new requirements
- Restricted direct bill capabilities

Cloud Solution Provider program guide, agreements, price lists, and offers

6/19/2020 • 3 minutes to read

Applies to

- Partner Center
- Partner Center for Microsoft Cloud for US Government

Review the information in this article to understand the requirements for participating in Microsoft's Cloud Solution Provider (CSP) program.

Cloud Solution Provider program guide

Review requirements for becoming a partner in the Cloud Solution Provider program.

Program guide for Cloud Solution Provider partners

> **NOTE**
> If you require a business letter confirming or certifying your status as an approved Microsoft partner in the Cloud Solution Provider program, contact support to request one.

Additional Offer Terms to the Microsoft Partner Agreement

Supplemental Offer Terms Guide to the Online Services Subscriptions and Software Channel Authorization

Microsoft Customer Agreement customer templates

Before you can place an order on a customer's behalf, the customer must accept and sign the applicable Microsoft Customer Agreement. Microsoft Customer Agreements are region-specific. Be sure to select the correct country based on the customer's location.

To manually download the latest version of the Microsoft Customer Agreement template, select this URL.

> **IMPORTANT**
> You need to confirm that a customer has accepted the Microsoft Customer Agreement. You can confirm by either attesting the customer has accepted the agreement or by inviting the customer to accept the agreement directly. See Confirm a customer's acceptance of the Microsoft Customer Agreement.

Professional Secrecy Amendment to the Microsoft Cloud Agreement (Germany)

In Germany, the Criminal Code (Section 203) and the professional codes of conduct require that certain client relationships are to be kept confidential, for example, the relationship between patients and their medical doctors and the relationship between attorneys and their clients. These occupational groups have to ensure professional secrecy. For these and other professions to buy cloud-based services from cloud solution providers, the cloud service provider must conclude a written agreement with the customer that ensures professional secrecy.

If you do business in Germany, you may need to provide this professional secrecy amendment to your customers there in addition to the Microsoft Cloud Agreement.

Microsoft Cloud Agreement Professional Secrecy Amendment for Germany (EN)

Microsoft Cloud Agreement Professional Secrecy Amendment for Germany (DE)

Pricing

Download pricing details for license-based, usage-based, and one-time purchases from the **Pricing and offers** page, available from your **Partner Center** menu.

The license-based price list is updated monthly, and Microsoft releases new pricing 30 days before it takes effect. Examples of license-based services include Office 365, Enterprise Mobility Suite, and Microsoft Dynamics CRM.

Usage-based pricing is dynamic and changes frequently. Examples of usage-based services include Microsoft Azure.

One-time purchase pricing is also dynamic. Examples of one-time purchases include Microsoft Azure reservations and corresponding subscriptions to Windows Server and SQL software.

For pricing info about Azure Marketplace offers, go to **Marketplace** in the Partner Center left navigation menu. Select a product to see info about the publisher, SKUs, and pricing. Prices for these Azure Marketplace products can change frequently. To get current pricing info for all Marketplace products, select **Export price list** to generate a spreadsheet with all pricing data. This info is updated daily, so you can check it as often as you'd like.

Offers

As a partner in CSP, you can sell a wide range of Microsoft products, services, and solutions, including Office 365, Enterprise Mobility Suite, Microsoft Dynamics, and Microsoft Azure. For more information about which offers are available for you to sell within these product families, see the CSP offer matrix on the **Pricing and offers** page, available from your **Partner Center** menu. This document is updated monthly.

For CSP partners who use the Crest Usage Record API, Microsoft also publishes a list of the Azure Services in CSP on the **Pricing and offers** page.

To learn about Azure Marketplace offers published by Independent Software Vendors (ISVs), visit the **Marketplace** page in the left navigation menu. Currently, only SaaS (software as a service) product types can be purchased in Partner Center. You'll need to visit the Azure portal to acquire other types of Azure Marketplace offers.

Cloud Solution Provider program regional markets and currencies where you can sell CSP offers

6/19/2020 • 6 minutes to read

Your company's location determines your market. Your market includes the regions and/or countries where you can sell Cloud Solution Provider (CSP) program offers.

For example, if your company is located in the United States, you can sell CSP offers to customers in the U.S. and in U.S. Outlying Islands. If your company is located in Brazil, you can sell CSP offers to customers only in Brazil. If your company is located in the Africa region, you can sell CSP offers to customers in all 18 countries in the Africa region.

Before you can order CSP offers on behalf of a customer, the customer must sign the Microsoft Customer Agreement. You can find the applicable Microsoft Customer Agreement for your region/country here.

> **IMPORTANT**
> You need to confirm that a customer has accepted the Microsoft Customer Agreement by providing information about the person who signed it. See Confirm a customer's acceptance of the Microsoft Customer Agreement for more details.

To determine where you can sell CSP offers, find your company's location in one of the lists below. You must have an active Microsoft Partner Network (MPN) ID for the location you want to sell in.

For unsupported countries

If your country is not supported, establish the customer CSP relationship using the Office admin URL.

- Direct bill partners use the following url: https://portal.office.com/partner/partnersignup.aspx?type=ResellerRelationship&id=partnertenantguid&csp=1&msppid=0. Replace **partnertenantguid** with your tenant ID.
- The URL for indirect resellers is: https://portal.office.com/partner/partnersignup.aspx?type=IndirectResellerRelationship&id=IRtenantguid&csp=1&msppid=IRMPNID&indirectCSP=IPtenantguid. You will replace **IRtenantguid** with your tenant ID. Replace **IRMPNID** with your MPN ID, and replace **IPtenantguid** with your indirect provider tenant id.

Africa region and market

If your company's location is in the list below, you can sell CSP offers to customers in all locations in the list.

COUNTRY/REGION	CURRENCY
Angola	
Benin	USD
Botswana	
Burkina Faso	USD

COUNTRY/REGION	CURRENCY
Burundi	USD
Cameroon	USD
Cape Verde	
Central African Republic	USD
Chad	USD
Comoros	USD
Congo	USD
Congo (DRC)	USD
Côte d'Ivoire	
Djibouti	USD
Equatorial Guinea	USD
Eritrea	USD
Ethiopia	
French Polynesia	USD
Gabon	USD
Gambia	USD
Ghana	USD
Guinea	USD
Guinea-Bissau	USD
Kenya	USD
Liberia	USD
Madagascar	USD
Malawi	USD
Mali	USD
Mauritius	USD

COUNTRY/REGION	CURRENCY
Mayotte	USD
Namibia	USD
New Caledonia	USD
Niger	USD
Nigeria	USD
Reunion	USD
Rwanda	USD
São Tomé and Príncipe	USD
Senegal	
Seychelles	USD
Sierra Leone	USD
Somalia	USD
South Sudan	USD
St Helena, Ascension, Tristan da Cunha	USD
Tanzania	USD
Togo	USD
Uganda	
Zambia	

Asia and Pacific region and market

If your company's location is in the list below, you can sell CSP offers to customers in all locations in the list.

COUNTRY/REGION	CURRENCY
Bangladesh	USD
Bhutan	
Brunei Darussalam	USD
Cambodia	

COUNTRY/REGION	CURRENCY
Hong Kong	USD
Indonesia	USD
Laos	
Macao	USD
Malaysia	USD
Maldives	
Myanmar	
Nepal	
Philippines	USD
Singapore	USD
Sri Lanka	USD
Thailand	USD
Timor-Leste	USD
Vietnam	USD

Australia region and market

If your company's location is in the list below, you can sell CSP offers to customers in all locations in the list.

COUNTRY/REGION	CURRENCY
Australia	AUD
Christmas Island	AUD
Cocos (Keeling) Islands	AUD
Cook Islands	AUD
Fiji	AUD
French Southern Territories	AUD
Guam	AUD
Heard Island and McDonald Islands	AUD

COUNTRY/REGION	CURRENCY
Kiribati	AUD
Marshall Islands	AUD
Micronesia	AUD
Nauru	AUD
Niue	AUD
Norfolk Island	AUD
Northern Mariana Islands	AUD
Palau	AUD
Papua New Guinea	AUD
Pitcairn Islands	AUD
Solomon Islands	AUD
Tokelau	AUD
Tonga	AUD
Tuvalu	AUD
Wallis and Futuna	AUD

Brazil region and market

If your company's location is Brazil, you can sell CSP offers to customers in Brazil.

COUNTRY/REGION	CURRENCY
Brazil	USD

Canada region and market

If your company's location is in the list below, you can sell CSP offers to customers in all locations in the list.

COUNTRY/REGION	CURRENCY
Canada	CAD
Saint Pierre and Miquelon	CAD

COUNTRY/REGION	CURRENCY

Europe region and market

If your company's location is in the list below, you can sell CSP offers to customers in all locations in the list.

COUNTRY/REGION	CURRENCY
Åland Islands	EUR
Andorra	EUR
Austria	EUR
Belgium	EUR
Bouvet Island	EUR
Bulgaria	
Croatia	EUR
Cyprus	
Czech Republic	EUR
Denmark	DKK
Estonia	EUR
Faroe Islands	EUR
Finland	EUR
France	EUR
Germany	EUR
Gibraltar	GBP
Greece	EUR
Greenland	
Guernsey	GBP
Hungary	EUR
Iceland	EUR
Ireland	EUR

COUNTRY/REGION	CURRENCY
Isle of Man	GBP
Italy	EUR
Jersey	GBP
Latvia	EUR
Liechtenstein	EUR
Lithuania	EUR
Luxembourg	EUR
Malta	
Monaco	
Netherlands	EUR
Norway	NOK
Poland	EUR
Portugal	EUR
Romania	EUR
San Marino	EUR
Slovakia	EUR
Slovenia	EUR
Spain	EUR
Svalbard and Jan Mayen	NOK
Sweden	SEK
Switzerland	CHF
UK	GBP
Vatican City	

India region and market

If your company's location is India, you can sell CSP offers to customers in India.

COUNTRY/REGION	CURRENCY
India	INR

Japan region and market

If your company's location is Japan, you can sell CSP offers to customers in Japan.

COUNTRY/REGION	CURRENCY
Japan	JPY

Korea, Republic of region and market

If your company's location is Korea, Republic of, you can sell CSP offers to customers in Korea, Republic of.

COUNTRY/REGION	CURRENCY
Korea, Republic of	KRW

Latin America and the Caribbean region and market

If your company's location is in the list below, you can sell CSP offers to customers in all locations in the list.

COUNTRY/REGION	CURRENCY
Anguilla	USD
Antarctica	USD
Antigua and Barbuda	USD
Argentina	USD
Aruba	USD
Bahamas	USD
Barbados	USD
Belize	USD
Bermuda	USD
Bolivia	USD
Bonaire	USD

COUNTRY/REGION	CURRENCY
British Virgin Islands	USD
Cayman Islands	USD
Chile	USD
Colombia	USD
Costa Rica	USD
Curaçao	USD
Dominica	USD
Dominican Republic	USD
Ecuador	USD
El Salvador	USD
Falkland Islands	USD
French Guiana	USD
Grenada	USD
Guadeloupe	
Guatemala	USD
Guyana	USD
Haiti	USD
Honduras	USD
Jamaica	USD
Martinique	
Mexico	USD
Montserrat	USD
Nicaragua	USD
Panama	USD
Paraguay	USD

COUNTRY/REGION	CURRENCY
Peru	USD
Puerto Rico	USD
Saba	USD
Saint Barthélemy	USD
Saint Kitts and Nevis	
Saint Lucia	USD
Saint Martin	USD
Saint Vincent and the Grenadines	USD
Sint Eustatius	USD
Sint Maarten	USD
South Georgia and South Sandwich Islands	USD
Suriname	USD
Trinidad and Tobago	USD
Turks and Caicos Islands	USD
Uruguay	USD
Venezuela	USD
Virgin Islands, U.S.	USD

Middle East, Central Europe, and Eastern Europe region and market

If your company's location is in the list below, you can sell CSP offers to customers in all locations in the list.

COUNTRY/REGION	CURRENCY
Afghanistan	
Albania	USD
Algeria	
Armenia	USD
Azerbaijan	USD

COUNTRY/REGION	CURRENCY
Bahrain	USD
Belarus	USD
Bosnia and Herzegovina	
British Indian Ocean Territory	USD
Egypt	USD
Georgia	USD
Iraq	USD
Israel	USD
Jordan	
Kazakhstan	USD
Kosovo	USD
Kuwait	USD
Kyrgyzstan	USD
Lebanon	USD
Lesotho	USD
Libya	
Macedonia, Republic of	
Mauritania	USD
Moldova	
Mongolia	
Montenegro	
Morocco	USD
Mozambique	
Oman	USD
Pakistan	USD

COUNTRY/REGION	CURRENCY
Palestinian Territory, Occupied	
Qatar	USD
Saudi Arabia	USD
Serbia	USD
South Africa	USD
Swaziland	USD
Tajikistan	
Tunisia	USD
Turkey	USD
Turkmenistan	
Ukraine	USD
United Arab Emirates	USD
Uzbekistan	
Yemen	USD
Zimbabwe	

New Zealand region and market

If your company's location is in the list below, you can sell CSP offers to customers in all locations in the list.

COUNTRY/REGION	CURRENCY
American Samoa	NZD
New Zealand	NZD
Samoa	NZD
Vanuatu	NZD

Russia region and market

If your company's location is Russia, you can sell CSP offers to customers in Russia.

COUNTRY/REGION	CURRENCY
Russia	RUB

Taiwan region and market

If your company's location is Taiwan, you can sell CSP offers to customers in Taiwan.

COUNTRY/REGION	CURRENCY
Taiwan	TWD

United States region and market

If your company's location is in the list below, you can sell CSP offers to customers in all locations in the list.

COUNTRY/REGION	CURRENCY
United States	USD
U.S. Outlying Islands	USD

Instructions for CSP regional authorization tenant consolidation

6/19/2020 • 5 minutes to read

Applies to

- Partner Center
- Partner Center for Microsoft Cloud for US Government

Appropriate roles

- Global admin
- Admin agent

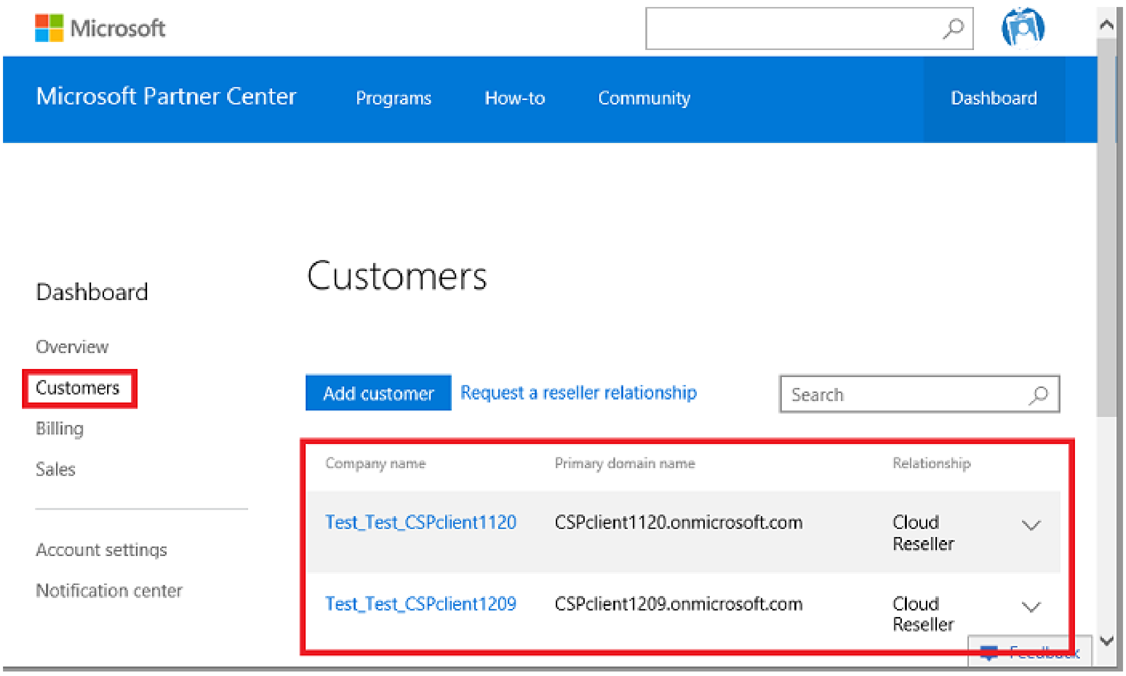
[Some information relates to pre-released product which may be substantially modified before it's commercially released. Microsoft makes no warranties, express or implied, with respect to the information provided here.]

Use these instructions to consolidate tenants for different country/regions.

> **NOTE**
>
> You must be aware of all of the subscriptions and seat counts for your customers provisioned from the transition accounts. You will be re-provisioning those same exact subscriptions with the same seat counts under the new Central CSP account as part of the migration process. Use the export list feature to help create a list of customers to move over to the centralized tenant. Partners choose to consolidate their tenants. Once consolidation is complete, Partners cannot revert to their previous state. Customer action may also be required.

Prepare for migration

- Sign in to **Partner Center** with the **Transitioning** (existing) account (the one you will transition) and review of all customers and all of the services provisioned for those customers.



Migrate customer accounts

1. Sign in to your **Partner Center** with the **Transitioning** (new) account (the one you are transitioning into) and navigate to the Customers list from **Customers**.

2. Select Customers.

3. Click **Request a reseller relationship**. You are presented with a default email message to present to your customers. This message contains a URL with the org ID unique to your new Partner Center account.

4. **Customer Action:** Ensure that each of the active customers you want to migrate visits this URL. When opening the URL, the customer is prompted to sign in to the Office 365 portal. The customer signs in using the same Org ID that they use to access the Azure and Office 365 admin portals.

5. After signing in, the Global Admin for the customer account is prompted to submit an agreement to give delegated admin privileges to the new CSP account. If they agree, the customer selects the checkbox and agrees to authorize the relationship.

The customers will appear in the partner's customer list after they have submitted the agreement, one by one.

Migrating Office 365 and non-Azure usage-based subscriptions

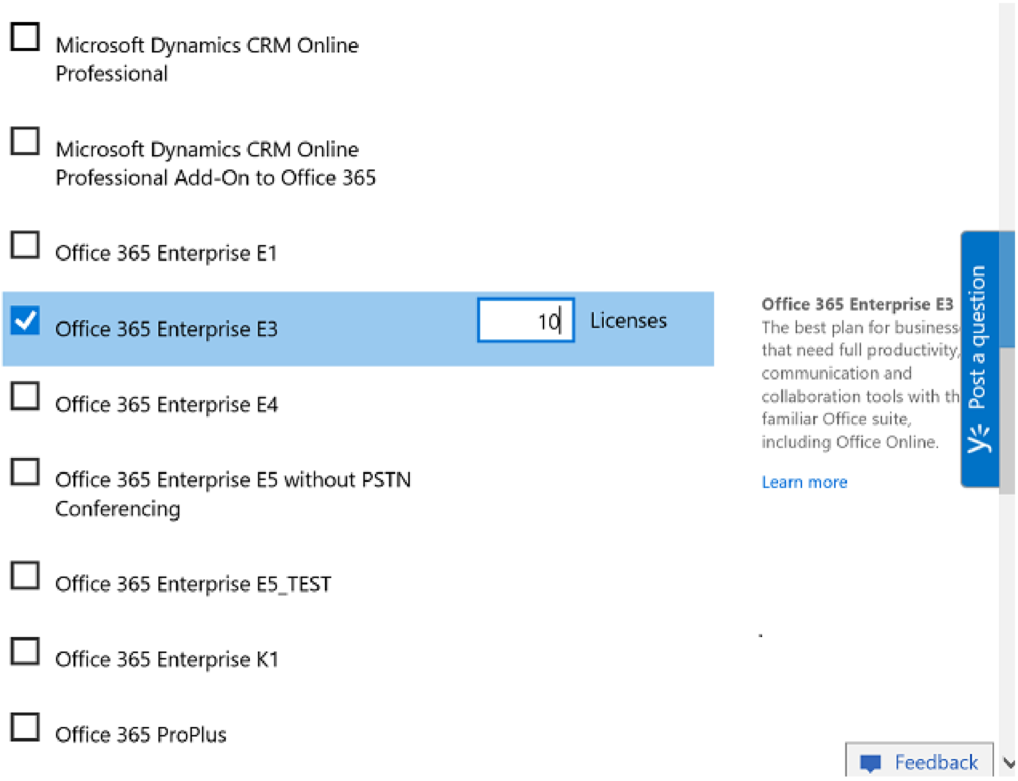
1. Once your customer has signed the agreement, you can recreate their subscriptions under your Centralized Partner Tenant.

2. From **Partner Center** select **Customers**.

3. Open the company name for the customer you want to migrate.

4. Select **Add subscription**.

5. Add the correct subscriptions and seat counts from the catalog. Verify with the information provided in the **Transitioning From** partner accounts.



6. Click **Submit**.

   The services are now provided to the customer from the **Transitioning To** partner account.

7. Repeat these steps to migrate subscriptions for all additional customers.

Before proceeding to the next section, ensure all customer subscriptions existing under the **Transitioning From** partner accounts are re-provisioned under the **Transitioning To** partner account.

> **NOTE**
>
> Partners must suspend subscriptions on the **Transitioning From** Partner Tenant account in Partner Center the same day that those subscriptions are transitioned and set up under the **Transitioning To** Partner Tenant account in the Partner Center to ensure double billing does not occur. Support requests will be denied for credits due to any overlap in billing that occurs from not correctly setting the **Transitioning From** subscriptions to disabled.

Disabling the Office 365 subscriptions under the Transitioning From partner account

Disabling the CSP subscription under the **Transitioning From** partner accounts stops any future billing. You do not have to manually disable Azure subscriptions, because Azure subscriptions are automatically disabled during the migration process.

1. Sign in to the **Partner Center** with the **Transitioning From** CSP account and navigate to the customer list.
2. Open the customer with subscriptions to disable, and then select the first offer to disable.
3. Set the subscription to **suspended**, and then click **submit**.

   > **NOTE**
   >
   > Suspending the subscription ensures double billing does not occur.

   The Subscription shows **suspended** on the subscriptions list.
4. Repeat these steps for all subscriptions under the customer. Verify all show **suspended.**
5. Select the next customer on the list and repeat the process of disabling all subscriptions.

Migrating Azure usage-based subscriptions

Azure, usage-based CSP subscriptions do not need to be migrated manually as is the case with Office 365 CSP subscriptions. Microsoft Azure Support can migrate the Azure subscriptions as well as all deployed services or resources from the **Transitioning From** CSP reseller accounts to the **Transitioning To** CSP reseller account. There will be no disruption of service to the customer during this transition.

1. Ensure that the customer accounts that need Azure subscriptions migrated have accepted the agreement to be associated with the new **Transitioning To** CSP account.
2. Partners notify Microsoft which customer accounts that have Azure subscriptions are ready to migrate, and provides those customer's company names.
3. Microsoft migrates the Azure usage-based subscriptions and notifies the partner when the migration is complete.
4. The partner confirms that the Azure subscription under the **Transitioning From** CSP reseller accounts now shows suspended in the Partner Center under the customer subscriptions section.
5. The partner confirms that the Azure subscription under the **Transitioning To** CSP reseller account now shows a status of **active** in the Partner Center under the customer subscriptions section.

> **NOTE**
>
> Disabling the subscriptions under the customer does not change the appearance of the customer in the Customers list. There is currently no option to remove customers from the list. Partners should avoid adding subscriptions back to these customers from their **Transitioning From** account in the future.

6. Repeat these steps for all subscriptions under all of your customers to stop future charges on the **Transitioning From** account(s). The partner will receive one final invoice with a credit for the number of unused days between the day of cancellation and the last day of the billing period. No future invoices will generate after that final billing period.

Additional information

- Disabling the subscription from the **Transitioning From** CSP account does not impact end customer's service as long as the service was provisioned from the **Transitioning To** CSP account prior to disabling the subscription.
- Subscriptions cannot be used by the customer and do not generate charges when suspended or canceled.
- There is currently no way to remove a customer from the Customers list completely.

> **NOTE**
>
> Partners must suspend subscriptions on the **Transitioning From** Partner Tenant account in Partner Center the same day that those subscriptions are transitioned to and set up under the **Transitioning To** Partner Tenant account in the Partner Center to ensure double billing does not occur. Microsoft will not support requests for credits due to any overlap in billing that occurs from not correctly setting the **Transitioning From** subscriptions to suspended.

Simplify migration using Export

Using the **Export Function**, you can capture the subscriptions you need to use in your new consolidated structure:

1. Click **Customers** on Partner Center to see the list of customers in your existing structure.
2. Open the desired customer name.
3. On the **Subscriptions** page, click **Export Subscriptions** to export details of subscriptions to an Excel file.
4. Use this list to recreate the subscriptions in your new consolidated tenant.

API registration

For more information about API registration, see Set up API access in Partner Center.

Confirm customer acceptance of the Microsoft Customer Agreement in the CSP partner program

6/19/2020 • 8 minutes to read

Applies to

- Partner Center
- Microsoft 365 Admin Center

Appropriate roles

- Admin agent
- Sales agent

Appropriate partner types

- Indirect resellers, Direct bill, Indirect providers

On October 1st, 2019, Microsoft introduced the **Microsoft Customer Agreement** to the CSP program to replace the Microsoft Cloud Agreement. Read additional guidance for indirect resellers. To facilitate partners' migration to the new agreement, both agreements coexisted in the CSP program until January 31st, 2020. Starting February 1, 2020, the Microsoft Customer Agreement replaced the Microsoft Cloud Agreement.

Customers have two options for accepting the Microsoft Customer Agreement.

Option 1: Partner attestation of customer acceptance - Partner can confirm customer acceptance using Partner Center API/SDK or through the Partner Center dashboard.

Option 2: Customer direct acceptance - Partner can invite the customer via a URL to review and accept the agreement in the Microsoft 365 Admin Center.

Access Microsoft Customer Agreement template

You can manually download the latest version of the Microsoft Customer Agreement template from here. The Microsoft Customer Agreement is country-specific. When requesting the Microsoft Customer Agreement template, be sure to select the correct country based on the customer's location.

Option 1: Confirm customer acceptance in Partner Center

Partners can confirm customer acceptance of the Microsoft Customer Agreement in Partner Center for new and existing customers. Resellers cannot attest on behalf of their customers and need to work with their Indirect Provider to get attestation completed.

Confirm customer acceptance for new customers

When you create a new customer tenant in Partner Center, use the following steps to confirm the customer's acceptance of the Microsoft Customer Agreement. You must be an Admin agent or Sales agent to perform these steps.

1. Select **Customers**, and then **New customer**.

2. Under **Account info**, enter information for the company and its primary contact.

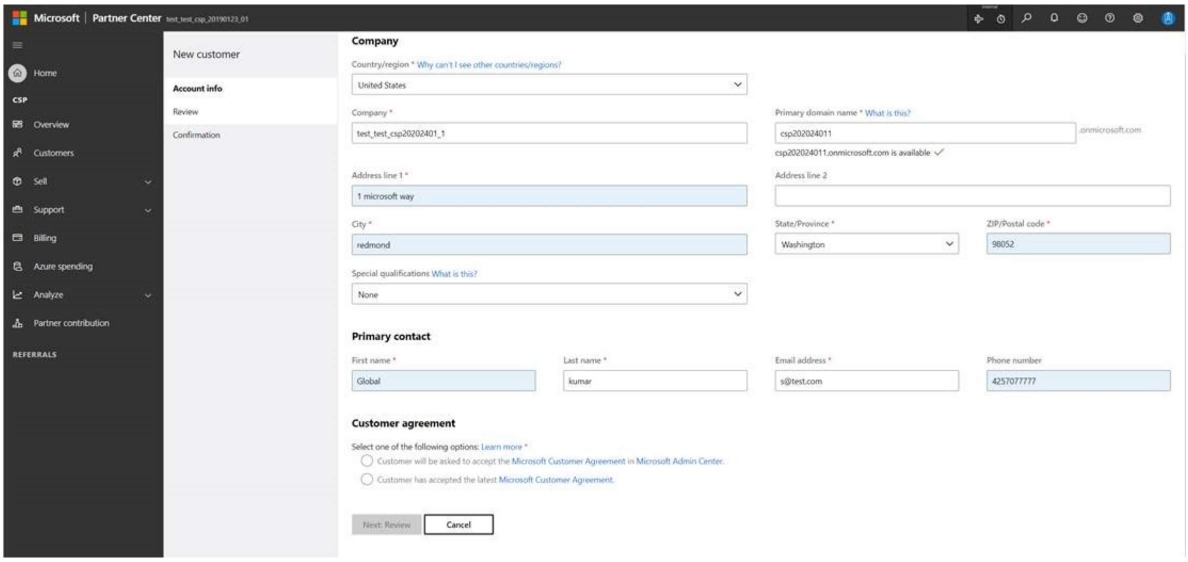
3. Under **Microsoft agreement**, select the box to attest that the customer has accepted the Microsoft

Customer Agreement.

4. Under **Agreement acceptance date**, enter the appropriate date. You cannot set this to a future date.

5. Make sure that the primary user contact information displayed is correct. If it's incorrect, select **Update** and enter the accurate information for the person who accepted the agreement.

6. Select **Next** to continue creating the customer tenant.



Confirm customer acceptance for existing customers

You must be an Admin agent or Sales agent to do this:

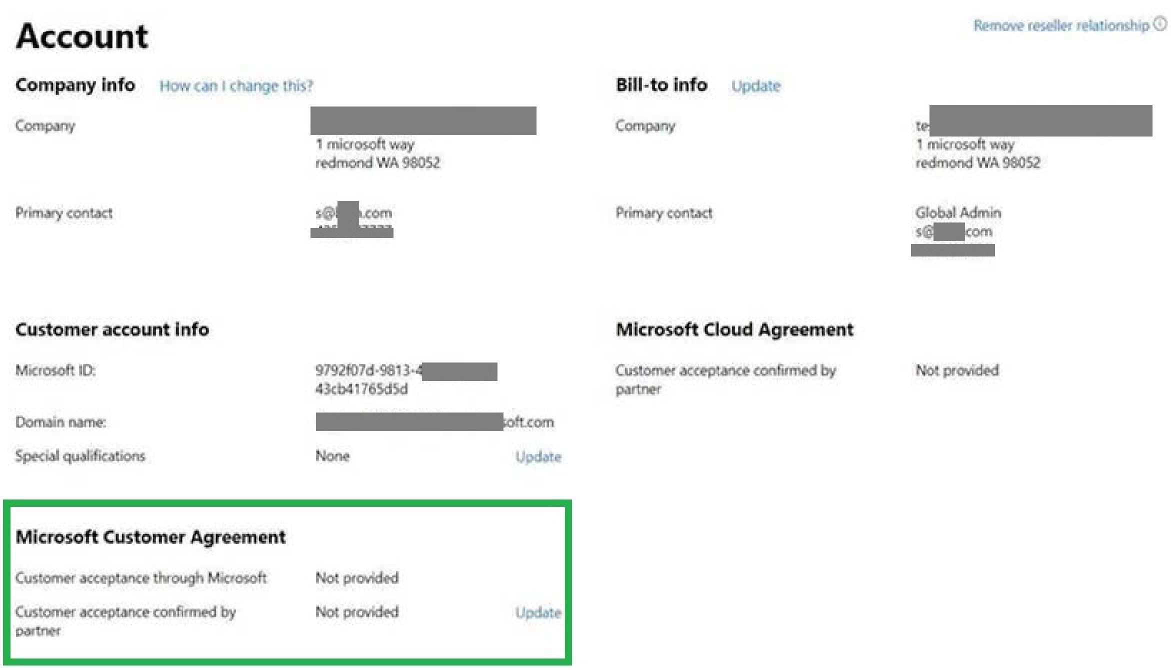
1. Select **Customers**. Find and select the customer.

2. Select **Account info**.

3. Under **Microsoft Customer Agreement**, select **Update**.

4. Enter the **First name**, **Last name**, **Email address**, and **Phone number** (optional) of the person who accepted the agreement. Under **Agreement acceptance date**, enter the appropriate date. You cannot set this to a future date.

5. Select **Save** and continue.



Retrieve confirmation of customer acceptance

You can retrieve confirmation that an existing customer has accepted the Microsoft Customer Agreement using the following steps. You must be an Admin agent or Sales agent to do this.

1. Select **Customers**, and then find and select the customer you want to see.
2. Select **Account info**.
3. Under **Microsoft customer agreement**, view if confirmation has or hasn't been provided by this customer.

Confirm customer acceptance using Partner Center API/SDK

You can use Partner Center API/SDK to confirm customer acceptance of the Microsoft Customer Agreement. For details on the API/SDK, refer to:

- Get agreement metadata for the Microsoft Customer Agreement
- Confirm customer acceptance of Microsoft Customer Agreement
- Get confirmation of customer acceptance of Microsoft Customer Agreement
- Get a download link for the Microsoft Customer Agreement template

Option 2: Customer acceptance in Microsoft 365 Admin Center

Partners can invite new and existing customers, via a URL, to review and accept the agreement within the Microsoft 365 Admin Center. The next few sections show you how to:

- Create a new customer and invite the customer to review and accept the agreement.
- Invite a new customer to review and accept the reseller relationship and agreement.
- Invite an existing customer to review and accept the agreement.

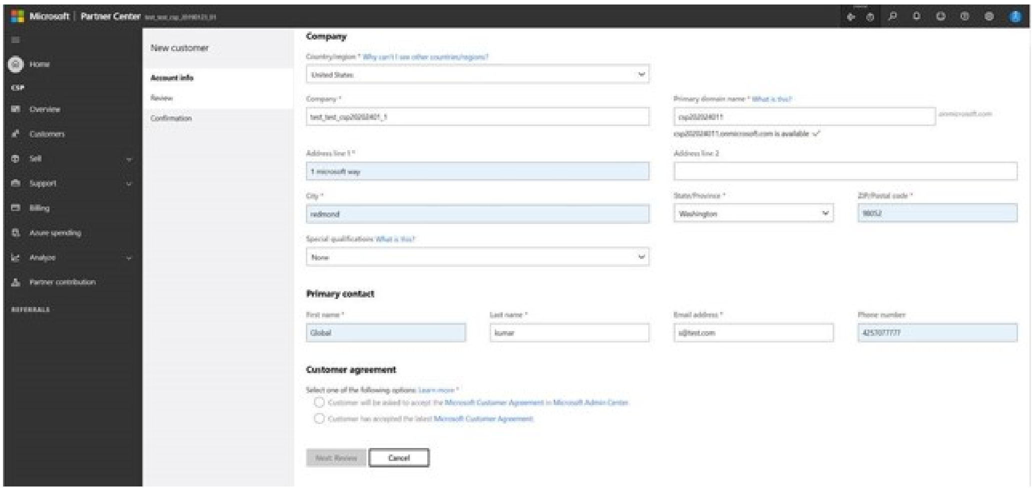
> **NOTE**
>
> You can use Partner Center API/SDK to get the status of a customer's direct acceptance of the Microsoft Customer Agreement.

Create a new customer and invite the customer to review and accept the agreement

Use the following steps to create a new customer in Partner Center then invite them to review and accept the Microsoft Customer Agreement within Microsoft 365 Admin Center.

1. From the **Customers** tab within Partner Center, select **Add customer**.
2. Under **Account Info**, enter information about the new customer in all required fields, including the customer's company name and primary contact.
3. Under **Customer Agreement**, select the first option, **Customer will be asked to accept the Microsoft Customer Agreement in Microsoft 365 Admin Center**. Complete any other required fields on the page.
4. Select **Next: Review** then continue the steps to create the customer tenant.

> **NOTE**
>
> New customers cannot make a new purchase until they accept the Microsoft Customer Agreement.



5. When you reach the **Confirmation** screen in the new customer workflow, save the customer credentials. You will need to give these credentials to your customer later.

6. Outside of Partner Center, create and send an email that invites the customer to accept the Microsoft Customer Agreement in Microsoft 365 Admin Center. Make sure to include these items in the email:

   - A link to this URL (Sign-in required)

   - The customer's credentials you saved in Step 5.

7. The customer will then receive the email invite from the partner and select the URL.

8. The customer signs into Microsoft 365 Admin Center using the customer credentials previously received from the partner.

9. The customer then checks the box to accept the Microsoft Customer agreement.

Invite a new customer to review and accept the reseller relationship and Microsoft Customer Agreement

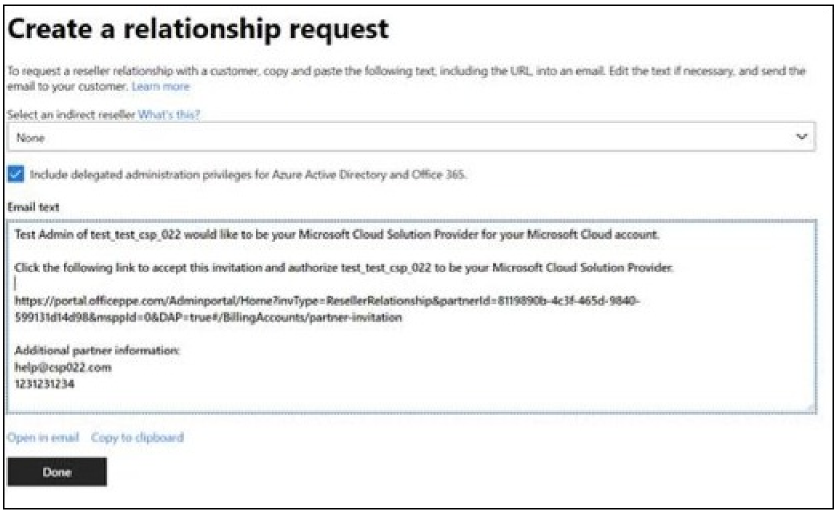
Use the following steps to invite a new customer to review and accept the reseller relationship and the Microsoft Customer Agreement.

1. From the **Customers** tab within Partner Center, select **Request a reseller relationship** link.

2. An automatic email template will be generated, including text and a parameterized URL which will direct the customer to the Microsoft 365 Admin Center.

3. You can customize the automatically generated email template and then select **Copy to clipboard** or **Open in email**.

4. Use this email template to invite the customer to accept **reseller relationship** request and the **Microsoft Customer Agreement**. (Note: In the email invite, make sure the partner also includes the URL that was automatically provided as well as the customer credentials that were recently created.)

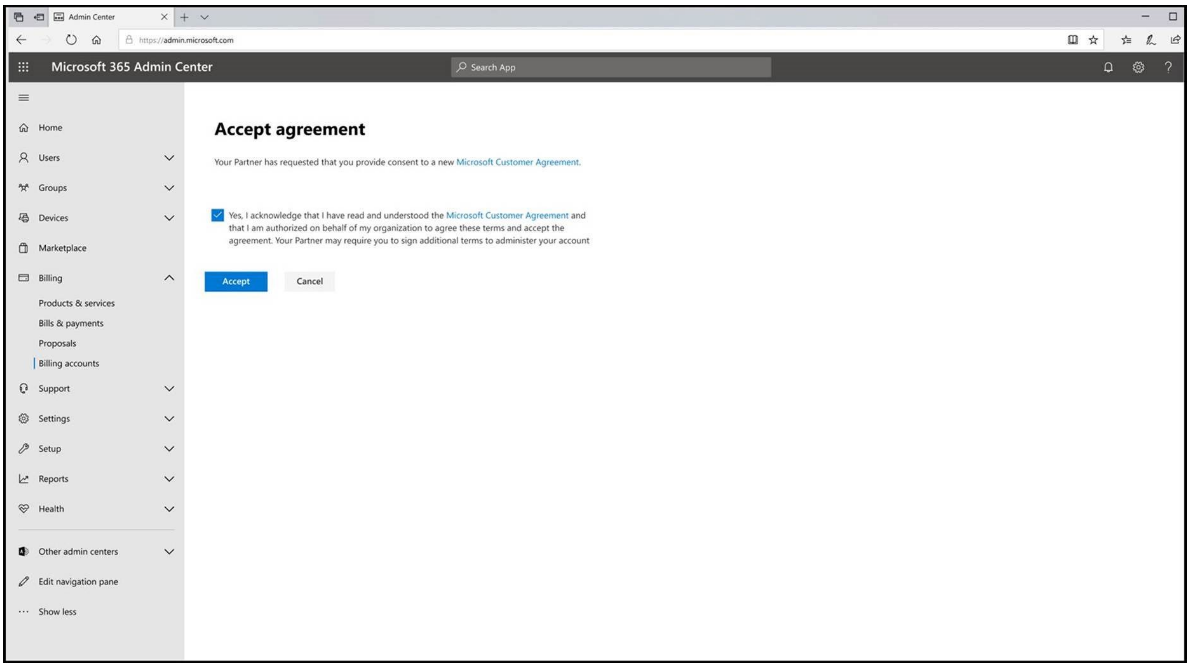


5. Customer receives invite via email and clicks on the parameterized URL.

6. Customer uses credentials provided by partner within email to sign into Microsoft 365 Admin Center.

7. Customer checks the box to accept the **reseller relationship** and **Microsoft Customer Agreement**.

8. Within the same URL, the customer is able to see a consolidated list of different partners they are working with. They can select a partner to see details.



Invite an existing customer to review and accept the agreement

Use the following steps to invite an existing customer to review and accept the Microsoft Customer Agreement.

1. Create the customer email with the embedded URL inviting your customer to accept the Microsoft Customer Agreement.

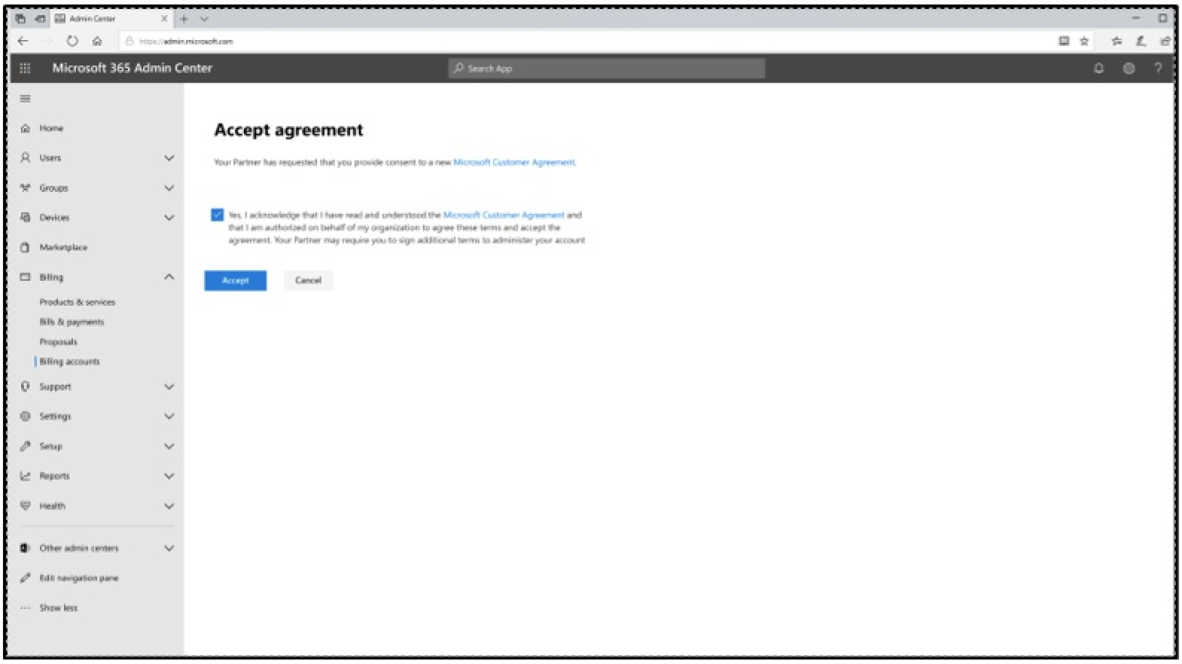
2. Your customer receives the invitation via email and clicks the URL.

3. The customer enters their credentials into Microsoft 365 Admin Center.

4. Your customer checks the box to accept the Microsoft Customer Agreement.

5. Within the same URL, the customer can see the consolidated list of different partners they are working

with. They can select a partner to see details.



> **NOTE**
>
> In certain scenarios, customers may not be able to directly accept the Microsoft Customer Agreement. To learn more about these situations, see [Two scenarios where you need to attest on behalf of your customer](#).

Historical timeline details

DATE	MILESTONE	DETAILS
August 01, 2019	UX preview available in sandbox	Partners can confirm customer acceptance of the Microsoft Customer Agreement using the Partner Center dashboard in the CSP sandbox environment. Partners with access to the CSP sandbox environment preview the user experience changes. Partners without sandbox access can learn about the changes in this topic.
September 03, 2019	API preview is available in sandbox.	Partner can confirm customer acceptance of the Microsoft Customer Agreement using Partner Center API in CSP sandbox environment. API partners can use this opportunity to preview the API changes and start working on API integration to support the new agreement.
September 20, 2019	.NET SDK preview is available in sandbox.	Partner can confirm customer acceptance of the Microsoft Customer Agreement using Partner Center .NET SDK in CSP sandbox environment. API partners can use this opportunity to preview the .NET SDK changes and start working on API integration to support the new agreement.

DATE	MILESTONE	DETAILS
October 01, 2019	Microsoft Customer Agreement available in production	Microsoft introduces the Microsoft Customer Agreement to the CSP program to replace the Microsoft Cloud Agreement. Partners can confirm customer acceptance of the Microsoft Customer Agreement using the Partner Center dashboard and API in production. The Microsoft Cloud Agreement remains supported within the CSP partner program. However, partners are advised to start migrating to the Microsoft Customer Agreement. New purchases and seat count changes to existing subscriptions will require partner confirmation of either the Microsoft Customer Agreement or the Microsoft Cloud Agreement. Certain new offers (for example, the new Azure plan) will require confirmation of the Microsoft Customer Agreement.
January 31, 2020	Microsoft Cloud Agreement removed from production	The Microsoft Cloud Agreement is no longer accepted within the CSP partner program. New purchases and seat count changes to existing subscriptions will require the partner to provide confirmation of the Microsoft Customer Agreement. This requirement applies to new customers and existing customers who may have previously accepted the Microsoft Cloud Agreement.
February 3, 2020	Partner now has the option to invite the customer via a URL to review and accept the agreement in authenticated Microsoft 365 Admin Center.	Customer can accept the Microsoft Customer Agreement in Microsoft 365 Admin Center. Customer's direct acceptance of the agreement in Microsoft 365 Admin Center confirms approval of terms.

Attest acceptance of the Microsoft Customer Agreement on behalf of your customer

6/19/2020 • 2 minutes to read

Applies to

- Partner Center
- Microsoft 365 Admin Center

Appropriate roles

- Admin agent
- Sales agent

Appropriate partner types

- Indirect resellers, Direct bill, Indirect providers

This article describes certain scenarios where you might need to attest a customer's acceptance of the Microsoft Customer Agreement on the customer's behalf.

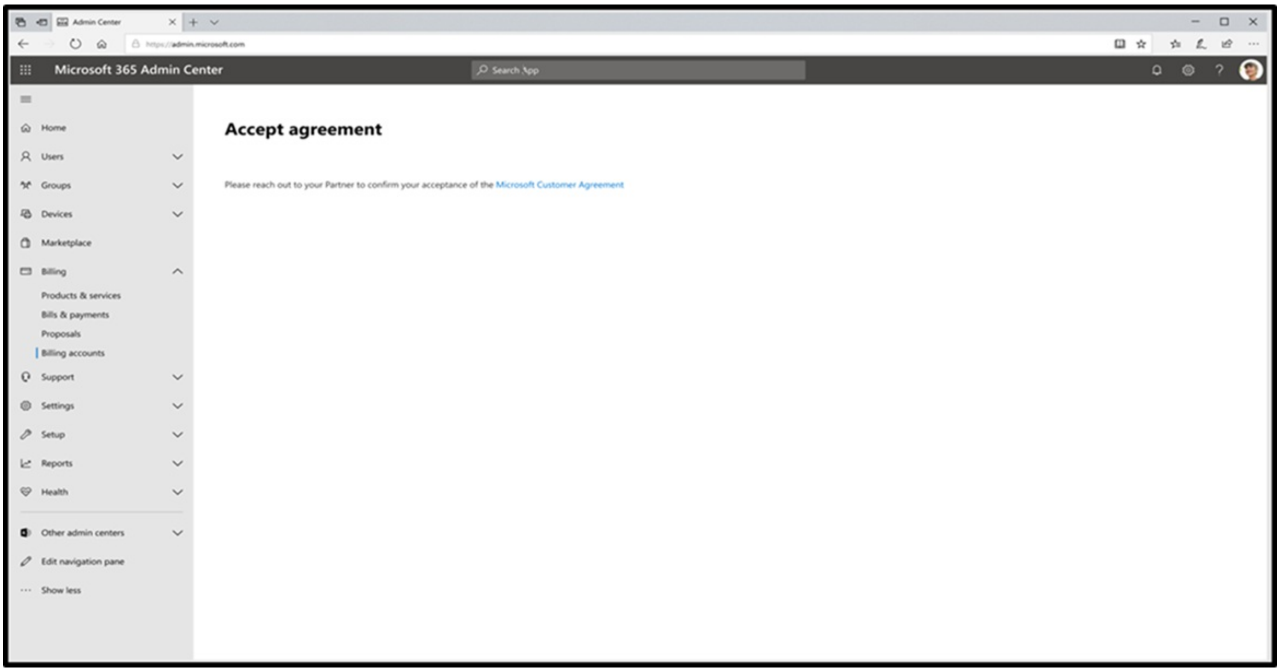
> **NOTE**
>
> To learn more, see also Confirm customer acceptance of the Microsoft Customer Agreement.

Two scenarios where you need to attest on behalf of your customer

There are currently two scenarios where customers may not be able to directly accept the Microsoft Customer Agreement within the Microsoft 365 Admin Center.

Scenario 1: An existing customer has purchased any of the following through an existing partner relationship: offers, software or software subscriptions, Reserved Instances, and Azure Plan. The customer is now attempting to make any new purchase (excluding auto renewal). When that customer clicks the URL, they will receive the message "Please reach out to your Partner to confirm your acceptance of the Microsoft Customer Agreement."

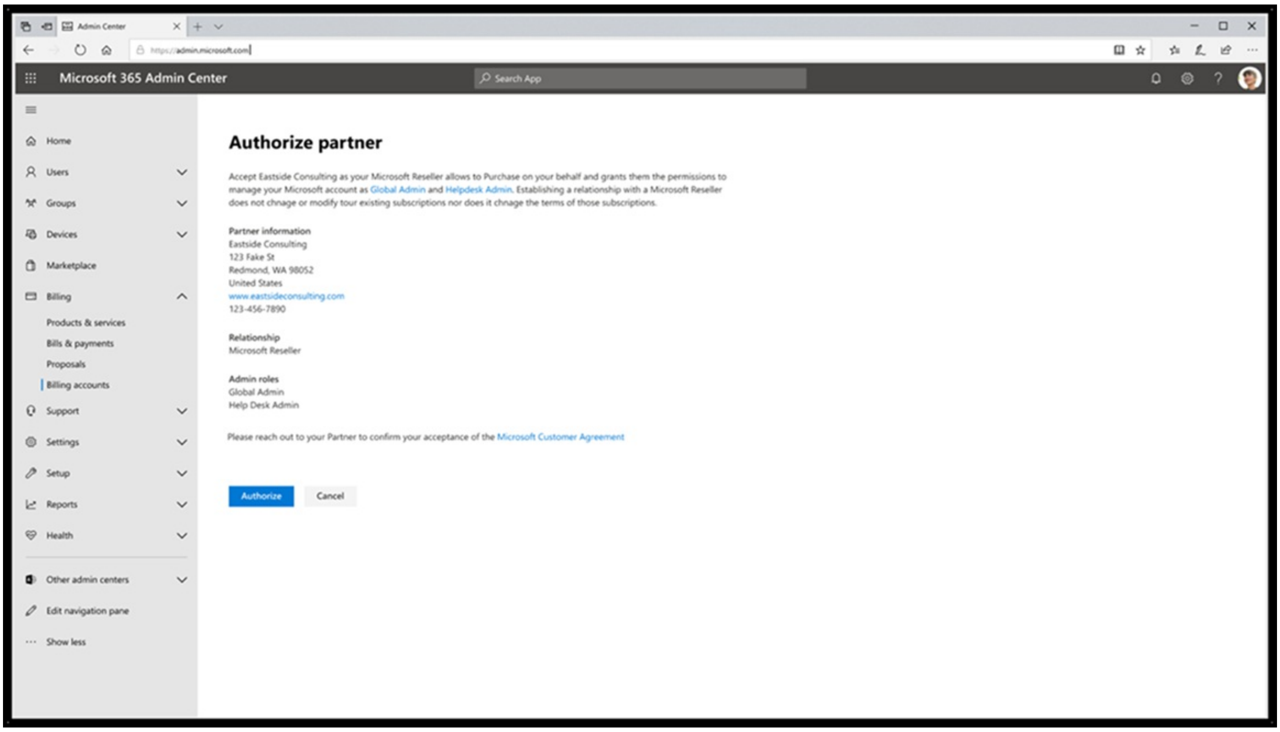
To resolve: You must attest on behalf of the customer.



Scenario 2: An existing customer has purchased any of the following offers, software and software subscriptions, Reserved Instances and Azure Plan. The customer is now attempting to make any new purchase with a new partner.

When the customer clicks the URL to Microsoft 365 Admin Center to accept the new partner relationship and the agreement, they will receive the message "Please reach out to your Partner to confirm your acceptance of the Microsoft Customer Agreement."

To resolve: You must attest on behalf of the customer.



Apply to sell in Microsoft national clouds as part of the CSP program

5/8/2020 • 2 minutes to read

In addition to selling to customers as part of the global Cloud Solution Provider program, qualified Microsoft partners can also sell cloud solutions to customers in three separate national clouds. National clouds are physical and logical network-isolated instances of Microsoft enterprise cloud services, which are confined within the geographic borders of specific countries and operated by local personnel.

For more information about Microsoft's national cloud offerings, see Microsoft National Clouds.

Microsoft makes these services available in the national clouds:

- Microsoft Azure in-scope services offer hyperscale computing, storage, networking, and identity management. Azure safeguards data in the cloud at the government-required level of security, privacy, control, compliance, and transparency.
- Microsoft Dynamics 365 is a cloud-based customer relationship management (CRM) solution that equips government employees with data reporting, modeling, and workflows, while offering security features that can limit access to sensitive data.
- Microsoft Office 365 combines a defense-in-depth approach to security, rich data-protection tools, and an enterprise-grade compliance framework to provide a secure cloud-based productivity experience for government employees.

Qualified partners can sell Microsoft cloud solutions to customers in these national clouds:

- **Microsoft Cloud for US Government** Designed for the US government from the ground up, Microsoft Cloud for Government enables public sector customers in the United States—from large federal agencies to small town governments—to select from a range of cloud computing services. To best address its customers' specific needs, Microsoft has made significant investment in datacenters and is dedicated to meeting compliance with US federal and state policies, mandates, and requirements.

  For information about how to enroll in and sell to customers in Microsoft Cloud for US Government, see Partner Center for Microsoft Cloud for US Government.

- **Microsoft Cloud Germany** Microsoft Cloud Germany offers Azure, Office 365, and Dynamics 365 from German datacenters through a unique model. In this model, access to customer data is controlled by an independent German Data Trustee operating under German law. T-Systems International GmbH, a subsidiary of Deutsche Telekom, acts as the independent Data Trustee for Microsoft Cloud Germany.

  > **IMPORTANT**
  > Based on the evolution in customers' needs, our cloud strategy for Germany will focus on delivery of the new cloud regions in Germany that are consistent with our global cloud offering. With this focus, we will no longer be accepting new customers or deploying any new services from the currently available Microsoft Cloud Germany. Existing customers can continue to use the current cloud services available today, which we'll maintain with necessary security updates.
  >
  > Moving forward, new customers have the option to use the currently available European regions or the new regions in Germany when they become available. For more information, see Microsoft to deliver cloud services from new datacenters in Germany.

- **Azure and Office 365 operated by 21Vianet in China** Microsoft provides cloud services in China through a unique partnership with Shanghai Blue Cloud Technology Co., Ltd. (21Vianet), a wholly owned subsidiary of Beijing 21Vianet Broadband Data Center Co., Ltd. 21Vianet is the largest carrier-neutral Internet provider of datacenter, hosting, managed network, and cloud computing infrastructure services in China.

  Microsoft is the technology provider, but does not operate the service; 21Vianet independently operates, provides, and manages the delivery of Microsoft cloud services. By licensing Microsoft technologies, 21Vianet can offer Azure and Office 365 services and operate Azure and Office 365 datacenters that keep data within mainland China. 21Vianet also provides subscription and billing services, as well as support.

  For information about how to enroll in and sell to customers in Azure and Office 365 operated by 21Vianet in China, see Partner Center operated by 21Vianet.

Partner Center for Microsoft Cloud for US Government supports partner offers to government agencies

6/19/2020 • 2 minutes to read

Applies to

- Partner Center for Microsoft Cloud for US Government

Appropriate roles

- Global admin
- User admin
- Admin agent
- Sales agent
- Billing admin

Microsoft Cloud for US Government: Meeting data protection requirements

Designed for the US government from the ground up, Microsoft Cloud for US Government enables US federal, state, local, or tribal entities to select from a range of Microsoft's cloud computing services. To best address public sector customers' specific needs, Microsoft has made significant investment in data centers and is dedicated to meeting data protection compliance with US federal and state policies, mandates, and requirements. Partner Center for Microsoft Cloud for US Government enables partners to resell Microsoft cloud services to these customers.

Note that some of the capabilities available in Partner Center may not yet be available in Partner Center for Microsoft Cloud for US Government.

Microsoft Cloud for US Government provides a separate instance of Microsoft Azure that meets the data protection needs of government security, privacy, and compliance requirements.

See the Microsoft Cloud for US Government datasheet for more information.

Partner Center for Microsoft Cloud for US Government: Selling cloud solutions to US government entities

Once enrolled in the Cloud Solution Provider (CSP) program for Microsoft Cloud for US Government, you'll use Partner Center to sell cloud-specific solutions and services to your US government customers.

> **NOTE**
> At the time this article was published, the following Partner Center features were not yet available in Partner Center for Microsoft Cloud for US Government (since publication, some of the features may have been added to Partner Center and this list may be out of date):

- Find a partner
- Business profiles

- Referrals
- Request a reseller relationship with a customer (multi-channel, multi-partner)
- License analytics
- Customer insights
- Indirect reseller/provider model and settings
- Check service health
- Independent Software Vendor (ISV) enrollment
- Customer special qualification

The following Partner Center tasks are managed using the Azure admin portal for Microsoft Cloud for US Government:

- Partner user management
- Customer user and license management
- Resetting users' passwords

For information about managing users and licenses, see User and license management in Partner Center for Microsoft Cloud for US Government.

For information about enrolling in CSP for Microsoft Cloud for US Government, see Enrolling in CSP for Microsoft Cloud for US Government.

For an FAQ, see Frequently asked questions about the CSP Program for Microsoft Cloud for US Government.

Frequently asked questions for Partner Center for Microsoft Cloud for US Government

5/5/2020 • 8 minutes to read

Applies to

- Partner Center for Microsoft Cloud for US Government

Frequently asked questions

Use these frequently asked questions to learn more about the Cloud Solution Provider (CSP) program for Microsoft Cloud for US Government. You can also contact your account manager for additional information.

Common

What is Microsoft Cloud for US Government?

Designed for the US government from the ground up, Microsoft Cloud for Government enables public sector customers in the United States—from large federal agencies to small town governments—to select from a range of cloud computing services. To best address its customers' specific needs, Microsoft has made significant investment in datacenters and is dedicated to meeting compliance with US federal and state policies, mandates, and requirements.

Who is eligible for the CSP program for Microsoft Cloud for US Government?

Partners in the United States who serve US Federal, state, and local government entities in their governmental capacities are eligible for the CSP program for Microsoft Government cloud. Microsoft has a strict validation program to determine eligibility before partners can access Microsoft Government cloud. To qualify, you need to prove that you work with government customers. The sign-up process for the CSP program in Microsoft Could for US Government has been augmented to capture additional data to perform the validation. Types of proof can include, but are not limited to, government contract numbers and letter of sponsorship from your government customer.

Is customer pricing the same as for CSP Commercial?

No. Pricing will reflect the additional costs to provide the unique value of Microsoft Cloud for US Government.

Is the partner discounting model the same?

Yes. The partner discounting model for the CSP Program for Microsoft Cloud for US Government is same as partner discounting model for CSP Commercial.

CSP Commercial is an existing partner program. How is the CSP program for Microsoft Government cloud different?

The CSP program for Microsoft Government cloud is different than CSP Commercial in the following areas:

- Eligibility: The CSP program for Microsoft Government cloud is available only to partners in United States that serve US Federal, state, and local government entities in their governmental capacities. Microsoft has a validation program to determine eligibility before partners can access the US Government cloud.
- Onboarding: Partners need to onboard to the CSP program for Microsoft Cloud for US Government separately from CSP Commercial.
- Product availability: Both Azure Government and seat-based services like Office 365, Enterprise Mobility +

Security, and Dynamics 365 are available in the CSP program for Microsoft Government Cloud.

- Contracting: The Microsoft Cloud Reseller Agreement (MCRA) has been updated to reflect unique government terms.
- Partner Center functionality: Certain features of Partner Center will not be enabled for the CSP program for Microsoft Cloud for US Government to meet regulatory and compliance requirements. Partners can use Azure Active Directory (Azure AD) or Graph API instead to perform tasks related to user and group management. The Relationship request feature to support multi-channel and multi-partner scenarios will be available post-launch when seat-based services are available on CSP for Microsoft Cloud for US Government.

I am not a CSP partner yet. Where can I find more information on how to become a CSP partner?

To learn more about enrollment models available to partners, see Cloud Solution Provider on the Microsoft Partner Network.

How does licensing work?

Microsoft Cloud Reseller Agreement (MCRA)

The MCRA authorizes partners to resell using CSP. The US Government Cloud version of this agreement is accepted when onboarding to Microsoft Cloud for US Government. This version has a US Government Cloud Addendum and Exhibit A after the standard Cloud Reseller Agreement.

MCRA for Microsoft Cloud for US Government is different from the standard MCRA in the following two ways:

- US Government Cloud Addendum contains additional partner responsibility for transacting US Government Cloud services.
- Exhibit A contains the Microsoft Customer Agreement (Microsoft Customer Agreement) that must be incorporated into every contract for US Government Cloud services entered into between the CSP and its customer.

Microsoft Customer Agreement (Microsoft Customer Agreement) presented as Exhibit A in MCRA

CSPs are required to incorporate Exhibit A in the government Contract entered between CSPs and customers purchasing Microsoft Cloud for US Government. The agreement is published on the Partner Center, and is available in English.

Microsoft Customer Agreement for US Government Cloud is different from the standard Microsoft Customer Agreement in the following two ways:

- It is required to be incorporated into the CSP's contract with its customer.
- It has been tailored to comply with federal, state, and local laws and regulations.

Microsoft Cloud Distributor Agreement (MCDA)

The Microsoft Cloud Distributor Agreement (MCDA) authorizes distributors to sell via CSP. The US Government Cloud version of the MCDA has a US Government Cloud Addendum and Exhibit A after the standard Microsoft Cloud Reseller Agreement (MCRA).

MCDA for Microsoft Cloud for US Government is different from the standard MCDA in the following two ways:

- Microsoft Cloud for US Government Addendum contains additional partner responsibility for transacting US Government Cloud services.
- Exhibit A contains Microsoft Customer Agreement (Microsoft Customer Agreement) that needs to be incorporated into every contract for US Government Cloud services entered into between the CSP and its customers.

What are the qualifications to sell Microsoft Cloud for US Government?

Qualification criteria to sell the CSP program for Microsoft Government Cloud is the same as the qualification criteria for CSP Commercial, open to both direct partners and indirect resellers. You do not need to be re-nominated to be an indirect reseller for the CSP program for Microsoft Government Cloud if you are approved as an indirect reseller for CSP Commercial.

I am an existing partner. What do I need to do to sell Microsoft Cloud for US Government?

Partners will need to onboard to the CSP program for Microsoft Cloud for US Government to meet regulatory and compliance requirements. (Onboarding for Microsoft Cloud for US Government is separate from onboarding for CSP Commercial.) Once you onboard, you can create customers and transact offers available within Microsoft Cloud for US Government. If you are leveraging APIs, see Developing for Partner Center for Microsoft National Cloud.

Is there any difference in partner incentives?

No. Partner incentives for the CSP program for Microsoft Cloud for US Government are the same as partner incentives for CSP Commercial. To learn more about partner incentives, sign in to the Microsoft Partner Network portal.

Are there any changes to billing?

No. Billing criteria and requirements for the CSP Program for Microsoft Cloud for US Government are the same as billing criteria and requirements for CSP Commercial. To learn more about billing, review the resources on Microsoft Partner Network.

For data hosted in commercial datacenters, is it possible to change to Microsoft Cloud for US Government?

In order to facilitate and maintain the integrity of the isolation of Microsoft Cloud for US Government, there are no mechanisms to move a customer's existing services into Microsoft Cloud for US Government. If a customer or partner has Azure, they will be responsible for any data moves into a new environment within Microsoft Cloud for US Government.

Microsoft Cloud for US Government for Azure

What is Microsoft Cloud for US Government for Azure?

Azure Government cloud delivers a cloud platform built upon the foundational principles of security, privacy and control, compliance, and transparency. Public Sector entities receive a physically isolated instance of Microsoft Azure that employs world-class security and compliance services critical to US government for all systems and applications built on its architecture. These services include FedRAMP and DoD compliance certifications, CJIS state-level agreements, the ability to issue HIPAA Business Associate Agreements, and support for IRS 1075. Operated by screened US persons, Azure Government supports multiple hybrid scenarios for building and deploying solutions on-premises or in the cloud. Public Sector entities can also take advantage of the instant scalability and guaranteed uptime of a hyper-scale cloud service.

Does the CSP program for Microsoft Cloud for US Government offer all Azure services?

Infrastructure as a service (IaaS) and fundamental platform and data offerings are available now. The roadmap is updated on an ongoing basis and we provide documentation similar to documentation for CSP Commercial within Partner Center (authentication required). You can review Azure Government Services currently available here, but note that some services, such as classic compute, networking, storage and cloud services are not designed for and do not work for CSP.

What do I need to do to develop with the CSP program for Microsoft Cloud for US Government?

For more information about developing with Partner Center for Microsoft Cloud for US Government see, Developing with Partner Center for Microsoft Government Cloud.

Are there any differences in APIs?

APIs and integration requirements for the CSP program for Microsoft Cloud for US Government are identical to APIs and integration requirements for CSP Commercial. For more information about endpoints in Microsoft Cloud for US Government see, Partner Center REST URLs.

> **NOTE**
> CREST APIs will not be available for the CSP program for Microsoft Cloud for US Government. These APIs are being deprecated in CSP and therefore not available for Microsoft Cloud for US Government. To meet regulatory and compliance requirements, the following APIs will not be available in the CSP program for Microsoft Cloud for US Government.

User Account Management

- Create user accounts for a customer
- Delete user accounts for a customer
- Update user accounts for a customer
- Get a list of all user accounts for a customer
- Reset user password for a customer
- Get user roles for a customer
- Set user roles for a customer
- View deleted users for a customer
- Restore a deleted user for a customer

License Management

- Get a list of available licenses
- Assign licenses to a user
- Check which licenses are assigned to a user

Is there a workaround for APIs not available in the CSP program for Microsoft Cloud for US Government?

Partners can use the Azure Portal, Azure AD PowerShell, or the Graph API for partner user account management. For additional technical information see, Developing with Partner Center for Government Cloud.

Where can I learn more?

Use following links to familiarize yourself with the CSP program and learn about developing with Partner Center for Microsoft Cloud for US Government.

- To learn about Azure Government
- To learn about CSP
- To learn about Developing with Partner Center for Microsoft Cloud for US Government

Where should I go if I still have questions?

Contact your account manager for additional information. In addition, join our Yammer group specific to CSP for

Azure Government.

Partner Center for Microsoft Cloud Germany for partners selling to customers in EU & EFTA countries

6/19/2020 • 2 minutes to read

Applies to

- Partner Center for Microsoft Cloud Germany

Appropriate roles

- Global admin
- User admin
- Admin agent
- Sales agent
- Billing admin

Microsoft Cloud Germany is designed to meet strict German data protection requirements and includes a German data trustee, operating under German law, who controls physical and logical access to customer data. All customer data, and the systems that process or control access to customer data, reside in German data centers. The network between these data centers is isolated and dedicated within Germany.

Microsoft Cloud Germany provides a separate instance of Microsoft Azure, delivered from data centers in Germany. As a result, commercial customers in the European Union (EU) and European Free Trade Association (EFTA) can store and manage customer data in compliance with applicable German laws and regulations as well as key international standards. Microsoft personnel cannot access customer data without approval from and supervision by the German data trustee or customer.

> **IMPORTANT**
> Based on the evolution in customers' needs, our cloud strategy for Germany will focus on delivery of the new cloud regions in Germany that are consistent with our global cloud offering. With this focus, we will no longer be accepting new customers or deploying any new services from the currently available Microsoft Cloud Germany. Existing customers can continue to use the current cloud services available today, which we'll maintain with necessary security updates.
>
> Moving forward, new customers have the option to use the currently available European regions or the new regions in Germany when they become available. For more information, see Microsoft to deliver cloud services from new data centers in Germany.

Partner Center for Microsoft Cloud Germany: Selling German Cloud solutions in EU and EFTA

Once enrolled in the Cloud Solution Provider (CSP) for Microsoft Cloud Germany program, you'll use Partner Center to sell German Cloud-specific solutions and services to customers in EU and EFTA countries/regions.

To comply with German laws and regulations that govern the collection and use of individuals' data as well as key international standards, the following Partner Center tasks are managed using specific service portals.

FEATURE OR CAPABILITY	COMPLETE TASKS IN

FEATURE OR CAPABILITY	COMPLETE TASKS IN
Partner user management	Office 365 admin center or Azure for Microsoft Cloud Germany admin portal
Customer user management	Office 365 admin center or Azure for Microsoft Cloud Germany admin portal
Reset user password	Azure for Microsoft Cloud Germany admin portal
License management	Office 365 admin center or Office 365 admin center or Microsoft Cloud Germany Azure Active Directory Licensing portal

For information about managing users and licenses, see User and license management in Partner Center for Microsoft Cloud Germany.

Enroll in the Cloud Solution Provider program for Microsoft Cloud for US Government

6/19/2020 • 3 minutes to read

Applies to

- Partner Center for Microsoft Cloud for US Government

Appropriate roles

- Global admin

Microsoft partners can now sell Microsoft's cloud solutions and services to US federal, state, local, and tribal entities through the Cloud Solution Provider program (CSP) for Microsoft Cloud for US Government.

Microsoft Cloud for US Government provides a private, dedicated, and isolated instance of Microsoft Azure that meets the US government's requirements for data security, privacy, and compliance. Your company must meet Microsoft's eligibility requirements to participate in the CSP program for Microsoft Cloud for US Government. For more information, see Partner Center for Microsoft Cloud for US Government.

Before you begin

Before you can enroll in the CSP program for Microsoft Cloud for US Government, we need to verify that your company meets the requirements to sell to US government entities. Before you kick off the enrollment process, complete the Microsoft Government Cloud Validation form so we can verify your company's eligibility. After we verify your company's eligibility, we'll provide you with an Azure Active Directory (Azure AD) tenant specific to the Microsoft Cloud for US Government.

To create a Partner Center account and enroll in CSP for Microsoft Cloud for US Government, you'll need to supply the following information (you may want to gather this information before you kick off the enrollment process):

- Global admin credentials for your organization's new Azure AD tenant for Microsoft Cloud for US Government
- Your organization's Microsoft Partner Network (MPN) ID
- A business address in the United States

> **IMPORTANT**
> If you have an existing account in Partner Center and you want to enroll in CSP for Microsoft Cloud for US Government, you must create a new, separate account specifically for the US Government market.

How to enroll

Step 1 - Create a Partner Center account for Microsoft Cloud for US Government

1. Kick off the enrollment process here.

2. Sign in with global admin credentials for your organization's Azure AD tenant for Microsoft Cloud for US Government. If your organization doesn't have an account for this portal, you can request one by completing the Microsoft Government Cloud Validation form.

Step 2 - Apply to participate in the Cloud Solution Provider program for Microsoft Cloud for US Government

1. Fill in any missing information on the enrollment form, including your Microsoft Partner Network ID and

your organization's customer support details.

2. Select **Accept and continue**. Reviewing your application may take us several days. We'll email you when we've completed our review.

> **IMPORTANT**
>
> By selecting **Accept and continue**, you're confirming that you're authorized to act on your organization's behalf, and you're agreeing to allow Microsoft to run a background credit check before reviewing your organization's Cloud Solution Provider application.

Step 3 - Sign the reseller agreement for Microsoft Cloud for US Government

1. Sign in to Partner Center for Microsoft Cloud for US Government using the link provided in the application approval email.

2. On the **Agreement** page, read the terms, and if you agree, select **Accept and continue** to digitally sign the reseller agreement for Microsoft Cloud for US Government. Creating your account may take several hours. Sign out of Partner Center for Microsoft Cloud for US Government and then sign back in later.

Step 4 - Assign users to the Admin Agent role in the Microsoft Azure admin portal for Microsoft Cloud for US Government

Microsoft Cloud for US Government provides a separate instance of Microsoft Azure that meets government compliance, security, and privacy standards. To allow admins to manage users and licenses in the Microsoft Azure portal, you'll need to manually assign the Admin Agent role to them.

> **NOTE**
>
> After you assign users to the Admin Agent role, they'll be able to access your customer list on the **Customers** page and add new customers.

1. Sign in to the Microsoft Azure admin portal at https://portal.azure.us/.

2. Assign the Admin Agent role to the appropriate users in your organization. To do this, you'll need to add these users to the built-in **AdminAgent** group. See Manage the members for a group in Azure Active Directory for information about how to do this.

Connect with us

- Questions? Email us at azgovcsp@microsoft.com

- Join us on Yammer

Related topics

- Partner Center for Microsoft Cloud for US Government

- User and license management in Partner Center for Microsoft Cloud for US Government

Sell Office 365 Government GCC for CSP subscriptions to qualified customers

6/19/2020 • 2 minutes to read

Applies to

- Partner Center
- CSP partners

Appropriate roles

- Global admin
- Admin agent
- Sales agent

Overview

Microsoft partners in the Cloud Solution Provider program (CSP) can sell Office 365 Government GCC for CSP subscriptions to qualified customers. Office 365 Government GCC for CSP is designed for the unique needs of US government organizations and provides all the features and capabilities of Office 365 services in a segmented government cloud community that enables organizations to meet US government compliance and security standards.

> **IMPORTANT**
>
> Before you can sell Office 365 Government GCC for CSP subscriptions, your company must be approved to sell to qualified customers. And, before customers can buy and use Office 365 Government GCC for CSP subscriptions, they must meet eligibility requirements. See partner and customer eligibility criteria for important information.

Sell Office 365 Government GCC for CSP subscriptions

After your company has been approved to sell Office 365 Government GCC for CSP offers, you can start selling to customers using Partner Center. Refer to these resources to learn how to use Partner Center to sell subscriptions:

- For a step-by-step guide to selling Office 365 Government GCC for CSP subscriptions, go here.

Additional resources

Access information on the partner opportunity in US Government on the Microsoft 365 for partners site.

Product resources:

- Office 365 Government Service Description
- Roadmap.Office.com
- Microsoft Trust Center
- Microsoft Service Trust Portal

Office 365 Government GCC for CSP Partner and Customer Eligibility Criteria - Partner Center

5/8/2020 • 2 minutes to read

Applies to

- Partner Center
- CSP Partners

Appropriate roles

- Global admin
- Admin agent
- Sales agent

> **NOTE**
>
> The validation process and criteria outlined below are specific to direct bill partners. Direct bill partners include direct resellers and indirect providers. If you are an Indirect Reseller please work with your Indirect Provider.

If you are interested in having your organization (or your customer's organization) approved for Office 365 Government GCC for CSP, review the requirements below.

You could be approved if you are a partner serving US federal, state, local or tribal government entities. To have your organizations eligibility validated, complete the brief form located here.

Your customer could be approved if they are an organization that handles government-controlled data or are a U.S. federal, state, local or tribal government entity. To have your customers' organizations' eligibility validated, complete the brief form located here.

- Your organization must be enrolled in the Cloud Solution Provider program as it is a pre-requisite to being approved for Office 365 Government GCC for CSP.
- A step-by-step validation process guide for Office 365 Government GCC for CSP is located here.
- Contact RSC Support Escalations for additional validation questions or concerns.

Office 365 Government GCC for CSP partners and customers will be validated for eligibility based on meeting specific criteria outlined below.

Partner Criteria

1. Provides services or solutions to US government customers through direct or indirect contracts
2. Serves US government customers through GSA or other contract vehicles

Customer Criteria

1. US government entity in its governmental capacity. For example:

   - Federal agency (e.g. bureau, agency, department, or other entity of the US government)
   - State/local entity
   - Tribal entity
   - Regional or interstate government entities (but no international entities)

- Federally Funded Research and Development Centers (FERDCs)

2. Commercial private entity with data that's subject to regulations. Accepted government data types include:

   - International Traffic in Arms (ITAR)
   - Controlled Unclassified Information (CUI)
   - Department of Defense (DoD) Unclassified Controlled Nuclear Information (UCNI)
   - Department of Energy (DoE) UCNI
   - Criminal Justice Information (CJI)
   - Department of Defense Impact Level Data
   - Other types of data that require Azure Government

An international commercial entity may qualify if they meet the requirements noted above and have verified U.S. presence (such as mailing address, physical location, etc.).

User and license management in Partner Center for Microsoft Cloud Germany

6/19/2020 • 2 minutes to read

Applies to

- Partner Center for Microsoft Cloud Germany

> **IMPORTANT**
>
> Based on the evolution in customers' needs, our cloud strategy for Germany will focus on delivery of the new cloud regions in Germany that are consistent with our global cloud offering. With this focus, we will no longer be accepting new customers or deploying any new services from the currently available Microsoft Cloud Germany. Existing customers can continue to use the current cloud services available today, which we'll maintain with necessary security updates.
>
> Moving forward, new customers have the option to use the currently available European regions or the new regions in Germany when they become available. For more information, see Microsoft to deliver cloud services from new datacenters in Germany.

To comply with German laws and regulations that govern the collection and use of individuals' data as well as key international standards, the following user and license management capabilities are not available in Partner Center for Microsoft Cloud Germany. Instead, add and manage users and licenses in the Azure portal for Microsoft Cloud Germany or the Office 365 admin center.

FEATURE OR CAPABILITY	COMPLETE TASKS IN
Partner user management	Office 365 admin center or Azure for Microsoft Cloud Germany admin portal
Customer user management	Office 365 admin center or Azure for Microsoft Cloud Germany admin portal
Reset user password	Azure for Microsoft Cloud Germany admin portal
License management	Office 365 admin center or Microsoft Cloud Germany Azure Active Directory Licensing portal

How to manage users in the Azure portal for Microsoft Cloud Germany

If you are signed in to Partner Center for Microsoft Cloud Germany, you can open the Azure portal for Microsoft Cloud Germany without having to sign in again. However, if you need to sign in directly to the Azure portal for Microsoft Cloud Germany, go to https://portal.microsoftazure.de.

After you have signed in successfully to the Azure portal for Microsoft Cloud Germany, open your Azure Active Directory (Azure AD) overview page and then follow the instructions in these topics:

> **NOTE**
>
> Selecting the links below will take you to a different website.

- Add new users to Azure Active Directory
- Assign a user to administrator roles in Azure Active Directory
- Reset the password for a user in Azure Active Directory

Related topics

- Microsoft Azure Germany
- Partner Center for Microsoft Cloud Germany

User and license management in Partner Center for Microsoft Cloud for US Government

6/19/2020 • 2 minutes to read

Applies to

- Partner Center for Microsoft Cloud for US Government

The following tasks are managed in the Microsoft Azure admin portal for Microsoft Cloud for US Government:

- Partner user management
- Customer user and license management
- Resetting users' passwords

How to manage users in the Azure portal for Microsoft Cloud for US Government

If you are signed in to Partner Center for Microsoft Cloud for US Government, you can open the Azure portal for Microsoft Cloud for US Government without having to sign in again. However, if you need to sign in directly to the Azure portal for Microsoft Cloud for US Government, go to (https://portal.azure.us/) and sign in using global admin credentials for your Azure AD tenant for Microsoft Cloud for US Government.

After you have signed in successfully to the Azure portal for Microsoft Cloud for US Government, open your Azure Active Directory (Azure AD) overview page and then follow the instructions in these topics:

> **NOTE**
> Selecting the links below will take you to a different website.

- Add new users to Azure Active Directory
- Assign a user to administrator roles in Azure Active Directory
- Reset the password for a user in Azure Active Directory

Related topics

- Partner Center for Microsoft Cloud for US Government
- Enroll in the Cloud Solution Provider program for Microsoft Cloud for US Government

Manage your Partner Center account - company profiles, bank information, roles, permissions & more

6/19/2020 • 4 minutes to read

Applies to

- Partner Center

The account you create on the Partner Center when you enroll is your work email plus your business information. After you create an account on the Partner Center, you will finish setting up your company's full profile including support details, file tax exemptions if appropriate, and primary contact information. Your company's account will also include user accounts for anyone who will use the Partner Center for adding or managing customers, selling subscriptions, working with billing and invoicing, creating business profiles, managing referrals, working with incentives programs, and providing support.

See also

- Invite employees to join Partner Center
- Add a new user

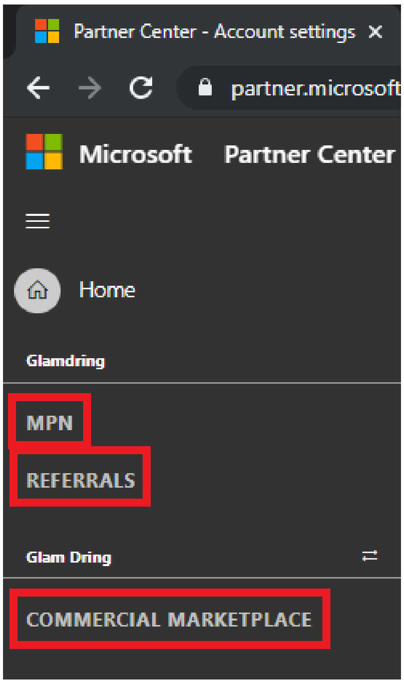
Programs in which you are enrolled

Much of the work you do to manage your Partner Center account relates to the specific program(s) you are enrolled in and the user roles and permissions you have been assigned in the Partner Center.

To see which programs you have access to in Partner Center:

1. Sign into the Partner Center dashboard.
2. Look to the left navigation pane. Options associated with your enrolled programs will appear.

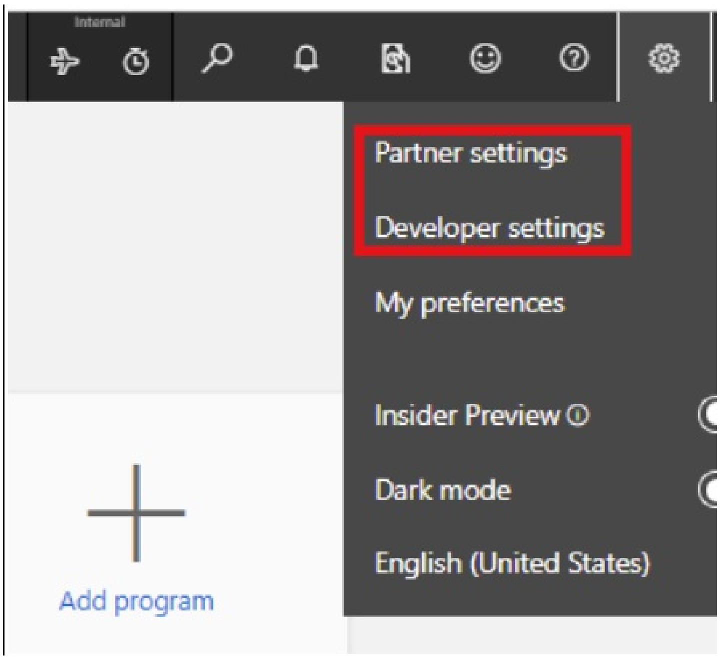
Here's one example. Let's assume a user has access to three programs in the Partner Center dashboard: The **MPN** program, the **Referrals** program, and the **Commercial Marketplace** program. When they sign into the Partner Center dashboard, they will see these three programs on the left side of the screen.



Account management

Partner Center today has account management under two different sections: **Partner settings** and **Developer settings**.

> **NOTE**
>
> To access **Partner settings** or **Developer settings**, you need to sign into the Partner Center dashboard, then select the **Settings** option (the gear icon) in the upper-right corner of the screen. You can then select either **Partner settings** or **Developer settings** from the drop-down menu.



Partners can see the option to manage **Partner settings** and/or **Developer settings** based on whether their company has enrolled in those programs. The settings option will only be available if your company has enrolled in at least one program associated with that setting.

To manage your account settings, you must select the appropriate account settings option for the program in question.

This is a partial list of programs available and the corresponding settings option associated with that program:

PROGRAM NAME	SETTINGS OPTION
MPN	Partner
CSP	Partner
Referrals	Partner
Commercial Marketplace	Developer
Windows and Xbox	Developer
Office Store	Developer
Edge extensions	Developer

The differences in Partner and Developer settings options

Locate your MPN ID

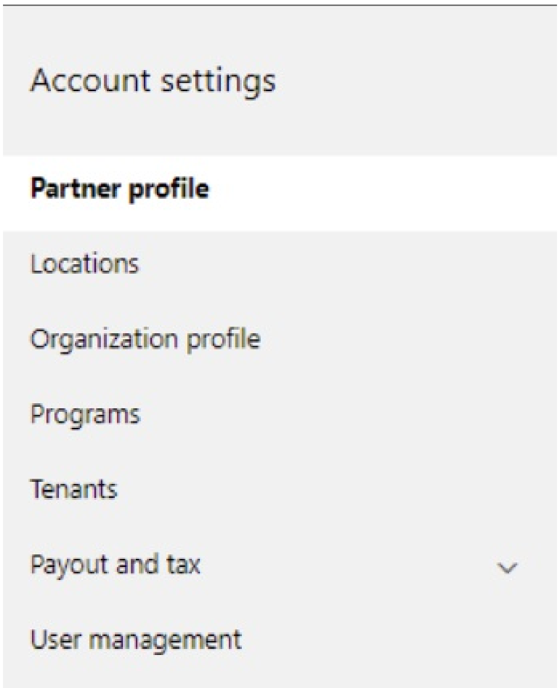
Regardless of whether you are a partner or a developer, you need to use your MPN ID for such things as logging support tickets. If you are a developer, your MPN ID is located on your **Account settings** details page.

The partner MPN ID is located on the **Partner profile** page.

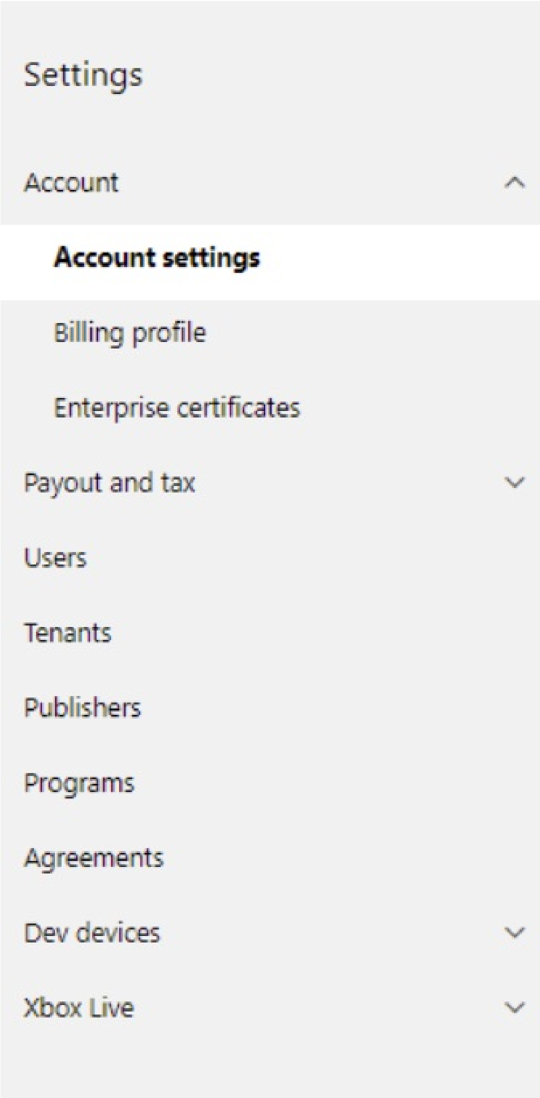
See partner and developer settings

Partner settings options will differ from **Developer settings** options. See below for sample screenshots of each set of options. If you have access to other programs, you may also see different options than the screenshot samples shown here.

Partner settings options:



Developer settings options:



Enrolling in programs

There are many Partner Center programs available. Each program has different requirements your company needs to meet before it can enroll in that program.

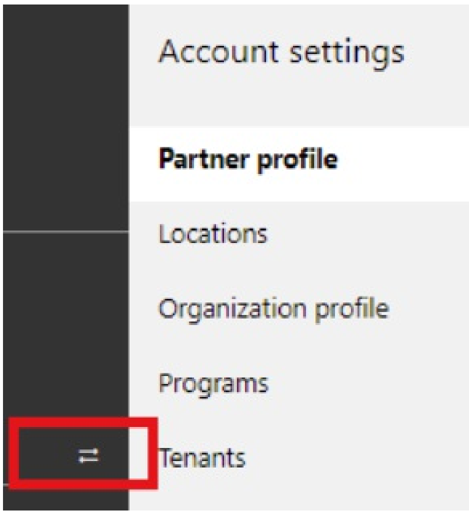
To learn about enrolling in certain Partner Center programs, see the following, partial list:

- Commercial Marketplace program
- MPN program
- CSP program
- Office Store

To learn more about enrolling in Partner Center programs, see also Partner network resources.

The account picker

You can be part of more than one account. If you are part of multiple accounts you will see the “account picker” in the left navigation menu. If you select the account picker, all the accounts you are a member of will appear as a list. You can select any of them and switch to that account where you will see all programs and information that pertains to that account. If you don't see an account picker, you a member of a single account.



Other resources to help you manage your Partner Center account

If you are enrolled in programs like the MPN program or the Cloud Solution Provider (CSP) program, the following resources may help you manage your account.

TO DO THIS	READ THIS
Ensure your company profile is current	Update your partner profile
Add new users	Create user accounts and assign permissions
Everyone in your company who needs to work in the Partner Center must be assigned roles. Each role has specific permissions and tasks available to it.	Create user accounts and set permissions
Review the permissions each role entails	Assign users roles and permissions
Manage your company's locations	Manage your partner account: Locations
If an employee forgets their password and you need to reset it	Reset a user password
Enroll in Partner Center as a Control Panel Vendor	Enroll in Partner Center as a Control Panel Vendor
Associate your Microsoft Learn account in Partner Center	Associate your Microsoft Learn account in Partner Center
Make sure to market your company so that customers can find you	Create a business profile
Organize your catalog so the most important products are at the top of the list	Customize the catalog
Stay up-to-date with current pricing and offers	Pricing and offers

Create a work account that links your company to your Partner Center account

5/14/2020 • 2 minutes to read

Applies to

- Partner Center

Appropriate roles

- Global admin
- User management admin

Why you need a work account

Microsoft requires you to link your company's work account to your new Partner Center account. The link enables your account users to sign in to Partner Center with their work account user names and passwords.

The work account email address

Your work account or work email is the email address provided to you by your company. A work account email is usually in the format `you@yourcompany.com`. Personal email addresses such as Hotmail, Gmail, or Yahoo aren't work email and can't be used for your Partner Center account.

If you have more than one valid work email address, use the one that is associated to your Corporate Headquarters rather than the regional department, for example, use your `contoso.com` email rather than the `contoso.uk` address.

> **NOTE**
> Before you decide to use an existing work account, think about how many users in the account will need to work in Partner Center. If you have users in the account who won't need to work in Partner Center, consider creating a new account for only those users who will need to work in the Partner Center.

Not sure if your company already has a work account?

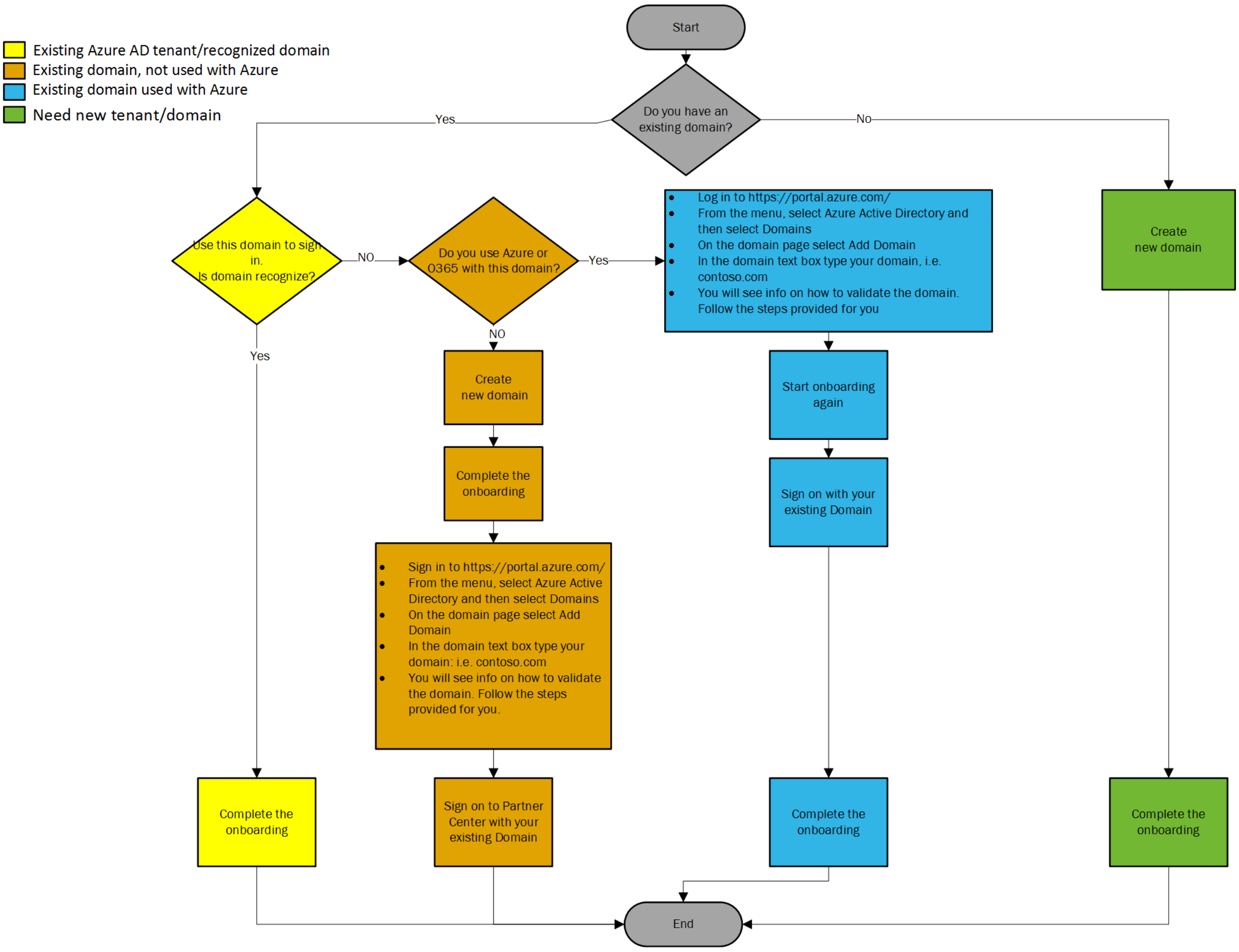
If you're not sure whether your company has a work account, follow these steps to check. If you have an active subscription to Microsoft Azure or Office 365, you already have a work account.

1. Sign in to the Azure portal.
2. Select Azure Active Directory from the menu and then select Domain Names.
3. If you already have a work account, your domain name will be listed.

If your company doesn't already have a work account, you can create one during the enrollment process.

The diagram below provides steps for several typical scenarios:

- determine if you have a work account
- determine how to sign into your work account
- determine if you need to create a new work account



For more information about adding domains in Azure AD, see Add or associate a domain in Azure AD

About Microsoft Azure

Microsoft Azure is a public cloud platform that companies can use to build, deploy, and manage applications across a global network of Microsoft-managed datacenters. Companies use Azure to build a virtual IT infrastructure with virtual functions, or services, instead of physical machines.

When you purchase an Azure subscription, you're essentially renting a dedicated, secure space in the Azure public cloud, not too different from renting a floor in an office building to house your company's physical business. To the office building's owner, your company is a tenant.

An Azure work account is a dedicated and isolated virtual representation of your company in the Azure public cloud, created for you when you subscribe to a Microsoft cloud service such as Azure, Microsoft Intune, or Office 365.

Your work account hosts your Azure AD users and the information about them - their passwords, profile data, permissions, and so on. The work account also contains groups, applications, and other information pertaining to a company and its security.

Partner Center has two levels of accounts for MPN partners

6/19/2020 • 2 minutes to read

Applies to

- Partner Center
- MPN partners

Appropriate roles

- Account admin
- Business profile admin

Your company has two levels of accounts in Partner Center.

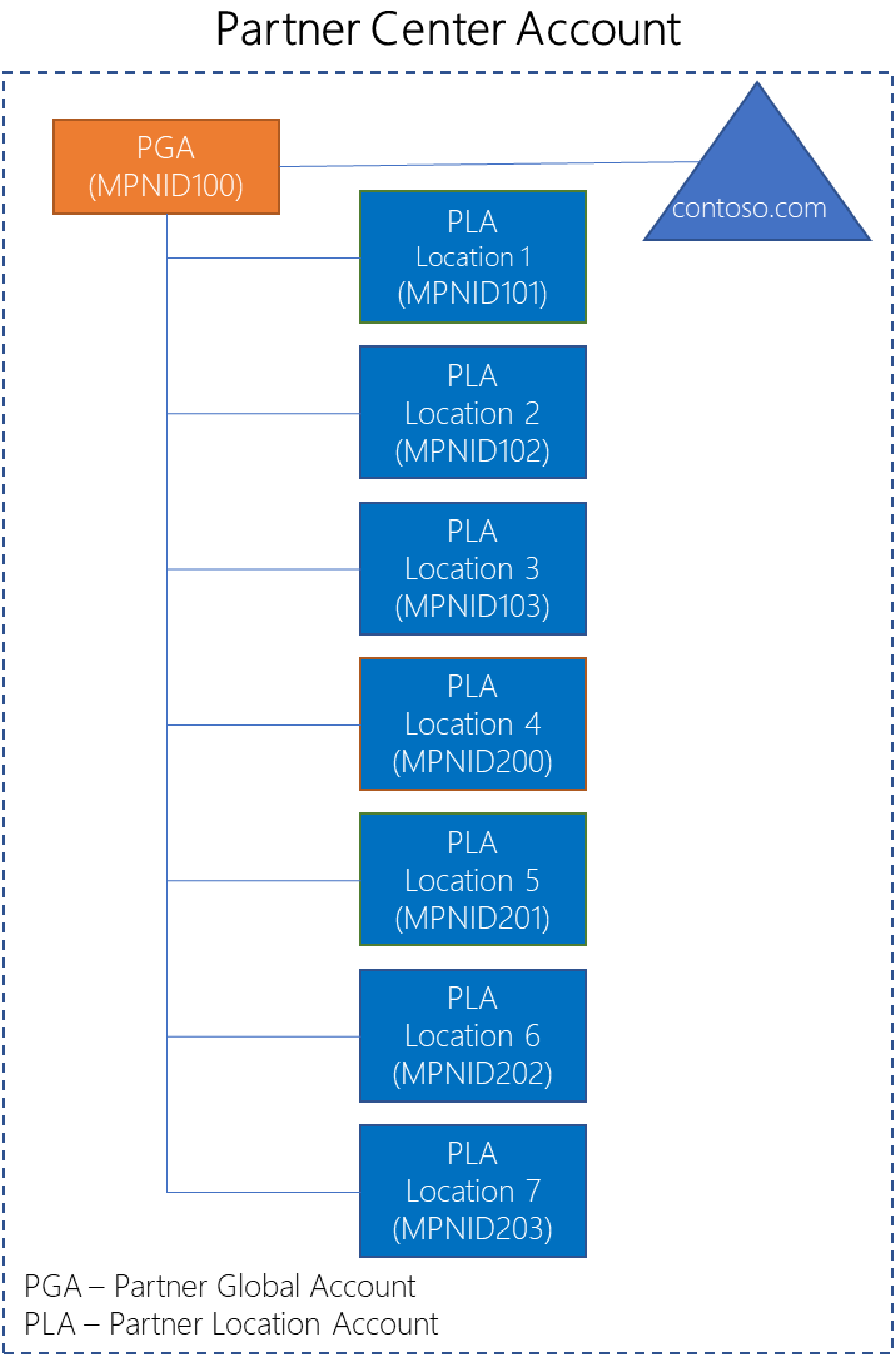
The top level is the Partner global account (PGA).

- The Partner global account contains the legal business address and the primary contact for your company.
- View the details of your Partner global account from **Settings** -> **Organization profile**, **Legal profile**.
- The details will also contain the Partner global account MPN ID.
- The PGA is the parent of your company and is not used to associate for Incentives programs or Cloud Solution Provider.
- Locations should be used for such associations.

The second level account is the location account called Partner Location Account (PLA).

Your PGA may have additional business locations under it. Each location has its own MPN ID or Partner Location Account (PLA). You use the location MPN ID for transactional business and enrollment in incentive programs.

- Each Partner Location Account can have its own legal address and primary contact. Locations can also share the legal address with the global account or with other locations.
- View the list of Partner Location Accounts from **Settings** -> **Locations**.
- All location accounts are at the same level and under the Partner global account.
- Account admins can add locations.



Next steps

- For more information on managing locations, read [Manage your partner account: Locations](#).

Verify your domain ownership

5/8/2020 • 2 minutes to read

Applies to:

- Partner Center

Appropriate roles

- Global admin

When your company first signs into Partner Center, it is likely your employees will not have been assigned the roles necessary to begin working in the Partner Center. To work in the Partner Center everyone needs to have a role, which includes permissions, assigned to them.

You need to verify ownership of your domain so that you can purchase the benefits your company is eligible for, add new users and assign them roles, or do other tasks in the Partner Center.

> **NOTE**
> For example, a global admin in your company is the one who manages cloud services. If your company does have a global admin but you are not sure of who it is, from the **Settings icon** at the top right of the Partner Center, select **User management**. Find global admins to contact by going to User management and filtering on global admin.

Verify your domain ownership and become a global admin in Partner Center

1. On the Partner Center, from the **Membership offers** page, select **Become a global admin**.
2. On the **Verify domain ownership** page copy the TXT values from the table. Notice that your domain is already selected for you.
3. Sign into your domain.
4. Follow the steps your domain provides to paste the TXT values into the DNS form. This allows us to verify that you own the domain you are trying to work from.
5. Return to Partner Center and select **Okay, I've added the record**
6. Once verification is complete you need to sign out. Sign in again to refresh your status.

Verifying ownership of your domain also makes you a global admin. Some of the permissions that come with the global admin role are:

- Can access all Microsoft account/services with full privileges
- Create support tickets for the Partner Center
- View agreements, price lists, and offers
- Billing
- View, create, and manage partner users
- Purchase and manage cloud services

For more information on roles and permissions, see Create user accounts.

Verify your account information when you enroll in a new Partner Center program

6/19/2020 • 2 minutes to read

When you enroll for a new program in Partner Center, Microsoft verifies the account enrollment information you have provided, such as your company name, company address, and primary contact details. During this process, Microsoft may send email to your primary contact to inform them of the status and request additional verification documentation.

> **NOTE**
> To ensure that you receive the email, be sure to flag email from Microsoft.com as a "safe" domain, and check Junk email folders.

If you are the primary contact (Global admin or Account admin), we recommend you go to your Partner Profile to monitor verification status and track progress.

For MPN program, go to this page.

For CSP program, go to this page.

What is verified and how to respond

TYPE OF VERIFICATION	WHAT IS VERIFIED	WHAT TO DO IF REJECTED
Email ownership	Email ownership verifies that the primary contact (primary email) address is valid. The primary contact email address must be a work account that is monitored and can send/receive email. **Partners shouldn't use**: (1) a personal email address not associated with the company domain. (2) a tenant user sign-in not associated to email (for example, jsmith@testcompany.onmicrosoft.com).	If you don't receive the email ownership verification email message within one business day, you can request we resend using the following links: for MPN, for CSP. In the profile page, click on "Resend verification email" link for Microsoft to resend the email to you. To ensure that the email is received, be sure to flag email from Microsoft.com as a "safe" domain, and check Junk email folders.
Employment	Employment verification confirms the primary contact is an employee of the enrolling company by virtue of having an active email address on an email domain owned by the company.	If employment verification is rejected, the primary contact (normally your Global or Account Admin) will need to provide documentation confirming the contact's email domain is under the ownership of their employer. Create a Support ticket.

TYPE OF VERIFICATION	WHAT IS VERIFIED	WHAT TO DO IF REJECTED
Business	Business verification confirms that the enrolling company is a legitimate business entity and at the address used for the enrollment.	If business verification fails, the primary contact (normally your Global or Account admin) will be asked to provide official documentation, such as a business registration or tax registration certificate or receipt, from the company's home country or municipality confirming that the company is authorized to do business under that entity name and is located at the enrollment address. Create a Support ticket

NOTE

Learn how to update your Legal Business Profile (address).

When verification concludes

Once the verification process is complete, the verification status of your enrollment on the profile page will change from "pending" to "authorized," and the process steps with status displayed on that page will disappear. The primary contact will receive an email from Microsoft within a few business days after the verification is completed.

After signing into your profile, if you see **Pending actions**, complete the necessary changes as follows:

- For MPN program, go here.
- For CSP program, go here.

If you need assistance completing these steps in Partner Center, you can contact the partner support team by opening a ticket in the Support section of Partner Center. Start here.

Merge your partner account with another partner account

6/19/2020 • 3 minutes to read

Applicable roles

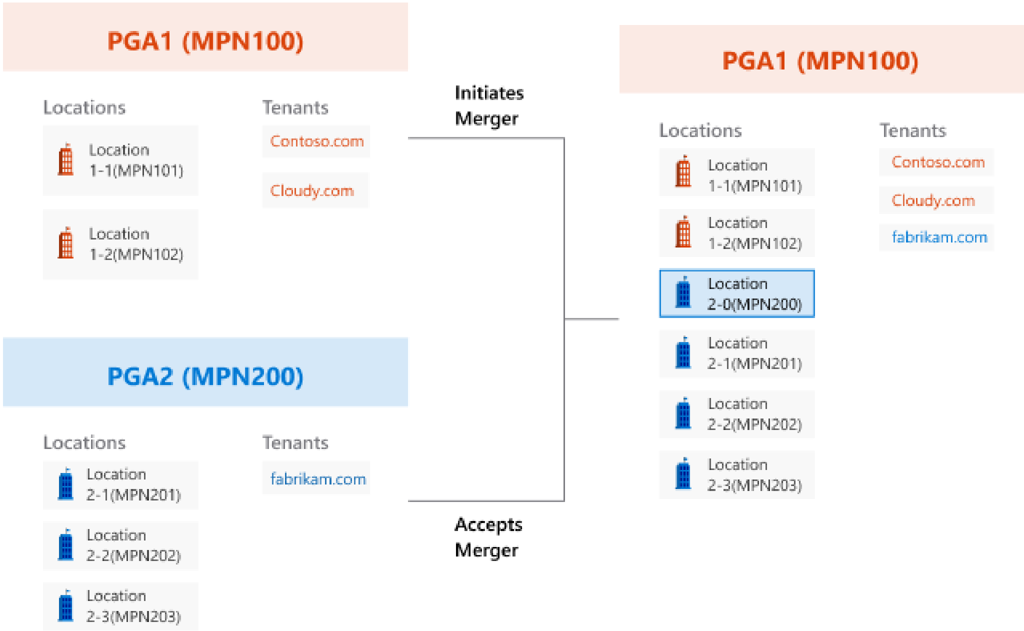
- Account admin

Two or more companies who are active Microsoft partners and have accounts in Partner Center can choose to merge their accounts.

What happens when two partners elect to merge their Partner Center accounts

- The partner organization who initiates the merge will be the Partner global account (PGA).
- The invited organization's PGA becomes a location of the initiating company.
- All the locations of the merging account become locations under the PGA.
- Once the account merger is complete, you will see both account's details such as locations and users within the PGA profile. You can't reverse this process.
- All MPN IDs for locations are preserved during this consolidation.
- User's roles are brought over. For example, if a user had been the incentives admin for a specific location, they would still have that role after the merger and be able to see the incentives they saw prior to the merger.
- Azure AD tenants and CSP accounts are not merged and have no impact.
- Published offers and co-sell pipeline data associated to both companies are preserved

View of merged accounts



What to expect if you have been invited to merge your Partner Center account with another Partner Center account

If you decide to accept the invitation to merge accounts: · Your MPN ID(s) and locations will be merged into the PGA of the partner account that invited you.

- Your users will be brought into the merged account with their roles intact.
- Existing benefits and competencies will be preserved for both companies after the merger until renewal. At renewal, the accounts will be treated as one company and standard renewal rules will apply.

Understand the impacts to programs and benefits when partners elect to merge accounts

- All existing competencies (Gold/Silver), purchases (such as Microsoft Action Pack), and associated benefits are preserved during consolidation. If both companies have the same competency but one's is gold and the other silver, the competency with highest proficiency level will be awarded, and partners will have one set of silver benefits and one set of gold benefits for that competency until their next renewal.
- Highest anniversary date for Microsoft Action Pack will be retained after the merger. For example, if the anniversary date for company 1 is June 2020 for Action Pack renewal and the anniversary date for Action Pack renewal for company 2 is October 2020, Microsoft will use the October 2020 date as the new anniversary date for the merged company.
- During the account merger and until your next renewal, each account will retain their Action Pack and/or competency benefits. At renewal, standard Action Pack and competency renewal rules apply.
- Upon renewal, benefits that are included with competency attainment and Action Pack are implemented for the partner company's partner global account:
  - Microsoft Action Pack: The partner company will be able to purchase one Action Pack per partner global account.
  - Competency: The partner company will receive one package of core benefits, associated to their highest attainment, plus competency-specific benefits the partner is eligible for per partner global account.

- All benefits are subject to the Microsoft Partner Network benefits usage guide. For example: an activated O365 E3 token is functional for twelve (12) months after activation. Once a token has been activated for seats on a tenant, those seats may not be moved to another tenant.
- The MCP ID associations for both companies will be retained and associated with the PGA MPN ID.
- Go-to-market and technical benefits are offered as competency core benefit. Post-merge, it's recommended that you check your bank and tax information to ensure accuracy.
- If your company is in the Azure Expert MSP program, benefits are retained until renewal.
- If your company has earned advanced specializations, they are retained across both accounts are retained.
- Any software assurance vouchers are retained across both accounts.

Invite a company to merge their Partner Center account with your Partner Center account

> **NOTE**
>
> To perform the account merger, you must be the **Account admin** for your company.

1. Select **Settings** from your Partner Center dashboard.
2. Select **Account merge**.
3. Add the MPN ID located in the **Partner profile** of the account you want to invite to merge with you. You must use their Partner global MPN ID. You can't use a location MPN ID.
4. When you select **Merge**, an invitation is sent to the partner company. When they accept your request, you can initiate the account merge within Partner Center. If the company rejects your request to merge accounts, they can explain why they rejected the request. A list of all your account merges is available to you under **Merge history**.

Next steps

- Assign users roles and permissions
- Verify your partner profile information
- Add Azure Partner Shared Services so partners can buy Azure subscriptions for their own use

Verify your partner profile information in Partner Center

6/19/2020 • 2 minutes to read

The first time you sign into Partner Center as global admin, you should confirm that all of your company details are correct. These include primary contact, legal business name and address, and program information. If your company has more than one location, review your location data for accuracy. As global admin, billing admin, or admin agent, you will also be able to see and update your billing and tax information.

Your partner profile consists of your legal business information, primary contact name and email, the programs in which your company participates, and if relevant, your other companies that are now merged under your legal business.

1. Go to **Settings** and select **Partner profile**.
2. Review your **Legal business profile**, **Primary contact info**, and your **Program info**.

If you have merged your other companies under your legal business, you can review their information as well on this page.

Update your legal business profile

You can now update your legal address on Partner Center.

1. Go to **Settings** and select **Partner profile**.
2. Select **Update** next to Legal address. ""

> **IMPORTANT**
> If you are a CSP partner, you can't change the country associated with your legal address.Your legal address country is tied to your tenant and services as well as the currency you do business with. If are not in the CSP program, you can change the country associated with your legal address. Legal company name cannot be updated in Partner Center if your vetting status is "Authorized". You will need to create a Support ticket.

3. When you select **Submit**, your legal identity will be reassessed, and you will receive another email which you will need to accept.

Update your MPN Global Business Account

If, during your migration from Partner Membership Center to Partner Center, the wrong business was identified as the legal business, you can change it to the correct business.

1. From **Account settings**, go to **Locations** and make sure the business you want as your legal business is in the list. If it isn't, you can add it. Select **Add location**.
2. Next go to **Partner profile** and select **Update legal business profile**.
3. Select the location and business you want to use as your legal business and then select **Save**.

Update your billing address

If you are the global admin, billing admin, or admin agent, you can change the address that appears on your invoice in your **Billing profile**. You can't, however, change the company name on your invoice because of a limitation with the invoice system.

Manage your partner account locations in Partner Center and add a new location

6/19/2020 • 2 minutes to read

Appropriate roles

- Global admin
- User admin
- Billing admin
- Admin agent
- Sales agent

The location MPN IDs identify each specific location of your company. You use the location MPN ID to enroll in incentive programs, to transact Cloud Solution Provider (CSP) business, to add new subscriptions, and other business transactions. The company MPN ID is used for non-transactional activities such as support requests.

The following is a typical scenario:

A partner company can have a CSP business and a publishing business. Their CSP business can be located in several locales and their pub business may be located in other locales.Their registered legal business has one MPN ID used for managing all non-transactional business such as adding users or logging support requests.

Each of their locations has an MPN ID used for transactional business such as CSP or incentives programs. Payouts are tied to specific locations.

Users may have roles that cross locations. For example, the incentives admin could have that role for all locations in Europe.

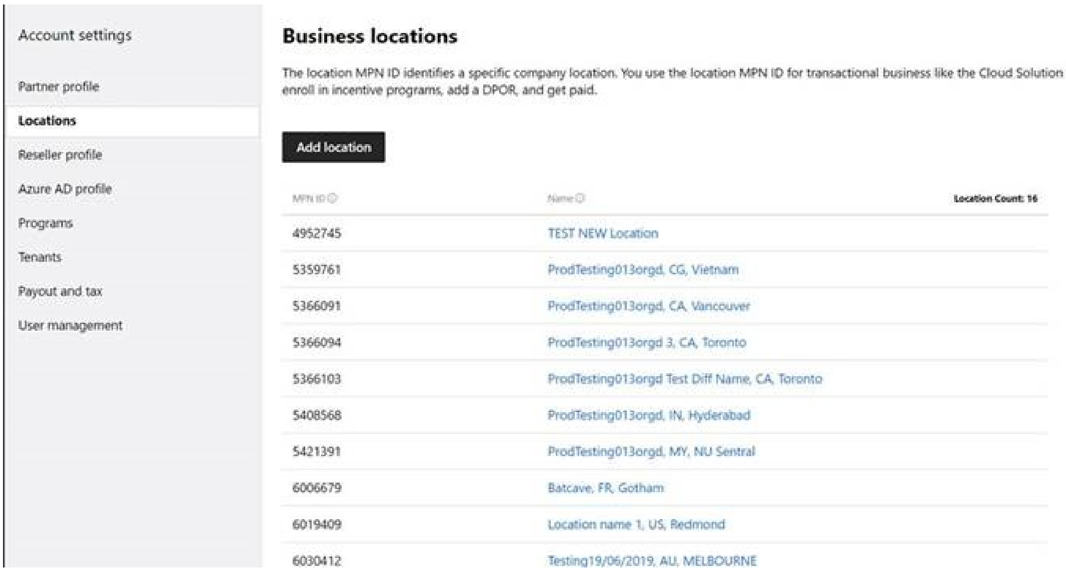
To add a location

1. From the **Setting icon**, select the **Partner settings**.
2. Select **Locations.**
3. Select **Add a location**.
4. In the **Add a location** page, insert the address details of the location that you want to add to your company as well as a primary contact for the location.

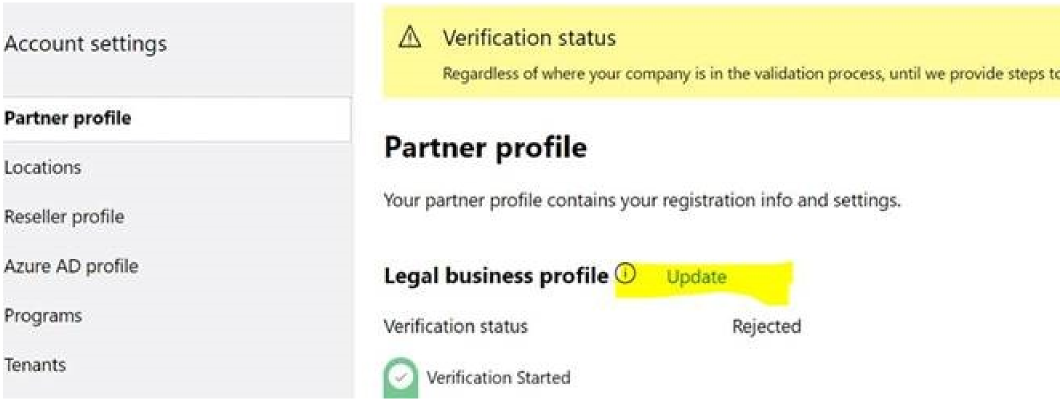
> **NOTE**
> Once a location is added in Partner Center, it cannot be removed.

Change legal headquarters location

1. On the **Locations** page, check the list of locations to ensure that the location you want as your legal entity is listed. If it isn't, add it.



2. Select **Partner profile** and then select **Update legal business profile**



3. Select the region and legal entity and **Submit** it.

Enroll as a Control Panel Vendor to help integrate CSP partner systems with Partner Center APIs

6/19/2020 • 2 minutes to read

Applies to

- Partner Center

Appropriate roles

- Global admin

A Control Panel Vendor (CPV) is an independent software vendor that develops applications for use by Cloud Solution Provider (CSP) partners to enable them to integrate their systems with Partner Center APIs. A Control Panel vendor is not a CSP Partner with direct access to the Partner Center dashboard or Partner Center APIs.

Whether you are a current Control Panel Vendor (CPV) or a new CPV who wants to work with Microsoft partners, Microsoft now requires you to enroll in Partner Center in order to register your applications and support Cloud Solution Provider partners. To create an account, a CPV partner can either use an existing CSP partner tenant, or existing CPV tenant or can create a new tenant as part of onboarding process. If the CPV partner chooses to use the existing CSP tenant, then they'll need to create separate multi-tenant applications and register them in Partner Center for CPV activities. An application can't be registered as both a CSP and CPV application. After you have enrolled in Partner Center and registered your applications, you will have access to the Partner Center APIs. Microsoft will contact you via a Partner Center notification with your sandbox information. If you already have a sandbox account, continue using it. You won't need a new sandbox.

Review the Microsoft Control Panel Vendor agreement

Working in Partner Center

Once you have enrolled in the Partner Center CPV experience and accepted the CPV agreement, you can:

- Manage multi-tenant applications (add applications to Azure portal, register, and unregister applications in Partner Center).

> **NOTE**
>
> CPVs must register their applications in Partner Center in order to get authorized for Partner Center APIs. Adding applications to the Azure portal alone does not authorize CPV applications for Partner Center APIs.

- View and manage your CPV profile
- View and manage your users who need access to CPV capabilities. Global admin is the only role a CPV can have.

Restore a suspended Partner Center account - learn why it happens and what to do about it

6/19/2020 • 2 minutes to read

This article explains what to do if your Partner Center account is suspended.

Applies to

- Partner Center
- Partner Center for Microsoft Cloud for US Government

IMPORTANT

While your Partner Center account is suspended, you can continue to manage your existing deployments, licenses, and services. However, you won't be able to authorize or resell new licenses or services until your account is in good standing again.

Why Partner Center accounts are suspended

Microsoft will suspend a Partner Center account for one of the following reasons:

- When the current billing amount is more than 60 days overdue
- When significant account abuse is detected
- When issues affect Indirect provider operations and negatively impact your account (Indirect resellers only)
- When your account profile is in a failed or rejected state

What to do if your account is suspended

If you know that your account is current, check your Partner profile settings to confirm your active information is complete.

If you're not sure whether your account is current, select **Billing** from the **Partner Center** menu to check your bill. The billing page shows your billing history and trends, the balance due for the current month, links to your invoice and reconciliation files, and your most recent payment.

If your account is overdue, follow the instructions on your bill to arrange payment and then submit a support request to ask that your account be reinstated.

For additional assistance in reactivating your account, contact Support.

Next steps

- Verify your partner profile
- Verify your account information when you enroll in a new Partner Center program

Add an Azure AD application (service principal) in Partner Center

6/19/2020 • 2 minutes to read

In the Commercial Marketplace program in Partner Center, you are now able to add an Azure AD application (service principal) as a user in your Partner Center account. (You were able to do so previously in your Cloud Partner Portal, or CPP, account. Now that you have migrated to Partner Center, the CPP account is read-only.)

NOTE

Service principal is synonymous with Azure AD application.

Add an Azure AD application (service principal)

1. From the Partner Center dashboard, select **Settings** and then select **Developer settings**.
2. Select **Users** and then select **Add Azure AD Applications**.
3. Select an existing Azure AD application or create a new one.
4. If you create a new Azure AD Application, include the following information:
   - **Reply URL**: The URL where users can sign in to use your Azure AD application.
   - **App ID URI**: A logical identifier for the Azure AD application that is presented when it sends a single sign-on request to Azure AD.
   - **Security roles**: The roles **Manager** (the same as 'Owner' role in CPP) and **Developer** (the same as 'Contributor' role in CPP) apply to the Commercial Marketplace program in Partner Center, and they can be associated with this Azure AD Application.

Associate your Microsoft Learn account to your Partner Center account

6/19/2020 • 2 minutes to read

Appropriate roles

- Global admin
- User admin

In order for your company to see the training and learning paths you have taken towards competencies, you need to associate your MCP ID to your Partner Center account. You do this manually after you have been added as a Partner Center user.

How to associate your MCP ID to your Partner Center account

1. From the Partner Center dashboard, select the **Your account** icon in the right corner of the dashboard, and then select **My profile**.
2. Under **Your learning**, you can associate your Microsoft Learning account. You can also connect your Microsoft account to Partner University.

Create user accounts and assign roles and permissions

6/19/2020 • 3 minutes to read

Appropriate roles

- Account admin
- Global admin
- User management admin

Create user accounts for employees who need access to the Partner Center. These tasks must be done by the user management admin, accounts admin, or the global admin. The user performing these tasks must also be assigned the Azure Active Directory (AAD) roles of User administrator or Global administrator. For more information about AAD roles, see Administrator role permissions in Azure Active Directory.

Add a new user

1. From the **Settings** icon at the top right of the Partner Center, select **User management**.
2. Select **Add user**.
3. Enter the user's full name and unique email address.
4. Select the type of agent and/or the type of admin you want to assign to the user. Partner Center access is role-based, so you can assign permissions to customize the user's view to show only the features the user needs to complete specific tasks. If users want a role assignment, they can find global admins to contact by going to **User management** and filtering on global admin.
5. Select **Add** to create the user account. Confirm the user's details on the next page.

> **IMPORTANT**
> Make a note of the new user's sign-in information displayed on this page. Be sure to copy and send this information to the new user as you will not be able to access it again later.

The user will need to sign in to the Partner Center with their user name and temporary password. When the user signs in to the Partner Center for the first time, they are prompted to change their password.

Find your global admin

Sometimes a user might need to have their role changed or a new user may want a specific role assignment. To find a global admin who can make role changes or assign roles to a new user, from the **Settings icon** at the top right of the Partner Center, select **User management** and filter on global admin.

New global admin

If your global admin leaves the organization and someone else needs to fill this role, you can submit a ticket to either the Azure or Office 365 team. For information on how to do this, select one of the options below.

New global admin for Azure

New global admin for Office 365

Assign user roles

To work in the Partner Center, you must have an assigned role. Currently, roles include Azure Active Directory tenant roles, Cloud Solution Provider (CSP) roles, and non-AAD company roles. An individual company can have a need for all of these roles.

> **IMPORTANT**
>
> Individuals must be listed in your tenant to access Partner Center. Role assignments provide additional access.

AAD tenant roles include:

- Global admin
- User admin

CSP roles include:

- Admin agent
- Billing admin
- Sales agent
- Helpdesk agent

Roles that manage the MPN membership and the company (Non-AAD)

- MPN partner admin
- Account admin
- Referral admin
- Business profile admin
- Incentives admin and user

Control Panel Vendor is a CSP and non-AAD role.

- Global admin

Guest user must be part of the AAD tenant and can have any non-AAD role.

For specific information on the roles and what each role can do, see Assign user permissions.

Associate a user's Microsoft Learn account in Partner Center

In order to be able to see the training and learning paths your users are taking towards competencies, they need to associate their MCP ID to their Partner Center account. As the global admin, when you add new users, be sure to remind them to associate their MCP ID to their account.

How to associate your MCP ID to your Partner Center account

1. From the Partner Center dashboard, select the **Your account** icon in the right corner of the dashboard, and then select **My profile**.

2. Under **Your learning** you will be able to associate your Microsoft Learning account and also connect your Microsoft account to Partner University.

Assign users roles and permissions for a company's users needing to work in Partner Center

6/19/2020 • 3 minutes to read

Appropriate roles

- Global admin
- User admin
- MPN partner admin

You've set up your partner profile including legal name and address, support details, file tax exemptions, bank info, and the primary contact for your company. Next step: Get your users set up with passwords and roles so they can begin working in Partner Center with you.

Set up your employees to work in Partner Center

You determine the types of access your users have to Partner Center by the roles and permissions you give them. Roles are related to the program(s) your business is involved in. For example,if your business is a Cloud Solution Provider (CSP) business, you will not only have the standard Azure AD tenant management roles such as global admin, but will need roles specific to the CSP program. Each program has roles specific to it.

> **NOTE**
>
> Azure Active Directory (AAD) tenant roles include global admin, user admin, and CSP roles. Non-AAD roles are those roles that do not manage the tenant, and they include MPN admin, business profile admin, referral admin, incentive admin, and incentive user.

Manage commercial transactions in Partner Center (Azure AD and CSP roles)

ROLE	WHAT THEY CAN DO
Global admin	* Can access all Microsoft account/services with full privileges
	* Create support tickets for the Partner Center
	* View agreements, price lists, and offers
	* View, create, and manage partner users
	View, create, and manage billing, invoices, and recon files
User management admin	* View, create, and manage users
	* View all partner profiles
	* View, create, and manage partner users
Billing admin	- View, create, and manage billing, invoices, and recon files

ROLE	WHAT THEY CAN DO
Default user	View My profile
Admin agent	* Customer management
	* Add device list to the Partner Center
	* Create and apply profiles to devices
	* Subscription management
	* Service health and service requests for customers
	* Request delegated administrator privileges
	* View pricing and offers
	* Billing
	* Administer on behalf of a customer
	* Register a value added reseller
Sales agent	* Customer management
	* Add device list to the Partner Center
	* Subscription management
	* View support tickets
	* Request a relationship with a customer
	* Manage customer leads
	* View the customer agreement
	* Register a value-added reseller
Helpdesk agent	* Search for and view a customer
	* Edit customer details
	* Help resolve customer issues with billing or subscription management
	* Request support on behalf of customers
	* Manage subscriptions and billing issues on behalf of customers

Control Panel Vendor (CPV). (CSP role and non-AAD role)

CPVs develop apps for use by Cloud Solution Provider (CSP) partners to enable them to integrate their systems with Partner Center APIs.

ROLE	WHAT YOU CAN DO
Global admin	View and manage your CPV profile
	View and manage any of your users who need access to CPV capabilities

Guest user (must be added to the AAD tenant)

GUEST USER	ROLES
	MPN partner admin
	Accounts admin
	Incentives admin
	Business profile admin
	Referrals admin

Manage MPN membership and your company (non-AAD roles: these roles manage the company business rather than the tenant)

ROLE	WHAT YOU CAN DO	
MPN partner admin	* View, create, and manage partner service requests	
	* View legal, company, business, and MPN profiles	
	* View user details and their skills data	
	* View competencies	
	* View and manage benefits	
	* View and purchase MPN offers	
	* View MPN offers order history and invoices	
	* View partner contribution indicator data	
	* Can work in the Voucher Validation tool	
	* View customer data analytics	

ROLE	WHAT YOU CAN DO	
	* View other user roles within company, but can't assign roles	
Account admin	Add locations	
	Manage profiles related to the accounts you are admin for	
	* Assign roles for users in tenant to non AAD roles	
	* Enroll locations into programs	

Manage referrals

ROLE	WHAT YOU CAN DO
Referrals admin	* View, create, and manage business profiles
	* Receive and manage referrals
	* View, create, and manage co-sell referrals
	* View, create, and manage partner service requests
Business profile admin	* View, create, and manage business profile
	* View, create, and manage partner service requests

Manage incentives

ROLE	WHAT YOU CAN DO
Incentives admin	* Initiates and manages incentives
	* Can view and edit all aspects of incentives programs
	* Can view and edit bank and tax details
	* View rebate and co-op earnings
	* Access support
	* Dispute incentives payments
Incentives user	* Can view incentives programs
	* Can view and initiate incentives claims

ROLE	WHAT YOU CAN DO
	* View rebate and co-op earnings
	* Access support

View Partner Center Insights data

ROLE	WHAT YOU CAN DO
Executive report viewer	Access to all reporting datasets
Report viewer	Access to data reports with exception of revenue and customer and employee personal data

Enroll as a Control Panel Vendor to help integrate CSP partner systems with Partner Center APIs

6/19/2020 • 2 minutes to read

Applies to

- Partner Center

Appropriate roles

- Global admin

A Control Panel Vendor (CPV) is an independent software vendor that develops applications for use by Cloud Solution Provider (CSP) partners to enable them to integrate their systems with Partner Center APIs. A Control Panel vendor is not a CSP Partner with direct access to the Partner Center dashboard or Partner Center APIs.

Whether you are a current Control Panel Vendor (CPV) or a new CPV who wants to work with Microsoft partners, Microsoft now requires you to enroll in Partner Center in order to register your applications and support Cloud Solution Provider partners. To create an account, a CPV partner can either use an existing CSP partner tenant, or existing CPV tenant or can create a new tenant as part of onboarding process. If the CPV partner chooses to use the existing CSP tenant, then they'll need to create separate multi-tenant applications and register them in Partner Center for CPV activities. An application can't be registered as both a CSP and CPV application. After you have enrolled in Partner Center and registered your applications, you will have access to the Partner Center APIs. Microsoft will contact you via a Partner Center notification with your sandbox information. If you already have a sandbox account, continue using it. You won't need a new sandbox.

Review the Microsoft Control Panel Vendor agreement

Working in Partner Center

Once you have enrolled in the Partner Center CPV experience and accepted the CPV agreement, you can:

- Manage multi-tenant applications (add applications to Azure portal, register, and unregister applications in Partner Center).

> **NOTE**
> CPVs must register their applications in Partner Center in order to get authorized for Partner Center APIs. Adding applications to the Azure portal alone does not authorize CPV applications for Partner Center APIs.

- View and manage your CPV profile
- View and manage your users who need access to CPV capabilities. Global admin is the only role a CPV can have.

Reset a user's password in Partner Center

6/19/2020 • 2 minutes to read

Applies to

- Partner Center

> **NOTE**
>
> If you're enrolled in the Cloud Solution Provider (CSP) program in Microsoft Cloud Germany, see User management in Partner Center for Microsoft Cloud Germany for information about resetting a user's password.

If users forget their passwords, assign them a temporary password. They can use it the next time they sign in to Partner Center.

Reset a user password as an admin

1. Go to **Settings** > **User management**.
2. Select the user from the list.
3. Choose **Reset password**, at the bottom of the page.
4. You will see a confirmation screen with a temporary password for the new sign-in. You must copy this and send it to the new user - it is not accessible after you leave the screen. When they first sign in, they will be prompted to update their password.

Reset my password

6/19/2020 • 2 minutes to read

If you can't remember your Partner Center password, you can reset it.

To reset your Partner Center password

Your Global admin must have set up the ability for you to reset your password yourself. (If your Global admin hasn't set this up yet, you will have to ask them to reset your password for you.)

1. On the **Sign in** screen, select **Can't access your account?** and then select **Next**.
2. Select **Work or school account**.
3. You are next asked to enter your user ID and the characters in the picture or audio. Then select **Next**.
4. Set up your new password.

If your Global admin has left the company

If your Global admin has left your company or moved onto another role and you need to add a new Global admin, you have to log a service request on the Microsoft Partner Network portal. The support agent can request elevation of a user to Global admin if your requestor is able to provide the requisite personal identity information and provide additional information about your company.

If you can't sign into Partner Center and need to reset your password

6/19/2020 • 2 minutes to read

If you have forgotten your password and can't sign into Partner Center, you'll need to call Support. Find the appropriate phone number at Support for Business Products.

For different ways on how you can reset your password and regain access to your work account, read Reset your work or school password using security info.

After your work account password has been reset, you will be able to access Partner Center.

See more

- Verify your account information
- Reset my password
- Reset a user password

Add Azure Partner Shared Services so partners can buy Azure subscriptions for their own use

6/19/2020 • 2 minutes to read

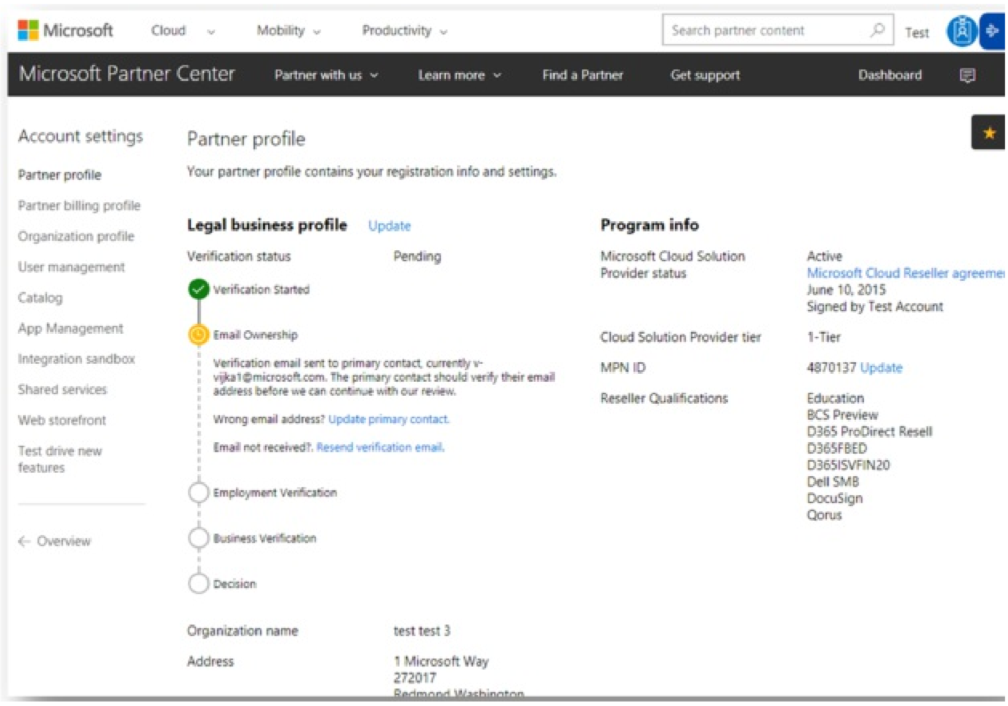
Applies to

- Partner Center

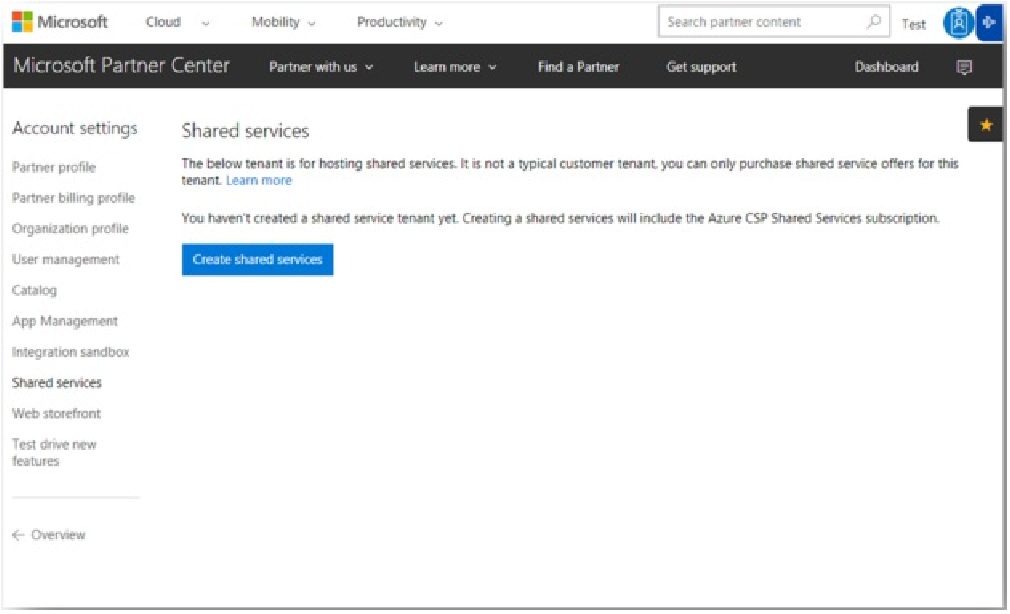
Azure Partner Shared Services is a new offer type for partners in the CSP program enabling partners to purchase Azure subscriptions for their own use. It creates the opportunity for partners to use a uniform method for purchasing, tracking, and managing Azure in addition to the ability to consolidate their Azure licensing and reselling agreements with Microsoft. With Azure Partner Shared Services, partners now have the same flexibility to use Azure subscriptions in CSP as they do in the Microsoft Enterprise Agreement and Web Direct programs, opening up scenarios such as: build development and test environments, deploy internal workloads, and host shared services or multi-tenant applications.

Create the shared services tenant

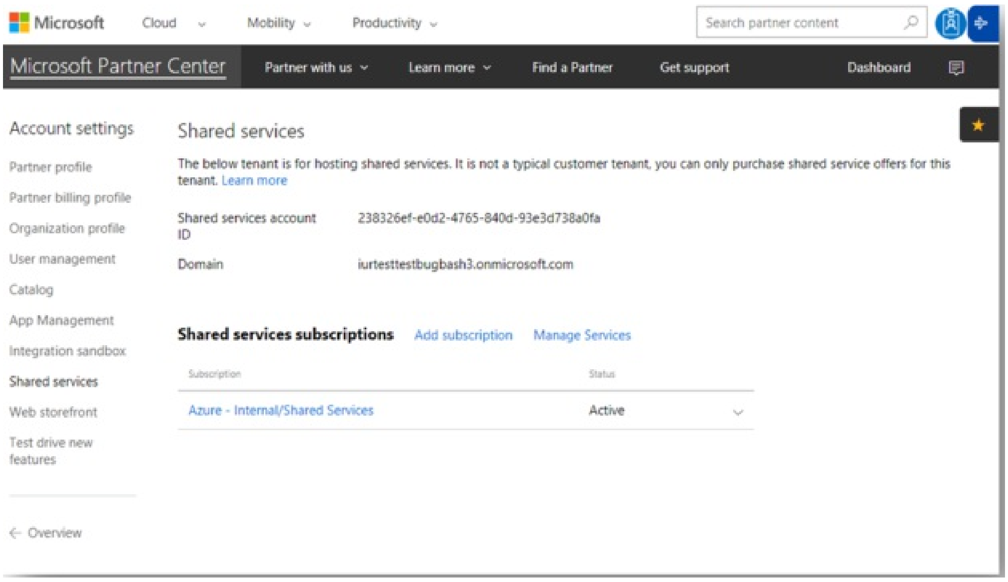
1. Go to **Settings** > **View all settings** > **Shared services**.



2. If you don't already have a shared services tenant, click **Create shared services**.



3. This creates a shared services tenant and purchases the Azure CSP Shared Services subscription, to be used for shared resources and internal workload.



About the Azure- Internal/Shared Services offer

- The Azure - Internal/Shared Services subscription is a new Azure offer type in CSP accessed through Partner Center that partners get for their own use of Azure.
- Azure - Internal/Shared Services offer is not eligible for discounts and incentives.
- The Azure - Internal/Shared Services offer can only be applied to the shared services tenant.
- The primary use for the Azure - Internal/Shared Services subscription is so that you can use Azure for your own development purposes. The shared tenant you use to provision this offer cannot be used for other services such as Office 365 or Dynamics seats.
- You can cancel the subscription like any other subscription. Go to the **settings** > **View all settings** > **Shared services**. Select the Azure - Internal/Shared Services subscription and cancel it.

Accessing Azure Partner Shared Services consumption details

You will find the Azure consumption on your CSP invoice and the reconciliation file. It will be included as part of Microsoft Azure line item in the invoice. The detailed consumption information will be available in the reconciliation file logged against the tenant that was created for this offer.

Azure Partner Shared Services pricing

To see the new pricing file for Azure Partner Shared Services go to **Sell** > **Pricing and offers** and select the current month's price list. In the coming weeks, a specific rate card api will also be released.

Marketplace offers and Azure Partner Shared Services

As of March 1, 2019, Azure Partner Shared Services (APSS) no longer supports Marketplace offers.

MARKETPLACE SUPPORT	APSS SUPPORTED BEFORE MARCH 1, 2019	AFTER MARCH 1, 2019
Bring your own license (BYOL) and free services	Yes	No
Other third-party marketplace offers	No	No

Partners who have BYOL or free services deployed using APSS will not be impacted; however after March 1, 2019 they will not be able to purchase new BYOL or free services.

To take advantage of the full catalog of Marketplace offers available (not just BYOL and free services), we recommend CSP partners deploy shared services using web direct Azure subscriptions. CSP partners who have deployed third-party BYOL and free service resources from the Marketplace previously and wish to continue using them and deploy more third-party offerings are encouraged to migrate the APSS subscription to web direct Migrating Existing Azure Subscriptions.

Partners, who plan to continue using APSS subscription after the March 1, 2019 and wish to deploy new third-party BYOL services or free services, can follow the instructions from ISVs to deploy these to their APSS subscriptions.

Pricing and offers for Office 365, Dynamics CRM, Enterprise Mobility Suite, Azure, and more

6/19/2020 • 11 minutes to read

Applies to

- Partner Center

Appropriate roles

- Global admin
- User admin
- Admin agent
- MPN partner admin
- Sales agent
- Billing admin

To see the latest Cloud Solution Provider programs and offers, from the Partner Portal, go to **Sell > Pricing and Offers**. You will find separate price lists for the different types of products that are available. The following price lists are available on the **Pricing and Offers** page:

- **License-based services** includes pricing information for Office 365, Enterprise Mobility and Security E3 as well as and Dynamics 365. License-based pricing section includes current and preview pricing as well as the offer list matrix. Price lists include list price and estimated retail prices (ERP) for offers in all supported currencies. The offer list matrix includes market availability and other important information about the offers. These files are updated on the first day of every month.
- **Usage-based services** includes pricing information for Microsoft Azure and Visual Studio. You can also use the Azure Services in CSP Pricing Calculator. The usage-based download includes both the CSP price lists for all supported currencies as well as the Shared Services pricing files in ERP. These files are updated on the first day of every month.
- **Microsoft Azure Reserved Instances** includes pricing information for all supported currencies for Azure Reserved Instances. The pricing download also includes the Shared Services pricing in ERP. These files are updated on the first day of every month.
- **Software subscriptions** includes pricing for term-based software subscriptions for all supported currencies. The price file includes all supported currencies with list price and MSRP. These files are updated on the first day of every month.
- **Azure plan pricing** includes pricing information for Azure plan consumption services as well as Azure plan reservation pricing. Prices are direct prices or ERP and can be retrieved for any given supported market. The data in these files is refreshed every day.
- **Foreign exchange rates** are used to calculate billing charged between USD and the partners local currency. The rates are updated on the first of every month and hold true for the given month the rates are made available. These files are updated on the first day of every month.
- **Marketplace** includes pricing for ISV solutions from Microsoft's commercial marketplace. Prices are retrieved per market. The data in these files is refreshed every day.

NOTE

Only CSP partners with the capability to transact can view and download price lists. Indirect resellers should contact their CSP provider to request details about pricing

Price list preview and change frequency

License-based services include a price list preview, provided 30 days in advance of any changes. To see the price list preview, go to **Sell** > **Pricing and offers**. There's no price preview for usage-based services since these services are dynamic. The following table explains how to read the price list table.

ITEM	DEFINITION
ADD	A new item to the price list
CHG	Changes in list price from month to month. Other changes not related to list price may occur, partners should compare price lists between months to determine changes to other properties.
DEL	An item removed from the price list
UNC	List price unchanged from the previous month's price list
Valid from date	The first date an offer can be ordered
Valid to date	The last date an offer can be ordered
Offer display name	The customer facing name for the offer
Offer ID	The internal identifier for the offer
License agreement type	License agreement types can be either corporate, government, or academic. The agreement type determines which customer types the offer can be sold to.
Purchase unit	The duration of offer being purchased. Purchase units are typically one month.
Secondary license type	Secondary license types will be either non-specific, add-on, or trial. Add-on indicates that there are prerequisite products the customer must purchase before purchasing the add-on.
End customer type	Relates back to license agreement type: corporate license - cloud reseller corporate, government license - cloud reseller government, or academic license - cloud reseller faculty or cloud reseller student
List price	The price the partner will pay
ERP price	The estimated or recommended retail price to the customer

Price changes

Price changes are a common occurrence. Partners can anticipate price changes for license-based offers by looking at the price list preview. On the Partner Center dashboard, open the Pricing and Offers page to see the price list preview.

However, Azure usage-based pricing has no preview. Partners can keep up with Azure consumption price changes by using the RateCard API, which returns that day's meter pricing.

TYPE OF PRODUCT	PRODUCT EXAMPLES	PREVIEW AVAILABLE	CHANGE DETAILS
License-based	Office, Dynamics, Intune, Windows Enterprise	30-day	List price changes marked CHNG in preview price lists
Usage-based	Azure resources	Not available	Change log available in previous month's price list's **Change History** tab
Software		Not available	Compare price lists manually from month to month
Reservations	Virtual machines, pre-paid	Not available	Compare price lists manually from month to month

Usage-based prices can change throughout a month. To get 'current' daily pricing for these Azure resources, partners need to call the RateCard API.

> **NOTE**
>
> Subscription price changes apply only during a renewal. A partner's monthly charge is determined at the price of purchase, or the price at the time of creating a subscription. If a price increases or decrease after the annual term is acquired, the partner is not charged the changed price until the renewal - typically at the 12-month term.

Pricing and special segments

CSP offers some services to special market segments, for example, education, non-profit and government community cloud. Not all services are available in every channel. No segment defaults to what we call the 'commercial' segment. All license-based pricing is available in the license-based price list on the Pricing and Offers page. Azure Government pricing is available in the usage-based price list when signed into the Azure Government enabled CSP tenant.

SEGMENT	WHO NEEDS TO QUALIFY	PARTNER QUALIFIES CUSTOMER	ENABLED PRODUCT TYPES
Education	Customer	No, customer qualification will be performed by Microsoft	License-based only
Non-profit	Customer	No, customer qualifies outside of Partner Center	License-based only
Government Community Cloud (GCC)	Partner and customer	Once GCC enabled, partner can create GCC customers	License-based only

SEGMENT	WHO NEEDS TO QUALIFY	PARTNER QUALIFIES CUSTOMER	ENABLED PRODUCT TYPES
Azure Government	Partner	Once qualified, partner operates in a CSP tenant specific to Azure Government	Azure resources

Partner margins, the difference between the list price and the estimated retail prices, may vary from segment to segment. Typically, education and non-profit tend to have lower or no margins for CSP partners. Refer to the license-based price list for exact values.

Add-on offer types

License-based services can be acquired as either base offers or add-ons. Only base offers are discoverable and purchasable via the Partner Center catalog. Add-ons have to be applied after purchasing the base offers. The license-based price list **Secondary license type** column includes information about each offer and its type. Base offers have **Non-specific** values in the price list secondary license type column and can be purchased in the catalog. Secondary license type values of **add-on** cannot be purchased in the catalog. To purchase these add-ons:

1. Consult the offer list matrix to see the list of offer ids that need to be purchased before you can purchase an add-on.
2. Purchase the base offer from the catalog
3. Navigate to your customer from the customer list. Click on the subscription for the base offer you just purchased. On the manage subscription page you will see available add-ons that can be applied to the base offer.

> **NOTE**
>
> Some base offers have **Unit type** values of **Add-on licenses**. For a base offer this simply means that you do not assign user licenses after purchasing. If the offer can be purchased in the catalog it is a **Base offer** regardless of the unit type in the user interface.

Pricing between Azure and non-Azure

Pricing differs across different types of offers. License-based pricing is typically the amount per seat (license) for a given month. Usage-based pricing is determined by use of a given resource, with an associated meter ID. Partners are not charged for acquiring the Azure subscription. However, partners are charged for resources consumed by different deployments under the Azure subscription. Pricing in the usage-based price list is organized around different resource meter IDs in Azure.

Azure reservations are term-based purchases for the particular resource type - Virtual Machines. Purchasing an Azure reservation enables a partner to pre-pay (one- or three-year terms) and reserve a given virtual machine. Reservations save the partner money and ensuring their virtual machine is always available for the duration of the term. A partner can align the reservation they want against the usage-based resource meter IDs. The meter IDs are consistent across the resource, whether the partner is purchasing a virtual machine or simply deploying the virtual machine as a usage-based resource.

Offers matrix

On the Pricing and offers page, view the Cloud Reseller Offer Matrix, to read about the different SKUs and product bundles available to you to sell. The offers matrix includes which offers are available per locale. If an item is listed on the price list but not on the offer matrix, it means that the products cannot be ordered yet. As soon as they are available to order, the offers matrix is updated.

For CSP partners who use the Partner Center Software Development Kits (SDKs). Microsoft also publishes a list of the Azure Services in CSP on the Pricing and offers page.

Offers matrix and price list questions

If you have questions about the price list or offer matrix, submit a service request through the Partner Center.

Offer limits

Some license-based offers have certain rules and limitations that prohibit multiple purchases for the same customer. These rules apply to most trials and many of the small business offers. **Small business offers** are defined by those offers that have a maximum license count that is less than 300.

These purchasing constraints are defined as part of the offer configuration and can be found by looking in the offer list matrix. Two columns of data work together to define the enforcement: 1. Offer Limit Scope and 2. Offer Limit. The constraints are enforced during a purchase. The catalog in partner center will disallow a partner from purchasing more offers than the rules allow. Any attempt to violate the constraints will result in an error.

Offer limit scope is recorded as a column on the offer list matrix and can have values of None, Lifetime or Concurrent.

- Offers with **None** can be purchased without constraints.
- **Lifetime** offers can be purchased only once.
- **Concurrent** offers can be purchased as many times as is allowed by the **Offer Limit** value for that offer. Most trials have a Lifetime Offer Limit Scope with an Offer Limit of "1". Most small business offers have a Concurrent Offer Limit Scope with an Offer Limit of "2".

> **IMPORTANT**
>
> Concurrency limits are enforced even if an offer is canceled. An offer must be completely canceled and then deprovisioned in order to free up an additional space allowing for another purchase.

Taxes and pricing

All pricing in partner center CSP price lists is tax inclusive. For more information in the Partner Center document Taxes and tax exemptions.

Multi-year term offers

36 month offers

There are approximately 50 Dynamics offers that have three-year terms. These are identified by **(36 mo)** in the title of the offers. These offers are very similar to the yearly term offers. The only difference is around their term. These offers have a three-year term which means the subscriptions auto-renew after three years instead of one. Below is a summary of how these offers work:

- Terms are 36 months, subscriptions will auto-renew after three years
- Partners can cancel or change the number of licenses throughout the term of the subscription
- Annual renewal will be at the price of purchase time for the three-year term
- Billing frequency is still yearly or monthly

72 month offers

Microsoft 365 A1 base offer has a six-year term. The Office 365 A1 add-ons are available after purchasing this base offer.

OFFER NAME	OFFER ID	TYPE
Microsoft 365 A1	778a4dce-0014-4d53-8647-314ef2b091d2	Base offer
Office 365 A1 for faculty (for Device)	0757d14e-7c57-456f-8dab-47d164f2ff1f	Add-on
Office 365 A1 for students (for Device)	bae285a9-d56b-4384-b02f-38adc61a6f12	Add-on

Below is a summary of how these offers work:

- Term is for 72 months or 6 years
- Subscription is not renewed and expires after 6 years
- Billing frequency on the offer shows as annual but the partner is billed up front on their first invoice after acquiring the subscription
- Subscriptions for A1 72-month offers are locked after purchase and cannot be canceled and license counts cannot be added to the subscription after initial purchase
- Partners that need to cancel need to create a support ticket with the reason for cancelation and the subscription ID they need help with.

Estimated retail price (ERP)

Most price lists include a list price, the price the partner is billed, and the estimated retail price. Estimated retail price (ERP) is also called Microsoft suggested retail price or MSRP. These two values, ERP and MSRP, represent the estimated market value of the products if a customer were to purchase the products directly from Microsoft. Below are where to find ERP/MSRP details for each type of product or service.

PRODUCT OR SERVICE	ERP AND MSRP PRICE LIST DETAILS
Product or Service	ERP and MSRP price list details
License-based services	Listed as ERP in the license-based price lists
Azure usage-based services	Can be found in the Shared Services equivalent price lists
Azure reservations	Can be found in the Shared Services equivalent price lists
Azure plan usage based	Prices are retail non-discounted in price sheets
Azure plan reservations	Reference Azure reservations shared services price lists
Software subscriptions	Listed as MSRP in software subscriptions price lists
Marketplace	Listed as MSRP in Marketplace price lists

More resources:

- Azure plan pricing
- Azure pricing overview

Customize the Microsoft catalog with offers or products most-suited to your organization

6/19/2020 • 2 minutes to read

Applies to

- Partner Center
- Partner Center for Microsoft Cloud for US Government

Appropriate roles

- Admin agent
- Global admin
- Sales agent

The catalog lists Microsoft products and add-ons available for you to offer to customers. These offers are grouped by customer segment, including enterprise, small business, and government. To make it easier to access the offers that your organization uses the most or to showcase new offers to your sales agents, you can pin up to five offers to the top of the catalog list.

Customize the catalog

1. Go to the Partner Center menu > **Sell** > **Catalog**.
2. Choose up to five offers to show at the top of the catalog.

Grow your Microsoft partner business - learn how to get leads & set your company apart

6/19/2020 • 2 minutes to read

Microsoft offers many resources to help you grow your partner business. Learn how the capabilities on this site, the Microsoft Partner Center, can help you attract new customers and gain more profitability.

Use Partner Center to:

- Get sales leads (all partners)
- Set your company apart with Silver or Gold partner status (all partners)
- Offer trial subscriptions to Microsoft products (CSP partners)
- Offer promotional pricing on Microsoft products (CSP partners)
- Sell in additional markets (CSP partners)

NOTE

Your company must be enrolled in the Microsoft Partner Network and have a Partner Center account to take advantage of these capabilities. See Join the Microsoft Partner Network for information about joining the network. For some capabilities, you must also be a reseller in the Cloud Solution Provider(CSP) program. See Cloud Solution Provider overview for information about selling through this program.

Resources to help your business grow

TO DO THIS	READ THIS TO LEARN HOW	APPLIES TO
Get and manage sales leads	Watch this short video, Optimize your business profile to create a business profile so customers can find you when they search for solution providers, and then read about responding to referrals.	All network partners
Earn Silver or Gold partner status	Read Competency partners on the Microsoft Partner Network site for information about how to qualify for Silver or Gold membership levels. When you're ready to move your competency information to Partner Center, read Managing your competencies on Partner Center.	All network partners
Offer your customers trial subscriptions to Microsoft products	Read Offer your customers trials of Microsoft products to learn how to use trial subscriptions to sell more to your customer base.	CSP partners

TO DO THIS	READ THIS TO LEARN HOW	APPLIES TO
Offer your customers promotional pricing on Microsoft subscriptions	Microsoft occasionally offers promotions on license-based subscriptions, allowing you to pass the savings on to customers and grow your business. Read Offer your customers promotional pricing on Microsoft subscriptions to learn how.	CSP partners
Sell in additional markets	The Cloud Solution Provider sales channel is available in many regions and countries. See Cloud Solution Provider markets to review the list. For an introduction to the Cloud Solution Provider channel, see Cloud Solution Provider overview.	CSP partners
Sell to specialized industries like non-profit orgs and education	Sell to specialized industries	CSP partners
Grow your business through the many activities available in the Incentives co-op program. File claims for the activities through the Partner Center.	Create and manage incentives claims	CSP partners
Sell subscriptions to commercial marketplace products	Understand CSP commercial marketplace activities	CSP partners
Is your company a superstar at selling and managing Azure? Apply to enroll in the Azure Expert Microsoft Service Provider program	Azure Expert Microsoft Services Provider program	CSP partners

Grow your business with referrals from Microsoft

6/19/2020 • 2 minutes to read

Applies to

- Partner Center

Many customers are looking for qualified experts to help implement Microsoft technology and business solutions. Here at Microsoft, we often get direct requests for help from customers through our marketing activities and from our internal Microsoft sales agents. Customers also use the **Find a solution provider** experience to find companies that can help them meet their business needs.

We want to connect you with customers who need your solutions and expertise. The most important step you can take to start getting sales leads from us is to create a business profile that showcases your company's offerings, solutions, and expertise. Your business profile will be listed in all the places customers and internal Microsoft sales agents search for qualified partners.

After you publish your business profile, you'll start to receive sales leads through the Referrals feature in the Partner Center. It's important to respond to referrals within the required time frames to continue to receive these leads and, most importantly, to win deals. See Respond to referrals for details about how to manage sales leads in the Partner Center.

To get started, watch this short video, Optimize your business profile.

Respond to referrals and get potential business leads

6/19/2020 • 4 minutes to read

Applies to

- Partner Center

As a qualified Microsoft partner, you can receive potential business leads through referrals. In Partner Center, you can manage incoming leads, respond quickly to those that are a good fit, and skip or decline those that aren't.

Referral management

Start by setting up a business profile for each region where you do business. Once your profile is active, we'll be able to direct customers to your business, through:

- Microsoft marketing activities
- Internal Microsoft sales and service agents
- Customer search, using the solution provider search tool.

When a customer is interested in learning more about your solutions and services, they'll contact you by submitting a request for information (RFI). The contact listed in your business profile specific to the region and location selected will receive a system-generated email. You can also see incoming RFIs in Partner Center by going to **Referrals** > **Engagements** > **Inbox**.

Customers often choose to send the same RFI to multiple companies at the same time. To increase your chance of success, we recommend accepting or declining new engagement referrals within 24 hours or less.

New referrals

In your **Inbox**, we'll show you an overview of the RFI. From here, you can decide whether you're interested in the referral.

Review the details, and feel free to contact the customer if you want to learn more about their business needs. Then accept or decline the referral:

- **Accept**: Enter a name for the engagement, the estimated deal value, and the estimated purchase time frame. You should also provide info in the **Notes** field to explain more about what the customer is looking for. You can optionally enter your CRM ID here (for your reference only) and add additional contacts from your company. When you're finished, select **Next**. We'll move the referral to **Active**, which means you plan to actively engage with the customer to address their need. We'll also use this information to help you find similar deals in the future.

- **Decline**: Select the reason you're declining the engagement and add any notes you'd like to include, then select **Close engagement**. We'll archive it as **Declined** and notify the customer to choose a different partner.

If you don't respond within the allotted time period (currently 14 days), we'll archive it as **Expired** and notify the customer to choose a different partner.

> **TIP**
>
> A customer has the option to explicitly request that interested partners contact them directly. If this is the case, you'll see an alert at the top of the page with a flame icon. We strongly recommend reaching out to contact the customer as quickly as possible to improve your chances of winning the engagement. After 72 hours, the referral will continue to be active, but the icon and message will change. You should still contact the customer if you're interested in pursuing the referral.

Active referrals

Work to close the deal with the customer. When you're finished, select **Won** or **Lost** to report the outcome so we can archive it accordingly.

> **TIP**
>
> For certain eligible solutions, after you select **Won** you'll be asked to provide additional information in order to register your deal. Microsoft will review the info you provide here and may ask for additional details during the review process. For more information, see Register your deals.

If you want to change any of the info you've provided for an active referral, select **Edit engagement**. You can then update the engagement name, estimated purchase date, estimated value, notes, and/or your CRM ID.

You can also select **Add contact** to provide the name, phone number, and email addresses of any additional people who are working on the engagement.

Archived referrals

Review your past referrals (**won, lost, declined** and **expired**) at any time.

Getting more referrals

Here are some tips to help you get more referrals that are appropriate to your business:

- **Choose keywords and preferences that represent your unique expertise and business model** in your business profile. Remove keywords that would generate referrals for you're not interested in. If you're not interested in dealing with businesses of a certain size, update this preference.
- **Review your contact information in your business profile** for each location to make sure that your team gets incoming alerts.
- **Respond quickly to referrals**. When you respond in a timely fashion to incoming requests, we'll increase your visibility in future customer search results. Make sure your team responds quickly with your intent.
- **Be choosy with the deals you accept**. We monitor the types of deals that you accept and decline, and use this information to help find you similar deals. Accepting deals that aren't a good fit won't improve your search results and could impact the quality of the leads you receive.
- **Report back the estimated deal sizes, closing dates, and the final status of your deals** (won or lost). We'll use this info to continue to provide you with quality referrals.

Create a business profile to get Microsoft sales leads and help customers find you

6/19/2020 • 6 minutes to read

Applies to

- Partner Center
- Microsoft Partner Network partners
- Cloud Solution Provider program partners

Appropriate roles

- Account admin
- Business profile admin
- Global admin
- Referrals admin

As a qualified Microsoft partner, you can create a business profile to showcase your business to customers who are looking for your unique solutions and expertise to address their business needs.

Microsoft engages millions of customers every year through marketing, sales, and service efforts. Most of these engagements create opportunities for us to provide referrals to our partners in the form of sales leads.

As the first step to getting these leads, create a business profile. We'll show your profile to customers who are searching for partners who can help them implement Microsoft products and solutions, through:

- **The Find a solution provider search experience**. Potential customers can search partner listings on their own to locate partners who meet their search criteria.
- **Referrals from Microsoft sales and service employees**. Potential customers interested in deploying cloud-based technology solutions contact Microsoft for help finding professionals who can meet their business needs. These Microsoft professionals can then refer potential customers to your company.

> **IMPORTANT**
> To help our partners streamline business operations, we're consolidating features and capabilities that used to be spread across several tools and websites into Partner Center, this site. As part of that effort, we've moved all referrals-related capabilities to Partner Center and retired the Pinpoint and C2PC sites. If you used Pinpoint or C2PC in the past to get and manage referrals from Microsoft, you'll need to create a new business profile in Partner Center to continue to get referrals. We no longer support importing profiles from these sites.

Create a profile

> **NOTE**
> Before you can create a business profile, you must have a Partner Center account. If you don't already have a Partner Center account, see Create a Partner Center account for help creating one.

Create profiles for each region you are authorized to do business in.

1. From the **Partner Center** menu, select **Referrals** > **Business profiles** > select a country/region > **Create a business profile**.
2. On the **Create a business profile** page, select a region, then enter your profile information.

> **NOTE**
>
> While Partner Center supports multiple languages, some elements, such as the description and free-form tags, may need to include text from different languages, as noted in this topic.

Partner information

Introduce your company, adding a logo and a brief description, and a link to your website.

The logo can be a GIF, JPG, or PNG file, with a maximum width of 300 pixels. We recommend using square or long aspect ratios. Tall aspect ratios are not recommended.

Your description can be up to 2500 characters. Tips for a great description:

- **Be brief**, leading with what's important in the first sentence or two. This should be the headline that catches customers' attention. In the Find a partner search experience, we show the first line or two in the search results preview.
- **Focus on your company's experiences with Microsoft-specific offerings**. Customers searching for referrals are generally looking for partners with Microsoft-specific experience.
- **Use bullets**. Break up information into bulleted lists to make it easier to scan.
- **Avoid jargon**. Use simple, everyday language, naming your offerings for what they do: the business needs they address, or task or objective they help customers accomplish.
- **Don't worry about filling the description with search keywords**. The customer search tools search for keywords generated in the Partner Expertise section, not the description.
- **Keep your profile current**. With each software or service release, update your profile, keeping it in sync with your company's website.
- **Do not refer to another Microsoft partner company by name**, unless it is a subsidiary or is otherwise affiliated with your company, or you have a current agreement with that partner company to act in partnership and/or promote each other for shared work opportunities.
- **For regions with multiple languages**, consider including text from multiple languages in the description.

LinkedIn company page: more ways to connect

Add your LinkedIn company page to strengthen your connections to potential customers.

When you include this link, customers will be able to quickly view more about your organization through the LinkedIn platform.

If you don't already have a LinkedIn company page, you can create one now.

Partner expertise

The Find a Partner search tools look for expertise tags. Optimize these tags to help your profile gain visibility.

Start by adding your own tags into the Partner Expertise section. Tags you can add:

- **Industry focus tags**
- **Products**. Limited to Microsoft products
- **Service type**
- **Solutions, skills, and capabilities**. These tags are free-form, and provide you the ability to add search keywords that are unique to your capabilities.

Other tags used in search:

- **Competency tags** are an earned designation showcasing your company's capabilities.
- **Endorsement tags** are earned when Microsoft or your customers who have worked with you endorse your work.

Allow Microsoft to endorse my areas of expertise

We recommend that you leave this setting checked.

As you demonstrate success with customers through Partner Center, or participate in other Microsoft certifications or programs, we'll automatically add endorsements for your specific products, services and industries contributing to that success. Endorsements are an important factor in search results.

If there are products that you provide services for that you'd rather not show up on your profile, you can uncheck this box and manage your profile manually. These endorsements will be hidden from your customers view, but you can add them back to your profile later at any time.

Customer preferences

Target size

You can opt out of referrals from businesses that don't meet your target customer size.

By opting out, you'll have more time to spend on businesses that are a match for the businesses that you prefer to work with.

Locations

You can add up to 5 of your organization's top locations per region. These locations appear when customers search for partners by proximity.

Indicate locations that are official company locations and can be validated. Pick locations that are central to the markets you serve, and best represent your company's ability to fulfill.

When you're finished updating the location info, select **Save this location** or **Save this location and add another one** (even if you're only adding one location).

Each location you add becomes a separate profile page. When updating profile pages, make sure that you update them for each location.

To update a location's address, you'll need to **Delete** the location first and re-add it.

If you're at 5 top locations and you need to change one, **Delete** an existing location first and add the new location.

Review your profile

After you publish your profile, updates appear in the Find a solution provider searches within 24 hours.

Improve the visibility of your profile

- **Respond quickly to requests**. When you receive a customer referral, a faster response can lead to better results on the search pages for future customers.
- **Be selective with your tags**. It's better to have fewer tags that best represent your company's offers, solutions, value propositions, and unique position where you can consistently demonstrate success. That will pay dividends in future search results.
- **Earn competency tags** through Microsoft to demonstrate your proficiency in our products.
- **Earn endorsement tags** from customers who appreciate your work.

Next steps

Responding to referrals

Manage different leads like customer inquiries, marketing-qualified leads, and sales-qualified leads

6/19/2020 • 5 minutes to read

Applies to

- Partner Center
- Referrals
- Microsoft Solution Provider
- Business Profiles

Appropriate roles

- MPN partner admin
- Referrals admin

Microsoft sends millions of leads per year to its partners. You have the opportunity to receive leads from Microsoft and build your business. This section will help you understand how to manage the leads that you receive from Microsoft solution provider page and act on them.

The pre-requisite to receive leads is creating a business profile for your company. The business profile you create for your company will help you be visible to prospective customers, other partners, and Microsoft sellers on the Microsoft solution provider webpage. Your business profile information is combined with your company's membership information like the competency data and additional endorsements from Microsoft providing a rich profile for the customers when they search for a partner to work with. All the requests that originate from the profile listing on the Microsoft solution provider page are available in the **"Leads"** section under the **Referrals** tab in the left navigation pane.

Types of Leads

Customer inquiries – These are leads that originate directly from the customers. A company searched and found your company profile and filled out the form stating the need and the contact details.

Marketing qualified – These are leads that are sent to your company by Microsoft employees who received the customer request through one of the various marketing channels.

Sales qualified – These are leads that are sent to you by Microsoft sellers who gather the requirements from a customer and are helping them find the right partner to solve a customer problem. These leads are not the same as Co-sell opportunities where a Microsoft sales representative is actively engaged with the partner and customer until the deal closure.

Navigating the Leads section

There are three top-level tabs in the leads section.

Marketplace leads – All the leads originating from Microsoft solution provider page searches, which are customer inquiries.

Qualified leads – All the leads of type Marketing qualified and Sales qualified are available in this tab.

Favorites – Any leads that are marked as favorites in the Marketplace leads or Qualified leads tab will be shown in this tab. You can mark any lead as a favorite by clicking on the heart icon on the lead in the list view. You can remove the lead from favorites by just clicking on the same icon again.

Responding to a lead

Each lead moves through a life cycle of its own. This section identifies the different stages and the actions that you can take in each stage.

Received stage

In this stage, you have received a new lead either directly from the customer or from a Microsoft employee. Review the details, and feel free to contact the customer if you want to learn more about their business needs.

You can take two actions in this stage- either accept or decline the referral:

- **Accept:** Enter a name for the deal, the estimated deal value, and the estimated purchase timeframe. You should also provide info in the **Notes** field to explain more about what the customer is looking for. You can optionally enter your CRM ID here (for your reference only), the marketing campaign id, which resulted in the respective lead and add additional contacts from your company. When you're finished, select **Next**. We'll move the referral to the **next stage**, which means you plan to actively engage with the customer to address their need. We'll also use this information to help you find similar deals in the future.
- **Decline**: Select the reason you're declining the deal and add any notes you'd like to include, then select **Close** deal. We'll archive it as **Declined** and notify the customer to choose a different partner..
- If you don't respond within the allotted time (currently 14 days), we'll archive it as **Expired** and notify either Microsoft or the partner who sent you this opportunity.

> **TIP**
> A customer has the option to explicitly request that interested partners contact them directly. If this is the case, you'll see an alert at the top of the page with a flame icon. We strongly recommend reaching out to contact the customer as quickly as possible to improve your chances of winning the deal. After 72 hours, the referral will continue to be active, but the icon and message will change. You should still contact the customer if you're interested in pursuing the referral.

Accepted Stage

As you work to close the deal, if you want to change any of the information you've provided for an accepted referral, select **Edit**. You can then update the deal name, estimated purchase date, estimated value, notes, CRM ID and/or the marketing campaign id. You can also select **Add your employees** to provide the name, phone number, and email addresses of any additional people who are working on the deal.

When you're finished, you can take one of the two actions, which are marking the deal as **Won** or **Lost** to report the outcome so we can archive it accordingly.

Archived Stage

This is a terminal stage where all the opportunities finally reach. You can view all the leads that are in **won, lost, declined**, and **expired** in this stage. There are no actions that you can take in this stage.

Getting more leads

Here are some tips to help you get more appropriate referrals:

- **Choose keywords and preferences that represent your unique expertise and business model** in your business profile. Remove keywords that would generate referrals you're not interested in. If you're not interested in dealing with businesses of a certain size, update this preference.
- **Review your contact information in your business profile for each location** Make sure your team gets incoming alerts.

- **Respond quickly to referrals** When you respond in a timely fashion to incoming requests, we'll increase your visibility in future customer search results. Make sure your team responds quickly with your intent.
- **Be choosy with the deals you accept** We monitor the types of deals that you accept and decline and use this information to help find you similar deals. Accepting deals that aren't a good fit won't improve your search results and could impact the quality of the leads you receive.
- **Report back the estimated deal sizes, closing dates, and the final status of your deals** (won or lost). We'll use this info to continue to provide you with quality referrals.

Next steps

- Manage co-sell opportunities
- Get the co-sell connector for Dynamics 365 CRM
- Get the co-sell connector for Salesforce CRM

Manage co-sell opportunities in Partner Center to define deals and better meet customer needs

6/19/2020 • 8 minutes to read

Applies to

- Partner Center
- Referrals
- Co-sell with Microsoft
- Deal sharing

Appropriate roles

- MPN partner admin
- Referrals admin

You can take advantage of co-sell opportunities. Co-sell opportunities are those where there is a collaborative selling done by multiple parties to meet a customer need. This section will help you understand how you can leverage the power of Co-sell in Partner Center to effectively do co-selling and acquire new customers.

Types of Co-sell opportunities

Co-sell – This is where one or more Microsoft sales representatives are actively engaged in the deal to help solve a customer problem. The opportunities can originate from a customer account where a Microsoft sales representative invites the partner to participate in a co-selling activity or from a partner where they need additional help from Microsoft sales to close the deal.

Private pipeline deal – This is when a partner decides to work independently on a deal that has been created in Partner Center. Partners have the option to invite Microsoft sellers after creating the deal to make it a collaborative selling activity. The details of the deal are not shared with Microsoft sales team until the time Microsoft sales help is explicitly sought by the partner.

> **NOTE**
> Private pipeline deals, even though they are not truly collaborative, are included here to provide an easy path to upgrade any pipeline deal in to a co-sell opportunity in any non-terminal stage (**won, lost, declined and expired**).

Navigating the Co-sell section

There are three top-level tabs in the co-sell section.

Inbound – All the opportunities that are sent to the partner from Microsoft sellers for collaborative selling are available in this tab.

Outbound – All the opportunities that are created by the partner are available in this tab. Partners can create two different categories of opportunities – co-sell and private pipeline.

Favorites – Opportunities marked as favorites in the Inbound or Outbound Co-sell opportunities tabs will be shown in this tab. Mark any opportunity as a favorite by clicking on the heart icon on the opportunity in the list view. You can remove the opportunity from favorites by just clicking on the same icon again.

Creating a Co-sell opportunity

> **IMPORTANT**
>
> To co-sell with Microsoft, partners need a commercial-ready solution, an engaged sales team, and a strong go-to-market strategy. They must also meet specific additional criteria. For more info, see Become co-sell ready.

You can create two types of co-sell opportunities.

Select your customer

Select the customer for this specific deal. Enter their location and start typing the name. The auto-suggest will start showing recommendations based on the search criteria. Since many companies have more than one business entity in the same location, you may see multiple results. If you're not sure which to choose, you can confirm which D-U-N-S Number belongs to your customer. Be sure to select the exact match for the customer who you're working with.

Once you click **Select the customer**, you'll be prompted to enter the name, phone number, and email address for the person who's your main point of contact for this deal. These details are optional and are required only if you are planning to invite Microsoft sales to help you with the engagement. Select **Next**.

> **IMPORTANT**
>
> Be sure that you have obtained the customer's consent to provide their contact information to Microsoft for the deal. Microsoft may use this information to contact the customer directly.

Deal details

Enter the details of the current deal. The fields, defined below can change as you are actively working with the customer to close the deal.

FIELD NAME	MANDATORY/OPTIONAL	DETAILS
Deal name	Mandatory	The friendly name to identify your deal at a later point of time.
Estimated value	Mandatory	The value of the deal based on the information available while creating the deal.
Estimated close date	Mandatory	The date by which you expect to close the deal with the customer.
CRM ID	Optional	Tag the deal with the ID of the opportunity in your respective CRM for tracking purpose.
Marketing campaign ID	Optional	Capture the marketing campaign that resulted in the deal. This filed can help you track the ROI of a certain campaign if you tag all the deals originating from the campaign with the same ID.

FIELD NAME	MANDATORY/OPTIONAL	DETAILS
Notes	Optional	Update all the latest information to provide visibility to other employees from your company working on the same deal or trying to understand the current state of the deal. You can also use this as a communication on record for discussions between Microsoft sellers/other partners with your company.

Add your employees

After adding the deal details, add the employees that will be working on this specific deal. You will need to enter the name, phone number, and email address of the employee. These details are mandatory, and you need to have at least one contact with all the details entered for you to create a deal. These details can be changed even after creating a deal. Recent contacts from your previous deals are shown on the right side for you to quickly add them to the deal.

Add Solution(s)

In this section, you need to provide the information related to the solutions that will be part of this deal. This is a mandatory section where you must add at least one solution to create a deal. The solution details can be changed after creating a deal. There are multiple types of solutions that can be added to a deal, which are described below

- **My company's solutions:** These are co-sell ready solutions that are published by your company
- **Microsoft:** These are solutions owned by Microsoft
- **Other third-party solutions:** These are co-sell ready solutions that are published by other partners in the Microsoft co-sell ecosystem

Once you have provided the solution information, select Next to move to the section where you can decide the selling type. You have two options:

Private pipeline deal: If you don't invite Microsoft and create an engagement at this step, it will be of the type private pipeline. Microsoft sellers will have no visibility into the details of this deal.

Co-sell deal: If you switch the toggle to yes for the question **"Would you like Microsoft's help?"**, the deal turns in to a co-sell deal where a Microsoft seller can potentially help you with closing the deal. A request for help from Microsoft is no guarantee that a Microsoft seller will participate in the deal. Microsoft sales representatives have 14 days to decide if they want to participate. In the notes section, be sure to identify the type of help you want.

Responding to a Co-sell opportunity

Each opportunity moves through a life cycle of its own.

Received stage

In this stage, if you have received a new Co-sell opportunity either from a Microsoft seller or from other partners in the Microsoft Co-sell ecosystem, review the details, and feel free to contact the customer if you want to learn more about their business needs. You can take two actions in this stage. accept or decline the referral:

- **Accept:** Enter a name for the deal, edit the estimated deal value, and the estimated purchase timeframe based on your review. Once you established the contact with the customer, you should provide info in the **Notes** field to explain more about what the customer is looking for. You can optionally enter your CRM ID here (for your reference only), the marketing campaign ID that resulted in the respective opportunity and add contacts from your company who will be working on this deal.

- When you're finished, select **Next**. We'll move the referral to **the next stage**, which means you plan to actively engage with the customer to address their need. We'll also use this information to help you find similar deals in the future.

- **Decline**: Select the reason you're declining the deal and add any notes you'd like to include, then select **Close deal**. We'll archive it as **Declined** and notify either Microsoft or the partner who sent you this opportunity.

- If you don't respond within the allotted time (currently 14 days), we'll archive it as **Expired** and notify either Microsoft or the partner who sent you this opportunity.

Accepted Stage

Work to close the deal with the customer. If you want to change any of the information you've provided for an accepted referral, select **Edit**. You can then update the deal name, estimated purchase date, estimated value, notes, CRM ID and/or the marketing campaign ID. You can also select **Add your employees** to provide the name, phone number, and email addresses of any additional people who are working on the deal. Solutions can also be edited based on the customer need.

All the deals you have created are in Accepted stage by default.

When you're finished, you can take one of the two actions, which are marking the deal as **Won** or **Lost** to report the outcome so we can archive it accordingly.

> **TIP**
> For certain eligible solutions, after you select Won, you'll be asked to provide additional information to register your deal. Microsoft will review the info you provide here and may ask for additional details during the review process. For more information, see Register your deals.

Archived Stage

This is a terminal stage where all the opportunities finally reach. You can view all the leads that are in **won, lost, declined**, and **expired** in this stage. There are no actions that you can take in this stage.

Getting more Co-sell opportunities

Here are some tips to help you get more co-sell opportunities that are appropriate to your business:

- **Respond quickly to deals**. When you respond in a timely fashion to incoming requests, we'll increase your visibility in future partner search results progressively. Make sure your team responds quickly with your intent.
- **Be choosy with the deals you accept**. We monitor the types of deals that you accept and decline and use this information to help find you similar deals. Accepting deals that aren't a good fit won't improve your search results and could impact the quality of the opportunities that you receive.
- **Report back the estimated deal sizes, closing dates, and the final status of your deals** (won or lost). We'll use this info to continue to provide you with quality referrals.

Next steps

- Manage leads

- Get the co-sell connector for Dynamics 365 CRM

- Get the co-sell connector for Salesforce CRM

Co-sell connector for Dynamics 365 CRM – Overview

6/19/2020 • 8 minutes to read

Appropriate roles

- Referrals admin
- System admin or system customizer on the CRM

Partner Center co-sell connector enables your sellers to co-sell with Microsoft from within your CRM systems. They won't have to be trained to use Partner Center to manage Co-sell deals. Use the Co-sell connectors, to create a new Co-sell referral to engage a Microsoft seller, receive referrals from the Microsoft seller, accept/decline referrals, modify deal data such as deal value, and closing date. You can also receive any updates from the Microsoft sellers on these Co-sell deals. You can do all of your referrals work within the CRM of your choice rather than in Partner Center.

The solution is based on Microsoft Power Automate Solution and uses Partner Center APIs.

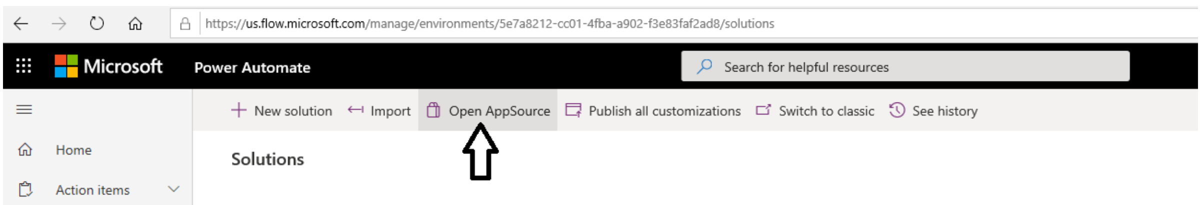
Before you install - pre-requisites

TOPICS	DETAILS	LINKS				
Microsoft Partner Network ID	You need a valid MPN ID	To join MPN				
Cosell ready	Your IP/Services solution must be co-sell ready.	Sell with Microsoft				
Partner Center account	The MPN ID associated with the Partner Center tenant must be same as the MPN ID associated with your Co-sell solution. Verify that you can see your co-sell referrals in Partner Center portal before deploying the connectors.	Manage your account				

TOPICS	DETAILS	LINKS				
Partner Center user roles	The employee who will install and use the connectors must be a Referrals admin	Assign users roles and permissions		Dynamics 365 CRM	The CRM user role is System admin or System customizer	Assign roles in Dynamics 365
Power Automate Flow Account	An active Power Automate account for the CRM System admin or System customizer. That user should sign into Power Automate at least once before installation.					

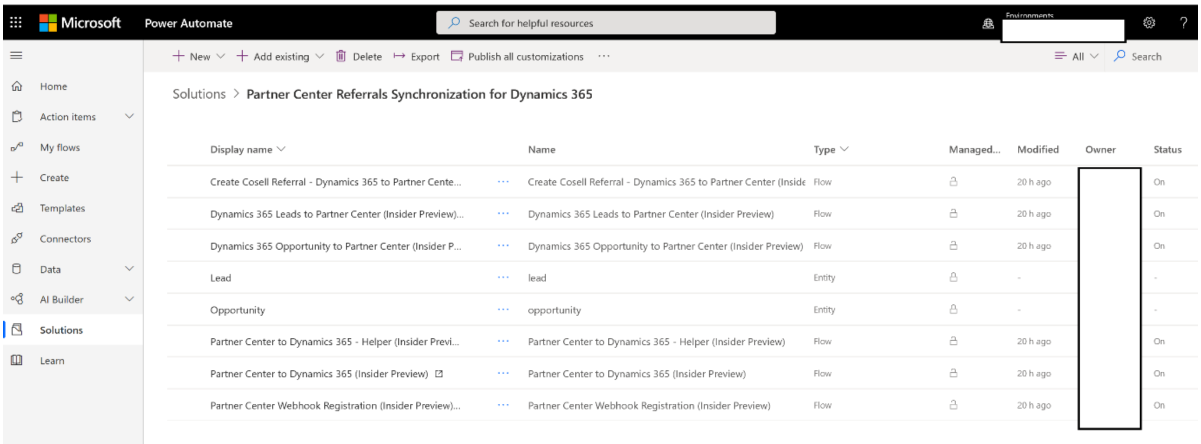
Install Partner Center Referrals Synchronization for Dynamics 365 (Power Automate Solution)

1. Go to Power Automate and select **Environments** on the right top corner. This step will show you the available CRM instances.
2. Select the appropriate CRM instance from the drop-down on the right top corner.
3. Select **Solutions** on the left navigation bar.
4. Click on the **Open AppSource** link on the top menu.



5. Search for **Partner Center Referrals Connectors for Dynamics365** in the pop-up screen.
6. Click the **Get it now** button and then **Continue**.
7. This opens the page where you can select the CRM (Dynamics 365) environment to install application. Agree to terms and conditions.
8. You're then directed to the **Manage your solutions** page. Navigate to "Partner Center Referrals" by using the arrow buttons on the bottom of the page. **Installation scheduled** should appear next to Partner Center Referrals solution. Installation will take 10-15 minutes.
9. Once the installation is complete, navigate back to Power Automate and select **Solutions** from left navigation area. Notice that **Partner Center Referrals Synchronization for Dynamics 365** is available in the Solutions list.

10. Select **Partner Center Referrals Synchronization for Dynamics 365**. The following Power Automate flows and entities are available:



Best practice: test before you go live

Before you install, configure, and customize the Power Automate solution on the production environment, be sure to test the solution on a staging CRM instance.

- Install Microsoft Power Automate solution on a staging environment/CRM instance.
- Make a copy of the solution and run your configuration and Power Automate flow customizations on the staging environment.
- Test the solution on a staging/CRM instance.
- On success, import as managed solution to the production instance.

Configure the solution

1. Once you have installed the solution in your CRM instance, navigate back to Power Automate.

2. From the **Environments** drop-down on the right top corner, select the CRM instance where you installed the Power Automate solution.

3. You'll need to create connections that associate the three user accounts:

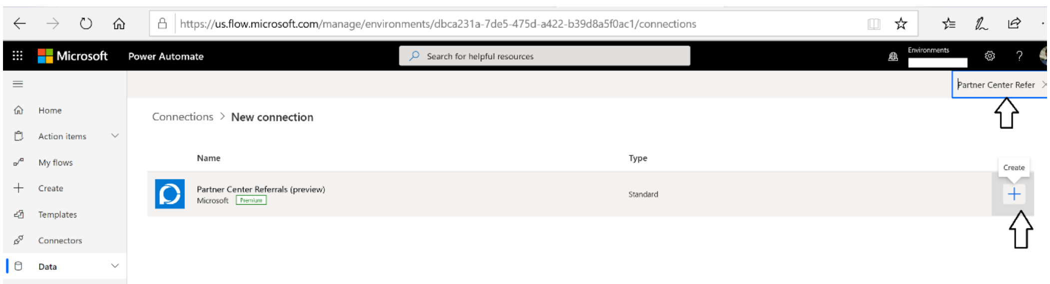
   - Partner Center user with referrals admin credentials

   - Partner Center Events

   - CRM admin with the Power Automate flows in the solution.

     a. Select **Connections** from the left navigation bar and select the "Partner Center Referrals" solution from the list.

     b. Create a connection by clicking **Create a connection**.



     c. Search for **Partner Center Referrals (preview)** in the search bar on the top-right corner.

     d. Create a connection for your Partner Center user with the credentials role of Referrals admin.

e. Next, create a Partner Center Events connection for your Partner Center user with the credentials of Referrals admin.

f. Create a connection for Common Data Service (current environment) for the CRM administrator user.

4. To associate the Power Automate flows with the connections, edit each of the Power Automate flows to connect to Common Data Service and Partner Center Referrals. Save the changes.

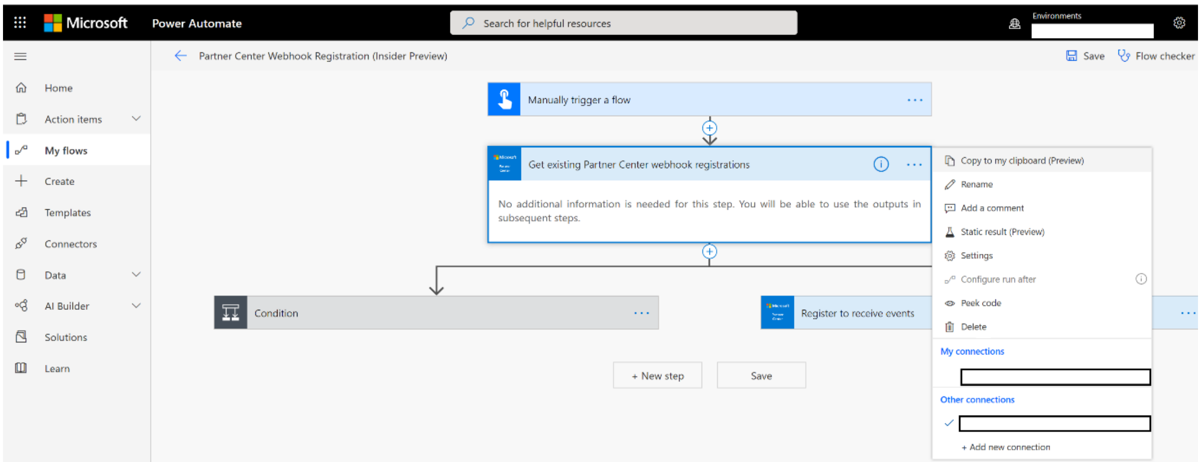
5. **Turn on** the Power Automate flows.

Use Webhook APIs to register for resource change events

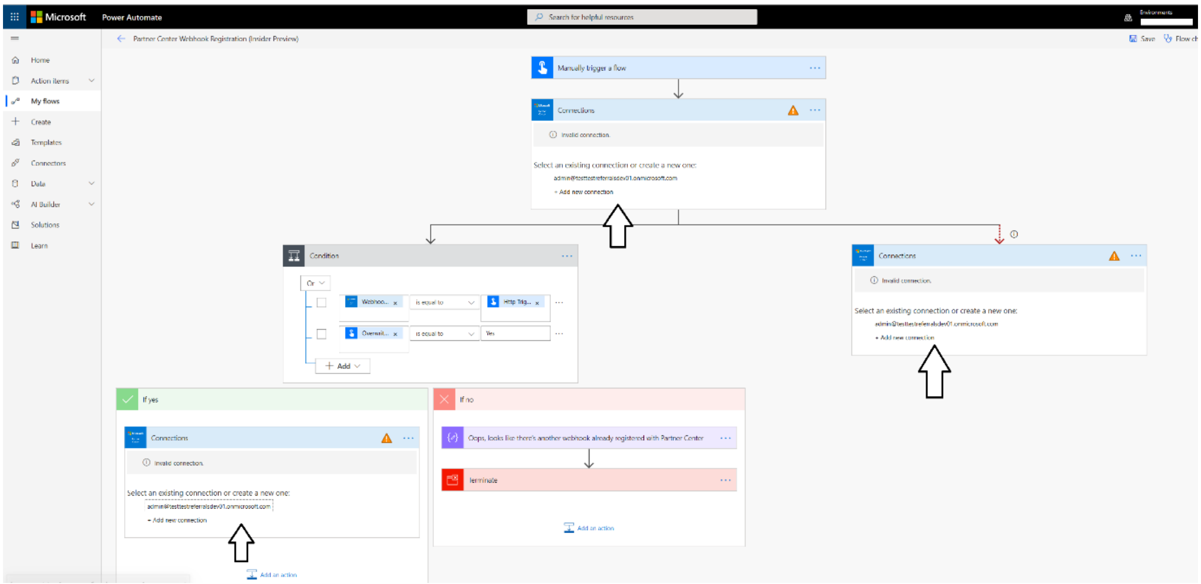
The Partner Center Webhook APIs allow you to register for resource change events. These change events are sent to your url as HTTP posts.

1. To register your url, select **Partner Center Webhook Registration (Insider Preview)** Power Automate flow.

2. Add connections for (a.) Partner Center user with referrals admin credentials (b.) Partner Center Events as highlighted below



3. When you make these updates, you'll see



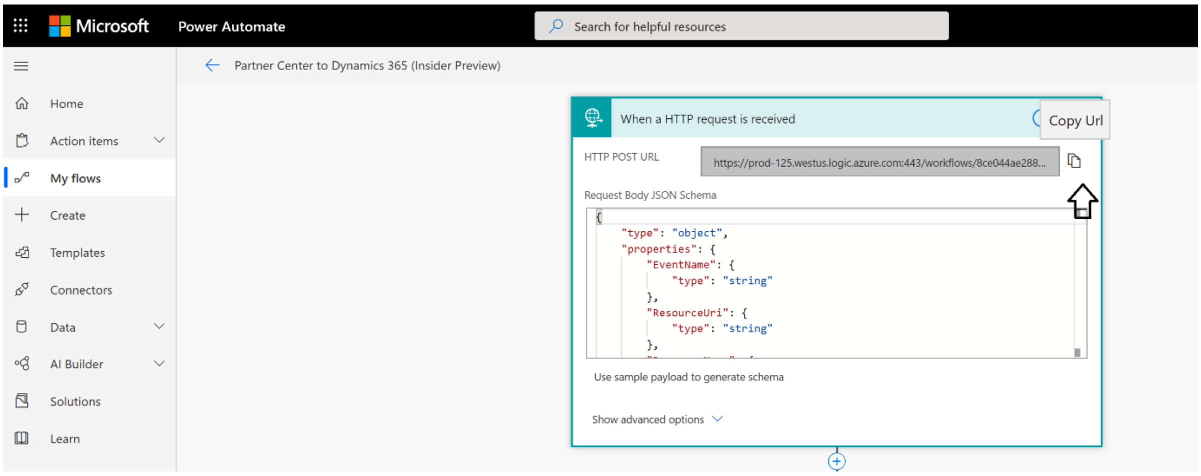
4. Save your changes and select **Turn on**.

To enable Partner Center webhooks to listen to event changes, do the following steps:

5. Select **Partner Center to Dynamics 365 (Insider Preview)**.

6. Select the **Edit** icon and select **When a HTTP request is received**.

7. Select the **Copy** icon to copy the provided HTTP POST URL.



8. Now select the “Partner Center Webhook Registration (Insider Preview)” Power Automate flow and select **Run**.

9. Ensure that the “Run Flow” window opens on the right-hand pane and click **Continue**.

10. Enter the following details:

    a. **Http Trigger Endpoint**: URL copied from earlier step

    b. **Events to Register**: “referral-created” and “referral-updated”

    c. **Overwrite existing trigger endpoints if present**: Yes (This overwrites any existing endpoints.)

11. Select **Run** and then select **Done.**

The webhook can now listen to create and update events.

Customize synchronization steps

When Co-sell referrals are synced between Partner Center and your CRM system, the fields that are synced on Partner Center PC are listed here.

Often CRM systems are highly customized. You can customize the Power Automate flows. Follow the field mapping guide, and if necessary, make appropriate changes in the steps of the Power Automate flows. Microsoft Partner Centers to CRM mappings are provided, but based on your CRM environment, you can choose to further customize the fields.

Multiple steps of each of the Power Automate flows can be customized based on your needs. The following are examples of available customizations:

1. To customize the fields for the create or update events in the Partner Center to CRM referral synchronization:

   a. Select Partner Center to Dynamics 365 (Insider Preview) or Partner Center to Salesforce (Insider Preview).

   b. Select **Edit** to edit/customize the Power Automate flow.

   c. Select **(Scope) Synchronize the lead or opportunity**.

2. To customize CRM field mappings (based on field mappings guide) for create events, select **If it’s new Shared opportunity, then**. Select the substep **if yes** and then expand **Creating a new opportunity in**

the CRM. You can edit the mappings in this section using the Field Mapping Guide.

d. For customizing CRM field mappings (based on field mappings guide) for update events, click on the step "(Scope) Synchronize the lead or opportunity".

e. Select **If it's an update to an opportunity, then**. Select the substep **if yes** and then expand **If difference between the opportunity objects in Partner Center and CRM, then**.

f. Select **If yes** followed with **Update existing opportunity**

3. To customize the fields for CRM to PC referral synchronization for update events:

   a. Select **Edit** to edit/customize the Power Automate flow.

   b. Select **(Scope) Synchronize the opportunity**.

   c. To customize CRM field mappings for update events, select **If there is difference between the lead objects in Partner Center and CRM, then**.

   d. Select the sub-step **if yes** and then expand the step **Update a referral with opportunity data**.

   You can edit the mappings in this section based on the Field Mapping Guide.

4. To customize the fields for CRM to PC referral synchronization for create events?

   a. Select **Edit** to edit/customize the Power Automate flow.

   b. Select **(Scope) Synchronizing Referrals.**

   c. For customizing CRM field mappings (based on field mappings guide) for create events, select **Create Microsoft Referral**.

   You can edit the mappings in this section based on the Field Mapping Guide.

End-to-end bi-directional co-sell referral synchronization

Once you have installed, configured, and customized the Power Automate solution, you can test for Co-sell referrals synchronization between Dynamics 365 and Partner Center.

Pre-requisites

To synchronize the referrals across Partner Center and Dynamics 365 CRM, the Power Automate solution clearly demarcates Microsoft-specific referral fields. This identification gives your seller teams the ability to decide which referrals they want to share with Microsoft for co-selling.

A set of custom fields is available as part of the **Opportunity** entity. A CRM admin user will need to create a separate CRM section with the **Opportunity** custom fields.

The following custom fields should be part of the CRM section:

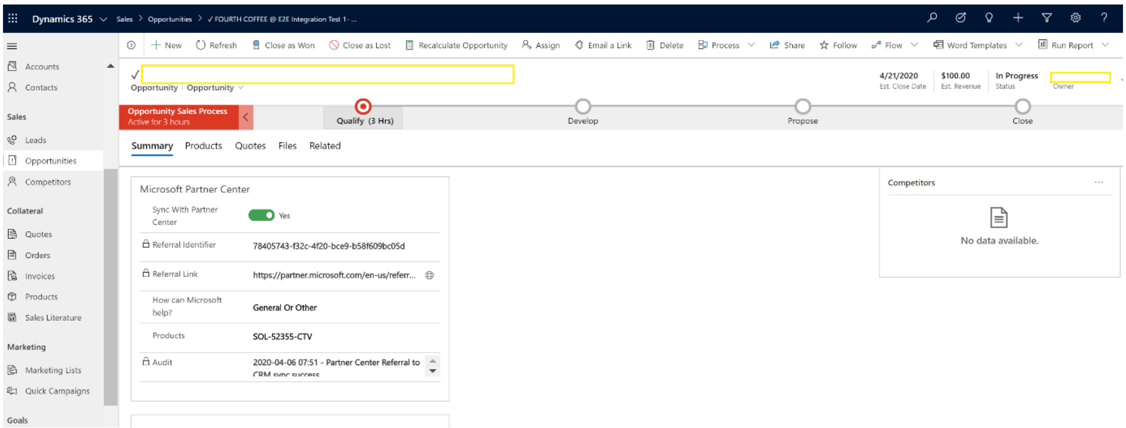
- **Sync with Partner Center**: Whether to sync the opportunity with Microsoft Partner Center
- **Referral Identifier**: A read-only identifier field for Microsoft Partner Center referral
- **Referral Link**: A read-only link to the referral in Microsoft Partner Center
- **How can Microsoft help?**: Help required from Microsoft for the referral
- **Products**: List of products associated with this opportunity
- **Audit**: A read-only audit trail for syncing with Partner Center referrals

SCENARIOS:

1. Referral synchronization when referral is created or updated in CRM and synced in Partner Center:

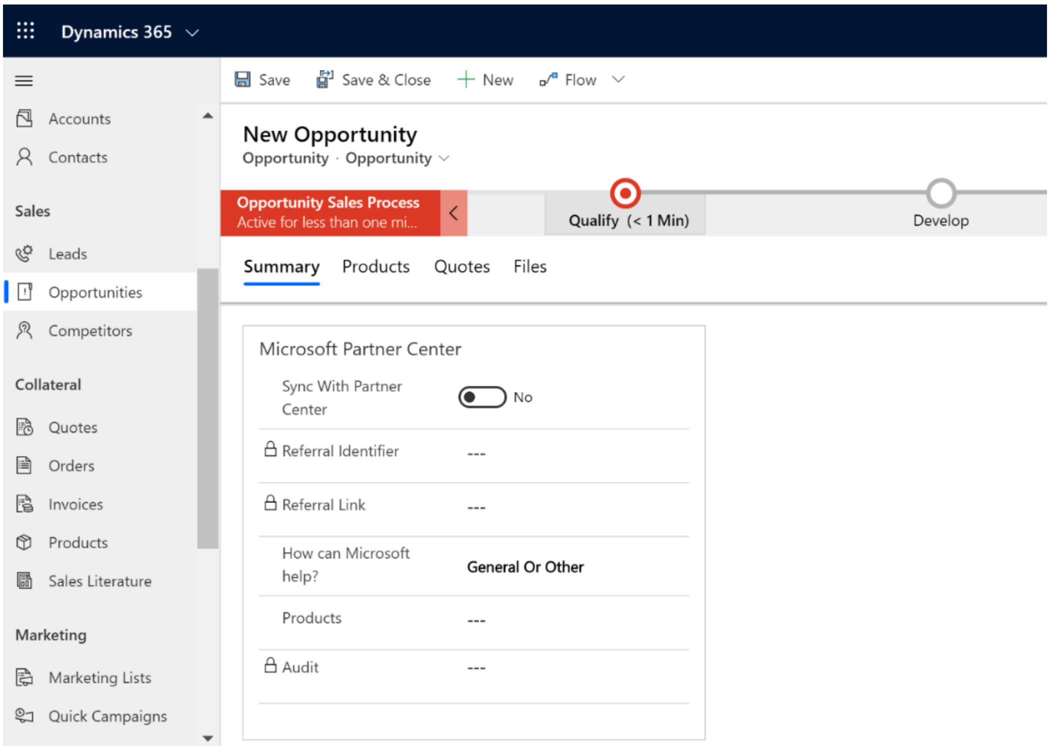
   a. Sign into your Dynamics 365 CRM environment with user who has visibility in the **Opportunity** section of the CRM.

   b. Ensure that the following section is present when you create a “New Opportunity” in Dynamics 365 environment



   c. To synchronize this opportunity with Microsoft Partner Center, ensure that you set the following fields in the card view:

      - **Sync with Partner Center**: Yes
      - **How can Microsoft help?**: Select from the following:



      - **Products**: Solution IDs of the product

   d. Once the opportunity is created in Dynamics 365 with **Sync with Partner Center** option set to **Yes**, wait 10 minutes, and then sign into your Partner Center account. Your referrals will be synchronized with Dynamics 365.

   e. Likewise, for an opportunity that had “Sync with Partner Center” option set to “Yes”, if you update the opportunity in Dynamics 365 CRM, the changes will be synchronized in your Partner Center account.

   f. Opportunities that are synchronized successfully with Partner Center will be identified with ✔ icon in

Dynamics 365.

2. Referral Synchronization when referral is created or updated in Microsoft Partner Center and synchronized in Dynamics 365 environment:

   a. Sign into your Partner Center dashboard.

   b. Select **Referrals** from the left-hand menu.

   c. Create a new Co-sell referral from Partner Center by clicking “New deal” option.

   d. Sign into your Dynamics 365 CRM environment.

   e. Navigate to **Open Opportunities**. The referral created in Microsoft Partner Center is now synchronized in Dynamics 365 CRM.

   f. When you select a synchronized referral, the card view details are populated.

Next steps

- Manage leads
- Manage co-sell opportunities
- More about Microsoft Power Automate platform?
- Partner Center webhooks

Co-sell connector for Salesforce CRM - overview

6/19/2020 • 10 minutes to read

Appropriate roles

- Referrals admin
- System admin or system customizer on the CRM

Partner Center co-sell connector enables your sellers to co-sell with Microsoft from within your CRM systems. They won't have to be trained to use Partner Center to manage Co-sell deals. Using the Co-sell connectors, you can create a new Co-sell referral to engage a Microsoft seller, receive referrals from the Microsoft seller, accept/decline referrals, modify deal data such as deal value, and closing date. You can also receive any updates from the Microsoft sellers on these Co-sell deals. You can do all of your referrals work while working within the CRM of your choice rather than in Partner Center.

The solution is based on Microsoft Power Automate Solution and uses Partner Center APIs.

Before you install - pre-requisites

TOPICS	DETAILS	LINKS
Microsoft Partner Network ID	You need a valid MPN ID	To join MPN
Co-sell ready	Your IP/Services solution must be co-sell ready.	Sell with Microsoft
Partner Center account	The MPN ID associated with the Partner Center tenant must be same as the MPN ID associated with your Co-sell solution. Verify that you can see your co-sell referrals in Partner Center portal before deploying the connectors.	Manage your account
Partner Center user roles	The employee who will install and use the connectors must be a Referrals admin	Assign users roles and permissions
Salesforce CRM	The CRM user role is System admin or System customizer	Assign roles in Salesforce CRM
Power Automate Flow Account	An active Power Automate account for the CRM System admin or System customizer. That user should sign into Power Automate at least once before installation.	

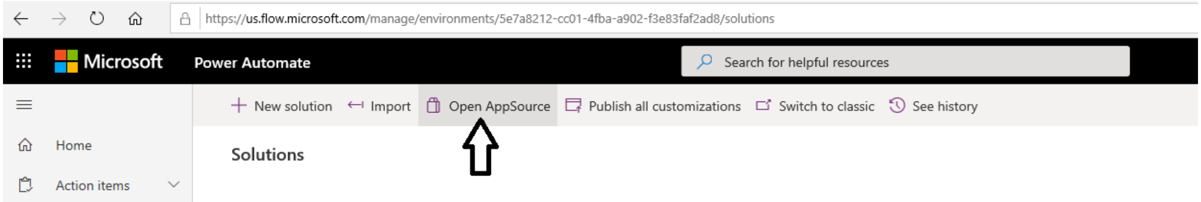
Install Partner Center Referrals Synchronization for Salesforce CRM

1. Go to Power Automate and select **Environments** on the right top corner. This will show you the available CRM instances.

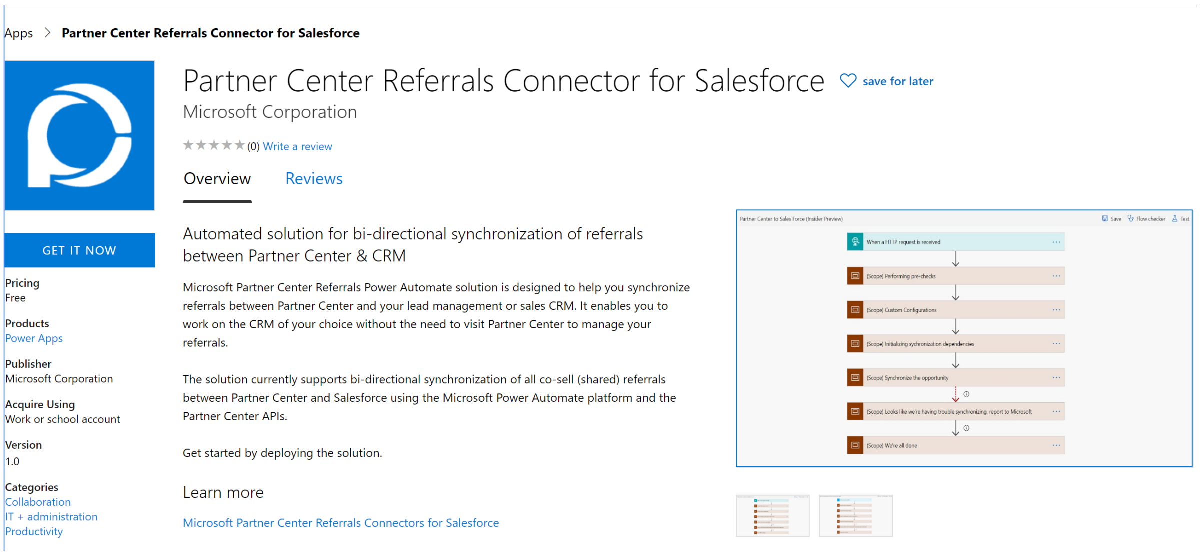
2. Select the appropriate CRM instance from the drop-down on the right top corner.

3. Select **Solutions** on the left navigation bar.

4. Click on the **Open AppSource** link on the top menu.

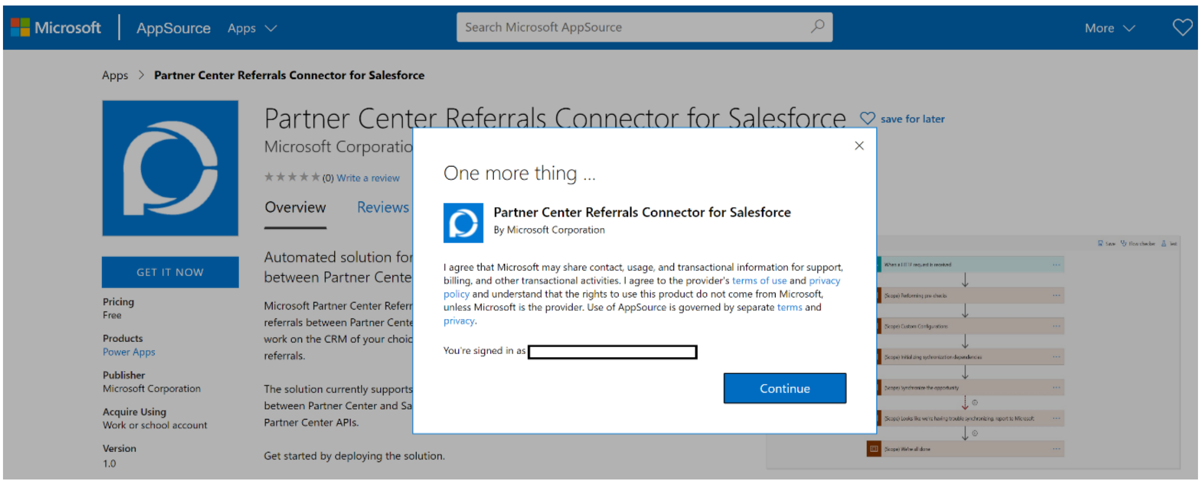


5. Search for **Partner Center Referrals Connectors for Salesforce** in the pop-up screen.



6. Click the **Get it now** button and then **Continue**.

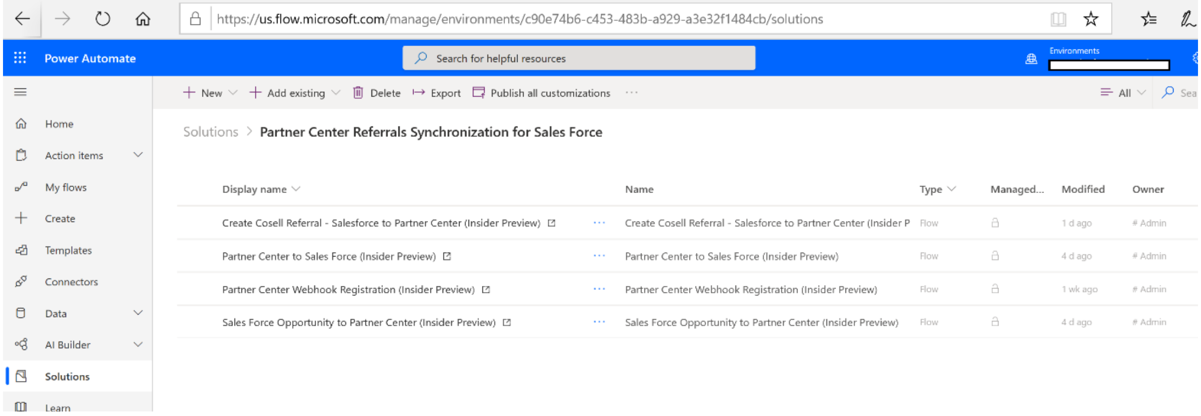
7. This opens the page where you can select the Salesforce CRM environment to install application. Agree to terms and conditions.



8. You're then directed to the **Manage your solutions** page. Navigate to "Partner Center Referrals" by using the arrow buttons on the bottom of the page. **Installation scheduled** should appear next to Partner Center Referrals solution. Installation will take 10-15 minutes.

9. Once the installation is complete, navigate back to Power Automate and select **Solutions** from left navigation area. Notice that **Partner Center Referrals Synchronization for Salesforce** is available in the Solutions list.

10. Select **Partner Center Referrals Synchronization for Salesforce**. The following Power Automate flows and entities are available:



Best Practice: Test before you go live

Before you install, configure, and customize the Power Automate solution on the production environment, be sure to test the solution on a staging CRM instance.

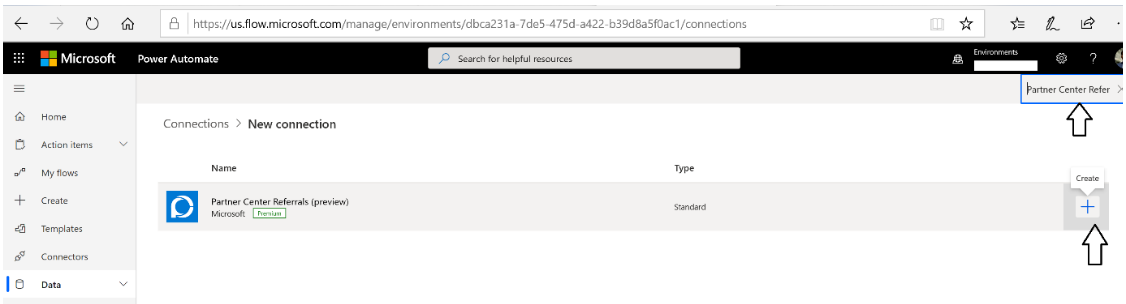
- Install Microsoft Power Automate solution on a staging environment/CRM instance.
- Make a copy of the solution and run your configuration and Power Automate flow customizations on the staging environment.
- Test the solution on a staging/CRM instance.
- On success, import as managed solution to the production instance.

Configure the solution

1. Once you have installed the solution in your CRM instance, navigate back to Power Automate.
2. From the **Environments** drop-down on the right top corner, select the CRM instance where you installed the Power Automate solution.
3. You will need to create connections that associate the three user accounts:
   - Partner Center user with referrals admin credentials
   - Partner Center Events
   - CRM admin with the Power Automate flows in the solution.

   a. Select **Connections** from the left navigation bar and select the "Partner Center Referrals" solution from the list.

   b. Create a connection by clicking **Create a connection**.



   c. Search for **Partner Center Referrals (preview)** in the search bar on the top right corner.

   d. Create a connection for your Partner Center user with the credentials role of Referrals admin.

   e. Next, create a Partner Center Events connection for your Partner Center user with the credentials of Referrals admin.

f. Create a connection for Common Data Service (current environment) for the CRM administrator user.

4. To associate the Power Automate flows with the connections, edit each of the Power Automate flows to connect to Common Data Service and Partner Center Referrals. Save the changes.

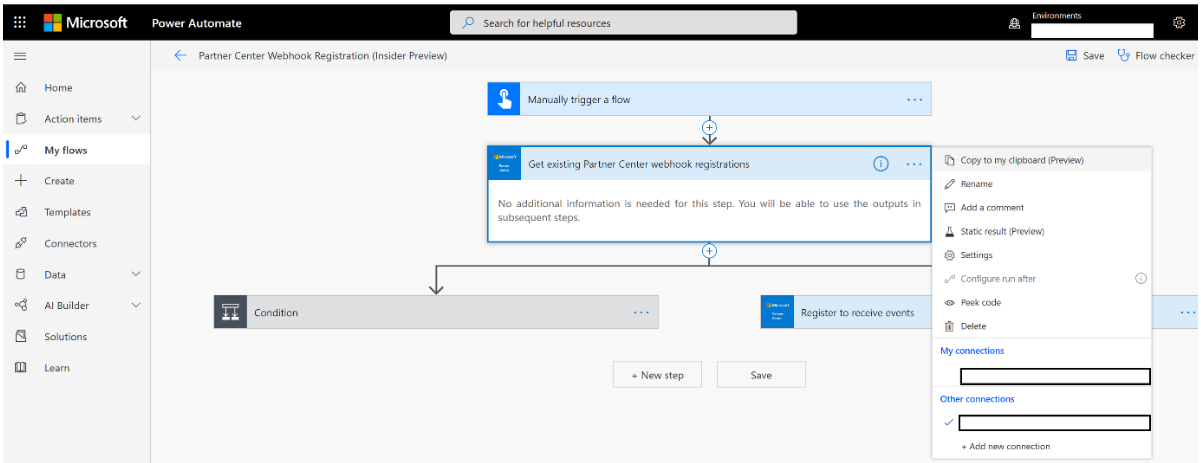
5. **Turn on** the the Power Automate flows.

Use Webhook APIs to register for resource change events

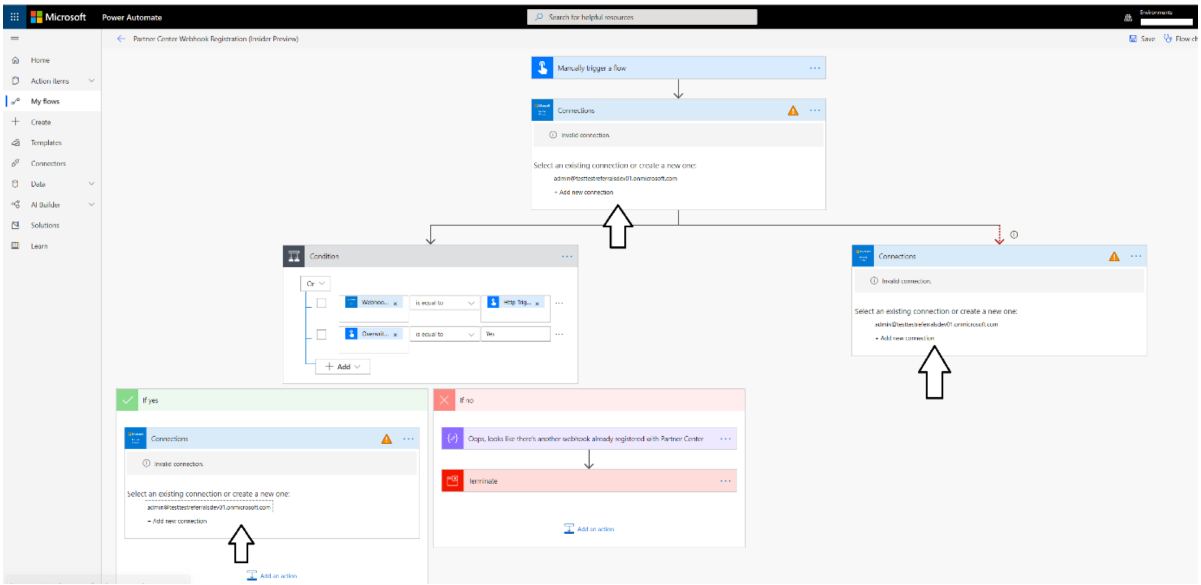
The Partner Center Webhook APIs allow you to register for resource change events. These change events are sent to your url as HTTP posts.

1. To register your url, select **Partner Center Webhook Registration (Insider Preview)** Power Automate flow.

2. Add connections for (a.) Partner Center user with referrals admin credentials (b.) Partner Center Events as highlighted below



3. When you make these updates, you'll see



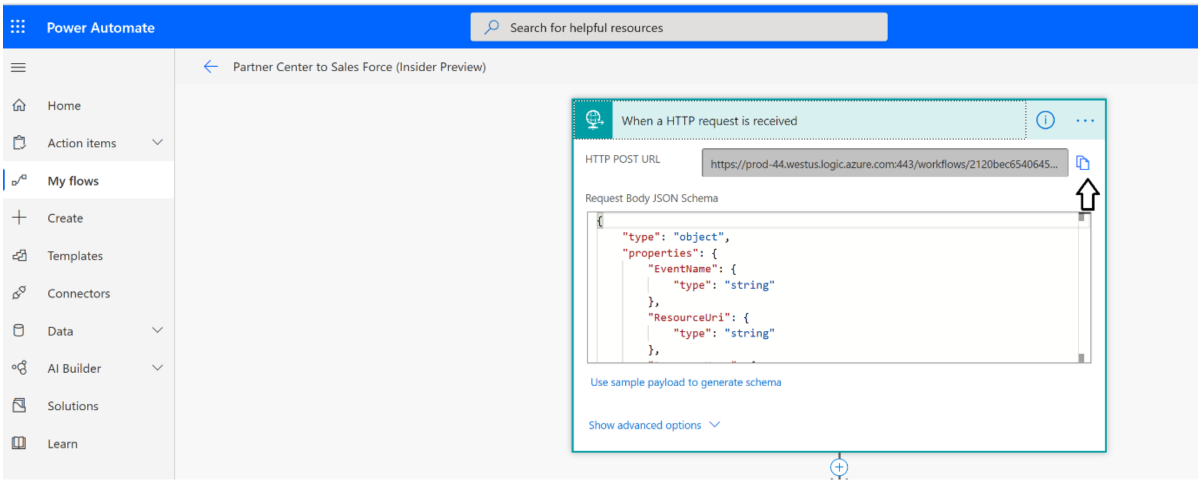
4. Save your changes and select **Turn on**.

   To enable Partner Center webhooks to listen to event changes, perform the following steps:

5. Select **Partner Center to Salesforce CRM (Insider Preview)**.

6. Select the **Edit** icon and select **When a HTTP request is received**.

7. Select the **Copy** icon to copy the provided HTTP POST URL.



8. Now select the "Partner Center Webhook Registration (Insider Preview)" Power Automate flow and select **Run**.

9. Ensure that the "Run Flow" window opens on the right-hand pane and click **Continue**.

10. Enter the following details:

    a. **Http Trigger Endpoint**: URL copied from earlier step

    b. **Events to Register**: "referral-created" and "referral-updated"

    c. **Overwrite existing trigger endpoints if present**: Yes (This overwrites any existing endpoints.)

11. Select **Run** and then select **Done.**

The webhook can now listen to create and update events.

Customize synchronization steps

When Co-sell referrals are synced between Partner Center and your CRM system, the fields that are synced on Partner Center PC are listed here.

Often CRM systems are highly customized. You can customize the Power Automate flows. Follow the field mapping guide, and if necessary, make appropriate changes in the steps of the Power Automate flows. Microsoft Partner Centers to CRM mappings are provided, but based on your CRM environment, you can choose to further customize the fields.

Multiple steps of each of the Power Automate flows can be customized based on your needs. The following are examples of available customizations:

1. To customize the fields for the create or update events in the Partner Center to CRM referral synchronization:

    a. Select Partner Center to Salesforce CRM (Insider Preview).

    b. Select **Edit** to edit/customize the Power Automate flow.

    c. Select **(Scope) Synchronize the lead or opportunity**.

2. To customize CRM field mappings for create events, select **If it's new Shared opportunity, then**. Select the sub-step **if yes** and then expand **Creating a new opportunity in the CRM**. You can edit the mappings in this section using the Field Mapping Guide.

    a. To customize CRM field mappings for update events, click on the step "(Scope) Synchronize the lead or opportunity".

b. Select **If it's an update to an opportunity, then**. Select the substep **if yes** and then expand **If difference between the opportunity objects in Partner Center and CRM, then**.

c. Select **If yes** followed with **Update existing opportunity**

3. To customize the fields for CRM to PC referral synchronization for update events:

   a. Select **Edit** to edit/customize the Power Automate flow.

   b. Select **(Scope) Synchronize the opportunity**.

   c. For customizing CRM field mappings (based on field mappings guide) for update events, select **If there is difference between the lead objects in Partner Center and CRM, then**.

   d. Select the sub-step **if yes** and then expand the step **Update a referral with opportunity data**.

   You can edit the mappings in this section based on the Field Mapping Guide.

4. To customize the fields for CRM to PC referral synchronization for create events?

   a. Select **Edit** to edit/customize the Power Automate flow.

   b. Select **(Scope) Synchronizing Referrals.**

   c. For customizing CRM field mappings (based on field mappings guide) for create events, select **Create Microsoft Referral**.

You can edit the mappings in this section based on the Field Mapping Guide.

Create Separate Section in Salesforce CRM Opportunity Layout

To synchronize the referrals across Partner Center and Salesforce CRM, the Power Automate solution needs to clearly demarcate Microsoft-specific referral fields. This provides your seller teams with the ability to decide which referrals they want to share with Microsoft for co-selling.

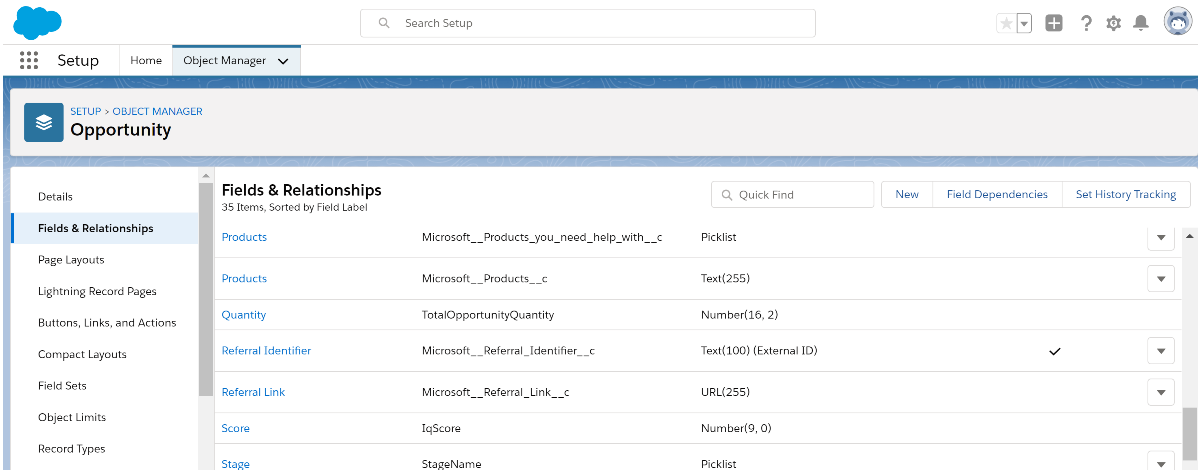
A set of custom fields is available as part of Partner Center Referrals Synchronization for Salesforce CRM **Opportunity** entity. A CRM admin user will need to create a separate CRM section with the **Opportunity** custom fields. Salesforce CRM administrator user will need to create a separate CRM section.

The following custom fields should be part of the CRM section:

- **Sync with Partner Center**: Whether to sync the opportunity with Microsoft Partner Center
- **Referral Identifier**: A read-only identifier field for Microsoft Partner Center referral
- **Referral Link**: A read-only link to the referral in Microsoft Partner Center
- **How can Microsoft help?** Help required from Microsoft for the referral
- **Products**: List of products associated with this opportunity
- **Audit**: A read only audit trail for syncing with Microsoft Partner Center referral

Set up fields and relationships

1. Sign into your Salesforce account and go to **Opportunity**.
2. Click on the **Setup** and **Edit Object** options to add the necessary fields.
3. Select **Fields & Relationships** from the left navigation



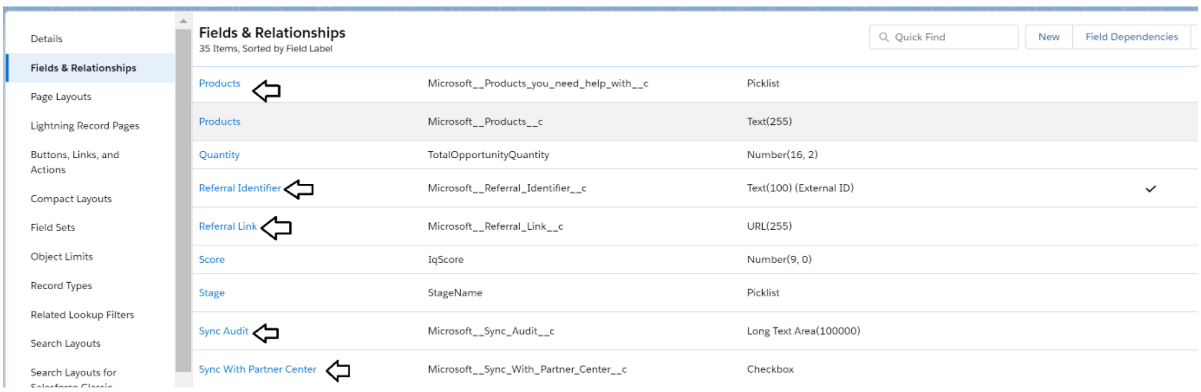
4. Add the following fields in the **Fields & Relationship** table:

FIELD LABEL	FIELD NAME	DATA TYPE	INDEXED
Audit	Audit__c	Long Text Area(100000) (visible line 4)	
How can Microsoft help?	How_can_Microsoft_help_c	Picklist*	
Products	Products_c	text (255)	
Referral	Referral_Identfier_c	Text(100)(External ID)	yes
Referral Link	Referral_Link_c_	URL(255)	
Sync with Partner Center	sync_with_partner_center_c	Checkbox (default unchecked)	

*Picklist values:

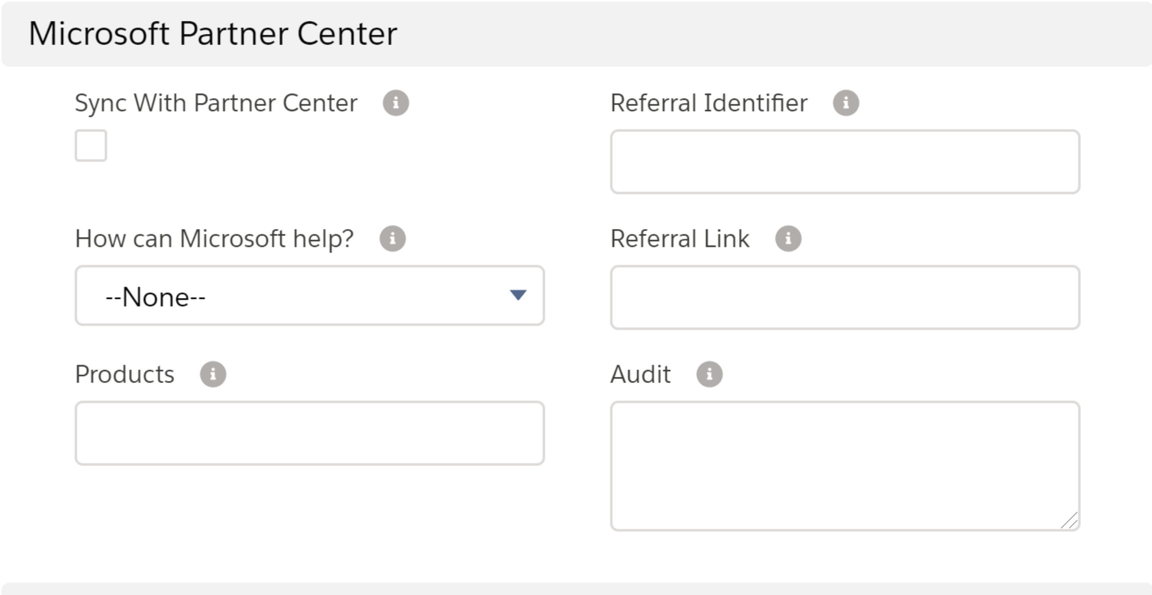
- Workload specific value proposition
- Customer technical architecture
- Proof of concept or demo
- Quotes or licensing
- Post sales customer success
- General or other

5. The fields would get created under **Fields & Relationships**



6. In the Opportunity layout, create a separate section with the fields as listed above.

   - This section should be available for the sellers in the Opportunity layout



End-to-end bi-directional co-sell referral synchronization

Once you have installed, configured, and customized the Power Automate solution, you can test for Co-sell referrals synchronization between Salesforce CRM and Partner Center.

Pre-requisites

To synchronize the referrals across Partner Center and Salesforce CRM, the Power Automate solution needs to clearly demarcate Microsoft-specific referral fields. This identification provides your seller teams with the ability to decide which referrals they want to share with Microsoft for co-selling.

A set of custom fields is available as part of Partner Center Referrals Synchronization for Salesforce CRM solution **Opportunity** entity. A CRM admin user will need to create a separate CRM section with the **Opportunity** custom fields.

The following custom fields should be part of the CRM section:

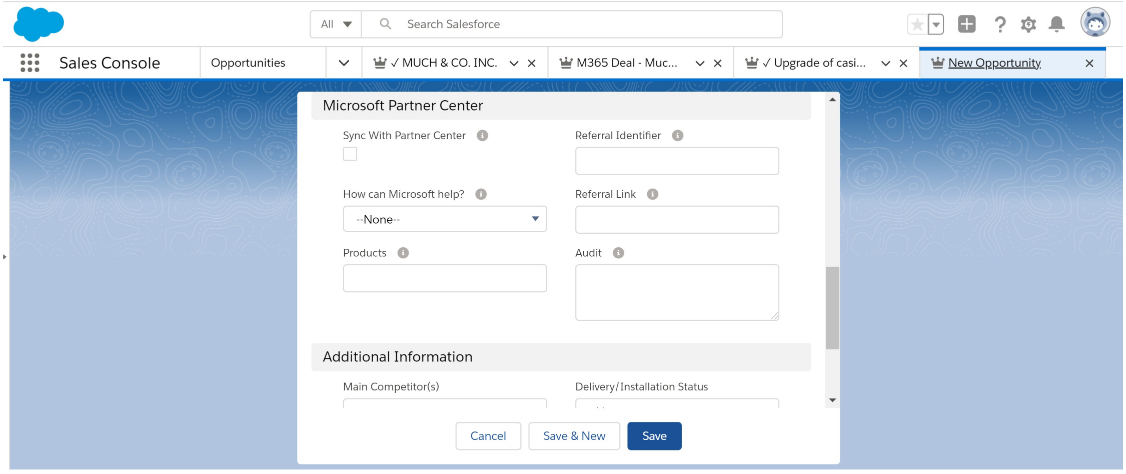
- **Sync with Partner Center**: Whether to sync the opportunity with Microsoft Partner Center
- **Referral Identifier**: A read-only identifier field for Microsoft Partner Center referral
- **Referral Link**: A read-only link to the referral in Microsoft Partner Center
- **How can Microsoft help**: Help required from Microsoft for the referral
- **Products**: List of products associated with this opportunity
- **Audit**: A read-only audit trail for syncing with Partner Center referrals

SCENARIOS:

1. Referral synchronization when referral is created or updated in CRM and synced in Partner Center:

   a. Sign into your Salesforce CRM environment with user who has visibility in the **Opportunity** section of the CRM.

   b. Ensure that the following section is present when you create a "New Opportunity" in Salesforce CRM environment



c. To synchronize this opportunity with Microsoft Partner Center, ensure that you set the following fields in the card view:

- "Sync with Partner Center": Yes
- "How can Microsoft help?": Select from the following options:
- Products: Solution IDs of the product

d. Once you have set the opportunity **Sync with Partner Center** option to **Yes**, wait 10 minutes, sign into your Partner Center account. Your referrals will be synchronized with Salesforce CRM.

e. When the "Sync with Partner Center" option is set to "Yes", if you update the opportunity in Salesforce CRM, the changes will synchronize with your Partner Center account.

f. Opportunities that are synchronized successfully with Partner Center will be identified with ✔ icon in Salesforce CRM.

2. Referral Synchronization when referral is created or updated in Microsoft Partner Center and synchronized in Salesforce CRM environment:

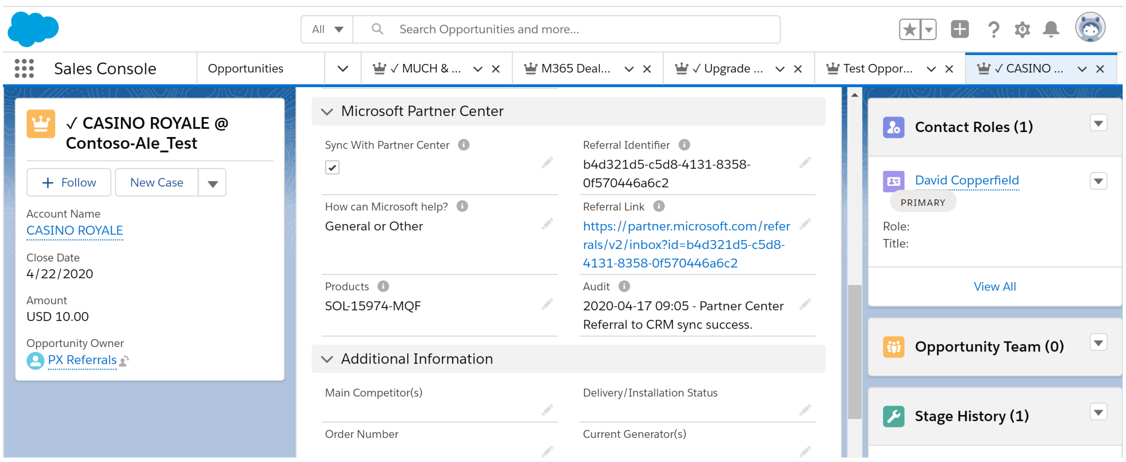
a. Sign into your Partner Center dashboard.

b. Select **Referrals** from the left-hand menu.

c. Create a new Co-sell referral from Partner Center by clicking "New deal" option.

d. Sign into your Salesforce CRM environment.

e. Navigate to **Open Opportunities**. The referral created in Microsoft Partner Center is now synchronized in Salesforce CRM.



f. When you select a synchronized referral, the card view details are populated.

Next steps

- More about Microsoft Power Automate platform?
- Manage leads
- Manage co-sell opportunities
- Partner Center webhooks

Register deals you've won in Partner Center so you can get more opportunities later

6/19/2020 • 3 minutes to read

Applies to

- Partner Center

You can register deals you've won in Partner Center by providing additional information about the contract. This information helps us provide you with more opportunities in the future.

For certain eligible solutions, after you select **Won** in the referral response process, you'll be asked to provide additional information in order to register your deal. Microsoft will review the info you provide and may ask for additional details during the review process.

You can also register new deals you've won that use one of your solutions, even if they didn't originate through a referral.

Register a new deal

To register a new deal, go to **Referrals** > **Deal registrations** > **Action required** and select **+New deal**.

In the **New deal** page, provide the following information.

- **Customer details**: Enter the **Company name** for your customer and select their **Country/Region**. Then enter their **City** and **State/Province**.
- **Solution**: Select the solution that will be used for the deal. If you don't see the right solution listed, contact support.
- **Contract type**: Specify whether this is a **New** contract or a **Renewal** of a previous contract.
- **Total contract value**: The total expected value for the engagement. This should include all software and service fees, but not hardware costs. Be sure to select the appropriate currency.
- **Solution value**: The total value of the cloud solution that will be used for the deal. Be sure to include all costs associated with software and maintenance fees, but don't include reimbursable items, non-recurring customization fees, or directly associated CSP license fees paid by Microsoft.
- **Deployed on**: Select either **Azure** or **Other**.
- **Where will the solution be deployed?**: Select either the **Customer tenant** or the **Partner tenant**.
- **Contract start date**: The date on which the contract will begin.
- **Contract end date**: If the contract will end on a specific date, select **Has an end date** and provide that date. If not, select **Perpetual**.
- **Contract signed date**: The date on which the final contract was signed by your organization and by the customer.
- **Registration contact**: The **First name**, **Last name**, **Phone number**, and **Email** for a person in your organization who we can contact if we need more details about any of the information provided here.

When you have completed all sections of the page, select **Register**. The deal registration will then be moved to the **In progress** page. Microsoft will then review the information you provided.

If a deal originated from a referral and you haven't registered it yet, you'll see the deal listed in the **Action required** page. Deal registrations that were created and registered but require further updates are also shown here. You can use the filters to show only **Incomplete** or **Update required** deal registrations.

Viewing active and closed deal registrations

You can review new, active, and closed deal registrations in the different pages under **Referrals > Deal registration**.

Action required

In the **Referrals > Deal registrations > Action required** page, you'll see new registrations that haven't yet been registered or need an update. You can use the filters to show only **Incomplete** or **Update required** deal registrations. **Incomplete** deal registrations are those which originated from referrals, but haven't been registered yet. **Update required** deal registrations are ones which were created and registered, but which require you to update the information you provided.

In progress

In the **Referrals > Deal registrations > In progress** page, you'll see the deal registrations that Microsoft is reviewing. If we need further information, we'll use the **Registration contact** information that you provided.

If any information needs to be updated, we may move the deal registration into the **Action required** page.

Closed

In the **Referrals > Deal registrations > Closed** page, you'll see the deals which were successfully registered and reviewed by Microsoft. You can use the filters to show only **Approved** or **Declined** deal registrations.

Get referral insights in Partner Center and find out how your referrals are doing

6/19/2020 • 4 minutes to read

Applies to

- Partner Center

The **Referral insights** page in Partner Center lets you see how your referrals are performing. Review these metrics regularly to identify trends or areas that need attention, and start driving towards your business goals.

To see your referral insights data, from the Partner Center menu, go to **Referrals** > **Referral insights**.

Apply filters

Near the top of the **Referral insights** page, you can select the time period for which you want to show data. The default selection is **3M** (3 months), but you can choose to show data for a period of 6 months or 1 year instead. You can also select **Lifetime** to see data for all referrals.

You can also expand Filters to filter all of the data on this page by market, referral direction, referral source, or referral type.

- **Markets**: The default is **All**, but you can limit the data to one or more markets that you select.
- **Referral direction** The default is **All**, but you can choose to limit the data to either **Incoming** referrals (ones that you received) or **Outgoing** referrals (ones that you sent).
- **Referral source**: The default is **All**, but you can choose to limit the data to referrals from one of the following sources:
  - **Direct**: Created directly by a customer.
  - **Marketing qualified**: Created via Microsoft's marketing systems.
  - **Sales qualified**: Created by a Microsoft sales agent.
  - **Unqualified**: A referral that has no quality measure associated.
  - **Referral type**: - The default is **All**, but you can choose to limit the data to either **Independent** referrals (those which you will work directly with the customer to close) or to **Co-sell** referrals (those which include additional parties who will work together to close).

The info in all of the charts listed below will reflect the date range and any filters you've selected, except as noted below. Some sections also allow you to apply additional filters, such as filtering to a specific solution.

Referrals summary

This chart shows an overview of how your referrals are performing. Only the date range filters apply to this chart; any other filters are not applied.

The chart shows the total number of referrals, the number that were won, and the total deal volume (in USD) for the selected time period. Expanding the chart shows additional data such as the breakdown of referral source and referral direction.

The percentage change metrics (shown in red or green, with an arrow indicator) indicate the difference between the last full month in the selected date range and the first full month in that range. For example, say the current date is June 15, and you have selected the **3M** filter to show data for the last three months. In this case, these metrics would show the difference between May (the last full month in the selected time period) and March (the first full month in the selected time period) the date range selected is last **3M**, the comparison would be between the data for May and the data for March.

Performance by solution

This chart lets you see which of your solutions are driving the most referrals and the highest deal volume.

The pie chart shows an all-up view of the top solutions by deal volume for referrals that were won. More details are shown for the four highest-performing solutions during the selected time period. For each of these solutions, you can see the total number of deals won, the average deal size (in USD), the total deal volume (in USD), and the conversion rate (showing the percentage of deals won).

Solution performance breakdown

This chart lets you select one or more of your solutions in order to see more detailed performance data.

For the solutions you select, the chart will show the following:

- At the top of the chart, you'll see total number of deals won, the average deal size (in USD), and the total deal volume (in USD).
- The **Referrals location** section shows the countries/regions where referrals came from, along with details for each country/region.
- The **Referrals trend** section shows a snapshot of referral performance across the selected time period.
- The **Referral status** section shows a visual indicator of the total number of referrals in different stages.
- The **Conversion funnel** section shows a visual indicator of how many referrals have moved from **New** to **Accepted** to **Won**.
- The **Average progression time** section shows the average number of days it has taken for a referral to pass between stages (for example, from **New** to **Accepted**).
- The **Pending referrals** section shows info about referrals that are yet to be accepted or declined, along with a link to **Take action** and accept or decline pending referrals. If there are no pending referrals, no data is shown here.

Solution performance comparison

This chart lets you choose up to three of your solutions to compare their referral performance (number of referrals and number of deals won). If you have three or more solutions, you will see three of them selected here by default. You can select whichever solutions you'd like to compare.

> **NOTE**
>
> The **Referrals insights** page only shows data for referrals generated in Partner Center. It does not show data for referrals generated through Partner Sales Connect or any other mechanisms.

> **TIP**
>
> To see how your business profile is performing in the Find a solution provider experience, review the Business profile insights page.

Analyze your business profile - see how well you attract target customers and potential referrals

6/19/2020 • 2 minutes to read

Applies to

- Partner Center
- Microsoft Partner Network partners
- Cloud Solution Provider program partners

Appropriate roles

- Global admin
- MPN partner admin
- Referral admin
- Business profile admin
- Admin agent
- Sales agent

The **Business profile insights** page in Partner Center lets you see how well you're capturing the attention of your target customers and generating referrals.

To see your referral insights data, from the Partner Center menu, go to **Referrals** > **Business profile insights**. Your data shows profile performance, analyzes trends and identifies areas that require action.

Near the top of the **Business profile insights** page, you can select the time period for which you want to show data. The default selection is **30D** (30 days), but you can choose to show data for a period of 3 or 6 months instead. Data for all regions is included.

After you post your company's business profile, you'll start to see data on how many customers find your profile, how often they click through to learn more, and how often they send you requests for information (RFIs). Use this data when refining your business profiles to generate more leads, and more relevant leads.

The **Profile performance summary** chart includes the following info for the selected time period:

- **Search results**: Info about the search terms that customers are using to find your business profile.
- **Page views**: The total number of times that customers viewed your business profile.
- **Contact clicks**: The total number of times that customers selected your business profile from the Find a solution provider page.
- **Referrals generated**: The total number of referrals sent to you after a customer selected your business profile.

> **TIP**
> As you start to respond to these referrals, be sure to review the Referral insights page to see more details on how your referrals are performing.

Incentives co-op claims overview

6/19/2020 • 2 minutes to read

Applies to

- Partner Center

Appropriate roles

- Incentives admin
- Incentives user

When you participate in one of the Microsoft Incentives programs (such as the Partner Incentives Cooperative Marketing Fund, Online Services Advisor program, or Dynamics ISV program), you claim reimbursements of earned funds for activities you have done that support Microsoft product awareness. You submit a claim directly from the Partner Center. You no longer need to have your activity plan reviewed by Microsoft before submitting a claim. Submit your claim and the required documentation no later than the claim period deadline, which is 45 days after the end of the usage period.

A successful claim includes:

- Documentation that demonstrates you have met the core requirements for the activity
- Invoices from third-party vendors you work with
- Certification Statement and Report (CSRs) for any in-house work completed
- The appropriate documentation (proof of execution) that proves you completed the activity

> **NOTE**
> Microsoft reserves the right to request original proof of execution (POE) documents. Maintain all your original documents for a period of 24 months from the activity date.

TO DO THIS	READ THIS
Submit a claim and include the correct documentation	Create and manage an incentives program activity claim
Once you've submitted the claim, manage additional documentation requests	Create and manage an incentives program activity claim
Make sure you know the core requirements for the activity claim	Know the incentives claims core requirements
Learn the full incentives program details	Partner Incentives Co-op Guidebook
Create a customer association and submit a claim	Create a customer association using the CPOR model

Create and manage an incentives claim

12/3/2019 • 2 minutes to read

Applies to

- Partner Center

Appropriate roles

- Global admin
- Incentives admin
- Incentives user

You can initiate an incentives claim from within Partner Center.

1. From **Incentives** on the Partner Center dashboard, select **Claims**.

2. If you already have a claim in process, the Claims overview page shows information on the status of existing claims and funds approved, claimed, and totals.

3. To create a new claim, select **Create a claim**.

4. When you have filled out the initial form and selected **Create Claim**, you will be taken to the Claim detail page where you will be able to add invoices, CSR's, proof documents, and metrics. You can also add additional information if needed.

The claims details page allows you to request others in your organization to upload documentation to the form. For each of the supporting documents you upload, you can provide explanatory details.

Manage your claims

You can see all the activity that goes into the building of your claim in **History**. Each time a colleague adds a supporting document or comments on something, the action is stored in **History**. Until you submit the claim, the status is **editing**. Your claim's status changes as it moves through the approval process. Sometimes during the reviewing of a claim, you may receive feedback on a specific item in your documentation (POE docs). Feedback and requests for additional information also appear in the claim history.

You can't edit your claim after you submit it unless a reviewer requests additional information.

For more information see Partner Incentives Co-op Guidebook

Core requirements for incentives co-op claims

6/19/2020 • 7 minutes to read

Applies to

- Partner Center

Appropriate roles

- Incentives admin
- Incentives user

Each type of activity that you submit an incentives claim for has core requirements that you need to meet and which you demonstrate in your proof of execution documents. In some cases, there are defined communications types and metrics that are required also.

The following tables outline the core requirements for each of the accepted activities.

Demand generation

Activities include traditional and digital advertising with broad reach that furthers the marketing and promotion of Microsoft offerings. Results and audience size should be measurable.

ACTIVITY	CORE REQUIREMENTS	COMMUNICATION REQUIREMENTS	METRICS	ELIGIBLE EXPENSES
Print advertising	Company brand and contact information, Microsoft content	Copy of final communication piece (based on advertising) showing program-specific core requirements	Estimated customer (or partner) reach	Third-party media placement; printed material; Fee-agency marketing and creative services including agency fees
Digital advertising		Screenshot of digital advertisement AND URL of landing page, showing program-specific core requirements	Summary of results (such as click-through report)	Third-party media placement; Fee - agency: Marketing and creative services, including agency fees

ACTIVITY	CORE REQUIREMENTS	COMMUNICATION REQUIREMENTS	METRICS	ELIGIBLE EXPENSES
Direct mail, email, and sms		1) Copy of final communication piece showing program-specific core requirements 2) Proof of distribution can include postmarked shipping envelope or other proof of mailing (direct mail), final email showing dated header or other proof of emailing (email), or photo of phone message (SMS)	Estimated customer (or partner) reach	•Database acquisition • Printed material • Postage; Fee - agency: Marketing and creative services, including agency fees
Partner website and search engine		URL and/or screenshots of site page(s) showing URL; statement of work or service agreement for SEO project (SEO activity only)	Summary of results (such as click through report)	Fee - agency: Marketing services, including agency fees; Programming/development: Programming and development fees; Fee - SEO: Optimization and maintenance fees
Microsoft syndicated content		URL and/or screenshots of site pages showing URL	Summary of results (such as click-through report)	Actual costs up to USD18,750 per usage period for: fee - agency marketing services, including agency fees; programming and development fees; media placement
Multi-touch digital campaign		All Proof of Execution as detailed in the applicable activity page is required. - Digital Advertising - Direct Email - Partner Website and Search Engine Optimization - Telemarketing		Third-party media placement • Fee - agency: Marketing and creative services, including agency fees; Database acquisition;•Programming/development: Programming and development fees; Fee - SEO: Optimization and maintenance fees; Fee - Third-party call center charges

Market development

Activities include customer recruitment and education, as well as market and business development activities that further the awareness, preference, and sales of Microsoft offerings. Typically, these marketing activities are designed for a specific customer audience.

ACTIVITY	CORE REQUIREMENTS	COMMUNICATIONS REQUIREMENTS	METRICS	ELIGIBLE EXPENSES
Telemarketing and expositions	Company name/brand information must be included in the telesales script, Microsoft content	Copy of script	Summary of results (number of calls and number of successful contacts)	Fee - agency: Marketing services, including agency fees; Fee - Third-party call center: charges; Database acquisition
Customer seminars and bootcamps	Company brand name and contact information, Microsoft content	Event invitation and agenda/program.Event photos. Presentation materials if event invitation and agenda do not meet core requirements	Number of registered guests	Signage / display / printed materials; Giveaways; Fee - agency: Marketing services, including agency fees; Fee - registration; Fee - external speaker; Fee - facility and equipment rental including Surface devices owned and managed by a third party; Catering (excluding alcohol)
Tradeshows and exhibitions	Company brand name and contact information, Microsoft content	Event invitation and agenda/program. Photo showing event participation (for example, photo of booth, photo of presentation, etc.)	Estimated number of attendees or booth visitors	Signage / display / printed materials; Giveaways; Fee - agency: Marketing services, including agency fees; Fee - registration; Fee - external speaker; Fee - facility and equipment rental including Surface devices owned and managed by a third party; Catering (excluding alcohol)
Customer offers	Microsoft content	Show offer with terms and conditions. Actual costs up to 25% total of earned co-op funds per usage period. Surface partners may claim up to 100% of earned co-op funds per usage period for eligible activity expenses.	Summary of results	Signage / display / printed materials; Giveaways; Fee - agency: Marketing services, including agency fees

ACTIVITY	CORE REQUIREMENTS	COMMUNICATIONS REQUIREMENTS	METRICS	ELIGIBLE EXPENSES
Internal incentives and SPIFFs	Company brand name and contact information (internal contest rules will suffice if the company/brand name is included in the communication material, Microsoft content)	Show offer with terms and conditions. Actual costs up to 25% total of earned co-op funds per usage period. Surface partners may claim up to 100% of earned co-op funds per usage period for eligible activity expenses.	Summary of results	Actual costs up to 25% total of earned co-op funds per usage period for: Signage, display, printed materials; Giveaways; Fee - agency: Marketing services, including agency fees; Surface partners may claim up to 100% of earned co-op funds per usage period for eligible activity expenses
On-site Champ	Services focused 100% on Microsoft products	Sample of deliverables (based on what is described in the On-site Champ form)		Actual costs up to 100% for Surface and 50% for all other programs of earned co-op funds per usage period for: Fees - services: Services provided by On-Site Champ resource(s)
Proof of concept	Microsoft content	Copy of materials developed for concept explication or market research data: White paper, case study development, market research, Customer Immersion Experience - Microsoft Customer Immersion Experience (CIE) is an eligible research expense. Eligible service fees can include set-up of a technology demo center and deployment services, including installation, configuration, data migration, testing, or customer-facing system set-up. Programming / development expenses can include API system development.	Printed Materials: Research: White paper, case study development, market research, Customer Immersion Experience; Programming / development; Fee - agency: Marketing services, including agency fees; Fee - service: Labor services provided by partner or third-party vendor in support of the proof of concept	

ACTIVITY	CORE REQUIREMENTS	COMMUNICATIONS REQUIREMENTS	METRICS	ELIGIBLE EXPENSES
Employee purchase web setup for customers		URL landing page or screenshot of website pages. Not eligible for Surface ADD	Fee - agency: Marketing services, including agency fees; Programming/development: Programming and development fees; Fee - service: Labor services provided by partner or third-party vendor in support of the web setup	

Partner readiness

Activities for the partner's internal sales and technical personnel and includes specific expenses related to training that helps develop the partner's sales and technical expertise on Microsoft.

ACTIVITY	CORE REQUIREMENTS	COMMUNICATIONS REQUIREMENTS	METRICS	ELIGIBLE EXPENSES
MPN participation	Original Microsoft invoice			Fee - Annual enrollment: MPN annual registration fees • Plaque and DVD (first set): MPN membership plaque and first set of DVDs • Additional Benefit Toolkit
Microsoft exams and tuition	Course code /exam code on Microsoft Learning	Third-party invoice with course code and date of completion or invoice with exam code and date of completion	Attendee list and per person cost	Fee - exam: Microsoft exam fees for certifications and competencies; Fee - training / tuition: Microsoft tuition fees for certifications and competencies, including on-demand training expenses; third- party ISV solution training - tuition expenses for training on third-party solutions that can be demonstrated to leverage or reside on Microsoft applications and platforms; Fee - MCT renewal: Microsoft Certified Trainer renewal fee (no metric required)

ACTIVITY	CORE REQUIREMENTS	COMMUNICATIONS REQUIREMENTS	METRICS	ELIGIBLE EXPENSES
Internal training and floor days	100% Microsoft content for timeframe of day or event space being claimed	1) Training Agenda or Event Program 2) Microsoft presentation content	Number of attendees	Fee - training / tuition / registration / digital training platform or digital training formatting; Signage / display / printed materials; Giveaways; Fee - agency: marketing services, including agency fees; Fee - external speaker; Fee - facility and equipment rental; Catering (excluding alcohol)
Microsoft hosted conferences	Microsoft-hosted conferences. Airfare/hotel expenses are capped up to USD 5,000 per person per conference, limited to 3 attendees, with a total cap of USD 45,000 for airfare/train fare/hotel expenses per period per program. * Hosting may have different allowances.	Copy of conference/event invitation or registration confirmation showing evidence that conference is hosted by Microsoft; Transportation itinerary with travel dates (Travel - airfare expenses only)		Fee - Registration: for up to 3 attendees per conference; travel - Airfare/Hotel: Transportation (airfare or train fare and applicable taxes) and hotel (room rate only and applicable taxes); Note: Travel - Airfare/hotel expenses are capped up to USD 5,000 per person per conference, limited to 3 attendees, with a total cap of USD 45,000 for airfare/train fare/hotel expenses per period per program. Hosting may have different allowances.
Product seeding/demo units	You can claim up to 10% of total accrued co-op funds or USD 3,000 whichever is greater or per program period. Surface PC & Hub partners have no claims limit.	Systems specifications for demo units built in-house. Proof of delivery for third-party demo unit. Proof of third-party demo unit		

For details, download Partner Incentives Co-op Guidebook (Sign in required)

Access your incentives payouts page

5/5/2020 • 2 minutes to read

Appropriate roles

- Global admin
- User admin
- Incentives admin
- Incentives user
- Sales agent
- MPN partner admin

The payout help information that applies to you depends on which partner program you're working in. To see the page appropriate for you, select the corresponding link below:

- For Windows app and game payments, see Payout summary in the Windows developer documentation.
- For Microsoft Partner Network (MPN) incentive payouts, see View your incentive payments information in the MPN incentives documentation.
- For information about Commercial Marketplace payments for Independent Software Vendors (ISVs), see Commercial marketplace payout summary.

View your incentive payments and programs

3/24/2020 • 9 minutes to read

Applies to

- Partner Center

Appropriate roles

- Incentive administrator
- Incentive user
- Incentive Read-only viewer
- Global admin
- MPN Partner admin

Use these pages to view details of your past, pending, and upcoming payments and earnings, the status of your incentive programs in each location, and your complete transaction history. You can also download or export detailed information for any transaction. All incentives pages show amounts in US dollars.

> **NOTE**
> You'll only see data for MPN IDs and programs that you're associated with. If you want to access additional data, see your Incentives administrator.

Access the incentives pages

You can access incentives information a few ways from the Partner Center dashboard:

- Select **Incentives** from the left-hand menu. Several options appear under **Incentives**, including **Overview**. Explore these options to learn the status of incentive programs, incentive payments, earnings and claims.
- Select the **Money** (Payout) icon in the upper-right corner. You can then select other options, such as **Transaction history**, **Payments**, **Export data** or **Office sales report**.

The following pages are described here:

- My incentives overview page
- Payments page
- Transaction history page
- Export data page and other, associated export pages

> **NOTE**
> For more information about incentives and incentive features in Partner Center, see Partner Investments and Incentives (sign-in required).

My incentives overview page

My incentives overview shows the overall status of your incentive programs, as well as the status of each program at each location. This information includes total incentive earnings and payments since you enrolled in incentive programs.

Also included on this page are earnings and payments by location or program as well as any further actions you might need to take to enroll in a program at a specific location.

To access **My incentives overview**:

1. Sign into the Partner Center dashboard.
2. Select **Incentives**, then **Overview** from the menu.
3. View the earnings and payments summary at the top of the page and further details in the table below. You can also sort, group and expand the accompanying table:
   - To sort by column, select the column name.
   - To group by program, select the **By program** tab above the table.
   - To group by location, select the **By location** tab above the table.
   - To view more detail about enrollments within a specific group, select the chevron symbol at the end of a given row. This expands your view.
4. If further action is required to enroll in a program, this information will appear in the **Status** column. In this case, select the chevron symbol to learn about next steps you need to take.

> **NOTE**
> See the following table to learn more about the different enrollment states shown in the **Status** column.

STATUS	APPEARS WHEN
Action required	The partner has accepted an invitation to enroll in an incentive program but may need to update bank or tax information. See the **Actions required** column for any next steps or links to update your bank or tax information in Partner Center.
Discontinued	The specific incentive program is no longer offered in the incentives system.
Enrolled	All tax and bank information has been validated. No further enrollment action is required by the partner.
Enrolling	The user is not an Incentive Administrator and the enrollment is in the **Action required** or **Validating enrollment** states.
Inactive / Ineligible	The incentive program may not be open to enrollment at this time or the partner does not meet current eligibility for enrollment or re-enrollment. If the status is **Ineligible**, then the partner does not meet the current eligibility requirements for the program; clicking the **See eligibility requirements** link beneath the enrollment status will show the requirements for eligibility and which of these requirements have been met.
Invited	A new incentive program enrollment invitation has been sent to the partner but the partner has not yet started the enrollment process. The adjacent, **Actions required** column shows next steps and any related links.

STATUS	APPEARS WHEN
Validating enrollment	The partner has already completed or updated bank and tax information for a new or existing enrollment and is waiting for Microsoft to validate this information. During the validation process, **Validating enrollment** may appear for up to 48 hours.

Payments page

The totals on this page represent all of the MPN IDs you use. You can filter by Participant ID, Program, Payment ID, and Earning type. Amounts are given in US dollars. The paid value is also displayed in pay to currency.

AREA	DESCRIPTION
Total paid this year	The combined total paid out to you this year, in US dollars, for all of your MPN IDs.
Next estimated payment	The single next payment coming to you (even if there are others coming soon), in US dollars.
Last payment	The amount (in US dollars), program name, and MPN ID of your most recent payment.
Payments by source	Amount of payments, in US dollars, represented by program over the last 12 months.
Payments	Select **Paid** or **Pending** and then sort as you like. For additional details of a specific payment select **View**. To download a copy of the payment remittance statement, select **Download**. Note that transaction history data may take up to 24 hours to appear, so you may not see associated earnings right away.

To export any of the data on this page, select **Export** and then follow directions on the Export data page.

Transaction history page

This page displays all of your individual earnings, including the date, type, and earning for each. You can select a time period to view, and you can also filter by Enrollment ID, Program, Payment ID, Earning type, Lever, and Status. Data is available for the current fiscal year (July 1 - June 30) and the previous two fiscal years.

To see more details about an earning, select the down arrow at the right-hand side of the page. This will display the lever, revenue amount, product, and customer. If for some reason any of this data is unavailable, but you need access to it, contact support. If the earning is the result of an adjustment, and not a transaction, the Product and Customer fields will not be displayed.

To export any of the transaction data on this page, select **Export** and then follow directions on the Export data page. Files exported from the Transaction History page show data in transaction currency, earnings in both transaction currency and US dollars,and the paid value in pay to currency.

Payment status

EARNING STATUS	REASON	PARTNER ACTION REQUIRED?
Unprocessed	The earning is eligible for payment. It stays in this state for a cooling period as defined in the program guide for the Incentive program.	No
Upcoming	Payment order generated pending internal reviews before payment is processed.	No
Pending tax invoice	Your tax invoice is incomplete or invalid.	You need to update your tax invoice before you can be paid
Rejected during review	The payment was rejected during review.	Contact Microsoft support for details
Failed	The payment failed due to a Microsoft system error.	Contact Microsoft support for details
In progress	The payment is in progress.	No
Incorrect payment	The payment recouping is in progress.	No
Sent	The payment has been sent to your bank.	No
Reprocessing	The payment encountered a Microsoft system error and is being reprocessed.	No
Reversed	The payment was reversed by your bank and will be sent again in the next payment cycle.	No
Tax invoice rejected	Your tax invoice was rejected during review. All pending payments will be on hold until the tax invoice review is complete.	Contact Microsoft support for details
Tax invoice under review	Your tax invoice is being reviewed. Your payment will be released once the tax invoice has been approved.	No
Rejected	The payment was rejected by your bank.	Contact your bank for details.

Export data page

Follow the instructions on this page to export the data you want.

Notes:

- You'll only see data for MPN IDs and programs that you're associated with. If you want to access additional data, see your Incentives administrator.
- The Export data page does not refresh on its own. You may need to refresh the page manually to see the most recent data.

- Your filter may result in a **No data available** error. This probably means you've left the default time period selected at three months, and then selected a Payment ID from an earning that's outside of that period. Expand your time period and try again.

Payment download export

This option provides a download of the payments you received in your bank for a given program, the associated tax, and aggregated earning amount.

COLUMN NAME	DESCRIPTION
participantID	The primary identity of the partner earning under the program
participantIDType	Usually MPN for Incentive programs and Seller ID for Store programs
participantName	Name of the earning partner
programName	Incentive/store program name
earned	Amount earned in the Pay To currency for that program/participantID
earnedUSD	Amount earned for the program/participant ID, in USD
withheldTax	Amount of tax withheld in the Pay To currency for the program/participantID
salesTax	Total amount of sales tax in the Pay To currency for the program/participantID
serviceFeeTax	Total amount of serviceFeeTax in Pay To currency for the program/participantID
totalPayment	Total payment in local currency excluding the withholding tax and including the sales tax (if applicable) for the program/participantID
currencyCode	Pay To currency code
paymentMethod	The method used to pay the partner (electronic bank transfer, credit note)
paymentID	Unique identifier for the payment. This number is usually visible in your bank statement.
paymentStatus	Payment status
paymentStatusDescription	Friendly description of payment status
paymentDate	Date payment was sent from Microsoft

Transaction history download export

This option provides a download of each earning line item you see in the Transaction history page, earning type, date, associated transaction amount, customer, product, and other transactional details applicable to the Incentives program.

COLUMN NAME	DESCRIPTION
earningId	Unique identifier for each earning
participantID	The primary identity of the partner earning under the program
participantIDType	Usually MPN for Incentive programs and Seller ID for Store programs
participantName	Name of the earning partner
partnerCountryCode	Location/country of the earning partner
programName	Incentive/store program name
transactionCurrency	Currency in which the original customer transaction occurred
transactionDate	Date of the transaction. Useful for programs where many transactions contribute to one earning.
transactionExchangeRate	Exchange rate date used to show the corresponding USD amount
transactionAmount	Transaction amount in the original transaction currency based on which earning is generated
transactionAmountUSD	Transaction amount in USD
transactionCountryCode	Transaction purchase/sold to country code
lever	Indicates business rule for the earning
earningRate	Incentive rate applied on transaction amount to generate an earning
quantity	This field varies by program. For transactional programs it indicates billed quantity.
earningType	Indicates whether it is a fee, rebate, coop, sell, etc.
earningAmount	Earning amount in the original transaction currency
earningAmountUSD	Earning amount in USD
earningDate	Date of the earning
earningExchangeRate	Exchange rate used to show the corresponding USD amount
exchangeRateDate	Exchange rate date used to calculate EarningAmount USD

COLUMN NAME	DESCRIPTION
paymentId	Unique identifier for the payment. This number is usually visible in your bank statement.
paymentStatus	Payment status
paymentStatusDescription	Friendly description of payment status
customerId	Customer identifier
customerName	Transaction customer name

In addition to the table above, these Transaction history fields will be available as applicable for the program.

COLUMN NAME	DESCRIPTION
partNumber	Part number linked to transaction. Microsoft terminology.
productName	Product family name lined to transaction
invoiceNumber	Invoice number
subscriptionId	Subscription identifier associated with customer
subscriptionStartDate	Subscription start date
subscriptionEndDate	Subscription end date
offerId	TBD
resellerId	Reseller identifier
resellerName	Reseller name
distributorId	Distributor identifier
distributorName	Distributor name
agreementNumber	Agreement number
agreementStartDate	Agreement start date
agreementEndDate	Agreement end date
workload	Workload

Create a customer association via the CPOR model – use for Microsoft 365 and Dynamics 365 customers

6/19/2020 • 2 minutes to read

Applies to

- Partner Center

On October 1, 2019, Microsoft began using the Claiming Partner of Record (CPOR) model to manage the associations you have with your Microsoft 365 and Dynamics 365 customers with regards to the Online Services Advisory (OSA) Sell, Online Services Usage (OSU)-Microsoft 365 and OSU-Business Application incentives.

When you submit your claim, Microsoft validates it. We may ask you for more information at this point. We'll also notify the customer of your association request. Customers have five business days to opt out. If they don't opt out, your association with this specific tenant and workload will be official. At this point you'll have access to the customer's usage data.

You'll need the following information to complete a claim:

- The **MPN ID** for your entity that makes the claim
- Customer's **domain name** Find this
- Customer's **Directory ID** or **Tenant ID** Find this
- The **Solution area**, such as Business Applications or Microsoft 365
- The **Activity** you have performed and the type of claim you want to make, such as Pre-sales, Usage, or Revenue association
- Your customer's **Contact name**, title, and email address
- For Dynamics 365, you also need to provide your customer's **Technical contact** name, title, and email address
- Your own company's **Contact name** and email address
- You'll create a **Name** for this claim
- The **Product(s)** or workload(s) you're claiming
- **Proof of execution (POE)**, such as a statement of work signed by the customer. You can also download a POE template to use.
- For partners claiming revenue association only: **Dynamics solution seller name**, **Customer name**, and **Name of ISV product/solution**.

You should also understand the following points:

- If you have existing Microsoft 365 customers, you'll need to re-associate with those you want to continue to earn OSU incentives by using this process.
- If you have existing associations with Dynamics 365 or Power BI customers, these associations will remain valid, until the expiration of their subscriptions.
- A customer can have multiple partners, but each workload (for OSU-Microsoft 365) or subscription (for

OSA-Sell and OSU-Business Applications) can only be associated with one partner.

Create a customer association

1. In the Partner Center dashboard, under **Incentives**, select **Overview**, and then select **Customer associations**.
2. At the top of the Customer associations page, select **+ Customer association**.
3. Select the **MPN ID** of the partner location to be associated with the customer, and then add the customer's domain name and Directory ID. Where are these?
4. Select **Continue**.
5. Select the **Solution area** and **Activity**.

   > **NOTE**
   >
   > If you select Business Applications, select either **Usage and/or Pre-sales**, or **Revenue association**, and then select **Continue**.

   > If you select Revenue association, you'll be prompted for slightly different information than what's listed below.

6. Enter the appropriate information on the **Associate customer** page, and then select **Create claim**.
7. Select the product(s) associated with this customer association, and then select **Continue**.
8. Complete the customer contact information and your company's contact information. All fields are required.

   > **NOTE**
   >
   > If your product is Dynamics 365, and the product you choose has multiple subscriptions for this particular customer, you'll also need to enter the subscription ID.

9. Supply your proof of execution (POE). You can drag it to the box, browse to your own supporting documentation, or use a template by selecting **Download template**.
10. Add and save comments if you like, and then select **Submit claim**. We'll send an email to the customer requesting approval of your customer association.

> **NOTE**
>
> Once you submit your customer association, you can't edit it.

The status of your customer association appears in the **Status** field.

Select **History** to view the history of a customer association.

Overview: Main billing and tax articles in Partner Center

6/19/2020 • 2 minutes to read

Applies to

- Partner Center
- Partner Center for Microsoft Cloud for US Government

Appropriate roles

- Admin agent
- Billing admin
- Global admin
- Sales agent

TOPIC	DESCRIPTION
Billing basics	Basics of Partner Center billing (including payments, invoices, and reconciliation files).
Types of billing	Explanation of different types of billing in Partner Center.
Monthly and annual billing differences	Explanation of differences between monthly and annual billing frequencies.
Understand your bill	How to read and understand your Partner Center bill.
Free trials	How to offer free trials to your customers and how these trials are billed.
Reconciliation file	How to read and use your reconciliation file for line items.
Common billing scenarios	How to understand common Partner Center billing scenarios (for monthly and annual billing, as well as billing for one-time and recurring purchases).
Tax responsibilities and exemptions	Explanation of your tax responsibilities and tax exemptions for Partner Center sales.
Azure spending budget	How to set an Azure spending budget for your customers.
Non-payment, fraud or misuse	How to manage non-payment, fraud or misuse by your customers in Partner Center.
Request an SLA credit for outages	How to request an SLA credit from Microsoft for your customers when there is a service outage.

If you're looking for Partner Center API billing information and resources, see the developer billing documentation.

Billing overview for CSP program partners working in Partner Center

5/8/2020 • 6 minutes to read

Applies to

- Partner Center
- Partners in the Cloud Solution Provider (CSP) program

Appropriate roles

- Admin agent
- Billing admin
- Global admin
- Helpdesk agent
- Sales agent

Find your bill

To find your bill:

1. Sign in to the Partner Center dashboard.
2. In the left-hand menu, choose **Billing**.
3. On the **Billing** page, you can download your latest bill or download previous bills in the **Billing history** section.

Bill your customers

Microsoft has no requirements or conditions about how you handle your own invoicing.

To determine a customer's usage, see your reconciliation files. You can use the customer name and other relevant fields to determine usage.

Billing types

Billing types in Partner Center include **license-based billing**, **usage-based billing**, and **one-time billing**. For more information, see the full explanation of billing types in Partner Center.

Billing currency

License-based and usage-based billing: You'll be billed for product(s) in the currency of the country or region in which you're located. You're billed the same regardless of the location of the customer to whom you sold the product(s).

One-time billing: Your bill be generated in the context of customer's currency. This means that if you are a partner transacting with customers from different billable currencies, you will receive an invoice for each customer currency type. Read more about onetime and recurring.

Invoices

Your invoice is a summary of all charges for the current billing period. This includes charges across the program, all products, and all customers. For examples of monthly and annual billing scenarios, see common billing scenarios

For usage-based and license-based billing, your invoice is available within two (2) days of your selected billing date in UTC time. For example, if you have a September 12th billing date, the invoice generation process will begin at 12:00AM UTC on the 13th and complete by 12:00AM UTC on the 14th.

For one-time and recurring billing, the billing period is aligned to calendar month and the invoice/reconciliation files will be available no later than 8th of every month. For more information read Azure Plan billing.

Price lists

Price lists are updated monthly. Preview price lists are available one (1) month in advance.

To view price lists:

1. Sign in to the Partner Center dashboard.
2. In the left-hand menu, choose **Sell**, then select **Pricing and offers**.
3. On the **Pricing and offers** page, you can see 6 months of price lists (including the current month) and preview price lists (where applicable).

License-based prices are guaranteed for the term of the subscription, usually 12 months from the purchase date.

Usage-based prices can change on a monthly basis.

Prices for products, services, and software subscriptions are guaranteed through the subscription duration. However, prices may change when you renew.

You'll see **adjustments** and **credits** in arrears on your next billing invoice after the credit or adjustment is applied.

Payment terms

Payment terms are net 60 days. Invoices must be paid by the invoice due date (60 days after the billing date), or your account will be delinquent, which may impact your enrollment in CSP.

You can regain full functionality of your suspended accounts when you pay the past due amount.

Taxes and VAT

You are taxed based on your details (not your customers' details) because the billing relationship is between Microsoft and you. You can submit your tax identifier during the account setup process or through a support request later. You'll see the changes reflected on your next billing cycle.

For **withholding and sales tax exemption**, you must submit tax documentation through a support request. You'll see the changes and appropriate refunds on your next billing cycle. Find out more information on submitting withholding tax.

For **value-added tax (VAT) exemption**, you must submit your VAT ID (validated by Microsoft) through a service request. If the VAT ID is submitted after the account setup (through a support request), your invoices prior to that request will not have a VAT ID stamped on invoice PDF. You'll see the changes on your next billing cycle.

You can find further tax details from your local tax office or tax advisor.

Change billing frequency

Billing frequency is changed at the order level, and once the frequency is changed, the revised billing cycle will be applied to all the subscriptions within that order.

To change the billing frequency of an online service for a customer:

1. Sign in to the Partner Center dashboard.

2. In the left-hand menu, choose **Customers**.
3. Select the customer whose subscription billing frequency you want to change.
4. On the customer's **Subscriptions** page, select the subscription that you want to change.
5. On the **Details** page, under **Billing frequency**, select **Monthly** or **Annual**. You'll see a confirmation page with important information about changing billing frequency, as well as a list of the subscriptions about to be changed.
6. Choose **OK** to make the change (or **Cancel** to undo it).

Adjustments/Credits/Cancellations

Cancellation credits for licensed-based services are pro-rated for unused days for mid-cycle cancellations (as well as license decreases according to this formula:

[ROUND((ROUND(Unit Price * Quantity / Number of days in pro-rated Month, 2) * Number of pro-rated days) / Quantity, 2) * Quantity]

Microsoft does not charge early termination fees for cancellation of license-based services.

Billing rules

There are two types of billing frequencies today: Annual & Monthly.
Metered service rates can change within the invoice cycle.

Annual billing rules

- Subscriptions are annual and auto-renewed.
- Billing is in 12 monthly payments or one annual payment per annual subscription.
- You are billed in advance for the next billing period for license-based services, based on number of licenses at the end of the prior billing period.
- You are billed/credited in arrears for any changes in the number of licenses (pro-rata calculation based on license-days). Pro-rata calculation uses the following formula:
    - [ROUND((ROUND(Unit Price * Quantity / Number of days in pro-rated Month, 2) * Number of pro-rated days) / Quantity, 2) * Quantity]
- Payments are billed for licenses sold, not licenses provisioned

Monthly billing rules

- Subscriptions are month-to-month and automatically renew at the new metered service rates. You're billed each month for the previous month's usage.
- Metered service rates can change within the invoice cycle.
- The invoice you receive will only have the charges that are accrued for that month.

Manage one-time billing

Billing status, invoices, and reconciliation files

To view your current billing status, invoices, and reconciliation files:

1. Sign in to the Partner Center dashboard.
2. On the left-hand menu, choose **Billing**, then select **Recurring and one-time purchases**.
3. On the billing status page, select an invoice or reconciliation file to view more detailed information.

Customer order history

To view a customer's order history:

1. Sign in to the Partner Center dashboard.

2. On the left-hand menu, choose **Customers**.
3. On the **Customers** page, find the customer whose order history you want to view. Select the down arrow to expand the customer's record.
4. Choose **View orders** to display the customer's order history.

Credit notes

You might need to request a credit or rebill for the following reasons:

- You need to make address or purchase order corrections.
- A tax refund was applied after the invoice was generated. You can request a credit or rebill to get the tax refund pulled back into the original invoice. The same is also true for refunds. You can request a credit or rebill of the original invoice, then pull in a refund.

For all one-time and recurring transactions, Microsoft can issue a credit note when you request a credit or rebill. The invoice is canceled when the credit is issued.

Types of billing in Partner Center - includes license-based, usage-based, and one-time billing

6/19/2020 • 2 minutes to read

Applies to

- Partner Center
- Partners in the CSP program

Appropriate roles

- Admin agent
- Billing admin
- Global admin
- Helpdesk agent
- Sales agent

You'll be billed for Partner Center purchases depending on the products, solutions and services you buy on behalf of your customers. The types of billing are as follows:

- License-based billing, where you're billed per license (not by license usage).
- Usage-based billing, where you're billed for monthly usage rates.
- Billing for one-time and select recurring charges, where you pay in advance for a preset term for Microsoft and third-party ISV products.
- Billing for license-based SaaS transactions (see common billing scenarios for SaaS charges).

Depending on the types of products you purchase for your customers, you might have different billing periods and be billed on different days of the same month.

If you've chosen to be billed monthly or if you've bought usage-based products that are billed monthly, your monthly billing date is the day of the month you selected when you created your CSP account on Partner Center. After you've successfully created your CSP account, Microsoft will send a confirmation email that includes your billing date. Once created, this date cannot be changed.

Understand your bill and reconciliation file - learn how to find them in Partner Center

6/19/2020 • 3 minutes to read

Applies to

- Partner Center
- Partner Center for Microsoft Cloud for US Government

Appropriate roles

- Global admin
- Billing admin
- Admin agent

Your **invoice** is a **summary of all your Partner Center charges** (across the program, all products, and all customers).

Invoice types

Microsoft will issue one invoice for any license-based charges (such as Office 365) and usage-based charges (such as Azure) and a separate invoice for one-time charges (such as Azure RI, Marketplace, or Azure plan).

For example,

Scenario 1 [Single Currency]: Partner has purchases for 145P offer and O365 licenses,

- Partner will get one invoice PDF and 2 reconciliation files covering the charges for both O365 and Azure (145p).

Scenario 2 [Single Currency]: Partner has purchases for Azure RI, Marketplace and/or Azure plan along with 145p purchases.

- Partner will get one invoice PDF and a reconciliation file covering the charges for Azure (145p).
- Partner will receive another invoice PDF and a reconciliation file covering their charges for Azure RI, Marketplace, Azure plan.

Scenario 3 [Multi-Currency]: Partner has purchases for Azure RI in DKK and Azure plan in EUR along with 145p purchases in EUR.

- Partner will receive one invoice PDF and a reconciliation file covering the charges for Azure RI in DKK.
- Partner will receive one invoice PDF and a reconciliation file covering the charges for Azure plan in EUR.
- Partner will receive another invoice PDF and a reconciliation file covering their charges for 145p offer in EUR (or partner billing currency).

Find your bill

You can find your invoice on theBillingpage of the dashboard in Partner Center. You can also find your billing history, spending trends, and reconciliation files on this page.

1. Sign in to the Partner Center dashboard.

2. In the left-hand menu, select**Billing**.

3. On theBillingpage, select the invoice you want to download.

You can find a link to your latest invoice at the top of the page underAccount balance as of last invoice date.

You can find previous invoices in theBilling historysection. Choose the appropriate year, then select the drop-down arrow next to the appropriateBilling period. Select the link next toInvoices (.pdf)to download that period's invoice.

Understanding invoice PDF

Invoices for Usage and license-based charges: Invoices for charges for services such as Office 365 and Azure will be available withintwo (2) daysof your selected billing date [UTC].

Invoices for onetime and recurring charges: Invoices for charges for services such as Azure RI, Azure plan, Marketplace will be available not later than 8th of every month.

Below are some of the key fields on the Invoice PDF document –

Invoice number: Unique identifier for the invoice document generated for the respective billing period.

Billing period: This is the period during which you have usages and license-based services.

Invoice date: The billing date or anniversary date on which your invoice is generated each month.

Payment due date: The date by which your payment must be received.

Charges: The amount due in your billing currency for the respective billing period.

Credits: Credits (such as SLA) or adjustments for changes made to subscriptions (for example, seat increases or decreases).

Payment instructions: Description of how to pay your invoice, based on your region. Always be sure to include your invoice number when making a payment.

For a detailed description of all the fields in your invoice file (including fields for one-time charges), seeInvoice file fields.

Understand reconciliation files

Reconciliation files, which provides a drill down/itemized details of your charges, are available to download along with the Invoice PDF. The reconciliation files include customer identifiers and subscription identifiers that you can use to create customer invoices. Please refer to How to use the reconciliation files to get more details on the recon files.

Learn how to read the line items in your Partner Center reconciliation files

6/19/2020 • 2 minutes to read

Applies to:

- Partner Center
- Partner Center for Microsoft Cloud for US Government

You can download your reconciliation files from Partner Center for a detailed, line-item view of each charge in a billing cycle. Line-item details include charges for each customer's subscriptions, and detailed events (such as a mid-term addition of seats to a subscription).

Appropriate roles:

- Billing admin
- Global admin

For information on how to read your **invoice**, see Read your bill.

Understand reconciliation file fields

- License-based reconciliation file fields
- Usage-based reconciliation file fields
- One-time and recurring reconciliation file fields
- Daily-rated usage reconciliation file fields

Understand charge types in reconciliation files

To understand the types of charges in reconciliation files (the **ChargeType** column), see Reconciliation file charge types.

Fix formatting issues

Occasionally, a reconciliation file might contain formatting issues. For example, this issue might occur if the en-US locale is not used.

Follow these steps for fix any formatting issues in your reconciliation files:

1. Open the reconciliation file (in .csv format) in Microsoft Excel.
2. Select the first column in the file.
3. Open the **Convert Text to Columns Wizard**. On the ribbon, select **Data**, then select **Text to Columns**.
4. In the wizard, select **Delimited file type**. Then, select **Next**.
5. In the **Delimiters** field, select **Comma**. (If **Tab** is already selected, you can leave this option selected.) Then, select **Next**.
6. In the **Column data format** field, select **Date:MDY**. Then, select **Next**.
7. In the **Column data format** field, select **Text** for all amount columns. Then, select **Finish**.

Download reconciliation files programmatically

Reconciliation files can be very large and are sometimes difficult to download. To download reconciliation files programmatically, see Get invoice line items.

Map taxes or VAT

To map Taxes or value-added tax (VAT) to your invoice:

- Sum the **Tax** column from the license-based file.
- Sum the **TaxAmount** column from the usage-based file.

Itemize reconciliation files by partner

Partners in the **indirect model** can use these additional fields in both license-based and usage-based reconciliation files to itemize the files by reseller.

MPN ID	DESCRIPTION
MPN ID	The Microsoft Partner Network (MPN) identifier of the Cloud Solution Provider (CSP) partner (direct or indirect).
Reseller MPN ID	The MPN identifier of the reseller of record for the subscription. This field corresponds to the reseller ID listed for the specific subscription in Partner Center. Only appears on reconciliation files for partners in the indirect model.

Reseller MPN ID

If a CSP partner sold the subscription directly to the customer, their **MPN ID** is listed twice, as both the **MPN ID** and the **Reseller MPN ID**.

If a CSP partner has a reseller with no **MPN ID**, this value is set to the partner's **MPN ID** instead.

If the CSP partner removes a **Reseller MPN ID**, this value will be set to *-1*.

To view or update the **Reseller MPN ID**:

1. Sign in to Partner Center.
2. In the Partner Center menu, select **Customers**.
3. Choose the customer from the list.
4. In the customer menu, select **Subscriptions**.
5. Choose the subscription from the list.
6. Select **update** to change the **Reseller (MPN ID)**.

Learn how to read daily-rated usage reconciliation files in Partner Center

6/19/2020 • 3 minutes to read

Applies to

- Partner Center
- Partner Center for Microsoft Cloud for US Government

Appropriate roles

- Admin agent
- Billing admin
- Sales agent
- Helpdesk agent

This topic explains how to read daily-rated usage reconciliation files.

> **NOTE**
> Daily-rated usage normally takes 24 hours to appear in Partner Center or to be accessed through the API.

Fields in daily-rated usage reconciliation files

COLUMN	DESCRIPTION
PartnerId	Partner identifier in GUID format.
PartnerName	Partner name.
CustomerId	Unique Microsoft identifier for the customer in GUID format.
CustomerName	Customer's organization name as reported in Partner Center. *This column is very important for reconciling the invoice with your system information.*
CustomerDomainName	The customer's domain name.
CustomerCountry	The country in which the customer is located.
MpnId	MPN identifier of the CSP partner.
Tier2MpnId	MPN identifier of the reseller of record for the subscription.
InvoiceNumber	Invoice number where the specified transaction appears.
ProductId	The identifier for the product.

COLUMN	DESCRIPTION
SkuId	The identifier for a particular SKU.
AvailabilityId	The identifier for a particular SKU's availability. This shows whether the SKU is available for purchase in the given country, currency, industry segment, etc.
SkuName	The title for a particular SKU.
ProductName	The name of the product.
PublisherName	The name of the publisher.
PublisherId	The identifier of the publisher in GUID format.
SubscriptionDescription	The name of the service offering purchased by the customer, as defined in the price list. (This is an identical field to **OfferName**).
SubscriptionId	Unique identifier for a subscription in the Microsoft billing platform. Not used for reconciliation. *This identifier is not the same as the **Subscription ID** on the partner admin console.*
ChargeStartDate	Start date of the billing cycle (except when presenting dates of previously uncharged latent usage data from the previous billing cycle). The time is always the beginning of the day, 0:00.
ChargeEndDate	End date of billing cycle (except when presenting dates of previously uncharged latent usage data from the previous billing cycle). The time is always the end of the day, 23:59.
UsageDate	Date of service usage.
MeterType	The type of meter.
MeterCategory	The top-level service for the usage.
MeterId	The identifier for the meter being used.
MeterSubCategory	The type of Azure service, which can affect the rate.
MeterName	The unit of measure for the meter being consumed.
MeterRegion	This column identifies the location of a data center within the region for services where this is applicable and populated.
Unit	The unit of the resource **Name**.
ResourceLocation	The data center where the meter is running.
ConsumedService	The Azure platform service that you used.

COLUMN	DESCRIPTION
ResourceGroup	Represents a container that holds related resources for an Azure solution.
ResourceURI	The URI of the resource being used.
ChargeType	The type of charge or adjustment.
UnitPrice	Price per license, as published in the price list at the time of purchase. Make sure this price matches the information stored in your billing system during reconciliation.
Quantity	Number of licenses. Make sure this price matches the information stored in your billing system during reconciliation.
UnitType	The type of unit the meter is charged in.
BillingPreTaxTotal	Total billing amount before taxes.
BillingCurrency	The currency in the customer's geographic region.
PricingPreTaxTotal	The pricing before taxes are added.
PricingCurrency	The currency in the price list.
ServiceInfo1	The number of Service Bus connections that were provisioned and utilized on a given day.
ServiceInfo2	A legacy field that captures optional service-specific metadata.
Tags	Represents a logical organization of Azure resources set by the user.
AdditionalInfo	Any additional information not covered in other columns.
EffectiveUnitPrice	The actual value charged per unit, including any discounts, earned credit, etc.
PCToBCExchangeRate	Exchange rate applied for pricing currency to billing currency.
PCToBCExchangeRateDate	The date on which the pricing currency to the billing currency is determined.
EntitlementId	Represents the Azure Subscription ID.
EntitlementDescription	Represents the name of the Azure Subscription ID.
PartnerEarnedCreditPercentage	Displays the PartnerEarnedCredit for the line item. Earned credit will be either 0 or 15 percent

NOTE

Daily-rated usage normally takes 24 hours to appear in Partner Center or to be accessed through API.

Understand the fields in Partner Center license-based reconciliation files

6/19/2020 • 3 minutes to read

Applies to

- Partner Center
- Partner Center for Microsoft Cloud for US Government

Appropriate roles

- Global admin
- User admin
- Billing admin
- Admin agent

To reconcile your changes against a customer's orders, compare the **Syndication_Partner_Subscription_Number** from the reconciliation file against the **Subscription ID** from Partner Center.

Fields in license-based reconciliation files

COLUMN	DESCRIPTION	SAMPLE VALUE
PartnerId	Unique identifier in GUID format for a specific billing entity. Not required for reconciliation. Same in all rows.	*8ddd03642-test-test-test-46b58d356b4e*
CustomerId	Unique Microsoft identifier for the customer in GUID format.	*12ABCD34-001A-BCD2-987C-3210ABCD5678*
CustomerName	Customer's organization name, as reported in Partner Center. *Very important field for reconciling the invoice with your system information.*	*Test Customer A*
MpnId	MPN identifier of the CSP partner. See how to itemize by partner.	*4390934*
ResellerMpnId	MPN identifier of the reseller of record for the subscription.	
OrderId	Unique identifier for an order in the Microsoft billing platform. May be useful to identify the order when contacting support. Not used for reconciliation.	*566890604832738111*

COLUMN	DESCRIPTION	SAMPLE VALUE
SubscriptionId	Unique identifier for a subscription in the Microsoft billing platform. May be useful to identify the subscription when contacting support. Not used for reconciliation. *This value is not the same as the* ***Subscription ID*** *on the Partner Admin Console. Please see* ***SyndicationPartnerSubscriptionNumber*** *instead.*	*usCBMgAAAAAAAAIA*
SyndicationPartnerSubscriptionNumber	Unique identifier for subscriptions. A customer can have multiple subscriptions for the same plan. This column is important for reconciliation file analysis. This field maps to the **Subscription ID** in the Partner Admin Console.	*fb977ab5-test-test-test-24c8d9591708*
OfferId	Unique offer identifier. Standard offer identifier, as defined in the price list. *This value does not match* ***Offer ID*** *from the price list. See* ***DurableOfferID*** *instead.*	*FE616D64-E9A8-40EF-843F-152E9BBEF3D1*
DurableOfferId	Unique durable offer identifier, as defined in the price list. *This value matches the* ***Offer ID*** *from the price list.*	*1017D7F3-6D7F-4BFA-BDD8-79BC8F104E0C*
OfferName	The name of the service offering purchased by the customer, as defined in the price list.	*Microsoft Office 365 (Plan E3)*
SubscriptionStartDate	The subscription start date. The time is always the beginning of the day, 0:00. This field is set to the day after the order was submitted. Used in conjunction with the **SubscriptionEndDate** to determine: if the customer is still within the first year of the subscription, or if the subscription has been renewed for the following year.	*2/1/2019 0:00*
SubscriptionEndDate	The subscription end date. The time is always the beginning of the day, 0:00. Either *12 months plus* ***x*** *days after the start date* to align with the partner's billing date or *12 months from the renewal date*. At renewal, prices are updated to the current price list. Customer communication may be required in advance of automated renewal.	*2/1/2019 0:00*

COLUMN	DESCRIPTION	SAMPLE VALUE
ChargeStartDate	Start day of the charges. The time is always the beginning of the day, 0:00. Used to calculate daily charges (*pro rata* charges) when a customer changes seat numbers.	*2/1/2019 0:00*
ChargeEndDate	End day of the charges. The time is always the end of the day, 23:59. Used to calculate daily charges (*pro rata* charges) when a customer changes seat numbers.	*2/28/2019 23:59*
ChargeType	The type of charge or adjustment.	See charge types.
UnitPrice	Price per seat, as published in the pricelist at the time of purchase. Be sure this matches the information stored in your billing system during reconciliation.	*6.82*
Quantity	Number of seats. Be sure this matches the information stored in your billing system during reconciliation.	*2*
Amount	Total of price for quantity. Used to check if the amount calculation matches how you calculate this value for your customers.	*13.32*
TotalOtherDiscount	Amount of discount applied to these charges. Product licenses included with a competency or MAPS, or new subscriptions eligible for an incentive, will also contain a discount amount in this column.	*2.32*
Subtotal	Total before tax. Checks if your subtotal matches your expected total, in case of a discount.	*11*
Tax	Tax amount charge. Based on your market's tax rules and specific circumstances.	*0*
TotalForCustomer	Total after tax. Checks if you are charged tax in the invoice.	*11*
Currency	Currency type. Each billing entity has only one currency. Check if it matches your first invoice. Check again after any major billing platform updates.	*EUR*

COLUMN	DESCRIPTION	SAMPLE VALUE
DomainName	Customer's domain name. This field may appear blank until the second billing cycle. *Don't use this field as a unique identifier for the customer. The customer/partner can update the vanity or default domain through the Office 365 portal.*	*example.onmicrosoft.com*
SubscriptionName	Subscription nickname. If no nickname is specified, Partner Center uses the **OfferName**.	*PROJECT ONLINE*
SubscriptionDescription	The name of the service offering purchased by the customer, as defined in the price list. (This is an identical field to **OfferName**.)	*PROJECT ONLINE PREMIUM WITHOUT PROJECT CLIENT*
BillingCycleType	One-time billing frequency.	*Monthly*

Common billing scenarios for CSP program partners working in Partner Center

6/19/2020 • 2 minutes to read

Applies to:

- Cloud Solution Provider (CSP) program billing

Appropriate roles

- Admin agent
- Billing admin
- Helpdesk agent
- Sales agent

These topics explain what you should expect to see on your bill after you add new subscriptions, add new seats, adjust the number of licenses to a subscription, or cancel a subscription. Other Partner Center billing types, such as usage-based and license-based subscriptions, are billed differently.

TYPE OF BILLING	SCENARIOS COVERED
Monthly billing	Adding new subscriptions, changing license quantity, and suspending subscriptions.
Annual billing	Adding new subscriptions, adding licenses before your billing date, change license quantity, and suspending and reactivating subscriptions.
Billing for one-time and select recurring purchases	Purchasing subscriptions, adding more subscriptions, adding and removing seats.
Billing for license-based SaaS subscriptions	Free trials for license-based software as a service (SaaS) subscriptions. Purchasing and canceling custom meter SaaS subscriptions.

Sample monthly billing scenarios for new subscriptions, changing license amounts, or suspensions

6/19/2020 • 3 minutes to read

Appropriate roles

- Admin agent
- Billing admin
- Helpdesk agent
- Sales agent

These example common billing scenarios are applicable if you use monthly billing in Partner Center.

New monthly subscription

Your billing date is the 15th of each month. On January 13 you purchase a new subscription with one license for $4/month and select monthly billing. The January 15th license-based reconciliation file will contain the following billing lines:

CHARGE START DATE	CHARGE END DATE	CHARGE TYPE	UNIT PRICE	QUANTITY	AMOUNT
1/13/2018	2/12/2018	Cycle fee	4.00	1	4.00

The February 15th license-based reconciliation file will contain the following billing line:

CHARGE START DATE	CHARGE END DATE	CHARGE TYPE	UNIT PRICE	QUANTITY	AMOUNT
2/13/2018	3/12/2018	Cycle fee	4.00	1	4.00

Change license quantity

Your billing date is the 15th of each month. On January 13 you purchase a new subscription with one license for $4/month and select monthly billing. The January 15th license-based reconciliation file will contain the following billing lines:

CHARGE START DATE	CHARGE END DATE	CHARGE TYPE	UNIT PRICE	QUANTITY	AMOUNT
1/13/2018	2/12/2018	Cycle fee	4.00	1	4.00

On February 1 you increase your license quantity from one to two. The February 15th license-based reconciliation file will contain the following billing lines:

CHARGE START DATE	CHARGE END DATE	CHARGE TYPE	UNIT PRICE	QUANTITY	AMOUNT
1/13/2018	2/12/2018	Cycle Instance Prorate	-4.00	1	-4.00
1/13/2018	1/31/2018	Cycle Instance Prorate	2.45	1	2.45
2/1/2018	2/12/2018	Cycle Instance Prorate	1.55	2	3.10
2/13/2018	3/12/2018	Cycle Instance Prorate	4.00	2	8.00

The monthly price is 4.00 and there are 31 days in the service period 1/13/2018 – 2/12/2018. This equates to a daily price of 0.129 (4/31).

There are 19 days in the proration period 1/13/2018 – 1/31/2018.

Proration unit price = 2.451 = 19 x 0.129

There are 12 days in the proration period 2/1/2018 – 2/12/2018.

Proration unit price = 1.54 = 12 x 0.129

Suspend before 30 days

Your billing date is the 15th of each month. On January 13 you purchase a new subscription with one license for $4/month and select monthly billing. The January 15th license-based reconciliation file will contain the following billing lines:

CHARGE START DATE	CHARGE END DATE	CHARGE TYPE	UNIT PRICE	QUANTITY	AMOUNT
1/13/2018	2/12/2018	Cycle fee	4.00	1	4.00

On February 1 you suspend a subscription. The February 15th license-based reconciliation file will contain the following billing line:

CHARGE START DATE	CHARGE END DATE	CHARGE TYPE	UNIT PRICE	QUANTITY	AMOUNT
1/13/2018	2/12/2018	Cancel Fee	-4.00	1	-4.00

Suspend after 30 days

Your billing date is the 15th of each month. On January 13 you purchase a new subscription with one license for $4/month and select monthly billing. The January 15th license-based reconciliation file will contain the following billing lines:

CHARGE START DATE	CHARGE END DATE	CHARGE TYPE	UNIT PRICE	QUANTITY	AMOUNT
1/13/2018	2/12/2018	Cycle Fee	4.00	1	4.00

The February 15th license-based reconciliation file will contain the following billing line:

CHARGE START DATE	CHARGE END DATE	CHARGE TYPE	UNIT PRICE	QUANTITY	AMOUNT
2/13/2018	3/12/2018	Cycle Fee	4.00	1	4.00

On March 1 you suspend subscription. The March 15th license-based reconciliation file will contain the following billing line:

CHARGE START DATE	CHARGE END DATE	CHARGE TYPE	UNIT PRICE	QUANTITY	AMOUNT
3/1/2018	3/12/2018	Cancel Fee	-1.72	1	-1.72

The monthly price is 4.00 and there are 28 days in the service period 2/13/2018 – 3/12/2018. This equates to a daily price of 0.143 (4/28).

Unit price = days in service period x daily price x number of licenses.

There are 12 days in the cancellation period 3/1/2018 – 3/12/2018.

Therefore, the unit price = -1.716 (12 x 0.143 x (-1)).

Common annual billing scenarios in Partner Center

6/19/2020 • 4 minutes to read

Appropriate roles

- Admin agent
- Billing admin
- Helpdesk agent
- Sales agent

These example common billing scenarios are applicable if you use annual billing in Partner Center.

New annual subscription

Your billing date is the 15th of each month. On January 13 you purchase a new subscription with one license for $4/month and select annual billing. The January 15th license-based reconciliation file will contain the following billing line:

CHARGE START DATE	CHARGE END DATE	CHARGE TYPE	UNIT PRICE	QUANTITY	AMOUNT
1/13/2018	1/12/2019	Prorate fees when purchase	48.00	1	48.00

Add license after subscription anniversary date but before billing date

You purchase a new subscription on 2/11/17 with one license for $211.20/year. Your subscription anniversary is set as the 11th of each month. The Microsoft billing system creates the following billing lines:

- $211.20 charge for period 2/11/17 – 2/10/18.

On 2/12/17 you purchase a second license. Your billing date is 2/14/17. An invoice and reconciliation file are generated. The reconciliation file will contain the following billing lines:

CHARGE START DATE	CHARGE END DATE	CHARGE TYPE	UNIT PRICE	QUANTITY	AMOUNT
2/11/2017	2/10/2018	Prorate Fees When Purchase	211.20	1	211.20

On your subscription anniversary, 3/11/17, the Microsoft billing system creates the following billing lines for the license increase on 2/12/17:

- $211.20 credit for period 2/11/17 – 2/10/18.
- $0.58 prorated charge per license for 1 license for period 2/11/17 – 2/11/17.
- $15.62 prorated charge per license for 2 licenses for period 2/12/17 – 3/10/2017.
- $195.00 prorated charge per license for 2 licenses for period 3/11/2017 – 2/10/2018.

On 2/11/17 you purchase a subscription. On 2/12/17 you add a license. Your billing date is 2/14/17. On 2/11/18 your subscription renews.

Your next billing date is 3/14/17, and an invoice & reconciliation file are generated. The reconciliation file will contain the following billing lines:

CHARGE START DATE	CHARGE END DATE	CHARGE TYPE	UNIT PRICE	QUANTITY	AMOUNT
2/11/2017	2/10/2018	Cycle Instance Prorate	-211.20	1	-211.20
2/11/2017	2/11/2017	Cycle Instance Prorate	0.58	1	0.58
2/12/2017	3/10/2017	Cycle Instance Prorate	15.62	2	31.25
3/11/2017	2/10/2018	Cycle Instance Prorate	195.00	2	390.00

On 2/11/18 the subscription renews for another 12-month term.

Change license quantity

Your billing date is the 15th of each month. On January 13 you purchase a new subscription with one license for $4/month and select annual billing. The January 15th license-based reconciliation file will contain the following billing line:

CHARGE START DATE	CHARGE END DATE	CHARGE TYPE	UNIT PRICE	QUANTITY	AMOUNT
1/13/2018	1/12/2019	Prorate fees when purchase	48.00	1	48.00

On February 1 you increase your license quantity from one to two. The February 15th license-based reconciliation file will contain the following billing lines:

CHARGE START DATE	CHARGE END DATE	CHARGE TYPE	UNIT PRICE	QUANTITY	AMOUNT
1/13/2018	1/12/2019	Cycle Instance Prorate	-48.00	1	-48.00
1/13/2018	1/31/2018	Cycle Instance Prorate	2.47	1	2.47
2/1/2018	1/12/2019	Cycle Instance Prorate	44.98	2	89.96

Annual price is 48.00 which equates to daily price of 0.13 (48.00/365).

Unit price = days in service period x daily price x number of licenses.

There are 19 days in service period 1/13/2018 – 1/31/2018.

Therefore, unit price = 2.47 (19x0.13x1)

There are 346 days in service period 2/1/2018 – 1/12/2019.

Therefore, unit price = 44.98 (346x0.13x2)

Suspend before 30 days

Your billing date is the 15th of each month. On January 13 you purchase a new subscription with one license for $4/month and select annual billing. The January 15th license-based reconciliation file will contain the following billing line:

CHARGE START DATE	CHARGE END DATE	CHARGE TYPE	UNIT PRICE	QUANTITY	AMOUNT
1/13/2018	1/12/2019	Prorate fees when purchase	48.00	1	48.00

On February 1 you suspend your subscription. The February 15th license-based reconciliation file will contain the following billing line:

CHARGE START DATE	CHARGE END DATE	CHARGE TYPE	UNIT PRICE	QUANTITY	AMOUNT
1/13/2018	1/12/2019	Cancel Fee	-48.00	1	-48.00

Suspend after 30 days

Your billing date is the 15th of each month. On January 13 you purchase a new subscription with one license for $4/month and select annual billing. The January 15th license-based reconciliation file will contain the following billing line:

CHARGE START DATE	CHARGE END DATE	CHARGE TYPE	UNIT PRICE	QUANTITY	AMOUNT
1/13/2018	1/12/2019	Prorate fees when purchase	48.00	1	48.00

The February 15th license-based reconciliation file will not contain any billing lines for this subscription. On March 1 you suspend your subscription. The March 15th license-based reconciliation file will contain the following billing line:

CHARGE START DATE	CHARGE END DATE	CHARGE TYPE	UNIT PRICE	QUANTITY	AMOUNT
3/1/2018	1/12/2019	Cancel Fee	-41.34	1	-41.34

Annual price is 48.00 which equates to daily price of 0.13 (48.00/365).

Unit price = days in service period x daily price x number of licenses.

There are 318 days in service period 3/1/2018 – 1/12/2019.

Therefore, unit price = 41.34 (318x0.13x1). Because this is a credit the unit price is -41.34.

Suspend and reactivate

Your billing date is the 15th of each month. On January 13 you purchase a new subscription with one license for $4/month and select annual billing. The January 15th license-based reconciliation file will contain the following billing line:

CHARGE START DATE	CHARGE END DATE	CHARGE TYPE	UNIT PRICE	QUANTITY	AMOUNT
1/13/2018	1/12/2019	Prorate fees when purchase	48.00	1	48.00

On February 1 you suspend your subscription. The February 15th license-based reconciliation file will contain the following billing line:

CHARGE START DATE	CHARGE END DATE	CHARGE TYPE	UNIT PRICE	QUANTITY	AMOUNT
1/13/2018	1/12/2019	Cancel Fee	-48.00	1	-48.00

On March 1 you reactivate your subscription. The March 15th license-based reconciliation file will contain the following billing line:

CHARGE START DATE	CHARGE END DATE	CHARGE TYPE	UNIT PRICE	QUANTITY	AMOUNT
3/1/2018	1/12/2019	Prorate fees when purchase	41.34	1	41.34

Annual price is 48.00 which equates to daily price of 0.13 (48.00/365).

Unit price = days in service period x daily price x number of licenses.

There are 318 days in service period 3/1/2018 – 1/12/2019.

Therefore, unit price = 41.34 (318x0.13x1).

Partner Center billing scenarios for one-time and select recurring purchases

6/19/2020 • 3 minutes to read

Appropriate roles

- Admin agent
- Billing admin
- Helpdesk agent
- Sales agent

These example common billing scenarios are applicable to one-time and select recurring charges in Partner Center.

Purchase a subscription and add a seat on the same day

In Scenario 1, you purchase a subscription on June 11 at a unit price of $4. Later that same day you purchase another of the same subscription at the same price.

The recon file will include the following:

- $4 bill for service period June 10 – July 9.
- $-4.00 prorated rebill for service period June 11 – June 11. This is the period when you had 1 license. Calculation = (monthly price/total days in service period) x days in prorated service period x number of licenses = (4/30) x 30 x 1 = 4.00.
- $8.00 prorated rebill for service period June 10 – July 9. This is the period when you had 2 licenses. Calculation = (4/30) x 30 x 2 = 8.00.

PURCHASE DATE	CHARGE START	CHARGE END	UNIT PRICE	QUANTITY	AMOUNT	CHARGE TYPE
6/11/2019	6/10/2019	7/09/2019	$4	1	$4	New
6/11/2019	6/10/2019	7/09/2019	$4	1	-$4	addQuantity
6/11/2019	6/10/2019	7/09/2019	$4	2	$8	addQuantity

Purchase a subscription and add more subscriptions later

In Scenario 2, you purchase a subscription on June 11 at a unit price of $4, and on June 12 you purchase another subscription for the same product at the same price.

The recon file will include the following:

- $4 bill for service period June 10 – July 9.
- $-3.87 prorated rebill for service period June 11 – June 12. This is the period when you had 1 license. Calculation = (monthly price/total days in service period) x days in prorated service period x number of licenses = (4/30) x 29 x 1 = 3.87.
- $7.74 prorated rebill for service period June 12 – July 9. This is the period when you had 2 licenses. Calculation = (4/30) x 29 x 2 = 7.74.

PURCHASE DATE	CHARGE START	CHARGE END	UNIT PRICE	QUANTITY	AMOUNT	CHARGE TYPE
6/11/2019 (you have one license)	6/10/2019	7/09/2019	$4	1	$4	New
6/12/2019	6/10/2019	7/09/2019	$4	1	-$3.87	addQuantity
6/12/2019	6/10/2019	7/09/2019	$4	2	$7.74	addQuantity

Purchase a subscription and remove a seat on the same day

In Scenario 3, you purchase two subscriptions for the same product on June 11 at a unit price of $4. Later that same day you remove one of the seats.

The recon file will include the following:

- $8 bill for two licenses for service period June 10 – July 9.
- $-8.00 prorated rebill for service period June 11 – June 11. This is the period when you had 2 licenses. Calculation = (monthly price/total days in service period) x days in prorated service period x number of licenses = (4/30) x 30 x 2 = 8.00.
- $4.00 prorated rebill for service period June 11 – July 9. This is the period when you had 1 license. Calculation = (4/30) x 30 x 1 = 4.00.

PURCHASE DATE	CHARGE START	CHARGE END	UNIT PRICE	QUANTITY	AMOUNT	CHARGE TYPE
6/11/2019	6/10/2019	7/09/2019	$4	2	$8	New
6/11/2019	6/10/2019	7/09/2019	$4	2	-$8	removeQuantity
6/11/2019	6/10/2019	7/09/2019	$4	1	$4	removeQuantity

Purchase a subscription and remove seats later

In Scenario 4, you purchase 2 subscriptions on June 11 at a unit price of $4, and on June 12 you remove one of the seats.

The recon file will include the following:

- $8 bill for service period June 10 – July 9.
- $-7.74 prorated rebill for service period June 11 – June 12. This is the period when you had 2 licenses. Calculation = (monthly price/total days in service period) x days in prorated service period x number of licenses = (4/30) x 29 x 2 = 7.74.
- $3.87 prorated rebill for service period June 12 – July 9. This is the period when you had 1 license. Calculation = (4/30) x 29 x 1 = 3.87.

PURCHASE DATE	CHARGE START	CHARGE END	UNIT PRICE	QUANTITY	AMOUNT	CHARGE TYPE
6/11/2019 (you have 2 licenses)	6/10/2019	7/09/2019	$4	2	$8	New
6/12/2019	6/10/2019	7/09/2019	$4	2	-$7.74	removeQuantity
6/12/2019 (you have 1 license)	6/10/2019	7/09/2019	$4	1	$3.87	removeQuantity

Partner Center billing invoices - learn how to read the billing and one-time charge fields

6/19/2020 • 2 minutes to read

Appropriate roles

- Global admin
- User admin
- Billing admin
- Helpdesk agent

You can use the following tables to understand the fields in Partner Center invoice files.

Invoice file fields

The following fields appear on your invoice files.

FIELD	DEFINITION
US FEIN	Your Federal Employer Identification Number (FEIN). This is your United States federal tax identifier number.
Customer number	Your customer number.
Bill to	The address where we send your invoice. You can change your company name and/or address in your Partner Center billing profile.
License-based charges	The flat monthly or annual charges for your purchased usage-based licenses, billed in advance of the service. This number is the sum of all charges in the **Subtotal** column (column **T**) in your license-based reconciliation file.
Usage-based charges	Your Azure usage. This includes new services or applications enabled and used during the billing period. This number is the sum of all charges in the **PretaxCharges** column (column **Z**) in your usage-based reconciliation file.
Discounts	The discount that the customer receives from subscription's normal price. This number is shown as a *flat amount*, not as a price per unit or license.
Credits	Credits or adjustments for changes made to subscriptions (for example, seat increases or decreases).
Subtotal	Total before taxes and tax-exclusive charges and credits.

FIELD	DEFINITION
Tax	The total tax for your current charges, as totaled in the **Details** section beginning on page 2 of your invoice. This number is the sum of all charges in the **TaxAmount** column (column **AA**) in your usage-based reconciliation file, and the **Tax** column (column **U**) in your license-based reconciliation file.
Other credits	Tax-exclusive credits.
Total current charges	The amount due in your billing currency for the billing period. These charges are due by the payment due date.
Payment instructions	Description of how to pay your invoice, based on your region. *Always be sure to include your invoice number when making a payment.*
Invoice no	The number of your invoice.
Billing period	The monthly period leading up to the invoice date. This is the period during which usage-based services are consumed and license-based services are reconciled for any credit adjustments or changes in license count.
Invoice date	The billing date or anniversary date on which your invoice is generated each month.
Payment terms	The payment term. For one-time purchases this will always be 60 days.
Payment due date	The date by which your payment must be received.
Customer PO	Your purchase number order.
Customer service	The website address where you can access customer service.
Service recipient	The address where the service is being used. (This is the legal company address associated with company vetting.)

One-time charges fields

The following fields only apply to **one-time charges** in Partner Center:

FIELD	DEFINITION
Date	Date of purchase.
Description	Product name.
Quantity	The number of products (such as reservations) purchased.
Unit price	Price per product (such as a reservation).

FIELD	DEFINITION
Discounts	Any applicable discounts.
Pre-tax amount	Sub-total of the purchases before taxes.
Sales tax	Tax amount.
Total	Total amount to be paid.

License-based billing in Partner Center

6/19/2020 • 2 minutes to read

Applies to

- Partner Center
- Partners in the CSP program

Appropriate roles -Global admin

- User admin
- Billing admin
- Admin agent

When you buy products or online services in Partner Center that require **licenses**, you're billed *for each license* that you buy. You're *not billed* by usage for these licenses. (For information on usage-based billing and other billing types, see Types of billing in Partner Center.)

License billing frequency

You can choose to be billed for licenses once a month (**monthly billing**) or once a year (**annual billing**). For more information about **billing frequency**, see Monthly and annual billing differences.

Billing date for licenses

License-based subscriptions are billed in advance on the subscription's **anniversary date**. The anniversary date is the day of the month that you purchased the subscription.

For example:

- If you purchased a **monthly subscription** on January 15, the anniversary date will be the 15th of each month.
- If you purchased an **annual subscription** on January 15, the anniversary date will be January 15 of each year.

License term

All license-based subscriptions have a 12-month paid term, which begins on the purchase date.

License cancellation

You can cancel a license at any point during the license term. However, the month in which you cancel impacts how much credit you will receive for the canceled license.

If you suspend a subscription in month 1, you will be credited 100%.

If you suspend a subscription in months 2-12, you will be credited on a prorated basis.

License renewal

All license-based subscriptions autorenew 12-months after the paid term begins.

Next steps

- Overview of Partner Center billing
- Types of billing in Partner Center
- Monthly and annual billing differences
- Main billing and tax articles

Common billing scenarios for license-based SaaS transactions in Partner Center

6/19/2020 • 2 minutes to read

Appropriate roles

- Admin agent
- Billing admin
- Helpdesk agent
- Sales agent

These example common billing scenarios are applicable to license-based software as a service (SaaS) subscriptions in Partner Center.

Convert a free trial SaaS subscription to a paid subscription

This scenario describes billing for the renewal of a license-based free trial SaaS subscription. The renewal converts the free trial to a paid subscription at the end of the free trial period.

In this example, you purchased a free trial of a license-based SaaS (software as a service) subscription on June 10. This free trial automatically renewed as a paid subscription when the free trial period ends.

The recon files will include the following charges:

PURCHASE DATE	CHARGE START DATE	CHARGE END DATE	UNIT PRICE	UNIT QUANTITY	TOTAL AMOUNT	CHARGE TYPE	SUBSCRIPTION DESCRIPTION
06/10/2019	06/10/2019	07/09/2019	$0	1	$0	New	Free trial
07/10/2019	07/10/2019	08/09/2019	$2	1	$2	Renew	Paid subscription

Cancel a free trial SaaS subscription

TIP

You can cancel a license-based free trial SaaS subscription any time, even during the free trial period.

In this scenario, you purchased a license-based free trial SaaS subscription on July 1, and then canceled it immediately in Partner Center.

The recon file will include the following charges:

PURCHASE DATE	CHARGE START DATE	CHARGE END DATE	UNIT PRICE	UNIT QUANTITY	TOTAL AMOUNT	CHARGE TYPE	SUBSCRIPTION DESCRIPTION
06/10/2019	06/10/2019	07/09/2019	$0	11	$0	New	Free trial

PURCHASE DATE	CHARGE START DATE	CHARGE END DATE	UNIT PRICE	UNIT QUANTITY	TOTAL AMOUNT	CHARGE TYPE	SUBSCRIPTION DESCRIPTION
06/10/2019	06/10/2019	07/09/2019	$0	11	$0	Cancel	Free trial

Convert custom meter SaaS subscription to another SKU

This scenario describes how to convert a custom meter SaaS subscription from one stock keeping unit (SKU) to another SKU for the same product, on the same date.

In this scenario, you purchased one SKU (Silver) under a product and converted it to another available SKU (Bronze) under this product on the same date.

The recon file will include the following charges:

PURCHASE DATE	SKU	CHARGE START DATE	CHARGE END DATE	UNIT PRICE	UNIT QUANTITY	TOTAL AMOUNT	CHARGE TYPE	SUBSCRIPTION DESCRIPTION
06/10/2019	Silver	06/10/2019	06/10/2019	$20	1	$20	New	Custom meter SaaS subscription
06/10/2019	Silver	06/10/2019	06/10/2019	$20	1	-$20	Convert	Prorated rebill for custom meter SaaS subscription
06/10/2019	Bronze	06/10/2019	06/10/2019	$10	1	$10	Convert	Custom meter SaaS subscription

Purchase and cancel a customer meter SaaS subscription on same date

This scenario describes billing for a customer meter SaaS subscription that you purchased and canceled through the Azure portal on the same date.

In this scenario, you purchased a custom meter SaaS subscription on the Azure portal. Then, you canceled the subscription on the same date.

PURCHASE DATE	SKU	CHARGE START DATE	CHARGE END DATE	UNIT PRICE	UNIT QUANTITY	TOTAL AMOUNT	CHARGE TYPE	SUBSCRIPTION DESCRIPTION

PURCHASE DATE	SKU	CHARGE START DATE	CHARGE END DATE	UNIT PRICE	UNIT QUANTITY	TOTAL AMOUNT	CHARGE TYPE	SUBSCRIPTION DESCRIPTION
06/10/2019	Bronze	06/10/2019	06/10/2019	$10	1	$10	New	Custom meter SaaS subscription
06/10/2019	Bronze	06/10/2019	06/10/2019	$10	1	-$10	CancelImmediate	Custom meter SaaS subscription

Read about taxes and tax exemption details by region or country for partners in the CSP program

6/19/2020 • 3 minutes to read

Applies to:

- Partner Center
- Partner Center for Microsoft Cloud for US Government

The Cloud Solution Provider (CSP) program is a sales channel focused on partner resale of products. As a result, Microsoft is not always required to charge sales tax on partner invoices. The rules vary by country and/or region. You can review country-specific and region-specific details for tax exemptions.

Partners should work with their tax advisor to file tax exemptions based on their locations and where their customers are based.

Country and region tax details

Specific tax-related information is available for the following countries and regions: Canada, the European Union, South Africa, Turkey, and the United States. For Taiwan and Korea, see tax receipts details.

If you're in another country or region that charges taxes, see the information for other regions.

For additional questions, request support in Partner Center.

Canada

Most resellers are not exempt from GST/HST/QST. Consult your tax advisor to determine whether you are qualified for exemption, and what documentation you should provide to Microsoft.

For a BC PST Exemption, file a tax exemption as described. Provide your BC PST#, or a completed and signed *Certificate of Exemption General*.

European Union

In the member states of the European Union, partners must provide their valid VAT ID number for reverse charge and proper billing. The VAT number must be accepted as valid.

Microsoft does not support credit and re-bill. Before you sell any subscriptions, you must register your VAT ID number in Partner Center.

South Africa

Microsoft now applies the standard VAT on digital content and services purchased by partners in South Africa. To exclude the VAT from your invoices and manage this yourself, you must update your partner billing profile by sending Microsoft your VAT ID number.

Turkey

Microsoft now applies the standard VAT on digital content and services purchased by partners in Turkey. To exclude the VAT from your invoices and manage this yourself, you must update your partner billing profile by sending Microsoft your VAT ID number.

United States

All resellers in the United States are expected to provide sales tax exemption documentation within 30 days of accepting the Microsoft Reseller Agreement. Each state has different exemption certificates for resale. Please work with your tax advisor to determine what is relevant for your legal address and registered states.

This may include resale exemption certificates that work across multiple states such as the *Streamline Sales and Use Tax Agreement Certificate of Exemption* or the *MTC Uniform Sales & Use Tax Exemption Certificate*.

Other regions

If you are in another country or region that charges taxes, request support in Partner Center for your questions.

Tax receipts and DAF

Tax receipts (for Taiwan or Korea) or DAF generally require two weeks turn-around time after invoice generation.

File tax exemptions

Before you file a tax exemption, find your **Microsoft ID** and **MPN ID** to include in the support ticket:

1. Sign in to the Partner Center dashboard.
2. In the **Settings** menu (gear icon), choose **Partner Settings**.
3. On the **Account settings** page, choose **Organization profile** in the dashboard menu.
4. Note your **Microsoft ID**.
5. On the same page, choose **Partner profile** in the dashboard menu.
6. Note your **MPN ID**.

Then, create a support ticket for Microsoft with your tax exemption information:

1. In the dashboard menu, under **Support**, choose **Partner support requests**.
2. On the **Partner request** page, choose **New request**. (You can also view your open and closed support requests later on this page.)
3. On the **Basics** step, under **CSP - billing and payments**, choose **Select an issue type** and select **Tax exemption request**.
4. On the **Solutions** step, under **Do you need more help?**, choose **Yes**.
5. On the **Details** step, fill out the **Issue details** form. Be sure to:
   - Fill out all required fields.
   - Include your **Microsoft ID** and **MPN ID** in the **Details** field.
   - Include any supporting documentation to your ticket in the attachments field.
6. Choose **Submit** to send in your support request. Microsoft will email you back for more information.

Support

For other questions about tax exemptions and refunds, request support in Partner Center. Please allow two weeks for Microsoft to contact you and resolve the issue.

For other tax-related documentation needs, please also request service in Partner Center.

Company tax information and how to add or submit VAT IDs for Partner Center purchases

5/8/2020 • 2 minutes to read

Applies to

- Partner Center

Appropriate roles

- Global admin
- User admin
- Billing admin
- Admin agent
- Sales agent

Taxes for Partner Center purchases are determined by your business address. Businesses in some countries can provide their value-added tax (VAT) number or local equivalent.

Add your VAT ID

You must be a global admin, billing admin, or admin agent to edit the billing profile.

1. From the **Partner Center dashboard** go to **Settings** and then select **Billing profile**.
2. In the **Financial data** section, select **Update**.
3. In the **Company Tax ID** field, enter your VAT ID number.

Submit VAT ID number

If applicable, follow these steps to send Microsoft your value-added tax (VAT) ID number:

1. Sign in to the Partner Center dashboard.
2. In the **Settings** menu (gear icon), choose **Partner Settings**.
3. On the **Account settings** page, choose **Partner billing profile** on the page menu.
4. In the **Financial data** section, choose **Update**.
5. For **Company Tax ID**, specify your VAT ID number.

Make sure you are credited for withholding tax if you pay a local tax authority instead of Microsoft

6/19/2020 • 3 minutes to read

Applies to:

- Partner Center

Overview

CSP partners in some countries receive invoice amounts that include taxes. Some of these partners pay their local tax authority instead of Microsoft. If you do pay your local tax authority, you need to submit a tax withholding request including your tax certificate to clear the taxed amount from previous invoices. These cleared amounts show as credits in subsequent monthly invoices, so you will no longer owe Microsoft payment for taxes.

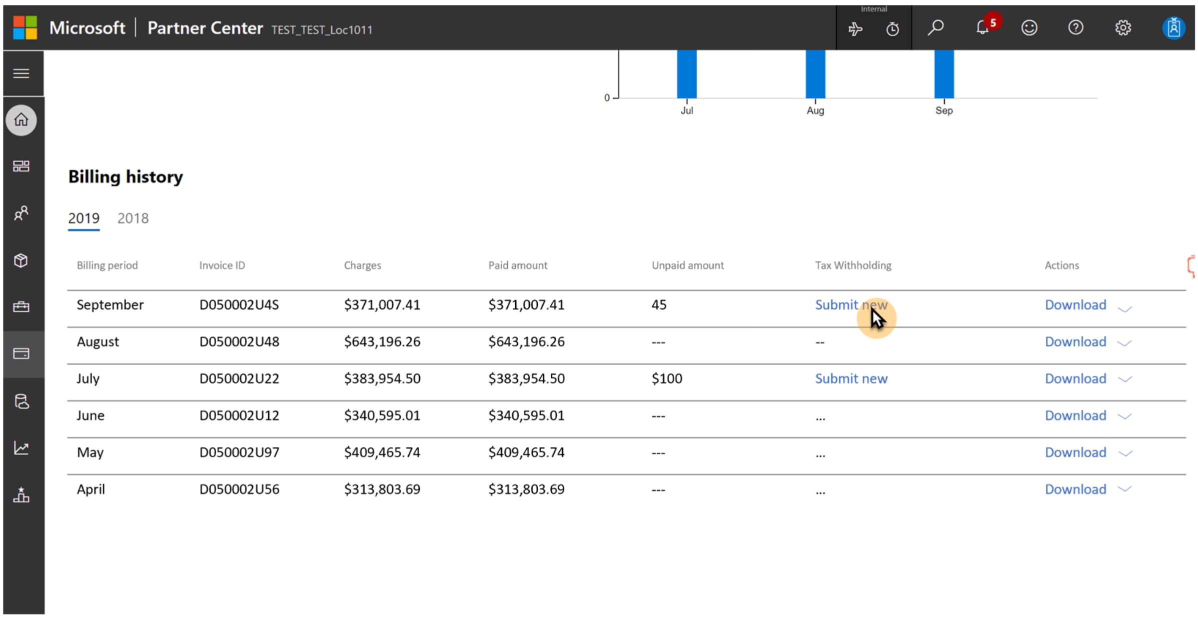
Starting January 2020 CSP partners should submit tax withholding requests on the **Billing page** instead of creating Support Requests.

> **IMPORTANT**
>
> Partners can submit withholding tax requests only for **paid** invoices.

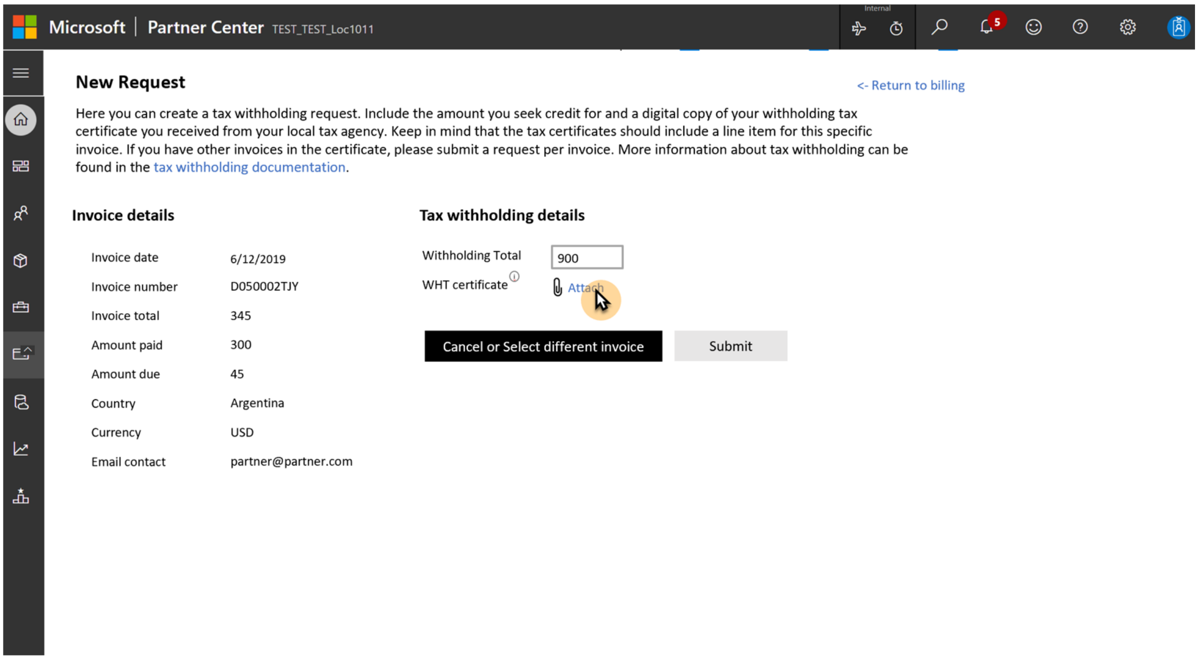
Submit a tax withholding request

Follow these steps to submit a new tax withholding:

1. Sign in to the Partner Center dashboard.
2. In the left-hand menu, choose **Billing** and go to **Billing history**.
3. Click **Submit new** which will take you to the **New tax withholding request** page.



4. Review the invoice details to ensure you are submitting the request for the correct invoice.



5. Enter the "Withholding total" under **Tax withholding details**. The "Withholding total" is the amount you expect to be credited.

6. **Attach** a tax certificate. You will need to include a **digital copy** of your **withholding tax certificate** in your tax withholding request. You received this certificate from your local tax agency when you pay your taxes to your local tax authority. The invoice tax amount in the withholding tax certificate must match total amount in your tax withholding request.

   > **IMPORTANT**
   >
   > The amount totals the partner provides should match the invoice line item from the attached tax certificate. Attached tax certificate files must be in one of the following file formats: .PDF or Image only (.JPEG, .PNG and .GIF). Additionally, files names should not contain spaces or special characters.

7. **Submit** the tax withholding request.

   Once submitted, the request will go into the approval process where it will be approved for completion or sent back to you if corrections are needed. View the request ID and status of your requests and in the **Billing history** where you submitted the new request from.

   If your request is sent back to you, you will be able to change the withholding amount and replace the certificate if there is a problem with it.

Update request and resubmit

The review team may require you to make corrections and resubmit a request before it can be approved. They will change the status to **Pending partner action**. To correct and resubmit the request:

1. Sign in to the Partner Center dashboard.
2. In the left-hand menu, choose **Billing**
3. On the **Billing** page's **Billing history**, find tax withholding request. Requests needing your attention will have a status of "Pending partner action".
4. Click the tax withholding request ID and status taking you to the request's page.
5. Select **Update and resubmit** under **Status**.

6. Review the comments left by the reviewers highlighting what needs to be changed.

7. Make the corrections by either resubmitting an updated certificate or adjust the withholding amounts.

8. **Submit** the request.

This will send the request back to the review team where they will either approve or ask for more changes.

Approved requests

Approved tax withholding requests will be executed against your next invoice, writing off the owed amount. This will show up as a credit on your invoice.

Processing the tax withholding requests should take two days to complete assuming the tax certificate and amount are correct. If there are changes required it will take longer, because of the corrections that need to be made and resubmitted.

If you have questions about the withholding tax credit request process, submit a ticket to Partner Support. You will need the tax withholding request ID to resolve questions.

German tax withholding

Partners who submit German tax withholding requests should remember to mail hard copies of your withholding tax certificate to the following address:

- ATTN: EOC Tax Team Marianne Gannon
- Microsoft EMEA Operations Centre
- One Microsoft Place,
- South County Business Park
- Leopardstown, Dublin 18, Ireland

Office 365 Partner Advisory: Microsoft 365 Business Voice in the CSP program

5/8/2020 • 2 minutes to read

Applies to

- Partner Center

Appropriate roles

- Global admin
- User admin
- Admin agent

Public Switched Telephone Network (PSTN) services in some jurisdictions may be subject to special tax and regulatory requirements that may affect partner order and invoicing. In the United States, including Puerto Rico, PSTN services, which include Audio Conferencing, Calling Plans, and Communication Credits, are subject to special tax and regulatory requirements. In the United States and Puerto Rico, Microsoft prices PSTN services as tax-inclusive. Unique PSTN taxes and regulations will affect Office 365 partners transacting Microsoft 365 Voice products. If a partner marks up the price of a Microsoft PSTN Service, they may be responsible for calculating and remitting PSTN taxes and fees.

Partner Recommendations

Engage your tax and legal counsel to understand your organization's responsibility regarding PSTN services' regulation, taxes and fees, and other potential liabilities.

Invoice Presentation and Partner Reconciliation File

CSP invoices and CSP reconciliation files in the United States, Puerto Rico and Canada which include Skype for Business PSTN and Microsoft 365 Voice services will provide separate line items for the PSTN and non-PSTN components.

Additionally, CSP invoices will display the following footnote:

- The price displayed is a charge for Audio Conferencing and Calling Plan Services. Any applicable transactional taxes are charged exclusively of the amount shown except for sales made within the United States. In the U.S., the price displayed is tax inclusive as it includes a charge for the Calling Plan and Audio Conferencing Services and a charge for the taxes and fees we are required to charge. Audio Conferencing and Calling Plan Services are serviced by the Microsoft Affiliate authorized to provide them. See Microsoft Volume Licensing for details.

Reconciliation File Example

Office 365 Enterprise E5 presents on reconciliation file as two line items with identical names and identical IDs, but each line item has a unique unit price (example: $28.40 and $2.00). This separates the Skype for Business PSTN Conferencing component of the Office 365 offer, so you can correctly apply taxes.

Partner Reconciliation example #1 (select columns):

DURABLE_OFFER_ID	OFFER_NAME	SUBSCRIPTION_START_DATE	SUBSCRIPTION_END_DATE	CHARGE_START_DATE	CHARGE_END_DATE	CHARGE_TYPE	UNIT_PRICE
a044b16a-1861-4308-8086-a3a3b506fac2	Office 365 Enterprise E5	8/10/2019 0:00	8/11/2019 0:00	8/11/2019 0:00	9/10/2019 0:00	Cycle fee	28.40
a044b16a-1861-4308-8086-a3a3b506fac2	Office 365 Enterprise E5	8/10/2019 0:00	8/11/2019 0:00	8/11/2019 0:00	9/10/2019 0:00	Cycle fee	2.00

Partner Reconciliation example #2

Microsoft 365 Business Voice available in Canada has additional PSTN taxable components that are consolidated on CSP Invoice (similar to Office 365 E5, two line items are presented, one for PSTN components and the other for non-PSTN components). The CSP Reconciliation file for Microsoft 365 Business Voice will display all PSTN taxable components individually (individual PSTN components will not be consolidated in .CSV or API tool). The summation of order details and billed amounts for customers found in the reconciliation file will match the CSP Invoice.

Additional Resources

For more details, visit the Microsoft 365 for Partners site.

How and when to request a service-level agreement (SLA) credit from Microsoft

6/19/2020 • 2 minutes to read

You're able to request **service-level agreement (SLA) credits** from Microsoft if a service that you're providing for your customers has an outage.

SLA credit calculation

SLA credits from Microsoft are determined based on which service(s) were impacted. For example, if your customer has an Office 365 suite but only experienced a SharePoint outage, the SLA credit is approved only for SharePoint and not the customer's entire plan.

Credits are pro-rated based on the service affected and the duration of the outage. To see the types of scenarios that qualify for SLA credits, see the Online Services Consolidated SLA document. This information applies to services sold through the Cloud Solution Provider program, too.

Request an SLA credit

The Cloud Solution Provider (CSP) partner must submit the claim and all required information by the end of the calendar month following the month in which the incident occurred. For example, if the incident occurred on February 15th, Microsoft must receive the claim and all required information by March 31st. End customers and indirect resellers can't submit SLA credit claims; either the indirect provider or direct bill partner must submit claims on their behalf.

Required information

Before you submit an SLA credit request to Microsoft, you must gather the following information to include in your support ticket:

- The customer tenant's GUID
- The outage incident identifier?
- Were the impacted subscriptions purchased through CSP? (*yes* or *no*)

Outage incident identifier

You can find the identifier for the outage incident on the **Service Health** page in the Microsoft 365 admin center. The **Outage Incident ID** is a number preceded by a two-letter abbreviation that indicates the affected service (for example, *EX25194* for an Exchange Online outage). The follow table describes common service abbreviations:

TWO-LETTER ABBREVIATION	MICROSOFT SERVICE
EX	Exchange Online
FO	Exchange Online Protection
SB	Skype for Business Online (formerly Lync Online)
OS	Office Subscription
PB	Power BI for Office 365

TWO-LETTER ABBREVIATION	MICROSOFT SERVICE
SP	SharePoint Online
YA	Yammer Enterprise
MO	Portal error

Submit SLA credit request

To submit your SLA credit request to Microsoft through the Partner Center dashboard:

1. Sign in to the Partner Center dashboard.
2. In the left-hand menu, choose **Service requests**, then select **Partner support requests**.
3. On the **Partner request** page, choose **New request**.
4. On the **Start the request** page, find the section **CSP - customers, orders and subscriptions**. In this section, choose **Select an issue type**, then select **Customer services credit requests**.
5. On the **Recommended solutions** page, under **Do you need more help?**, choose **Yes**.
6. On the **Details** page, fill out the **Issue details** section. In the **Details** text box, be sure to enter the required information that you gathered earlier.
7. Choose **Submit** to send in your SLA credit request.

Set, check, or remove monthly Azure spending budgets for customers in Partner Center

6/19/2020 • 3 minutes to read

Applies to:

- Partner Center
- Partner Center for Microsoft Cloud for US Government

You can set a monthly Azure spending budget for your customers in Partner Center. This helps your customers manage their Azure spending. This option allows you to compare your customers' Azure spending to the budget during the month. It also helps your customers to budget their Azure spending so their monthly bill isn't higher than they anticipate.

> **NOTE**
> This feature is not available in sandbox or Test in Production (TIP) accounts.

After you set an Azure spending budget for your customer(s), you can also review customer usage in the following ways. These options may help you spot misconfigured services or unusual trends that might suggest fraud. You can then work with your customer(s) to identify the root cause and manage costs. If necessary, you can also change the customer's budget to a higher amount.

- Check current Azure spending
- Turn on email notifications for when a customer's spending is nearing their budget limit
- View itemized costs by service for usage-based subscriptions

You can also remove an Azure spending budget for customer(s) at any time.

Azure spending data

The Azure spending data is an *estimate* and *actual billing amounts may vary*. The data's value *doesn't reflect* taxes, credits, adjustments, or other charges that may apply.

The spending data is *refreshed once per day*. Your customers can continue to use (and be charged for) Azure services and resources, unless you change their account settings in the Azure portal.

Set Azure spending budget

You can *set a monthly Azure spending budget* for multiple customers in Partner Center:

1. Sign in to the Partner Center dashboard.
2. In the left-hand menu under **CSP**, choose **Azure spending**.
3. On the **Azure spending** page, under **Customers with Microsoft Azure subscriptions**, select the customer(s) for whom you want to set a budget.
4. Enter a value for **Monthly budget**.
5. Choose **Apply** to save your changes.

You can also *set a budget for an individual customer* in their subscription settings:

1. Sign in to the Partner Center dashboard.
2. In the left-hand menu under **CSP**, choose **Customers**.
3. On the **Customers** page, select the customer's **Company name**.
4. On the customer's **Subscriptions** page, under **Usage-based subscription**, choose **Change budget**.
5. Enter a value for the budget.
6. Choose **Apply** to save your changes.

Remove Azure spending budget

You can *remove a monthly Azure spending budget* for your customer(s) in Partner Center:

1. Sign in to the Partner Center dashboard.
2. In the left-hand menu under **CSP**, choose **Azure spending**.
3. On the **Azure spending** page, under **Customers with Microsoft Azure subscriptions**, select the customer(s) whose budget you want to remove.
4. Choose **Remove budget**.

Check current Azure spending

You can *track your customers' current Azure spending and monthly budgets* at any time:

1. Sign in to the Partner Center dashboard.
2. In the left-hand menu under **CSP**, choose **Azure spending**.
3. On the **Azure spending** page, under **Customers with Microsoft Azure subscriptions**, you can see an overview of customers' monthly budgets, current spending estimates and percentage of budget used.

Notifications for budget limits

You can *turn on email notifications* for when your customer's monthly spending is nearing their budget limit. When you turn on this option, you will be notified when customers use 80% or more of their monthly budget. This option helps you can keep an eye on your Azure bill. To configure email notifications:

1. Sign in to Partner Center.
2. In the left-hand menu under **CSP**, choose **Azure spending**.
3. On the **Azure spending** page, under **Email notifications**, toggle the **Get emails** setting to **On**.
4. Choose **Change email address** to see the email address for notifications.
5. If the email address *isn't correct*, enter the correct email address and choose **Update**. If the email address *is correct*, choose **Cancel**.

Itemized costs by service

You can *view itemized costs (and estimated usage) by service for usage-based subscriptions*:

1. Sign in to Partner Center.
2. In the left-hand menu under **CSP**, choose **Customers**.

3. On the **Customers** page, select the customer's **Company name**.
4. On the customer's **Subscriptions** page, under **Usage-based subscriptions**, select the name of the **Subscription**.
5. On the subscription's page, you can review the **Itemized costs** by service, and the **Estimated usage** for the current month.

Managing non-payment, fraud, or misuse in Partner Center

6/19/2020 • 2 minutes to read

Applies to:

- Partner Center
- Partner Center for Microsoft Cloud for US Government

Appropriate roles

- Global admin
- User admin
- Admin agent
- Billing admin

You are financially responsible for fraudulent purchases by your customers and/or customers' non-payment of purchased services. Therefore, *we strongly recommend that you put in place fraud prevention and detection risk mitigation controls*.

To avoid and/or address fraudulent activity or misuse, it's important to understand potential risks and to develop policies and practices that can reduce your exposure.

Enforcement of Microsoft Acceptable Use Policy

If Microsoft detects partner or customer activity that we confirm or suspect violates the Acceptable Use Policy, we will take enforcement steps. The customer could be immediately suspended. You'll be notified of enforcement actions or updated on your requests by Microsoft.

Abuse of service risks

Abuse of service risks means customers who use cloud services in violation of Microsoft's Acceptable Use Policy.

Examples of abuse of service

Examples of these violations of Microsoft's acceptable use policy can include:

- Spamming
- Hacking
- Distributed denial-of-service (DDoS) attacks
- Bitcoin mining
- Malware distribution
- Resale of pirated subscriptions

Theft of service risks

Theft of service risks means customers who have no intention of paying for consumed services. This theft may involve using stolen payment instruments, providing false billing information, and/or defaulting on outstanding balances.

Examples of service theft

Examples of these online transaction risks can include:

- Transactions that don't occur in person ("credit card not present" transactions)
- Misrepresented identities
- Services provisioned and used before initial payment is received
- Emerging markets and/or high-risk regions for online fraud
- Automate account creation and purchasing by bad actors

Managing online risk

You can use the following recommendations to help you develop policies and practices to reduce your exposure to online transaction risks in the lifecycle of your customer relationships.

Onboarding new customers

Suggestions for reducing online risks when onboarding new customers include:

- Establish personal relationships with customers when possible (for example, contacting customers by phone).
- Verify customers' credentials and background through better methods (such as using credit bureaus or business commercial report agencies).
- Use multi-factor authentication (such as SMS verification) during sign-up to minimize exposure to robotic account creation and purchasing.
- Manage and track identities using services (such as digital identity services).
- Assess customer financial strength through rigorous credit card fraud detection systems.
- Establish a clear collections policy. Detail your collections process and when access to subscriptions will be impacted by non-payment. (You can disable access or suspend a customer's subscriptions for non-payment.)

Managing customer accounts

Suggestions for managing customer accounts post-purchase include:

- Implement a process to quickly receive, review, act on, and respond to Microsoft notifications.
- Work with customers to understand their cloud usage business needs while settings appropriate monitoring thresholds. (For example, you can set a monthly Azure spending budget in Partner Center. This allows you to monitor customer usage during the month and be notified when customers are close to their budget.)
- Monitor customer activity logs regularly to help detect fraud early.
- Take quick action when suspicious activities are detected.
- Avoid giving customers full administrative access to subscriptions without first implementing risk mitigation controls.

Managing customer billing

Suggestions for managing customer billing post-purchase include:

- Request prepayments prior to initial transactions and billing .
- Don't accept high-risk payment instruments (such as pre-paid cards or stored-value cards).
- Monitor customer payments and aging accounts receivables. Aggressively enforce standardized dunning processes for late payments or non-payment.

For more detailed strategies for mitigating online risk, see the Online transaction risk management guide.

Manage unallocated payments on your Partner Center Billing page

6/19/2020 • 2 minutes to read

Applies to

- Partner Center

Occasionally you may see an unallocated payment on your Billing page. An unallocated payment is a payment you've made to Microsoft which you haven't applied to a specific invoice.

To view your unallocated payments

1. Sign in to the Partner Center dashboard.
2. In the left-hand menu, choose **Billing**.
3. On the Billing page, find the **Unallocated payment** section.

To apply this amount to a particular invoice, email bposcapp@microsoft.com and tell us which invoice to apply this payment to. Be sure to include all of the information you would if you were making a payment. Your Billing page will be updated in 5-6 days.

Unallocated payments remain unallocated until you assign them to an invoice.

Customer account setup and management for reseller partners in Partner Center

6/19/2020 • 2 minutes to read

Applies to

- Partner Center
- Partner Center for Microsoft Cloud for US Government

Appropriate roles

- Global admin
- Admin agent
- Sales agent
- Helpdesk agent

As a reseller partner, you should make an account for each of your customers in the Partner Center. The customer account will be your starting point for selling subscriptions, billing, and providing support. You need to make a Partner Center account for each of your customers including customers you had prior to moving onto the Partner Center.

Resources for working with your customers on the Partner Center

TO DO THIS	READ THIS TO LEARN HOW	APPLIES TO
Get new customers	Indirect resellers connect with indirect providers who will refer you to customers. You should make sure your business profile is up-to-date, too. When you and a customer have agreed to work together, add them to your account. Direct partners should read Request a relationship with a customer.	CSP partners
Add existing customers to your account	Customers you transact with on other portals such as Office 365 will appear in your customer list on the Partner Center. You will need to establish reseller relationships with other existing customers. To do so, you email them an invitation to connect with you on the Partner Center.	CSP partners
End or reinstate a customer relationship	Add or remove customers or end a customer relationship.	CSP partners
Allow customers to buy their own services	Give customers permission to buy their own products or services, such as buying their own Azure reservations from a prior subscription you have purchased for them.	CSP partners

How to add a new customer record in Partner Center

6/19/2020 • 2 minutes to read

Applies to

- Partner Center
- Partner Center for Microsoft Cloud for US Government
- Cloud Solution Provider program partners

Appropriate roles

- Global admin
- User management admin
- Admin agent
- Sales agent

This article tells how to add a new customer to your list of customers in Partner Center. Follow these steps before you can sell subscriptions, manage billing, or provide support to a customer.

> **NOTE**
>
> For existing customers, including those who already have customer records in Partner Center through a multi-channel or Multipartner scenario, you can Request a relationship with them, instead of following the steps here.

To add a new customer in Partner Center

1. Select **Customers** from the Partner Center menu, and then select **Add customer**.

2. On the **Account info** page, enter the customer's details and primary contact information. Verify as well that the customer has accepted and signed the latest Microsoft Customer Agreement.

   > **NOTE**
   >
   > To ensure accuracy during customer verification, please ensure that you:
   >
   > - Use exact legal/official name as it appears in the official documents
   > - Avoid using acronyms or short forms
   > - Do not use test names
   > - Provide complete, exact address (location details, city, state, country, and postal/zip code)

   > **IMPORTANT**
   >
   > On October 1st, 2019, Microsoft introduced the **Microsoft Customer Agreement** to the CSP program to replace the Microsoft Cloud Agreement. Read about the Microsoft Customer Agreement and how to confirm consent

3. If you're an indirect provider, select the indirect reseller you want to associate with this customer's subscriptions from the list.

4. Select **Next: Subscriptions** when you're finished entering all required information.

5. On the **Subscriptions** page, select the offer(s) your customer wants to buy from you, enter the number of licenses, and then select **Next: Review**.

6. On the **Review** page, check your entries for accuracy and then select **Submit** if the information is correct.

> **NOTE**
>
> If you need to change any customer details, select **Update** in the **Account info** section. If you need to change the offers you selected, select **Update** in the **Subscriptions** section.

7. Select **Done** when you've finished adding the customer information and purchased the required subscriptions.

Next steps

- For more information about what you can sell to customers through the Cloud Solution Provider program, see Partner offers in the Cloud Solution Provider program.
- For more information about associating a new customer to your partner account, see Connect with customers.

Find your customer's domain name and directory ID

12/3/2019 • 2 minutes to read

Applies to

- Partner Center

Appropriate roles

- Admin agent
- Incentives admin
- Incentives user
- Global admin
- Sales agent

1. Ask your customer to open the Microsoft Azure portal and select **Azure Active Directory**.
2. In your customer's **Overview** section, the domain name appears directly above the company name.
3. Select **Manage**, and then **Properties** to display the company's Directory ID.

How to request a reseller relationship from a customer in Partner Center

6/19/2020 • 2 minutes to read

Applies to

- Partner Center

If you want to manage a customer's service or subscription on their behalf, the customer must grant you administrator permissions for that service or subscription and sign the Microsoft Customer Agreement.

If you want to establish a reseller relationship with a customer and manage only the Azure subscriptions that you provision, it is not necessary to obtain administrator permissions.

> **NOTE**
> The option to not request permissions is not available to partners operating in Microsoft Cloud for US Government or Microsoft Cloud Germany. To learn more, see Customers delegate administration privileges to partners.

Invite a customer to establish a reseller relationship with you

You can request a reseller relationship with a customer from within your country or your same region.

1. Select **Customers** from your **Partner Center** menu and then select **Request a reseller relationship**.

2. To request administrator permissions from this customer, select **Include delegated administration privileges for Azure Active Directory and Office 365**. To establish the relationship without requesting administrator permissions, clear this option.

3. On the next page, review the draft email message. You can open the draft message in your default email application or you can copy the message to your clipboard and paste it into an email.

   You can edit the text in the email, but be sure to include the link as it is personalized to link the customer directly to your account. Select **Done** when you've completed this step.

4. Send the email to your customer.

5. After the customer accepts your invitation, they'll appear on your **Customers** page, and you'll be able to provision and manage the service for the customer from there.

   > **NOTE**
   > If the customer has not already accepted the Microsoft Customer Agreement, they will be prompted to do so when they accept your invitation.

6. To manage the customer's account, services, users, and licenses, expand the customer's record by selecting the down arrow near their name.

> **IMPORTANT**
>
> Customers can reassign or remove administrator permissions in a service's admin portal. However, unless and until you renegotiate your agreement with the customer, you continue to be responsible for providing customer support and adhering to the terms of the Microsoft Partner Agreement, even after a customer reassigns or removes administrator permissions. In this situation, if the customer requires help, you can call Microsoft support to open a service request on behalf of the customer.

Changes to the customer invitation experience

The customer experience for accepting a reseller relationship invitation from a Cloud Solution Provider partner is hosted by different customer-facing portals. The portal location depends on whether a customer is in a Microsoft public cloud or national cloud:

TYPES OF CLOUD CUSTOMERS	WHERE DOES A CUSTOMER ACCEPT A RESELLER RELATIONSHIP INVITATION?
Customers in Public Cloud	Microsoft 365 Admin Center
Customers in Partner Center for Microsoft Cloud Germany	Microsoft Office Admin Portal
Customers in Partner Center for Microsoft Cloud for US Government	Microsoft Office Admin Portal

Next steps

- Assign support contacts
- Remove a relationship with a customer

How to remove a reseller relationship with a customer in Partner Center

6/19/2020 • 2 minutes to read

Applies to

- Partner Center

This article describes how to remove a reseller relationship with a customer in Partner Center.

Direct partners: if you're no longer transacting with a customer, you can remove the relationship in Partner Center.

Removing a relationship has the following consequences:

- Removes the customer from your list of customers in Partner Center
- Removes you from the list of available support contacts for your customer
- Removes your delegation admin privileges for the customer
- Prevents you from making future purchases for the customer

How to remove a relationship

To remove the relationship, you'll need to cancel Azure RI reservations, cancel software purchases, and suspend any remaining active subscriptions first.

1. **Suspend any active subscriptions.**

   a. From the Partner Center, go to **Customers** and select a customer

   b. Under **Subscriptions**, select a subscription.

   c. Select **Suspended**

   d. Repeat these steps for each active subscription.

2. **Remove the relationship in Partner Center:**

   a. From the Partner Center, go to **Customers** and select a customer.

   b. Select the **Account**.

   c. Select **Remove reseller relationship**.

   > **NOTE**
   >
   > If any subscriptions are still active, the **Remove reseller relationship** link will be inactive.

Next steps

- Request or re-establish a relationship with a customer

Obtain permissions to manage a customer's service or subscription

6/19/2020 • 5 minutes to read

Applies to

- Partner Center

Appropriate roles

- Admin agent
- Sales agent

To manage a customer's service or subscription on their behalf, the customer must grant you administrator permissions for that service. To get administrator permissions from a customer, email them a reseller relationship request. After the customer approves your request, you'll be able to log on to the service's admin portal and manage the service on the customer's behalf.

Invite a customer to establish a reseller relationship with you

1. Select **Customers** and then select **Request a reseller relationship**.
2. On the next page, review the draft email message. You can open the draft message in your default email application or you can copy the message to your clipboard and paste it into an email.

   > **IMPORTANT**
   > You can edit the text in the email, but be sure to include the link as it is personalized to link the customer directly to your account.

3. Select **Done** when you've completed this step.
4. Send the email to your customer.
5. After the customer accepts your invitation, they'll appear on your **Customers** page, and you'll be able to provision and manage the service for the customer from there.
6. To manage the customer's account, services, users, and licenses, expand the customer's record by selecting the down arrow near their name and then select the admin portal for the service you want to manage.

> **IMPORTANT**
> Customers can reassign or remove administrator permissions in a service's admin portal. However, unless and until you renegotiate your agreement with the customer, you continue to be responsible for providing customer support and adhering to the terms of the Cloud Reseller Agreement, even after a customer reassigns or removes administrator permissions. In this situation, if the customer requires help, contact Microsoft support to open a service request on behalf of the customer.

Your customers can find out which of their partners have admin privileges to their tenant from within the Office 365 admin portal. To do this:

1. The customer needs to sign in to the Office 365 admin portal as a Global admin.

2. Select **Settings** > **Partner relationships**.

3. On the **Partner relationships** page, the customer will see a list of the partners with whom they work and those that have been granted delegated administration privileges to their tenant.

Customers can manage a partner's delegated admin privileges

Your customer may decide to remove your delegated admin privileges from their tenant but retain the relationship with you for subscription and license renewal purposes. Customers manage rights and permissions to their Office 365 accounts on the **Partner relationships** page in the Office 365 admin center. On this page, customers can:

- See which partners they have a relationship with and which partners have delegated admin privileges

- Remove a partner's delegated administration privileges from the tenant

To remove delegated administration privileges from a partner:

1. Under the **Partner relationships** page, select the partner of interest.
2. In the details pane, select **Remove delegated admin**.
3. In the confirmation pane, select **Remove**.

> **IMPORTANT**
>
> Azure AD role assignments to the partner are implicit. If you try to list the members of the Azure AD roles using Azure AD Portal/PowerShell/Graph, the partner will not be returned. To find out if the partners are assigned to Azure AD roles, you must refer to the Partner relationships page in the Office 365 Admin Portal to find out if delegated administration privilege has been granted to the partner or not.

Delegated admin privileges in Azure AD

There are two security groups, Admin Agents and Helpdesk Agents, in the partner's Azure AD tenant that are used for delegated administration. When a customer grants delegated administration privilege to a partner:

- The Admin Agent group is assigned to the Global Administrator role in the customer's Azure AD tenant.

- The Helpdesk Agent group is assigned to the Helpdesk Administrator role in the customer's Azure AD tenant.

Based on the directory roles assigned, members of both groups can sign in to the customer's Azure AD tenant and O365 services using their partner credentials and administrator on behalf of the customer.

If your customer removes delegated admin privileges, the Azure AD role assignments are removed, and you will no longer be able to manage the customer's Azure AD tenant.

Azure subscriptions and resource management

Each Azure subscription has its own set of resource management roles. Before a CSP partner can manage a customer's Azure subscription, the partner must be assigned to one or more roles under the Azure subscription. Specifically:

- When a customer accepts a reseller invitation and grants delegated administration privilege to a partner, the partner does not automatically get access to existing Azure subscriptions under the customer tenant.

- When the CSP partner provisions a new Azure subscription for the customer, the Admin Agents group under the CSP partner tenant is automatically assigned Owner role under the subscription. Based on this role assignment, members of group can access and manage resources under the subscription.

- When a customer removes delegated administration privileges from a partner using Office 365 Portal, the partner can still manage the customer's Azure subscription as long as the partner is still assigned to one or more roles under the subscription. To stop the partner from managing the Azure subscription, the customer must remove the role assignment.

Windows Autopilot

From Partner Center, CSP partners can manage Autopilot profiles for their customers without delegated admin privileges under these circumstances:

- If a customer removes delegated administration privileges but retains a reseller relationship with you, you can continue to manage Autopilot profiles for them.
- You can manage customer devices that you or another partner have added.
- You can't manage devices your customer has added through the Microsoft Store for Business, Microsoft Store for Education, or Microsoft Intune Portal.

For more information about Autopilot, see Simplify device setup with Windows Autopilot.

> **IMPORTANT**
>
> The current Autopilot management experience in Partner Center might continue to change. At the time this article was published, the following changes are being considered:

- Partner must be granted delegated administration privilege by the customer before the partner can add/update/remove profiles and applying/removing profile from any devices in the customer tenant.
- Partner must be granted delegated administration privilege by the customer before the partner can remove devices added by other partners or by the customer in the customer tenant. Otherwise, the partner can remove only devices added previously by the same partner.

Manage your customer list - search, update, or export customers in Partner Center

6/19/2020 • 2 minutes to read

Applies to

- Partner Center
- Partner Center for Microsoft Cloud for US Government

Customer records are among your most important information assets in Partner Center. You can search your database of customer accounts, export the entire customer database, or export a subset, to an Excel-compatible comma-separated value file format (.csv). You can also export a customer's subscriptions information to a .csv file.

Activity logs also provide exportable data on transactions and management actions for customers. For more information, see View customer activity logs.

Search for a customer

1. From the **Partner Center** menu, select **Customers**.
2. To search for a customer, enter the customer name or domain name in the search box.
3. Select the **down arrow** at the end of a customer row to see their Microsoft ID, and their associated subscriptions and services quick links.

Update a customer's company name

From the **Partner Center** menu, select **Customers**. 2. To search for a customer, enter the customer name or domain name in the search box. 3. Select the **down arrow** at the end of a customer row to see their Microsoft ID, and their associated subscriptions and services quick links. 4. Under the customer's **Bill-to** information, update the company name. When you save the new value, it will be reflected in the customer list. This will only change the Bill-to company name and the customer list value. It will not be reflected anywhere else. [1]

Export your customer list

1. From the **Partner Center** menu, select **Customers**.

2. Select **Export customers**.

   Partner Center converts your complete customer list into a .csv file and uploads it to the default download folder on your computer. You can also export subsets of customer data. Data columns include the following:

   - **Microsoft ID**;
   - **Company name**;
   - **Primary domain name**;
   - **Relationship**—the Partner's business relationship to each listed customer.

   By default, Partner Center exports the entire customer list, regardless of length. You can also search the customer list by company name or domain and export that subset of data.

3. If you are an indirect provider, you can filter your customer list by indirect reseller. Select **Filter by indirect reseller** from the list and then choose a reseller. [1]

Export customer subscription information

1. From the **Partner Center** menu, select **Customers**.
2. Select the **Company name** for any customer. The customer's **Subscriptions** page opens, showing their complete list of product subscriptions.
3. Select **Export subscriptions**. Partner Center converts the customer's subscription data into a .csv file and uploads it to the default download folder on your computer. Data columns include the following:
   - **Subscription ID**;
   - **Subscription**—the product name for the subscription;
   - **Quantity**—number of purchased licenses;
   - **Status**;
   - **Reseller**—the ID of the reseller that owns and manages the subscription.

> **NOTE**
>
> For more information about subscription management, see Customer subscriptions.

View or export customer activity logs for more insight into customer transactions

6/19/2020 • 2 minutes to read

Applies to

- Partner Center
- Partner Center for Microsoft Cloud for US Government
- Cloud Solution Provider program partners

Appropriate roles

- Global admin
- Billing admin
- User management admin
- Admin agent
- Sales agent
- Helpdesk agent

Activity logs provide information on transactions and Partner management actions for customers. Logs for transactions provide detailed information about the transaction, including purchased subscriptions. You can also export activity logs to an Excel-compatible comma-separated value file format (.csv).

Activity logs provide records for Partner actions on customer accounts and product transactions. You can also export activity logs to a .csv file.

View and export activity logs

1. Sign into the Partner Center dashboard.
2. From the **Account settings** menu, select **Activity Log**.
3. Select the activity log period in the **From** and **to** fields. The activity log export defaults to the most recent month.

   Each activity log provides a link to the listed customer's **Subscriptions** page.

   Select a down arrow for any activity log to view details about a logged action. A single activity log can show a significant amount of data, such as the ordering of multiple products.
4. The data columns of the log include the following:

- **Date-Time**-the date and time of the action; - **Affected customer**—the customer's company name; - **Action**—the action taken by the customer such as "created a referral"; - **Partner user**—the partner associated with the activity.

4. Select **Export log** to copy the customer's subscription data into a .csv file and download it to the default download folder on your computer.

Update customer account info, company details, and customer billing information in Partner Center

6/19/2020 • 2 minutes to read

Applies to

- Partner Center
- Partner Center for Microsoft Cloud for US Government

In Partner Center, you can update a customer's billing information and other company details. You can also give or remove your permission for a customer to purchase their own products or services.

Update customer details

1. From the **Partner Center** menu, select **Customers**. Then choose a customer from the list.
2. From the customer menu, select **Account** and then **Update**.
3. After you've made your changes, select **Submit**.

Give customers permission in Partner Center to buy their own products or services

6/19/2020 • 8 minutes to read

Applies to

- Partner Center
- Partners in the CSP program

Appropriate roles

- Admin agent
- Sales agent

This article shows how a partner in the Cloud Solution Provider (CSP) program can give a customer permission to buy some of their own services or resources.

Partners in the CSP program often use Partner Center and its commercial marketplace to buy solutions and services for their customers. Partners then allow some customers to provision these services themselves directly from the Azure portal.

Here's an example. Let's say you buy an Azure Plan subscription for a customer in Partner Center. You then decide to add other resources or services to that subscription on the customer's behalf. In this case, you might add Azure reservations to the customer's subscription (such as, adding reserved, virtual machine instances). You might then allow the customer to further provision the Azure reservation resources themselves in the Azure portal.

Now, with the **Customer permissions** feature, you give customers more self-service options with Azure resources. By turning on permissions for the customer, you allow customers to buy their own resources (such as, buying their own Azure reservations).

Overview of customer permissions in Partner Center

Use the Customer **Account** page to turn on (or turn off) customer permissions. Currently, this feature supports:

- **Azure reservations:** Turning on this permission allows the customer to purchase their own Azure reservations for a specific Azure subscription you've purchased for them.

Before you turn on customer permissions, note these important points:

- By default, customer permissions are automatically disabled (turned off) in Partner Center.
- Before you can turn on (or turn off) permissions for a customer, you must be assigned the role of Admin Agent in Partner Center.

  Partners assigned the role of Sales Agent or Help Desk Agent have read-only access and can't turn customer permissions on or off.
- You can turn on (enable) permissions for any customer you choose.
- You can turn on (or turn off) customer permissions using either the Partner Center dashboard or Partner Center APIs.
- After you turn on (enable) permissions for a specific customer, you will be responsible to pay for any subsequent purchases made by that customer. If customers want to exchange, cancel or renew a purchase

they've made (or they want to change the initial scope of a reservation), they will not be able to do so themselves. They need to ask you, as the partner, to help them exchange, cancel, and renew purchases, or make later changes to a reservation's scope.

- After you turn on permissions for a specific customer, you will **not be** notified of any later purchases made by the customer.
- Later purchases made by the customer will appear in Partner Center along with any purchases made by you. You can find these purchases on the customer's **Order history** page, their **Reservations** page, or in the **Activity Log**.

> **NOTE**
>
> For information about prices the customer will pay and how to help customers manage their purchases, see Help customers manage reservations they purchase.

Give customers permission to buy their own Azure reservations

Azure reservations are a great way to buy Azure services at a discounted rate. To learn more about the benefits of Azure reservations, see What are Azure Reservations?

Now you have the choice to buy Azure reservations on behalf of your customers, as you may have already been doing. Or, you can give customers permission to buy their own Azure reservations.

> **NOTE**
>
> After you give customers permission to buy their own Azure reservations, help them manage any reservations they purchase. For more information, see Help customers manage reservations they purchase.

To enable customers to buy their own Azure reservations

1. Verify the customer has an existing Azure Plan or Azure Global subscription you purchased on their behalf.
2. Verify the customer has been assigned the **Owner** role for this subscription.
3. Enable customer permissions (turn this feature **On**) to purchase their own Azure reservations.

Each step appears below.

Verify the customer has an existing Azure subscription

Before you give customers permission to buy their own Azure reservations, you must verify the customer has an existing Azure Plan or Azure Global subscription. If the customer shows no current Azure subscription in Partner Center, you must buy a subscription for them before you turn on their customer permissions.

- To see if a customer already has an Azure subscription, sign into the Partner Center dashboard, then select **CSP** followed by **Customers**. Select the specific customer from the list. Then select **Subscriptions** and look for any usage-based subscriptions for either Azure Plan or Azure Global.
- If a customer doesn't have an existing Azure subscription, you can buy a subscription for them. See Purchase the Azure Plan.

Verify the customer has been assigned the correct role in Azure

After you verify the customer has an existing Azure subscription, you also need to verify the key users associated with your customer have been assigned the correct **Owner** role for that Azure subscription. This is the role-based access (RBAC) the customer needs to buy Azure reservations for an Azure subscription you purchased.

Some partners may have already assigned the **Owner** role to customers wanting to actively manage and provision their own Azure resources. If you have already assigned **Owner** status to a customer to manage prior subscriptions you've purchased for them, you can skip this step.

> **IMPORTANT**
> If a customer has not been assigned the **Owner** role, they will receive an error in the Azure portal preventing them from buying Azure reservations.

To verify the customer has been assigned the **Owner** role for an Azure subscription:

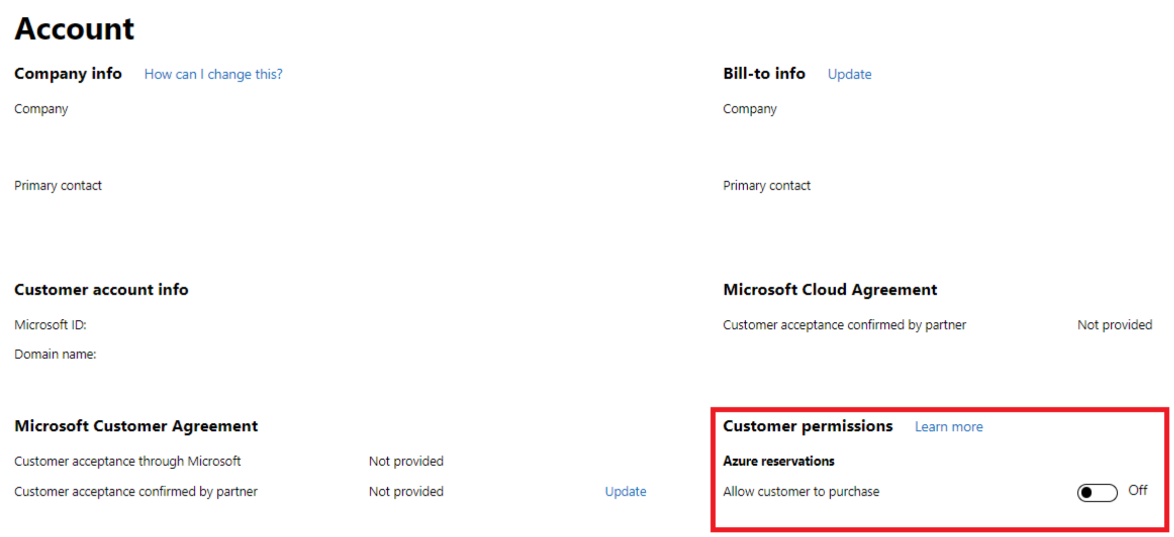
1. Sign into the Partner Center dashboard.
2. Select **CSP**, then **Customers** and select the specific customer.
3. Select **Subscriptions** for that customer and locate the specific Azure subscription.
4. Select the **Manage** button next to that customer's subscription. Doing so opens the Azure portal.
5. To assign the **Owner** role to a specific user, follow these steps To assign a user as an administrator.

Turn on or turn off customer permissions to purchase their own Azure reservations

After you verify the customer has an existing Azure subscription and users are assigned the **Owner** role for that subscription, you're ready to turn on (enable) customer permissions. You can also use these steps to turn off (disable) customer permissions. You can enable or disable customer permissions using either the Partner Center dashboard or Partner Center APIs.

To turn on (or turn off) customer permissions in Partner Center:

1. Sign into the Partner Center dashboard.
2. From the left navigation menu, select **CSP**, then **Customers**. A customer list appears.
3. Select a specific customer name.
4. Select **Account** from the customer menu. The customer **Account** page appears.
5. Locate the **Customer permissions** area at the bottom of the page.



6. Under **Azure reservations**, locate the **Allow customer to purchase** option.
7. To turn on customer permissions, move the switch next to this option to the **On** position. To turn off customer permissions, move the switch to the **Off** position.

NOTE

To learn what else happens when you turn on a customer's permissions to purchase their own Azure reservations, see Overview of customer permissions in Partner Center.

When you turn on (or turn off) customer permissions, the Activity log records each action. (This log is accessible when you select the Gear icon from the top of the Partner Center dashboard). When you turn customer permissions on or off, the action will appear as either **Create Customer Purchase Permissions** or **Delete Customer Purchase Permissions** in the Activity log.

Help customers manage reservations they purchase

Once you give customers permission to purchase their own Azure reservations, you can help them better manage any resources they purchase. Customers can manage many aspects of Azure reservations themselves directly from the Azure portal. They will need your help managing a few, other aspects of Azure reservations they purchase within your CSP subscription.

Help customers understand more about managing these aspects of Azure reservations:

- Prices customers will pay for Azure reservations
- How customers can optimize use of Azure reservations
- What happens when customers purchase reservations with a shared scope?
- What happens if customers want to change, cancel, and renew a reservation, or change its scope?

Prices customers will pay for their reservations. Your customer will be purchasing Azure reservations based on a subscription you previously bought for them in your CSP partner billing account. The customer's price for any Azure reservations they purchase based on this subscription is also set by you. This price may be different from the Web Direct price the customer sees in the Azure portal.

How customers can optimize their use of a reservation. Some customers might benefit from learning more about how to optimize their use of a reservation or how to assign a reservation’s initial scope during their purchase. For more information, ask customers to read Manage reservations for Azure resources.

What happens when a customer purchases a reservation with a shared scope? When customers purchase a reservation based on a prior CSP subscription and assign a shared scope to that reservation, any discounts the customer has been given by the CSP will apply to matching usage for all subscriptions the CSP partner has purchased for that customer.

What should customers do if they want to exchange, cancel, or renew a purchase they have made, or change the initial scope of a reservation? Customers need to ask their partner to help them change a reservation's initial scope. They also need a partner's help to exchange, cancel, or renew a reservation. They cannot perform these tasks themselves with reservations based on subscriptions purchased for them by a CSP partner.

Next steps

- Buy Azure reservations on behalf of your customers
- Partner Center - Sell Microsoft reservations
- Manage Azure reservations on behalf of your customers

Add multiple users to a customer account - upload a data file to Partner Center

6/19/2020 • 2 minutes to read

Applies to

- Partner Center

Appropriate roles

- Global admin

You can add multiple users to a customer's account all at once, by uploading a data file in the comma-separated value file format (.csv) to the Partner Center. You can download a sample data file from the Partner Center and then edit it for your use, or you can create a new data file using the data model defined below.

Data file requirements

To add multiple users to a customer's account using the bulk upload process, you'll need to meet the following requirements:

- You must have global administrator permissions to the customer account;
- Each user must have a unique email address, appended to the customer's email domain(s);
- You can upload up to 100 records at a time. If you need to add more than 100 users, create and upload additional data files.
- All users must be in the same geographic **Location**.
- Enter only the data described below. Extraneous data will cause the upload to fail.

Enter the following data in the data file:

COLUMN NAME	DESCRIPTION	LIMITATION
First name	User's first name (optional field)	50-character limit
Last name	User's last name (optional field)	50-character limit
Display name	Name displayed in the Partner Center (required field)	50-character limit
Email	User's business email address at customer company (required field)	Each user must have a unique email address
Status update	Used to indicate whether or not the new user record was successfully created	**Leave empty**

To create multiple user accounts

1. Create a comma-separated value (.csv) data file with the data described above. Save the file so you can browse to it in a later step.

2. Sign into the Partner Center dashboard.

3. From the Partner Center menu, select **Customers**, then choose a customer from the list.

4. Select the customer's **Users and Licenses** tab, then select **Upload users**.

5. Under **Upload user info**, select **Browse**.

6. In the file selector, select your data file and then select **Open**.

7. Select **Validate**.

   Note Most account creation errors are caused by data file issues, including missing information, malformed or duplicated email addresses, or too many records in the file.

8. After the Partner Center validates the file, select the geographic **Location** for the new users.

9. Select **Save**.

10. Download the temporary password information for the users.

IMPORTANT: Be sure to download the file with the temporary passwords now as you won't be able to do this later. New users must log in to their new account using the temporary password for their new accounts.

10. New users are automatically assigned permissions of **Can use licenses and services** .

Assign a reseller as a technical support contact for customers

6/19/2020 • 2 minutes to read

Applies to

- Partner Center

Appropriate roles

- Admin agent
- Global admin
- Helpdesk agent
- Sales agent
- User management admin

When you set up subscriptions for Microsoft services for your customers, you may want to assign the technical support for these products to a designated reseller, rather than providing the support yourself.

After you set up support contacts, customers see your assigned support contact's information on the product support pages. For example, when Office 365 customers need support, they can go into the Office.com page, log in with their admin credentials, select the **Admin** tile, and under the **Support** section, see the assigned support contact information.

This can be used for multi-partner and multi-channel scenarios.

Assign contacts

1. Start by requesting a relationship with your designated product reseller. Negotiate a support agreement with them for handling technical support.

2. From the **Partner Center** menu, select **Customers**, then select a customer, then select a subscription, for example, Office 365 Business Standard.

3. In **Designated support contact**, select the designated product reseller, and then click **Submit**.

> **NOTE**
> For new subscriptions, the designated support contact defaults to the indirect provider. You can also change this to an indirect reseller that has delegated admin privileges.
> If the reseller's name doesn't appear in the list of available support contacts, add them in by requesting a relationship. After the relationship is established, they should appear in the list.

4. Review that the changes are correct, and then select **Close**.

Next steps

Remove a relationship with a customer

Overview of partner offers in the Cloud Solution Provider program

6/19/2020 • 6 minutes to read

Applies to

- CSP partners

Appropriate roles

- Admin agent
- Global admin
- Sales agent

Microsoft partners in the Cloud Solution Provider program (CSP) have a growing catalog of offers available to them. You can sell the full range of Microsoft cloud services, as well as a variety of additional offers that change frequently. To see the CSP offers for the current month, sign in to Partner Center and then go to the **Pricing and offers** page.

Not yet enrolled in the Cloud Solution Provider program? Visit Cloud Solution Provider for more details about how to enroll.

> **NOTE**
>
> As of January 31, 2020, all customers will need to have signed the Microsoft Customer Agreement. This includes your existing customers and new ones. To learn more, read Confirm customer acceptance of the Microsoft Customer Agreement

What you can sell through CSP

Currently, you can sell the following types of products and services to your CSP customers:

Azure reservations

Customers can reserve space in advance on Azure virtual machines for a 1- or 3-year term.

For more information, see Sell Microsoft Azure Reserved VM Instances.

Software

Customers can buy software subscriptions (to Windows Server and SQL Server, for a 1- or 3-year term, to run on Azure reserved VM instances).

For more information, see Sell software subscriptions through CSP.

Online services

Online services is the new name for what are currently referred to as *subscriptions*. To make it easier for you to order multiple types of products in one place, we've integrated the "add subscription" task flow into the "add products" task flow.

For more information, see Customer subscriptions.

Software as a Service (SaaS) and other Azure Marketplace products

You can sell subscriptions to SaaS products from Independent Software Vendors (ISVs). To see only SaaS offers in

Online services, use the filters to set **Publisher** to **Partner**. This will show all SaaS offers that can be purchased for that customer.

You can also find info about these products on the **Marketplace** page.

> **NOTE**
>
> This page also includes info about other types of products that must be purchased from the Azure portal, not Partner Center.

For more information, see Overview of the CSP commercial marketplace

Add products page details

The following list identifies each of the new areas on the **Add products** page.

Add products - This page includes all types of products available for you to sell to your customers

Product categories - **Azure, Online services, Software** Select the type of product you're interested in to display only those products

Segment - Identifies the general type of business, for example, commercial or government, that you want to sell to

Publisher - Select which types of products you want to see - apps created by Microsoft or by third-party publishers

Billing type - Identifies whether the product is billed for number of licenses or for usage

Category - Identifies the type of business the product supports and whether it offers a trial version

View SKU, view product - Select to toggle between product and SKU lists. The **Products** page lists each product individually; **SKU** lists product groups.

Buy CSP offers

To buy products and services on behalf of your CSP customers, you select the items the customer wants, add them to your cart, which creates an order, and then review and submit the order. The general process is described below. (For more information about orders for a specific product type, see the links above.)

> **NOTE**
>
> A CSP offer needs to be available in both your tenant country and in your customer's tenant country. For example, if your tenant is located in Slovakia and the customer's tenant is in Germany, you won't be able to sell Dynamics 365 Business Central Premium to that customer, because this offer is currently not available in Slovakia.

1. Select **Customers** from the Partner Center menu and then locate the customer who wants to buy from you.
2. Select the down arrow at the end of the customer's row to expand the customer's record, and then select **Add products**. From here on out, you're creating an order. An order can include several items of different types, but they must all be for the same customer.
3. On the **Add products** page, select from **Azure**, **Online services**, or **Software**.
4. Fine-tune the available filters to more easily find the products you're looking for. To see the full list of what's available, set applicable filters to **any**.
5. Select the product the customer wants, enter the desired quantity, and then select **Add to cart**.
6. Repeat steps 4 and 5 until you've added all the necessary items to your cart. Select **Review** to verify that

your order is correct.

7. On the **Review your orders** page, verify or change the products and the quantity and then select **Buy** to purchase the order.

8. The details of your order, including your order number, are displayed on the next page. Select **Done** to go to your **Order history** page.

Rules for special segments

Some license-based offers can only be purchased under certain conditions. Special segment offers include Education, Non-profit or Government Community Cloud (GCC) offers. Details about these purchase conditions can be found in the purchase rules for special segments topic.

Troubleshooting catalog purchases

There may be different reasons you cannot find the offer you are looking for in the catalog. Below are things to check if you cannot find the offer you expect.

- **Verify your customer is qualified**. Many offers require special qualifications to be sold to customers. These special segments include Education, Non-profit and Government Community Cloud (GCC). Before logging an issue, first verify the customer's qualifications are set accordingly. You can check this by click the customer from the customer list and viewing the account. The account will have a Special Qualification set if applicable. If you are trying to purchase Education for a customer that is not qualified, you will not see those offers in the catalog. Consult the special segments documenation for more information on qualifying your customers.
- **Decide whether you are trying to purchase an Add-on or a Base-offer**. Many of the license-based services such as Microsoft 365 and Dynamics 365 enable both catalog purchases of the Base offers as well as Add-ons. Only base offers can be purchased in the catalog. To purchase Add-ons ensure you first purchase the Base offer in the catalog and then select the customer from the customer list and then select the subscription for the base offer. Add-ons can be applied to the base offer on this manage subscriptions page.
- **Verify the products are available in your market**. Many products and services are configured to only be sold to customers in specific countries. You can find the list of supported countries in the various price list files. License-based services supported countries are in the Offer List Matrix on the pricing and offers page.
- **Verify the offers are available in the price list**. The available list of offers can change from month to month. If you cannot find an offer in the catalog be sure to verify it is available in the current price lists in the **Sell** > **Pricing and Offers** page.

Recommended documents related to purchasing items in the Partner Center

- Pricing and offers in Partner Center
- Overview of partner offers in the Cloud Solution Provider program
- How to sell offers to education customers and create an education customer
- Sell to specialized industries like education, non-profit, and government users
- Purchase rules for special segments

Next steps

For info about how the billing process works, see Billing basics.

For info about purchasing under the Azure plan, see Purchase the Azure plan.

Overview of the commercial marketplace in Partner Center

5/8/2020 • 3 minutes to read

Applies to

- Partner Center
- Partners in the CSP program

Being a partner in the Cloud Solution Provider (CSP) program allows you to bundle and sell Microsoft products along with solutions published by third-party, Independent Software Vendors (ISVs). Being able to bundle solutions in this way lets you better serve end customers and grow your CSP services business.

As a partner in the CSP program, you can use Partner Center to purchase many ISV solutions from Microsoft's commercial marketplace. This gives you and your customers several key advantages:

- Access to a catalog of software solutions optimized for Microsoft technologies and environments.
- Simplified contracting and shortened procurement cycle.
- A single integration with Partner Center APIs. (Such integration further enables access to a catalog of ISV solutions, lowers the cost of operations and engineering, and streamlines management of multiple vendor subscriptions and billing through a single provider.)
- Streamlined deployment and provisioning in the customer's Azure tenant (for Virtual Machine-based solutions).
- Reduces potential challenges with direct ISV purchase or contracting, Microsoft solution configuration and integration, and the need to manage or consolidate recurring invoices from multiple vendors.

Overview of CSP offers in the commercial marketplace

If you are a partner in the CSP program, there are many commercial marketplace activities you may want to perform in regards to ISV offers. See the following table to learn more about each activity.

IF YOU WANT TO	READ
Learn how to view or search for available offers, pricing, product details, or publisher contact information	Discover offers
Learn how to purchase and deploy an offer	Purchase offers
Learn how to cancel or renew a subscription or add or remove seats	Manage offers
Learn about how billing works for commercial marketplace purchases	Understand billing
Learn about who is responsible for which types of support for ISV purchases	Understand support
Learn about contracts and responsibilities of CSP partners and ISVs in the commercial marketplace	Understand contracting

NOTE

This overview describes how partners in the CSP program can use certain commercial marketplace features in Partner Center. In contrast to partners in the CSP program, ISV publishers have a different marketplace role. They also have different Commercial Marketplace features available to them within Partner Center. To learn more about the role of ISV publishers, see the Azure Commercial Marketplace Overview.

Where to complete commercial marketplace activities

As a partner in the CSP program, you can complete many commercial marketplace activities for ISV SaaS offers directly from either the Partner Center dashboard or by using Partner Center APIs. To complete other marketplace activities, however, you may need to go to:

- The Microsoft Azure management portal

  Or

- A third-party ISV publisher's system or website

Much of where you go to complete activities begins with the type of offer you choose. Partners in the CSP program can currently transact two types of offers with third-party ISV publishers:

1. License-based SaaS offers
2. Usage-based offers (including offers based on virtual machines, containers or Azure applications)

Go to Billing Basics to learn more about how billing differs between license-based offers and usage-based offers.

To learn where to complete a specific marketplace activity for license-based or usage-based ISV offers, see the following tables.

FOR LICENSE-BASED SAAS OFFERS FROM ISVS	USE
To discover or search for available offers	Partner Center dashboard or Partner Center APIs
To purchase an offer	Partner Center dashboard or Partner Center APIs
To deploy a purchased offer (account setup, software management or deployment in customer's AAD tenant)	ISV publisher's system or website
To cancel/renew offer subscriptions or add/remove seats	Partner Center dashboard or Partner Center APIs
To create users or manage permissions	ISV publisher's system or website

FOR USAGE-BASED OFFERS FROM ISVS	USE
To discover or search for available offers	Partner Center dashboard, Partner Center APIs, or Azure portal
To purchase an offer	Azure portal
To deploy a purchased offer (account setup, software management or deployment in customer's AAD tenant)	Azure portal
To cancel/renew offer subscriptions or add/remove seats	Azure portal

FOR USAGE-BASED OFFERS FROM ISVS	USE
To create users or manage permissions	Azure portal

Next steps

- Discover or view commercial marketplace offers
- Purchase commercial marketplace offers

Discover offers and pricing in the Partner Center commercial marketplace

5/8/2020 • 4 minutes to read

Applies to

- Partner Center
- Partners in the CSP program

Appropriate roles

- Global admin
- Admin agent

When Independent Software Vendors (ISVs) choose to publish an offer in the commercial marketplace, they can also decide if they want the offer to be made available in the CSP program. If they choose to sell the offer through the CSP program, CSP partners should see the offer in the Partner Center Marketplace area.

If an ISV offer does not appear as you expect in the Partner Center, it may be because:

- The ISV decided not to sell the offer through the CSP program. For example, some ISV products may have been made available in other areas of the commercial marketplace (such as in Microsoft AppSource and Azure Marketplace), but may not appear for CSPs in the Partner Center marketplace.

- The ISV decided to make the offer exclusive to only a select number of CSP partners. For more information about exclusive offers, see later in this help topic.

- The offer type may not be transactable through the Partner Center or Azure portal (e.g. Containers or some usage-based offers).

- The billing country of your associated customer(s) may not be supported for this ISV offer.

View Marketplace offers in Partner Center

To view available commercial marketplace offers in the CSP program:

1. Sign into the Partner Center dashboard, then select **CSP** from the left navigation menu.

2. Select **Sell**, followed by **Marketplace**. By default, you will see products of all types and categories.

3. Select a filter by type or category. You can also use **Search** to find specific keywords, offer names or the names of ISV publishers.

4. Select a specific product offer from the list. This will take you to a product Overview tab where you can learn more about the offer. Information on this tab might include:

   - A description of the product or offer

   - More information about the ISV publisher

   - Links to documentation or marketing materials uploaded by the ISV publisher

   - Other possible ISV contacts for customer support, engineering, or a contact for the CSP Program

5. To see more information about an offer's available plans, SKUs, or pricing, select the **Plans + Pricing** tab.

This tab will show you:

- The markets where this offer is available to you
- A list of SKUs or plans available for the offer
- Pricing for each SKU or Plan available

View Marketplace offers via Partner Center APIs

CSP program partners can also use APIs to return a list of eligible offers. Eligible offers will be only those SaaS ISV offers available for the partner to sell via the Partner Center marketplace. For partners using APIs to identify offers in the catalog, refer to the guidance to obtain a list of offers for a market.

View the latest Marketplace offer pricing in Partner Center

Follow these steps for the latest pricing details associated with an offer:

1. Sign into the Partner Center dashboard, then select **CSP** from the left navigation menu.
2. Select **Sell**, followed by **Pricing and offers**.
3. Scroll down to the **Marketplace** section, select a location and download **Marketplace pricing**. This generates a spreadsheet with the latest pricing data for SaaS, license-based offers available from ISV publishers. Some Azure application pricing may also appear here. This information is updated daily, so you can check it for current prices as often as you choose.
4. If an ISV product includes a free trial period, the spreadsheet will display two rows for that product:
   - One row shows the free trial price of zero. This means a free trial period is available.
   - The other row shows the price and terms that will apply after the free trial period is over.

As a CSP program partner, you may be eligible for other incentives associated with certain commercial marketplace offers. For more information about other incentives, see the CSP incentive guide (requires CSP login).

Learn about marketplace exclusive offers

ISVs have the option to make their offers available only to specific partners in the CSP program. This is known as an Exclusive offer. All partners in the CSP program can still view all ISV offers in the Partner Center commercial marketplace, including those offers marked Exclusive.

If an offer is **not** marked Exclusive, all partners can purchase that offer (assuming the selected customer’s billing country matches the country availability of the ISV's offer).

For any offer marked Exclusive, however, only those partners selected by the ISV will be able to purchase that offer.

> **NOTE**
>
> If you see an offer marked Exclusive that you would like to sell to your customers, reach out to the ISV directly and ask for permission to sell the Exclusive offer. When you view the details of an Exclusive offer, you may see a **Contact ISV** link that you can select.

To learn more about the ISV experience in the commercial marketplace, read Cloud Solution Providers.

For more information on the CSP experience in the marketplace, read Commercial marketplace overview.

Next steps

- Purchase commercial marketplace offers

Purchase commercial marketplace products for your customers in Partner Center

5/8/2020 • 2 minutes to read

Applies to

- Partner Center
- Partners in the CSP program

Appropriate roles

- Global admin
- Admin agent

As a partner in the Cloud Solution Provider (CSP) program, you can use the commercial marketplace to purchase subscriptions for your customers to certain Software as a Service (SaaS) products offered by Independent Software Vendors (ISVs).

By offering ISV SaaS subscriptions to your customers, you can help differentiate your business. You can also give customers access to software bundles that address their specific business needs. You manage licenses and subscriptions for these marketplace SaaS products from ISV publishers just as you manage licenses and subscriptions for Microsoft products.

You can purchase either **license-based** SaaS subscriptions or **usage-based** subscriptions. To learn more about the difference between license-based and usage-based billing, see Billing basics.

Purchase license-based SaaS subscriptions in Partner Center

You purchase subscriptions for license-based SaaS products offered by ISV publishers using the same process you use to purchase subscriptions for Microsoft products.

To purchase a license-based SaaS subscription in Partner Center, see Create, suspend, or cancel customer subscriptions.

You can also use Partner Center APIs to create commercial marketplace subscriptions for your customers. (For more info on using Partner Center APIs, see Create a subscription for commercial marketplace products.)

> **IMPORTANT**
> As a partner in the CSP program, you can only purchase **license-based** SaaS subscriptions from ISV publishers within Partner Center. This means you can purchase any **license-based** SaaS offer the ISV publisher has made available to you, including exclusive offers to which you have access. To purchase or manage other, commercial marketplace offers from ISVs (such as **usage-based**, metered or consumption-based offers involving Azure applications, Containers or VMs), you must go to the Azure portal. For more information, see the following topic.

Purchase usage-based subscriptions in the Azure portal

In contrast to license-based SaaS subscriptions from third-party ISV publishers, usage-based subscriptions first require a customer to have an Azure subscription. Billing for commercial marketplace, usage-based resources falls under the customer's Azure subscription. Once your customer has an Azure subscription, a partner in the CSP program can follow these steps to purchase a commercial marketplace subscription for them:

1. Sign into the Partner Center dashboard, then select **Customers** from the left-hand menu.
2. Select the specific customer, then select **Subscriptions**.
3. Under the **Usage-based subscriptions**, select **All resources**. This takes you to the Azure Management portal.
4. In the Azure Management portal, select **Create a resource** from the left-hand menu.
5. Select **See all** at the top of the Azure Marketplace list.
6. To narrow your list, use filters at the top of the Marketplace list. For example, you can select **Microsoft** or **Partner** from the **Publisher** dropdown list to view only offers from Microsoft or those from an ISV publisher.
7. Choose a specific offer, then select **Create**.

Next steps

- Manage commercial marketplace offers

Marketplace exclusive offers from Independent Software Vendors

6/19/2020 • 2 minutes to read

Appropriate roles

- Global admin
- User admin
- Admin agent
- Sales agent

An Independent Software Vendor (ISV) has the option to make exclusive offers that are only available to certain CSP partners.

CSP partners can view all ISV offers in the Partner Center commercial marketplace. Offers marked **Exclusive**, however, can only be purchased by specific partners selected by the ISV. If an offer is not marked **Exclusive**, all partners can purchase it.

Specific CSP partners identified by an ISV can:

- Purchase exclusive offers from that ISV through the Partner Center commercial marketplace
- Export price list

How do you gain access to exclusive offers?

When an ISV publishes an offer on the Marketplace, they have the opportunity to indicate who can purchase it.

Their options are:

- All CSP partners can purchase
- Determine which partners can purchase
- Not available to CSP partners

Next steps

- To learn more about the ISV experience in the commercial marketplace, read Cloud Solution Providers.
- For more information on the commercial marketplace, read Commercial marketplace overview for Cloud Solution Providers.

Manage commercial marketplace products and offers for your customers

5/8/2020 • 3 minutes to read

Applies to

- Partner Center
- Partners in the CSP program

Appropriate roles

- Global admin
- Admin agent

Partners in the Cloud Solution Provider (CSP) program can use the Partner Center portal to purchase many ISV SaaS offers or subscriptions for their customers from the commercial marketplace. Once you purchase an offer, you have various ways to manage it.

View or edit a subscription

After you purchase a subscription from a third-party ISV publisher, you can review or edit it as follows:

1. Sign into the Partner Center dashboard, then select **Customers** from the left navigation menu.

2. Select an appropriate customer, then select **Subscriptions**. This lists any license-based subscriptions you have purchased for the customer.

3. In the **Subscription** column, select the subscription you want to view or edit. This gives you more information to set up or provision the offer. (If more action is needed on the offer, you may also see an "Action Needed" status displayed in the Status column. This may also be accompanied by a link to the ISV publisher's site.)

4. Once you select the subscription you want to view or edit, the subscription detail page allows you to edit the subscription and do things like:

   - Change the subscription nickname
   - Add/decrease the number of seats (licenses) in the subscription
   - Cancel the subscription
   - Turn off auto-renew
   - Add an Indirect Reseller MPN ID, if applicable

> **NOTE**
> You may need to complete certain steps defined by the ISV publisher before you can perform some changes to a subscription, such as cancelling a subscription.

Assign licenses and activate a subscription on behalf of a customer

When you purchase a Software as a Service (SaaS) offer provided by an Independent Software Vendor (ISV) publisher in the commercial marketplace, the ISV publisher helps manage the process of assigning licenses and activating the subscription on behalf of your customer.

The publisher should provide you with a personalized link and an authorization code that identifies your specific purchase.

1. You can find this personalized link from the ISV publisher in a few ways:
    - You can see the link from the confirmation page that appears after you purchase an ISV SaaS offer.
    - You can see the link from the specific customer's Subscriptions page. This publisher link appears on the row associated with the ISV offer or subscription purchased for the customer.
    - You can retrieve the link using Partner Center APIs.
2. Once you are in the ISV publisher's site or system, the publisher will let you know of any additional steps you need to take to complete the customer setup process and provision or assign licenses.
3. As a partner in the CSP program who is working on behalf of your customer, you are responsible to perform the following tasks:
    - Submit any required information to the publisher.
    - Send any required URL directly to your customer (or otherwise directly communicate details about this subscription to your customer)
4. Once you provide required information to the publisher, the publisher will provision and assign appropriate licenses. Subscription billing will start only after the following events occur:
    - The ISV publisher has successfully assigned appropriate licenses
    - The ISV publisher has confirmed to Microsoft (via a separate, SaaS fulfillment API) that the account setup has been successfully completed

Cancel a license-based SaaS subscription from an ISV publisher

When you subscribe to a license-based SaaS product offered by an ISV publisher within the commercial marketplace, you have the option to cancel the subscription within its designated cancellation period. This cancellation period changes depending on whether you have a monthly or annual subscription. You can also choose whether or not to automatically renew the subscription.

For more information about cancellation periods that apply, how to cancel or how to auto-renew a subscription, see:

- Cancel a subscription
- Auto-renew a commercial marketplace subscription

Add or remove licenses for a SaaS subscription

For SaaS commercial marketplace offers, you can add or remove user licenses for a customer subscription.

1. Sign into the Partner Center dashboard, then select **Customers** from the left navigation menu.
2. Select an appropriate customer, then select **Subscriptions**. This lists any license-based subscriptions you have purchased for the customer.
3. In the **Subscription** column, select the subscription you want to modify.
4. In the subscription details page, locate the **Quantity** field. This is where you can increase or decrease the number of licenses.

5. Change the quantity, then select **Submit**.

Manage subscriptions using Partner Center APIs

You can also use Partner Center APIs to perform lifecycle management and manage invoices for your subscriptions. For more information, see Create a subscription for commercial marketplace products.

Next steps

- Purchase commercial marketplace offers
- Learn about billing in the commercial marketplace

Billing for commercial marketplace products and subscriptions in Partner Center

5/14/2020 • 6 minutes to read

Applies to

- Partner Center
- Partners in the CSP program

Appropriate roles

- Global admin
- Billing admin

As a partner in the CSP program, you can use Partner Center to purchase license-based SaaS products from ISV publishers in the commercial marketplace. After you do so, you can access a bill for these types of purchases. The billing period starts on the first day of the calendar month and ends on the last day of the calendar month. Invoices are made available on the 8th day of the following month.

You can access invoices from either the Partner Center dashboard or by using Partner Center APIs.

Partners in the CSP program are billed for ISV commercial marketplace solutions purchased for a customer when they purchase those products from either Partner Center or from the Azure portal (using the customer's prior, CSP-purchased Azure tenant).

> **NOTE**
> If customers use their own Azure AD tenant (not one purchased from a partner in the CSP program), customers can also choose to purchase their own ISV SaaS solution directly from (Microsoft AppSource or Azure Marketplace). If they do so, they will receive their own bill directly from Microsoft. Likewise, if a partner in the CSP program sells an Azure subscription or the new Azure plan to the customer and grants the customer (or indirect reseller) role-based access to that tenant (assigning any role to the customer besides **Reader**), that customer (or indirect reseller) can also purchase commercial marketplace offers without prior approval or notification to the CSP partner. In these cases, Microsoft will not directly notify partners in the CSP program about purchases made by their customers. However, Microsoft does offer an optional Azure Monitor mechanism that you can use to set alerts or notifications about activity on an Azure subscription.

Access billing information for commercial marketplace products

The global admin or billing admin for your company will receive an email when an invoice is ready to view. To access the latest invoice and reconciliation file for commercial marketplace product purchases:

1. Sign in to the Partner Center dashboard.

2. From the Partner Center menu, select **Billing**.

   You will see two tabs at the top of the Billing page: **Recurring** and **Recurring and one-time purchases**. Each tab lets you access invoice and reconciliation (recon) files for different marketplace products:

   - **Recurring** tab: Shows invoice and reconciliation files for subscriptions related to Office 365, Microsoft 365, Dynamics 365, Azure Active Directory, PowerBI Pro, and Microsoft Azure.

   - **Recurring and one-time purchases** tab: Shows invoice and reconciliation files for Azure plan, Azure reservations, software and commercial marketplace products.

3. Select the **Recurring and one-time purchases** tab. If you purchased subscriptions for a customer in a different currency, you will see a tab for each currency. You can do a few things fr:om this page:

   - To see the latest invoice and reconciliation file, select **Invoice** or **Reconciliation file**. (If you wanted to, you can also access the latest invoice and recon file data using Partner Center APIs.
   - To see earlier invoices and recon files, expand the **Billing history** row below.
   - To check your estimated account balance or bill at any time based on the latest account activity, select a link under the **Estimates** heading.

   > **NOTE**
   >
   > When we post your bill on the 8th day of the month, it will include taxes and any other applicable charges and credits. This means the final amount due might differ from what you see during the billing period.

More about invoices and recon files for commercial marketplace products

This section offers more information about invoice and reconciliation files for commercial marketplace SaaS subscriptions purchased for customers from third-party ISV publishers.

When you select **Recurring and one-time purchases** from the **Billing** option in the Partner Center menu, you gain access to invoices and reconciliation files for charges related to both Microsoft (first-party) and ISV (third-party) purchases. These purchases may be associated with:

- SaaS subscriptions (from either Microsoft or ISV publishers)
- Azure plan
- Azure reservations
- Other subscription-based software (from either Microsoft or ISV publishers)

Examples of these purchases might include SUSE Linux software (a software subscription) or an Azure ISV SaaS product subscription.

> **NOTE**
>
> For more information about how to read invoice and recon files, see also Billing overview.

Tips on reading your invoice

When you purchase a license-based SaaS product from a third-party ISV publisher, you will only see charges for the license fee on your invoice. This is true even when the ISV's SaaS product uses (or consumes) underlying Azure infrastructure resources. That is because your customer's Azure infrastructure usage charges for an ISV's SaaS product are billed directly to the ISV. (ISVs will see associated Azure consumption charges in their own Azure usage daily-rated invoice reconciliation file.)

Your invoice will contain several pages:

- **Page 1 of the invoice:** Contains a summary overview of the CSP program partner's billing details. This includes a summary of charges for the billing period, an invoice number, payment terms (Net 60 days), and billing payment methods to pay by wire or by check.
- **Page 2 (and any subsequent pages) of the invoice:** Details charges for both first-party Microsoft

purchases and third-party ISV (license-based) purchases from the commercial marketplace. You can identify ISV license-based purchases by the **Publisher** line beneath each product name. The associated reconciliation file offers more billing details for specific invoice charges.

- **Final page of the invoice:** If you were charged for license-based marketplace products from an ISV, this final page will display more details about the ISV publisher's name and address.

Tips on reading your reconciliation file

The **Recurring and one-time purchases** reconciliation file contains several columns with additional details that map to the charges in your invoice. The **PublisherName** column shows whether the purchase is from Microsoft or a third-party ISV publisher.

Some charges in your reconciliation file may appear with a cost of $0. This may be due to an ISV "free trial" offer (usually 30 or 60 days) or a Bring Your Own License offer.

In the case of free trial ISV offers:

- The free trial period covers the cost of the ISV's license-based SaaS product during that time. You will also not be charged for associated Azure infrastructure use of that SaaS product. If you are using a usage-based ISV offer, however, the free trial does not include the cost of underlying Azure infrastructure usage. In this case, Azure infrastructure usage charges will appear in a separate Azure reconciliation file.

- When you purchase and deploy an ISV's free trial-eligible product for your customer, the customer is automatically enrolled in the free trial by the ISV publisher. The free trial period ends automatically after the period defined by the ISV publisher. After the period ends, the customer will be charged. This means the reconciliation file may show two rows for a trial-eligible product: One that tracks the trial period and one that tracks the paid offer (which will display a cost of $0 until after the trial period ends). Once the trial ends, the row showing the paid offer will start to show charges.

For more information about what each column represents, see Use your reconciliation files. See also Types of billing in Partner Center

Next steps

- Manage commercial marketplace products for customers
- Learn about support for commercial marketplace products

Support for commercial marketplace products in the CSP program

5/8/2020 • 2 minutes to read

Applies to

- Partner Center
- Partners in the CSP program

Appropriate roles

- Global admin
- Admin agent

Partners in the CSP program are the first point of contact for customer billing or subscription management questions related to any third-party ISV subscription or product purchased for customers from the commercial marketplace.

For technical support questions about commercial marketplace products from third-party ISV publishers, partners in the CSP program should contact the ISV publisher of that product or offer.

Support roles of ISV products for CSP partners, ISV publishers, and Microsoft

For commercial marketplace offers or purchases of third-party ISV products or offers:

- **Support role of the ISV publisher:** ISVs provide technical support and service level commitments to their customers regarding their offer, as defined in the Third-Party Customer Agreement. The ISV should provide a way for partners in the CSP program and/or their customers to contact the ISV directly for support, including user support and break-fix support. ISVs are expected to provide partners in the CSP program with user documentation, training, and service health/outage notifications (as applicable) so those partners will be equipped to coordinate support (if partners in the CSP program choose to provide that service to their customers).

- **Support role of the partner in the CSP program:** The partner in the CSP program is responsible for all other support for third-party ISV offers. This support can relate to customers' billing questions, account set-up, and payment. The partner in the CSP program may choose to direct technical support queries from customers to the support contacts provided by the ISV publisher.

- **Support role of Microsoft:** Microsoft provides support to the third-party ISV publisher and to the partner in the CSP program regarding Microsoft commerce system functionality. This means Microsoft will be responsible for support of certain activities by the partner in the CSP program partner activities and by the ISV that occur within the Microsoft commerce system, such as onboarding/offer management, transactions, billing, account support, and deployment and provisioning for Azure-based ISV solutions.

  Microsoft does not provide support for commercial marketplace products offered by third-party ISV publishers. Microsoft will, however, give the partner in the CSP program access to the ISV publisher's support contact information. Partners in the CSP program must contact the ISV publisher (above) to obtain other types of support for their offer.

In the indirect CSP model, these support responsibilities are shared between the indirect provider and the indirect reseller. If you are an indirect reseller, ask your indirect provider for details.

How to find ISV contact information

Most ISV contact details appear on the Partner Center **Offer details** page, available from the Partner Center dashboard. This includes an engineering contact for the ISV, customer support, and any CSP program contact. Information provided by the ISV here may also include user documentation, sales collateral, and a link to CSP program marketing materials.

To access the **Offer details** page, see Discover offers in the commercial marketplace.

Next steps

- Learn about contracts related to commercial marketplace products

Contracts for CSP partners doing business in the commercial marketplace

5/13/2020 • 2 minutes to read

Applies to

- Partner Center
- Partners in the CSP program

Appropriate roles

- Global admin
- Admin agent

This section relates to contracts for partners in the CSP program who choose to purchase ISV marketplace offers or products for their customers from the Partner Center commercial marketplace or the Azure portal.

The CSP Program Guide contains the terms and conditions governing commercial marketplace offers between Microsoft and partners in the CSP program. CSP partners should review these terms and conditions to ensure they are operating in compliance within the program.

If partners have already signed their CSP agreements, they do not need to re-sign in order to sell commercial marketplace offers. Applicable CSP agreements include the current Microsoft Partner Agreement (MPA) and the prior Microsoft Cloud Reseller Agreement (MCRA) or Microsoft Cloud Distributor Agreement (MCDA).

> **NOTE**
> Certain commercial marketplace offers may require additional agreements between the partner in the CSP program, the Independent Software Vendor (ISV) and/or the customer. It is the ISV's responsibility to provide the customer with the appropriate Customer Agreement associated with each ISV offer ordered by that customer.

Specific marketplace contract areas and distinctions for CSP partners

For more information about terms governing CSP activities in the commercial marketplace, see:

- **Section 5.7 (Third Party Offers)** in the CSP Program Guide. This provides the terms that govern the sale of ISV solutions by partners in the CSP program.
- **The Microsoft Partner Agreement (MPA)** will govern the CSP program, replacing the existing MCRA and MCDA. The MPA is available on Partner Center so that partners who choose to participate in the CSP program can review and accept it.

Microsoft does not accept legal responsibility for delivery of services between transacting parties and does not provide a mechanism for transacting partners to establish legal terms through its commerce platform. If the transacting partners require additional legal terms, they will need to execute an agreement directly.

Next steps

- Support for commercial marketplace products
- Overview of CSP commercial marketplace activities

Sell Microsoft Azure reservations to customers using Partner Center, the Azure portal, or APIs

5/8/2020 • 2 minutes to read

Applies to

- Partner Center
- Microsoft Azure portal
- Partners in CSP

Appropriate roles

- Admin agent
- Global admin
- Helpdesk agent
- Sales agent
- User management admin

Partners in the Cloud Solution Provider program (CSP) can offer their customers Microsoft Azure reservations. Customers can gain significant savings when they reserve in advance. Azure reservations offer customers simplicity and flexibility in the following ways:

- One or three-year reservation terms
- Easy to get started; setup completed in seconds
- Cancel or exchange reserved instances at any time for adjusted refund
- Manage reserved instances usage at the organizational or individual department level

Azure reservations can appeal to customers in the following ways:

- Reservations can offer significant savings over pay-as-you-go (PAYG) pricing
- Better budgeting and forecasting with upfront payment for one-year or three-year terms
- Prioritized computing capacity in the Azure region closest to their offices
- Azure reservations provide the foundation for end to end infrastructure solutions when combined with software like Microsoft Windows Server and Azure SQL Database

> **NOTE**
> You can buy, sell, and manage Azure reservations in both the Partner Center and the Azure portal, and using the Partner Center API. You can also give your customers permission to buy their own Azure reservations from an Azure subscription you purchased for them. Follow the links below to learn how.

Azure reservations resources

FOR INFORMATION ABOUT	READ THIS
Azure reservations documentation for your customers	What are Azure reservations?

FOR INFORMATION ABOUT	READ THIS
Purchasing Azure reservations for your customers in Partner Center	Buy Azure reservations
Managing Azure reservations in Partner Center	Managing Azure reservations in Partner Center
Determining the correct VM size and verifying customer VM usage	VM sizing for maximum Azure reservation usage
Purchasing Azure reservations using the Partner Center API	Purchase Azure Reserved VM Instances in the Partner Center developer documentation
Giving customers permission to buy their own Azure reservations from your CSP subscription.	Give customers permission to buy their own Azure reservations

Microsoft Azure VM sizing for maximum reservation usage

6/19/2020 • 4 minutes to read

Applies to

- Partner Center
- Azure portal
- Partners in CSP

Determine the VM size for a customer's Azure reservation

When buying Microsoft Azure reservations on behalf of your customers, you'll need to choose a virtual machine (VM) sized to meet the customer's computing needs. You can find this information using one of these methods:

- Azure utilization API
- The Azure portal
- Azure PowerShell
- The Azure Resource Manager (ARM) API

Instructions for using each of these methods are below. After you buy a reservation, the reservation discount is applied automatically to virtual machines matching the attributes and quantity of the reservation. You don't need to assign the reservation to a VM.

> **NOTE**
> Reservation discounts don't apply to classic or promotional VMs.

> **IMPORTANT**
> To correctly identify the type and size of VM to buy on behalf of your customer, you must use one of the methods described below as the VM series type is not correctly displayed in Partner Center reconciliation files.

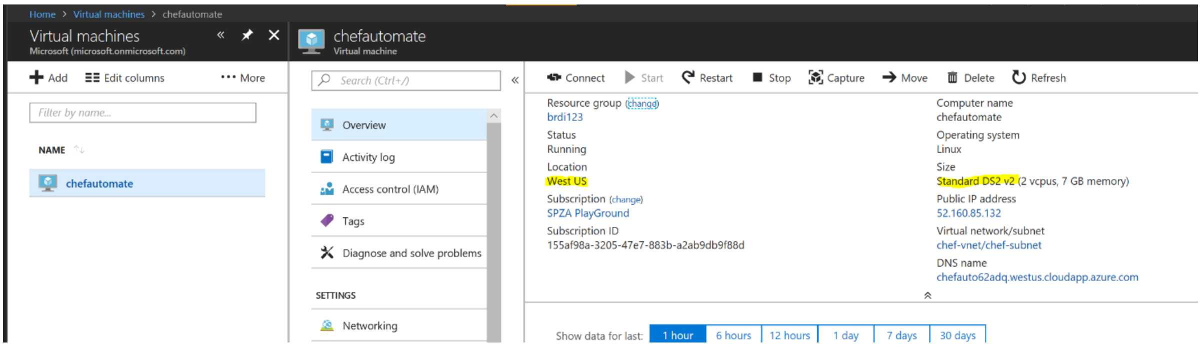
Get VM sizing information using the Azure utilization API

1. Use the value for ServiceType attribute from additionalInfo in the API response to identify the VM size to buy.
2. For more information, see Get a customer's utilization records for Azure in the Partner Center API.

Get VM sizing information using the Microsoft Azure portal

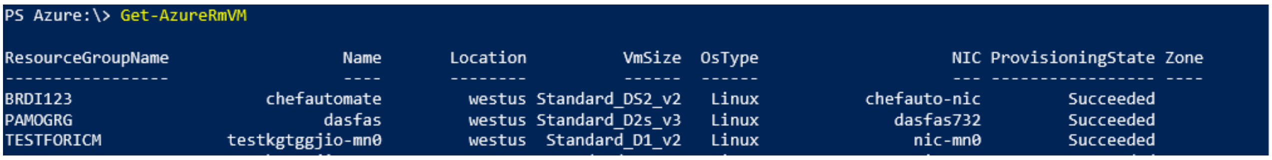
1. In Partner Center, go to your **Customers** page.
2. Find the customer who wants to buy Azure VM reservations and then select the down arrow to expand the customer's information. Select **Microsoft Azure Management Portal** to open the customer's record in the Azure portal.
3. Select **Virtual machines** from the portal menu and then select the VM for which you want to buy a reservation.
4. On the VM's detail page, find the size and region information, as illustrated below, and use this information

to purchase the reservation in Partner Center.



Get VM sizing information using Microsoft Azure PowerShell

Use the information in the image below to get the location and size of the VM for which you want to buy a reservation.

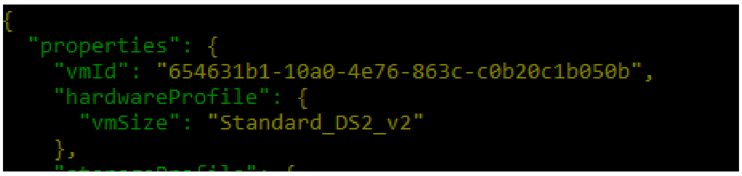


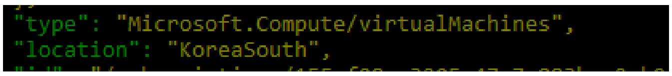
Get VM sizing information using the Azure Resource Manager (ARM) API

1. Using the ARMClient or the ARM APIs, call the ARM client for the VM for which you want to buy a reservation.

2. /subscriptions//resourceGroups//providers/Microsoft.Compute/virtualMachines/?api-version=2017-12-01

3. The call returns the values for **vmSize** and **location**, as illustrated below.





Verify Azure VM usage and reservation discount

After you purchase an Azure Reserved VM Instance on behalf of a customer, the discount for paying for VM space in advance is automatically applied to the virtual machines that match the attributes and quantity of the customer's reservation.

You can verify the customer's reservation usage and see which virtual machines the reservation discounts are applied to by using one of the following methods:

- The Azure portal
- Azure utilization API

Instructions for using each of these methods are below.

> **NOTE**
>
> Only the Azure utilization API shows which virtual machine the discount is being applied to.

Verify the customer's reservation usage in the Microsoft Azure portal

1. In Partner Center, go to your **Customers** page.

2. Find the customer whose reservation discount and usage you want to verify and then select the down arrow to expand the customer's information. Select **Microsoft Azure Management Portal** to open the customer's record in the Azure portal.

3. Select **Reservations** from the portal menu and then select the reservation you want to check usage for.

4. On the **Overview** page check the reservation's utilization graph, which shows how much of the reservation was applied to virtual machines.

   > **NOTE**
   >
   > Utilization data may be delayed by up to 8 hours.

   a. If the reservation's utilization is 100%, your customer is getting all the possible savings that the reservation purchase can provide. b. If the reservation's usage is 0%, the discount is not being applied to any virtual machine. c. If the reservation's usage is between 1% and 99%, there are unused benefits.

5. To avoid this situation, determine the correct size VM to support the customer's computing needs before making the purchase.

Verify the customer's reservation usage with the Azure utilization API

> **NOTE**
>
> Only the Azure utilization API shows which virtual machine the discount is being applied to.

You can get reservation usage data with the Azure utilization API to verify that the customer is getting the reservation discount and to see which VMs (virtual machines) the discount is applied to. Compare Example A to Example B to see how to verify a customer's reservation usage.

Example A – Reservation discount is correctly applied


```
{
        "usageStartTime": "2018-04-01T00:00:00+00:00",
        "usageEndTime": "2018-04-02T00:00:00+00:00",
        "resource": {
          "id": "32c11975-b464-43d1-bc77-
d787694e7c48",
          "name": "Compute Hours",
          "category": "Virtual Machines",
          "subcategory": "Reservation-Base VM",
          "region": ""
        },
        "quantity": 24,
        "unit": "1 Hour",
        "infoFields": {},
        "instanceData": {
          "resourceUri": "/subscriptions/25a70782-3820-
4a5e-b619-
35802d8090db/resourceGroups/TESTRG/providers/Micr
osoft.Compute/virtualMachines/nwatchllcRI",
          "location": "uswest2",
          "partNumber": "",
          "orderNumber": "",
          "additionalInfo": {
            "imageType": "",
            "serviceType": "Standard_B1s",
            "vmName": "",
            "vmProperties": "",
            "usageType": "ComputeHR",
            "reservationOrderId": "b55ddbff-5e1d-4ab0-
ac10-5825f8795b03",
            "reservationId": "9850471a-b1d6-4037-
bad1-8ac611ac8f1e",
            "consumptionMeter": "2c5f052a-e968-41cb-
863e-1e3a3c289e86"
          }
        },
        "attributes": {
          "objectType": "AzureUtilizationRecord"
        }
      },
```


Example B – Reservation discount is not present


```
{
        "usageStartTime": "2018-04-06T00:00:00+00:00",
        "usageEndTime": "2018-04-07T00:00:00+00:00",
        "resource": {
          "id": "55169dff-26e2-48e5-a57c-
85104d82ca58",
          "name": "Compute Hours",
          "category": "Virtual Machines",
          "subcategory": "Standard_D1_v2 VM
(Windows)",
          "region": "US West 2"
        },
        "quantity": 2.716681,
        "unit": "Hours",
        "infoFields": {},
        "instanceData": {
          "resourceUri": "/subscriptions/25a70782-3820-
4a5e-b619-
35802d8090db/resourceGroups/TESTRG/providers/Micr
osoft.Compute/virtualMachines/nwatchllcnonri",
          "location": "uswest2",
          "partNumber": "",
          "orderNumber": "",
          "additionalInfo": {
            "imageType": "",
            "serviceType": "Standard_DS1_v2",
            "vmName": "",
            "vmProperties": "",
            "usageType": "ComputeHR"
          }
        },
        "attributes": {
          "objectType": "AzureUtilizationRecord"
        }
      }
```


- The reservationId identifies the Azure reservation that was used to apply the discount to the VM.
- consumptionMeter is the MeterId for the VM that has the reservation discount applied to it.
- The ReservationMeter shows $0 cost since the reservation discount was applied.

For more information, see Get a customer's utilization records for Azure in the Partner Center API.

> **IMPORTANT**
>
> Software costs, such as Microsoft Windows Server, are not currently included in the price of a VM reservation and will appear as separate line items in the order record and on your invoice. However, if a customer has the Azure Hybrid Use Benefit, the software costs will not be applied. For more information, see Windows software costs not included with Reserved Instances.

Azure reservations resources

FOR INFORMATION ABOUT	READ THIS
Azure reservations in CSP overview	Sell Microsoft Azure Reserved VM Instances
Purchasing Azure reservations for your customers in Partner Center	Buy Azure reservations
Managing Azure reservations in Partner Center	Managing Azure reservations in Partner Center

FOR INFORMATION ABOUT	READ THIS
Purchasing Azure reservations in the Azure portal	Prepay for virtual machines with Azure Reserved VM Instances in the Azure Help
Managing Azure reservations in the Azure portal	Manage reserved VM instances in the Azure Help
Purchasing Azure reservations using the Partner Center API	Purchase Azure Reserved VM Instances in the Partner Center developer documentation
Giving customers permission to buy their own Azure reservations from a subscription you purchased for them.	Give customers permission to buy their own Azure reservations

Buy Microsoft Azure reservations on behalf of your customers in Partner Center

6/19/2020 • 5 minutes to read

Applies to

- Partner Center
- Microsoft Azure portal
- Partners in CSP

Appropriate roles

- Admin agent
- Global admin
- Helpdesk agent
- Sales agent
- User management admin

Before you begin

Review the important information below before you buy Azure reservations on behalf of your customers. (Do you want customers to be able to buy their own Azure reservations from a prior Azure subscription you purchased for them? See Give customers permission to buy their own Azure reservations.)

- If and when your customer signs the new Microsoft Customer Agreement (see Confirm customer acceptance of the Microsoft Customer Agreement), you must purchase Azure reservations under the Azure plan. For more information, read Purchase Azure Plan.
- Customers must already have an active Azure subscription before you can purchase reservations on their behalf
- Software subscription costs such as SQL Database or SUSE Linux software are not included in Azure reservation prices
- Microsoft's commercial pricing to you does not include taxes, unless your location is Brazil. If your location is Brazil, the commercial price to you includes the appropriate taxes
- Sales and help desk agents need explicit access to the Azure subscription so they can buy or manage it in the Azure portal and file support requests, including for exchanges and refunds, on behalf of the customer
- If you're an indirect provider and you buy Azure reservations through the Azure portal, the Partner of Record (indirect reseller) is inherited from the Azure CSP subscription you select.
- The Partner of Record for Azure reservations cannot be changed post-purchase. You can cancel the existing reservation and purchase a new one with the new Partner of Record.
- If a customer wants to transfer an Azure subscription from Direct or EA to CSP, reservations do not get transferred.

Azure reservations unavailable markets

IMPORTANT

Azure reservations **are not** available in the following markets:

Unavailable markets (in alphabetical order)

A TO GI	GR TO PAL	PAP TO Z
Åland Islands	Greenland	Papua New Guinea
American Samoa	Grenada	Pitcairn Islands
Andorra	Guadeloupe	Reunion
Anguilla	Guam	Saba
Antarctica	Guernsey	Saint Barthélemy
Antigua and Barbuda	Guinea	Saint Lucia
Aruba	Guinea-Bissau	Saint Martin
Azerbaijan	Guyana	Saint Pierre and Miquelon
Benin	Haiti	Saint Vincent and the Grenadines
Bhutan	Heard Island and McDonald Islands	Samoa
Bonaire	Isle of Man	San Marino
Bouvet Island	Jan Mayen	São Tomé and Príncipe
British Indian Ocean Territory	Jersey	Seychelles
British Virgin Islands	Kiribati	Sierra Leone
Burkina Faso	Kosovo	Sint Eustatius
Burundi	Laos	Sint Maarten
Cambodia	Lesotho	Solomon Islands
Central African Republic	Liberia	Somalia
Chad	Madagascar	South Georgia and South Sandwich Islands
China	Malawi	South Sudan
Christmas Island	Maldives	St Helena, Ascension, Tristan da Cunha
Cocos (Keeling) Islands	Mali	Suriname
Comoros	Marshall Islands	Svalbard
Congo	Martinique	Swaziland
Congo (DRC)	Mauritania	Timor-Leste
Cook Islands	Mayotte	Togo

A TO GI	GR TO PAL	PAP TO Z
Djibouti	Micronesia	Tokelau
Dominica	Montserrat	Tonga
Equatorial Guinea	Mozambique	Turks and Caicos Islands
Eritrea	Myanmar	Tuvalu
Falkland Islands	Nauru	U.S. Outlying Islands
French Guiana	New Caledonia	Vanuatu
French Polynesia	Niger	Vatican City
French Southern Territories	Niue	Wallis and Futuna
Gabon	Norfolk Island	Yemen
Gambia	Northern Mariana Islands	
Gibraltar	Palau	

Purchase Azure reservations

Follow the steps below to buy Microsoft Azure reservations on behalf of your customers in Partner Center. (Do you want customers to be able to buy their own Azure reservations from a prior Azure subscription you purchased for them? See Give customers permission to buy their own Azure reservations.)

1. Select **Customers** from the Partner Center menu.

2. On your **Customers** page, find the customer who wants to purchase Azure reservations and then select the down arrow to expand the customer's row.

3. Select **Add products** and then select **Azure**.

   a. Choose the customer's market segment from the **Segment** list.

   b. Choose **Reservations** from the product **Type** list.

   c. Choose the type of reservation the customer wants from the **Reservations type** list.

4. Azure reservations must be associated with an active Azure subscription. Choose the customer's subscription you want to add Azure reservations to from the **Customer subscription** list.

   > **IMPORTANT**
   >
   > If the customer doesn't already have an active Azure subscription, select **Azure** to add one now.

5. Use the filters to find Azure reservations on virtual machines that meet your customer's requirements.

6. After you find the reservation(s) you want to buy, enter the number of reserved instances the customer will need in **Quantity** and then select **Add to cart**.

7. Repeat steps 5 and 6 until you've added all the necessary items to the order. Select **Review** to verify that your order is correct.

8. On the **Review your orders** page, you can:

   - Verify or change the reserved instances quantity.
   - Select the reservation's scope. The reservation's scope can cover one subscription or multiple subscriptions (shared scope). If you scope the reservation to a single subscription, the reservation discount is applied to this subscription only. If you select shared, the reservation discount is applied to any subscriptions within the customer's billing context.

     > **NOTE**
     >
     > If you opt to limit the reservation's scope to a single Azure subscription, you may need to increase the subscription's vCPU quota. To increase the subscription's vCPU quota, you'll need to create a support request in the Azure portal. Follow the instructions in this topic to create the request.

     > **NOTE**
     >
     > If your customer is under the Azure plan, **Scope** will be set to **Shared**.

   - If you're a provider partner, select the reseller you want to associate with the product.
   - If your Azure reservation supports the Billing plan option, you can select the billing frequency as monthly from the dropdown menu.
   - If your Azure reservation does not support the Billing plan option, your billing frequency defaults to one time billing.

9. Select **Buy** to purchase the order. The details of your order, including your order number, are displayed on the **Confirm** page. Select **Done** to go to your **Order history** page.

10. To manage the customer's reservation in the Azure portal, find the customer on your **Customers** page and then select the down arrow to expand the customer's row. Select **Microsoft Azure Management Portal** to open the customer's record in the Azure portal.

Azure reservations resources

FOR INFORMATION ABOUT	READ THIS
Azure reservations in CSP overview	Sell Microsoft Azure Reserved Instances
Managing Azure reservations in Partner Center	Managing Azure reservations in Partner Center
Determine the correct VM size and verify customer VM usage	VM sizing for maximum Azure reservation usage
Purchasing Azure reservations using the Partner Center API	Purchase Azure Reserved VM Instances in the Partner Center developer documentation
Giving customers permission to buy their own Azure reservations	Give customers permission to buy their own Azure reservations

Manage, cancel, exchange, or refund Microsoft Azure reservations for customers

5/8/2020 • 3 minutes to read

Applies to

- Partner Center
- Microsoft Azure portal
- Partners in CSP

Appropriate roles

- Admin agent
- Global admin
- Helpdesk agent
- Sales agent
- User management admin

To manage your customers' Azure reservations post-purchase, you'll select the customer and reservation you want to manage in Partner Center, and then make changes to the reservation in the Azure portal.

1. To get started, select **Customers** from the Partner Center menu and then select the customer whose reservations you want to manage.

2. On the customer's detail page menu, select **Azure reservations** and then select the specific reservation you want to manage.

3. Under **Actions**, select **Manage** to go to the customer's reservation record in the Azure portal. On the reservation detail page, follow the steps below to complete tasks.

SELECT	TO
Overview	View details of a customer's reservation, including expiration date, scope, and utilization data. **NOTE** Select **Refund** to create a support request for a pro-rated refund. Select **Exchange** to create a support request to exchange the unused portion of your reservation term.
Access Control (IAM)	Manage access to the customer's reservation information.
Configuration	Change the reservation's scope and/or the Azure subscription the reservation is associated with.
Properties	View the reservation's properties and copy to the clipboard the reservation ID and reservation order ID. **NOTE** Support may ask you for the reservation ID and reservation order ID when you request support on behalf of a customer.
New support request	Request help from Microsoft Support.

Cancel or exchange a reservation

If at any point a customer's business needs change, they may want to cancel a reservation and get a refund or exchange a reservation's prorated refund amount to be used toward the price of a new reservation.

In both of these scenarios, Microsoft refunds the amount to you so that you can then manage the resulting financial transactions with your customers. Microsoft does not contact customers directly about billing, cancellations, or refunds.

How cancellations work

Customers can request to cancel a reservation at any time (refund amount capped at $50,000 per year). Canceling a reservation allows the customer to return the amount of the remaining months of an Azure reservation for an early termination fee. The remaining prorated balance, minus the early termination fee, is refunded to your account so that you can refund the customer's account.

See below for cancellation details and fees.

CANCELLATION DATE (DAYS)	USAGE	CREDIT	EARLY TERMINATION FEE	REFUND CAP
5 or fewer	No	100%	No	$50,000 USD
5 or fewer	Yes	Pro-rated	No	$50,000 USD
More than 5	No	Pro-rated	12%	$50,000 USD
More than 5	Yes	Pro-rated	12%	$50,000 USD

How exchanges work

If a customer wants to buy a different reservation than the one they originally bought from you, they can request an exchange. Exchanging a reservation can be an attractive alternative to canceling a reservation because it allows the customer to use the prorated refund amount toward the price of the new reservation.

The prorated refund amount is credited to your account so that you can offer the customer an exchange.

Request a refund or exchange on behalf of a customer

To file a support request for a refund or exchange on behalf of your customers, you'll select the customer and reservation in Partner Center, and then create the support request in the Azure portal.

> **NOTE**
>
> Microsoft Support agents may ask you to provide the reservation ID and reservation order ID. You can find this information on the reservation's **Properties** page in the Azure portal.

1. To get started, select **Customers** from the Partner Center menu and then select the customer who wants a refund.

2. On the customer's detail page, select **Azure reservations** and then select the specific reservation the customer wants refunded.

3. Under **Actions**, select **Refund** to go to the customer's reservation record in the Azure portal and initiate a support request.

4. On the **New support request** page, follow the steps below to request a refund. Select **Next** after each

step.

STEP	SELECTIONS
1 Basics	Issue type: Billing.
2 Problem	Problem type: Reservation management. Category: Exchanges and refunds.
3 Contact information	Select your preferences and enter the required information.

5. Select **Create** when done.

Azure reservations resources

FOR INFORMATION ABOUT	READ THIS
Azure reservations in CSP overview	Sell Microsoft Azure Reserved Instances
Purchasing Azure reservations for your customers in Partner Center	Buy Azure reservations
Determine the correct VM size and verify customer VM usage	VM sizing for maximum Azure reservation usage
Purchasing Azure reservations using the Partner Center API	Purchase Azure Reserved VM Instances in the Partner Center developer documentation
Giving customers permission to buy their own Azure reservations from a subscription you purchased for them.	Give customers permission to buy their own Azure reservations

Acquire, provision, & manage Azure reserved VM instances (RI) + server subscriptions for customers

5/8/2020 • 4 minutes to read

Applies to:

- Partner Center

Appropriate roles

- Admin agent
- Global admin
- Helpdesk agent
- Sales agent
- User management admin

What are Azure Reservations?

Azure Reservations help you save money by pre-paying for one-year or three-years of virtual machine, SQL Database compute capacity, Azure Cosmos DB throughput, or other Azure resources. Pre-paying allows you to get a discount on the resources you use. Reservations can significantly reduce your virtual machine, SQL database compute, Azure Cosmos DB, and other resource costs up to 72% compared to pay-as-you-go prices. Reservations provide a billing discount and don't affect the runtime state of your resources. For more information see What are Azure Reservations?

Why should customers buy a reservation?

If customers have virtual machines, Azure Cosmos DB or SQL databases that run for long periods of time, purchasing a reservation gives them the most cost-effective option. For example, if a customer continuously runs four instances of a service without a reservation, they are charged at pay-as-you-go rates. If they purchase a reservation for those resources, they immediately get the reservation discount. The resources are no longer charged at the pay-as-you-go rates.

Compelling New Azure offer in CSP

By bringing Azure Reservations and Server Subscriptions to its CSP program, Microsoft is better enabling its partners to address fast-growing customer demand for more cost-effective solutions to support highly predictable, persistent cloud workloads. The CSP program enables partners to acquire, provision and manage Azure Reservations and Server Subscriptions on behalf of commercial customers via Microsoft Partner Center and Azure portal.

We even give partners in our CSP program choices about how Azure reservations can be purchased. CSP partners can buy Azure reservations on behalf of a customer or they can allow the customer to buy their own reservations from a prior Azure subscription the partner has purchased for them.

Azure Reservations give customers the flexibility of virtualization for a wide range of computing solutions, including development and testing, running applications and extending the data center.

With Azure Reserved VM Instances for example, commercial customers can now save up to 72% versus pay-as-you-go Azure VM pricing simply by purchasing - or "reserving" - the virtual machine for a 1- or 3-year period. Windows Server customers with Azure Hybrid Benefit, included with Software Assurance, will be able to save up to

80% versus pay-as-you-go pricing.

With an unmatched combination of compelling pricing and unmatched deployment flexibility, customers will see the best overall value when they choose Azure Reservations:

Azure reservations

- Azure Reserved VM Instances
- SQL DB Reservations
- SQL Managed Instance
- Azure Cosmos DB
- Azure SQL Data Warehouse
- App Services
- Azure Databricks unit reservations
- Managed Disk
- Block blob
- MySQL
- Azure Data explorer
- MariaDB
- PostgreSQL

Server subscriptions

- Windows Server
- Remote Desktop Services (RDS) CALs
- SQL Server

Linux ISV annual subscriptions

- SUSE Linux
- Red Hat Enterprise Linux
- Azure Red Hat OpenShift

ISV annual subscriptions

- Azure VMware Solution by CloudSimple

Getting started

To understand how you can position Azure Reservations with your customers and get up and running operationally as quickly as possible, we recommend the following approach to review the readiness materials:

1. Review the Overview Presentations and associated webinars for the customer value proposition and positioning
2. Review and understand the Modern Commerce Operating Guide
3. Review the Azure RI and Server Subscriptions FAQ
4. Understand updates for Azure Reservations and Server Subscriptions in the Partner Center API (API/SDK)

Resources

Below is a comprehensive list of resources to help you onboard quickly to transacting Azure Reservations through Partner Center:

Sales readiness

- Azure Reservations and Server Subscriptions with Azure Hybrid Benefit Overview
- Sales Sheet
- Partner FAQ for Azure Reservations
- Partner FAQ for Azure Reservations and SQL DB

- Remote Desktop Services (RDS) Client Access License (CAL) (announcement)
- Azure Reserved VM Instances (Azure portal)
- Server Subscriptions
- SQL DB in Azure Overview
- SQL DB Reservations (Azure portal)
- Azure Cosmos DB (Azure portal)
- SQL Managed Instance (Azure portal)
- SUSE and Red Hat Enterprise Linux (Azure portal)
- Red Hat Linux on Azure
- SUSE Linux on Azure
- Linux on Azure
- Azure Pricing Overview
- Azure Pricing Calculator
- Azure Databricks unit reservations
- CSP Price lists: The **Microsoft Azure Reserved Instances** and **Software Subscriptions** price lists are both located on the Partner Center Pricing & Offers page.

Training

Register to view Commercial Licensing Readiness webinars and on-demand events.

Licensing Readiness on-demand events include topics like:

- CSP Online Services, CSP Azure, and general licensing updates, including Azure (November 2018)
- SQL DB Reserved Capacity & Instance Size Flexibility (August 2018)
- Server Subscriptions in CSP (July 2018)
- Azure Reservations Overview in CSP (May 2018)

Other useful training includes the Azure Licensing Module on Partner University.

Operations

- Modern Commerce Operations Guide (updated): A comprehensive guide covering key policy and operational aspects such as agreements, ordering through Partner Center, invoice, price list details, incentives, reconciliation file, API/SDK, Sandbox, and Azure Partner Shared Services.
- Modern Offers Country Availability and Customer Currency Matrix
- Sell Microsoft Azure Reserved Instances
- Buy Microsoft Azure reservations on behalf of your customers
- Manage Azure reservations on behalf of your customers
- Billing for Azure reservations
- VM sizing for maximum reservation usage
- Partner Center API (API/SDK)
- Remote Desktop Services

Azure Hybrid Benefit

The Azure Hybrid Benefit helps you get more value from your Windows Server licenses and save up to *47 percent on virtual machines. You can use the benefit with Windows Server Datacenter and Standard edition licenses covered with Software Assurance. Depending on the edition, you can convert or reuse your licenses to run Windows Server virtual machines in Azure and pay a lower base compute rate (Linux virtual machine rates).

See also Azure Hybrid Benefit FAQ

*Actual savings may vary based on region, instance type, or usage.

Azure services available in the Azure Cloud Solution Provider (CSP) program

6/19/2020 • 3 minutes to read

Appropriate roles

- Admin agent
- Billing admin
- Global admin
- Helpdesk agent
- Sales agent
- User management admin

Available Azure services in Azure CSP

This article lists the Azure services that are and are not available in the Azure Cloud Solution Provider (CSP) program. It also discusses service availability in the national clouds Microsoft Azure Germany and Microsoft Azure Government.

> **NOTE**
> Azure China is not available in the Azure CSP program.

Global Cloud

All services based on Azure Resource Manager model are available in CSP Program. Non-Azure Resource Manager services are not available in CSP program.

CSP-Specific Service Configurations

The following services require special configurations in CSP:

- StorSimple
- Azure Active Directory Domain Services
- Key Vault
- Azure Time Series Insights Only users from the customer tenant can access data in their Time Series Insights environment. Partners can manage their customer's Time Series Insights environment by default, but if they need access to the data in it, they must be added to the customer tenant.

Visual Studio Marketplace

You can now purchase the items listed below from Visual Studio Marketplace, with the exception of third-party extensions.

- Azure DevOps
- Visual Studio subscriptions

- Xamarin University training

To help get you started, we have created videos and documentation about how to set up, purchase, and manage Azure DevOps in CSP.

Azure Marketplace items in Azure CSP

Not all Azure Marketplace items are currently available in Azure CSP subscriptions.

- Microsoft-based Azure services: These services are available. Review the previous table and comments.
- Bring your own license (BYOL) items: These items are available. A full list of BYOL-enabled Azure Marketplace items is available on the Azure Marketplace BYOL page.
- Pay-As-You-Go third-party Azure Marketplace items: These items are available if the provider has published to the CSP channel. For more information, see Sell subscriptions to Azure Marketplace products.
- Citrix XenApp Essentials: Partners can purchase XenApp Essentials for customers in CSP. For more information, see the following Citrix blog- Distribution of XenApp Essentials now available through Microsoft Cloud Solution Provider Channel.

National clouds

The following table displays a regularly updated list of the available first-party Azure products, services, and features for CSP in national clouds.

AZURE PRODUCT, SERVICE, OR FEATURE	US GOVERNMENT	GERMANY
Compute		
Virtual Machines	X	X
Cloud Services		
Virtual machine scale sets	X	X
Functions		
Azure Container Service		
Networking		
Azure DNS		
Content Delivery Network		
Traffic Manager		
ExpressRoute	X	X
Virtual Network	X	X
Load Balancer	X	X

AZURE PRODUCT, SERVICE, OR FEATURE	US GOVERNMENT	GERMANY
VPN Gateway	X	X
Application Gateway	X	X
Network Watcher	X	X
Storage		
Storage	X	X
Backup	X	X
StorSimple		X
Site Recovery	X	X
Data Lake Store		
Managed Disks	X	X
Web + Mobile		
App Service	X	X
App Service on Linux		X
API Management	X	
Content Delivery Network		
Media Services	X	X
Notification Hubs	X	X
Azure Search		
Logic Apps feature of Azure App Service		
Containers		
App Service	X	X
App Service on Linux		X
Batch	X	X
Container Registry		
Container Instances		

AZURE PRODUCT, SERVICE, OR FEATURE	US GOVERNMENT	GERMANY
Service Fabric	X	X
Container Service		
Databases		
SQL Database	X	X
Azure Cosmos DB	X	X
SQL Data Warehouse	X	X
Redis Cache	X	X
SQL Server Stretch Database	X	X
Azure Database for MySQL		
Azure Database for PostgreSQL		
Data + Analytics		
Databricks		
HDInsight	X	X
Stream Analytics		X
Data Factory		
Log Analytics	X	
Data Catalog		
Data Lake Store		
Data Lake Analytics		
Azure Analysis Services		
Power BI Embedded		
AI + Cognitive Services		
Machine Learning		X
Azure Bot Service		
Cognitive Services		

AZURE PRODUCT, SERVICE, OR FEATURE	US GOVERNMENT	GERMANY
Azure Batch AI		
Internet of Things		
IoT Hub	X	X
IoT Central		
Machine Learning		X
Stream Analytics		X
Event Hubs	X	X
Location-Based Services		
Notification Hubs	X	X
Time Series Insights		
Enterprise Integration		
StorSimple	X	
API Management		
Event Grid		
Data Factory		
Service Bus	X	X
Data Catalog		
SQL Server Stretch Database		X
Logic Apps feature of Azure App Service		
Security + Identity		
Azure Active Directory	X	X
Azure Active Directory B2C		
Multi-Factor Authentication		
Azure Active Directory Domain Services		
Key Vault	X	X

AZURE PRODUCT, SERVICE, OR FEATURE	US GOVERNMENT	GERMANY
Security Center	X	X
Developer Tools		
Visual Studio Team Services		
Application Insights		
DevTest Labs		
Visual Studio App Center		
Xamarin University		
Monitoring + Management		
Advisor		
Backup	X	X
Site Recovery	X	X
Scheduler	X	X
Automation	X	X
Log Analytics	X	
Azure Monitor		
Azure-Managed Applications		
Azure Migrate		
Management Groups		

Next steps

- Learn about the available capabilities for Azure in Partner Center.
- Create your first customer in Azure CSP, and deploy Azure services.

Introduction: Azure plan lets partners buy Azure at pay-as-you-go-rates for customers

5/8/2020 • 2 minutes to read

Microsoft has introduced a new commerce experience in Partner Center, the Azure plan. With this new commerce experience, partners will gain access to Azure services at pay-as-you-go rates for customers under the Microsoft Customer Agreement.

This plan simplifies the purchase experience - you can have multiple Azure subscriptions in an Azure plan. You no longer need to submit a separate order per Azure subscription. And, in this new commerce experience for Azure, we have aligned to a single global pricing principle enabling CSP partners to offer Azure at the published prices.

Transition your customers from their existing CSP Azure offers to Azure services under the Azure plan in the new commerce experience in the CSP program from within Partner Center. This transition requires only the following:

- The partner and end-customer must have an established reseller relationship through Partner Center, and the customer must have signed the Microsoft Customer Agreement.

> **NOTE**
> Starting February 1, 2020, the existing Microsoft Cloud Agreement will be removed from the CSP program. From that time, partner confirmation (attestation) of the customer acceptance for the new Microsoft Customer Agreement will be required for all other offers including Microsoft 365, Dynamics 365 and existing Azure. Partners in the CSP will not be able to make a new order for the customer without attestation of the Microsoft Customer Agreement. For full details, read Confirm customer acceptance of the Microsoft Customer Agreement.

Learn about the Azure plan

TO DO THIS	READ THIS
Start moving to the Azure plan	Move to Azure plan - get started
Transition your customers from PAYG to Azure plan	Transition your customer to Azure plan
Purchase the Azure plan for your customers	Purchase the Azure plan
Billing partners who provide 24 X 7 cloud-operations management will become eligible for a **Partner earned credit for services managed** for that work.	Partner earned credit - overview and How the partner earned credit is determined - details
See a side-by-side comparison of Azure offer types	Compare Azure offers
Manage customers' subscriptions and resources under the Azure plan	Manage subscriptions and resources under the Azure plan
Learn how to read the Azure plan price list	Azure plan price list explained
Where is the Azure plan available?	The full list of countries/regions where Azure plan is available

TO DO THIS	READ THIS
To see how the partner earned credit is calculated, you need to sign into your Partner Center dashboard price list	Partner Center dashboard
Billing under the Azure plan	Azure billing

Begin using pay-as-you-go-rates with the Azure plan

5/14/2020 • 3 minutes to read

Microsoft has introduced a new commerce experience in Partner Center. With this new commerce experience, partners will gain access to Azure services at pay-as-you-go rates for customers under the Microsoft Customer Agreement.

This plan simplifies the purchase experience - you can have multiple Azure subscriptions in an Azure plan. You no longer need to submit a separate order per Azure subscription. And in this new commerce experience for Azure, we have aligned to a single global pricing principle enabling CSP partners to offer Azure at the published prices.

The digital transformation needs of our customers require new skills from partners. Many customers look for partners to provide services above and beyond the transaction to make their cloud journey smoother and help consume Azure services efficiently. Microsoft partners play a critical role in all stages of the customer lifecycle. These kinds of partner services are on-going in nature and include Azure estate monitoring, policy and governance management, set up and configuration fine-tuning, technical support and a variety of other services. They require a partner to be intimately familiar with the customer's Azure environment and have continuous and appropriate governance and control of the underlying resources they manage. Billing partners who provide this 24 X 7 cloud-operations management will become eligible for a **Partner earned credit for services managed** for that work.

Make sure your customers have signed the Microsoft Customer Agreement

Since October 1, 2019, the Microsoft Customer Agreement, a perpetual agreement that simplifies and streamlines the customer purchasing experience with a fully digital process, is available. All customers who want to take advantage of the new commerce experience in CSP for Azure must sign the Microsoft Customer Agreement.

Partners who want to transact under the new Azure plan and make a new order should confirm customer acceptance of the Microsoft Customer Agreement using the Partner Center dashboard and API in production.

Starting February 1, 2020, the existing Microsoft Cloud Agreement is removed from the CSP program. From that time, partner confirmation (attestation) of the customer acceptance for the new Microsoft Customer Agreement will be required for all other offers including Microsoft 365, Dynamics 365, and existing Azure. Partners in the CSP will not be able to make a new order for the customer without attestation of the Microsoft Customer Agreement.

For full details, read Confirm customer acceptance of the Microsoft Customer Agreement

Security and access control practices

To help safeguard partners and customers, we are introducing a set of mandatory security requirements for Advisors, Control Panel Vendors, and partners participating in the Cloud Solution Provider program.

Partners who do not implement the mandatory security requirements will not be able to transact in the Cloud Solution Provider program or manage customer tenants leveraging delegate admin rights, once these requirements are enforced. We are in the process of establishing a technical enforcement date for the requirements and will notify partners of the date with detailed information.

Actions to take to implement MFA

Given the highly privileged nature of being a partner we need to ensure that each user has an MFA challenge for every single authentication. This can be accomplished through one of the following ways:

- Implementing Azure AD Premium and ensure that multi-factor authentication (MFA) is enforced for each user
- Implementing the Azure AD security defaults
- Implementing a third-party solution and ensure MFA is enforced for each user

Starting August 1, 2019, all partners are required to enforce multi-factor authentication for all users, including service accounts, in their partner tenant. Detailed information on these security requirements can be found at Partner security requirements.

Microsoft recommends partners make use of RBAC diligently, following best practices enabled through Azure Active Directory Privileged Identity Management resources.

Read more about the Azure plan

- Purchase the Azure plan
- Compare Azure offers
- Partner earned credit - overview
- The partner earned credit (PEC) calculations and the roles and permissions that are eligible to earn partner earned credits are available from your Partner Center Dashboard price list (sign-in required).

Next steps

- How the partner earned credit is determined - details
- Azure plan price list explained
- Transition your customer to Azure plan
- Manage subscriptions and resources under the Azure plan
- The full list of countries/regions where Azure plan is available

Purchase the Azure plan for customers & access the latest Azure services at pay-as-you-go rates

6/19/2020 • 3 minutes to read

Appropriate roles

- Global admin
- User admin
- Sales agent

When you purchase an Azure plan for your customers under the Microsoft Customer Agreement, you have access to the full catalog of the latest Azure services at pay-as-you-go rates. CSP partners will now be able to access any Azure service when it becomes generally available. A partner can have multiple Azure subscriptions under an Azure plan.

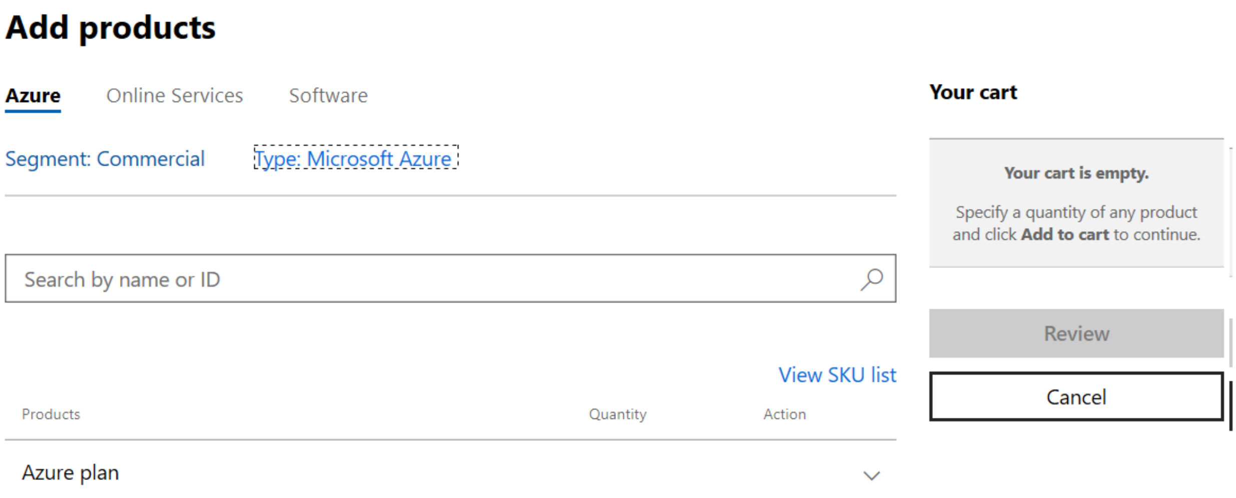
Country/region availability

The new commerce experience in CSP for Azure is currently scheduled to be available in 139 countries. See the full list of those countries/regions.

How to purchase Azure plan

How you purchase the Azure plan is similar to purchasing any other subscription. The key difference is that before you actually place your order you need to confirm that your customer has signed the Microsoft Customer Agreement.

1. Select **Segment Commercial** and type **Microsoft Azure**
2. Under Azure plan select **Add to cart**



The partner must confirm the customer has reviewed and accepted the Microsoft Customer Agreement terms. For more information on how the partner can do this, read the Confirm customer acceptance of the Microsoft Customer Agreement. Other resources are available in the resource gallery.

To confirm, you either:

1. Confirm digitally or,

2. Invite the customer to sign the Microsoft Customer Agreement directly with Microsoft.

To confirm

1. On the customer's **Account** page, select **Update** next to **Microsoft Customer Agreement**
2. Fill out the information about the individual at the customer's company who accepted the MCuA.
3. Select **Save and continue.**

Review and buy

You return to the **Add a product** page where you can see that the Azure plan has been added. Select **Review** to review your purchase and then select **Buy**.

> **NOTE**
>
> Once you purchase the Azure plan for a customer, you can no longer purchase Microsoft Azure (0145p) for that customer. You'll need to create future subscriptions through the Azure plan.

Purchase Azure reservations under the Azure Plan

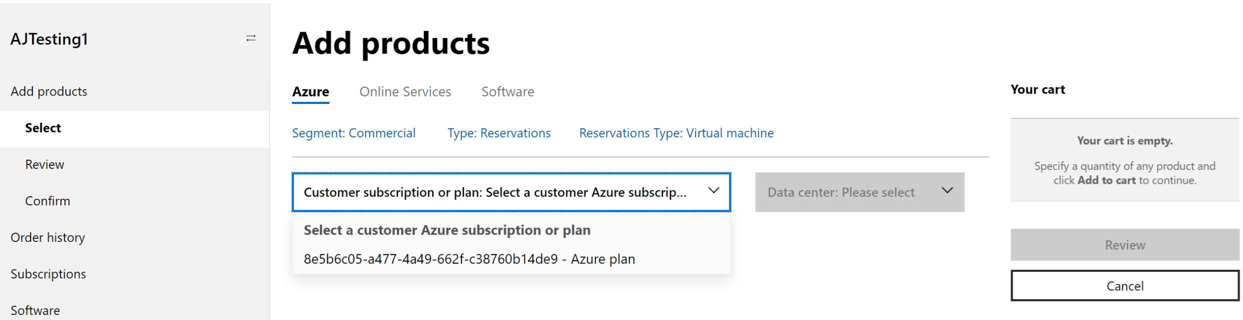
You can also buy Microsoft Azure reservations under Azure plan on behalf of your customers in Partner Center. (Or, if you prefer, you can give permission for your customers to buy their own Azure reservations from a prior subscription you purchased for them.)

1. From the Partner Center menu on your dashboard, select **Customers**. Find the customer who wants to purchase Azure reservations, and then select the down arrow to expand the customer's row.
2. Select **Add products** and then select **Azure**.
   - Choose the customer's market segment from the **Segment** list.
   - Choose **Reservations** from the **Product type** list.
   - Choose the type of reservation the customer wants from the **Reservations type** list.

Azure reservations must be associated with an active Azure plan. Choose the Azure plan you want to add Azure reservations to from the Customer subscription list.

> **IMPORTANT**
>
> If the customer doesn't already have an active Azure plan, select Azure to add one now. For further instructions read Purchase Azure reservations.

> **NOTE**
>
> A reservation's scope can only be set to **Shared**, currently.

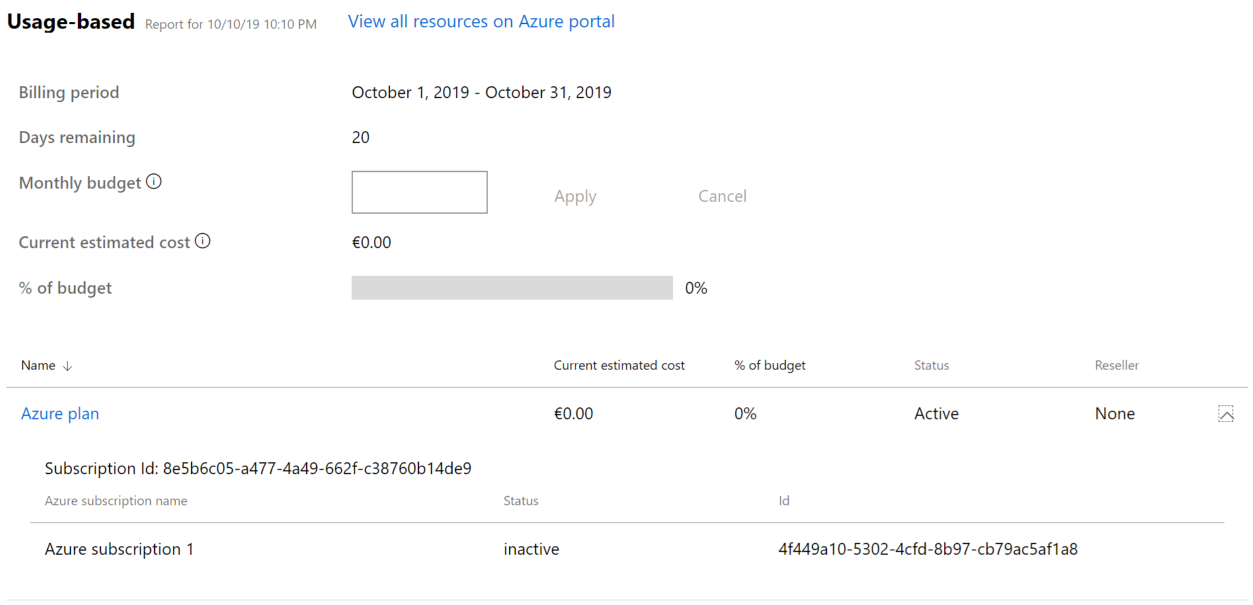


To manage the customer's reservation in the Azure portal:

1. From **Customers** select the customer you want to manage.
2. Using the down arrow, expand the customer's row and select **Microsoft Azure Management portal**.

View Azure subscriptions under the Azure Plan

From the **Subscriptions** page, in the usage-based section, expand **Azure plan** to see associated Azure subscriptions under the Azure Plan.



Add subscriptions and configure resources

You will add subscriptions and configure resources for your customer in Azure portal. You are also able to separate your customer's environment by workload or project. It is possible to manage subscriptions through Azure Lighthouse as well as Azure portal.

To manage your customer's resources and subscriptions, you need **Admin on Behalf Of** (AOBO) privileges. For information on managing your access, read Manage subscriptions and resources under the Azure plan

Next steps

- Customer transitions to Azure plan
- Partner earned credit - overview

Compare differences between Azure offers in the CSP program

6/19/2020 • 2 minutes to read

Appropriate roles

- Admin agent
- Billing admin
- Global admin
- Helpdesk agent
- Sales agent

The following table provides an overview of the key differences between offers available through the Cloud Solution Provider (CSP) program that are part of the new Microsoft commerce experience.

OFFER	AZURE PLAN	THIRD-PARTY MARKETPLACE OFFERS	AZURE RESERVATIONS	SERVER SUBSCRIPTIONS SOLD THROUGH CSP	SEAT-BASED OFFERS		
Billing	Monthly	Variable (offer dependent)	End customer	Up front for the full term or 3-year term	Monthly or Annual		
Licensee	End customer	Variable (offer dependent)	End customer	End customer	End customer		
Coverage Term	Active until canceled	Variable (offer dependent)	See offer description	All Azure Reservations have their own unique coverage period. All Server Subscriptions will have their own unique coverage period.	Additional seat-based licenses will snap into the existing coverage period		
Auto-Renew	Yes	Yes	No	No	Yes		
Multi-Currency	Invoice based on customer location / currency	Invoice based on customer location / currency	Invoice based on customer location / currency	Invoice based on customer location / currency	Based on Partner location currency		

OFFER	AZURE PLAN	THIRD-PARTY MARKETPLACE OFFERS	AZURE RESERVATIONS	SERVER SUBSCRIPTIONS SOLD THROUGH CSP	SEAT-BASED OFFERS		
Invoice & Recon file	Separate invoice and Recon file for each customer location currency. We will also provide daily rated usage files (for both bill and unbilled portions)	Separate invoice and Recon file for each customer location currency	Separate invoice and Recon file for each customer location currency	Separate invoice and Recon file for each customer location currency	All orders on one invoice and Recon file		
Price List & Offer Matrix	Published monthly and priced in USD*	Marketplace offers and pricing can be exported real-time to CSV file format beginning.	Separate, single file with all pricing and offer details included.There is no separate Offer Matrix file		Separate, single file with all pricing and offer details included.There is no separate Offer Matrix.	fileSeparate, single file with all pricing and offer details included.	Separate price list and offer matrix (2 files).
Returns & Exchanges	Not applicable. There is no commercial transaction in purchasing action of an Azure plan	Varies between one-month and 12-month license based offers as well as usage-based offers.	Returns less than 5 days after order date will receive a 100% credit. Returns greater than 5 days after order date will receive a pro-rated credit and a 12% early termination fee of the pro-rated credit; Cap of $50,000 USD (or local currency equivalent) per customer per year	Returns less than 60 days from order date will receive a 100% credit license keys will be deactivated. Partial returns will not be accepted.	Suspensions / cancellations less than 30 days will receive a 100% credit; Suspensions / cancellations greater than 30 days will receive a pro-rated credit.		

OFFER	AZURE PLAN	THIRD-PARTY MARKETPLACE OFFERS	AZURE RESERVATIONS	SERVER SUBSCRIPTIONS SOLD THROUGH CSP	SEAT-BASED OFFERS		
Geo Availability	139 countries - A full list of those countries is available here.	The New Commerce Offers Country Availability and Customer Currency Matrix shows the scope of where these offers are eligible to be made available in CSP by the partner.	See New Commerce Offers Country Availability and Customer Currency Matrix for full details. The same rollout schedule applies to all new commerce offers.	See New Commerce Offers Country Availability and Customer Currency Matrix for full details. The same rollout schedule applies to all new commerce offers.	247 countries		
Support requirements	Standard CSP support requirements.	Offer publishing company is responsible for technical support. CSP Partner is responsible for pre-sales activities, transaction, and billing support.	Standard CSP support requirements.	Standard CSP support requirements.	Standard CSP support requirements.		

*Microsoft will provide price list APIs in Q4 for real-time access programmatically on Azure meter prices.

For more information

- Move to Azure plan - get started
- Purchase the Azure plan
- Manage subscriptions and resources under the Azure plan

Transition customers to Azure plan from existing CSP Azure offers

6/19/2020 • 3 minutes to read

Appropriate roles

- Admin agent
- Billing admin
- Global admin
- Helpdesk agent
- Sales agent
- User management admin

Indirect providers and direct bill partners can transition to the new commerce experience available in the Microsoft Cloud Service Provider Program (CSP) for Azure. (Indirect resellers will need to work through their indirect providers.) Customers will have a streamlined way to buy cloud services, whether purchasing from partners, from Microsoft sellers, or directly on the web.

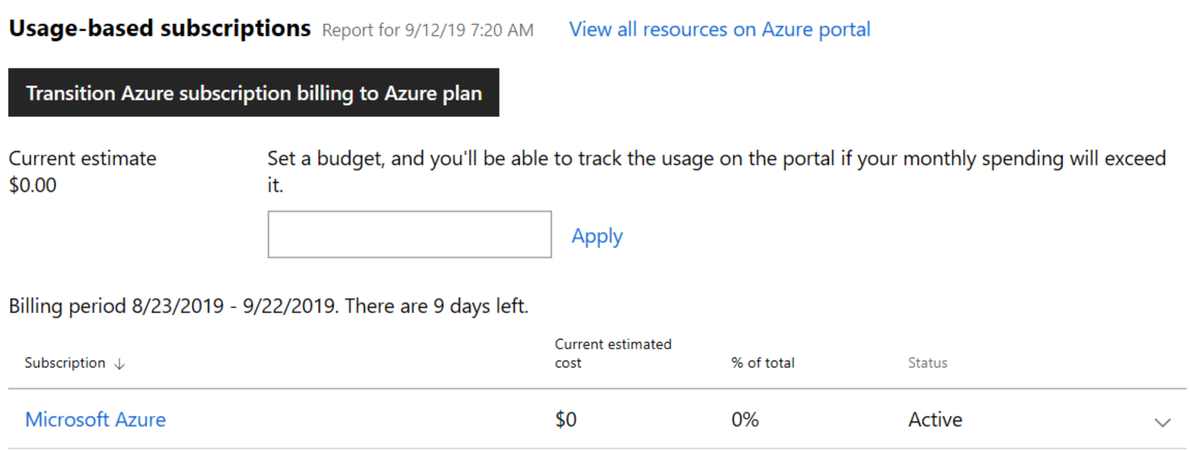
The transition capability is only for customers transitioning to the new commerce experience for Azure and who have signed the Microsoft Customer Agreement and not for other offers in CSP such as Office 365 or Dynamics 365.

Transition existing CSP offers to an Azure plan

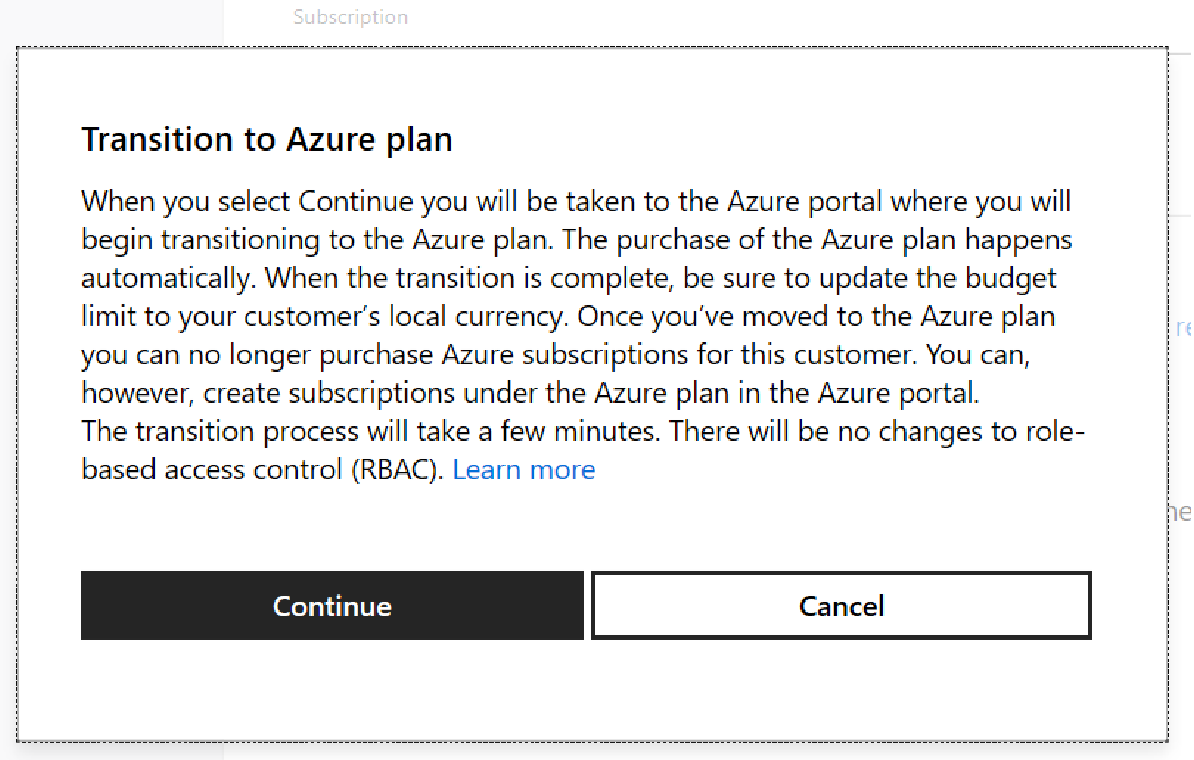
You can transition a customer from their existing CSP Azure offers to Azure services under the Azure plan in the new commerce experience in the CSP program from within Partner Center. To do this, the partner and customer must have an established reseller relationship through Partner Center, and the customer must have signed the Microsoft Customer Agreement.

Select transition to Azure plan

1. Select Azure plan for your customer.
2. Select **Transition billing to Azure plan**.



3. Select **Continue**



Your customer will be transitioned to the Azure plan.

The transition workflow automates the pre-requisite steps:

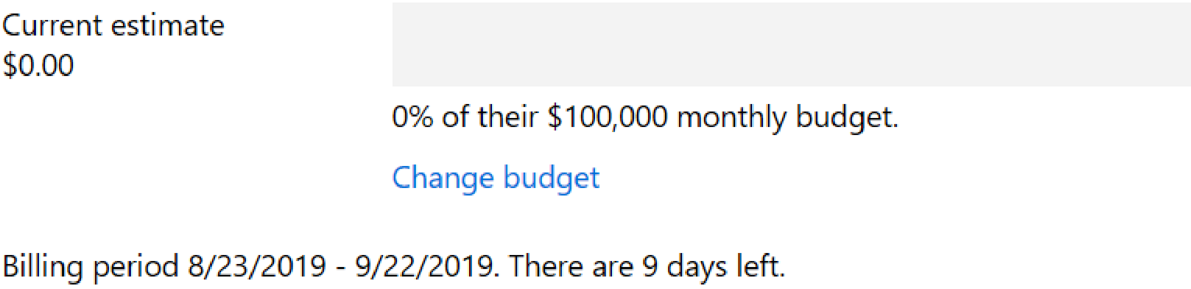
- Purchase of Azure plan(s)
- One plan per customer in Direct CSP scenarios
- One plan per reseller

For an example, a partner has purchased two Microsoft Azure offers and has included two distinct POR in the purchase. In this case, the transition workflow will purchase two Azure plans (one per reseller) and map the respective Azure subscriptions under the Azure plans automatically.

Mapping Azure subscription to Azure plan

After your purchase of Azure plan(s), our system will map the existing Azure subscriptions to the Azure plans. The progress can be viewed in Azure portal as well as in Partner center.

4. Return to your customer's Partner Center **Subscriptions** page to update their budget limit using their local currency.



> **NOTE**
>
> The budget you set in Partner Center doesn't carry over to the Azure portal. You should also set the budget and alert in Azure portal.

When you move to the Azure plan, you can no longer purchase Azure subscriptions for this customer. You create the subscriptions under the Azure plan in the Azure portal.

> **NOTE**
>
> All Azure subscriptions purchased through RBAC under the Azure plan will be priced and billed in local currency. FX rates will not be used.

Track your transition details

Follow the transition progress in Azure portal as well as in Partner Center.

Hide transition details

Subscription	Subscription Id	Transition date	Transition status
AzureSubscription	cf481f27-c3ae-499c-872b-eced1a5a684b	September 12, 2019	Completed
AzureSubscription	a56dbb46-0c4b-46fe-b5d9-4c4dda67471a	September 12, 2019	Completed

Billing impact to partners

If you transition a customer from an existing CSP Azure offer, you will have the following billing impacts:

- You will be billed on your existing CSP invoice for all usage up to the point of exiting the original CSP Azure subscription.
- If you had admin access rights to the existing CSP subscription, you will continue to have access when that subscription is migrated.

To transition direct Enterprise Agreements to CSP and Server and Cloud enrollments to Azure services, read Get billing ownership of Azure subscriptions for Microsoft Partner Agreement

Audit log

To reconcile billing, view your history of "Microsoft Azure" (0145P) subscriptions on the **Subscriptions** page.

"Microsoft Azure" (0145P) subscription is comprised of two parts:

1. Commerce subscription
2. Azure subscription (entitlement)

When the transition is complete, the Azure subscription is moved under new Azure plan and the commerce subscription is suspended so that no further usage is reported.

> **NOTE**
>
> When Microsoft Azure (0145P) subscription is purchased in CSP, both the commerce subscription and the Azure subscription (entitlement) have the same value. It is only in the case of billing ownership changes or transfers do the values differ.

Transition issues

We don't anticipate any issues during transitions. If one occurs, we will update you in the transition workflow itself. There won't be disturbances to Azure usage.

Next steps

- Manage subscriptions and resources under the Azure plan
- Partner earned credit - overview

Partner earned credit - an overview of how it works in the new commerce experience in CSP

6/19/2020 • 4 minutes to read

Appropriate roles

- Global admin
- User admin
- Admin agent
- Billing admin
- Sales agent

Partner earned credit in the new commerce experience in CSP is a business model that accomplishes simplified uniform Azure pricing across Microsoft's Go-To-Market vehicles, while nurturing a partner ecosystem that provides value-added managed services. Partner-earned credit also helps eliminate any competition on margins.

Pricing can be challenging for many customers and partners, especially when you consider the thousands of services in Azure and multiple options to buy. In the new commerce experience for Azure, we have aligned to single global pricing principles applicable to all motions we transact. CSP partners can offer Azure at the published prices. Doing so provides greater transparency to their customers and builds trust.

The digital transformation needs of our customers are changing the nature of value that partners offer. Many customers look to partners to provide services above and beyond the transaction. Such services can help them smooth out their cloud journey and help them consume Azure services efficiently. These services are on-going and include Azure estate monitoring, policy and governance management, set up and configuration fine-tuning, technical support, and a variety of other services.

These services require a partner to be both very familiar with the customer's Azure environment and have continuous and appropriate governance and control of the underlying resources they manage. Billing partners who provide this 24 X 7 cloud-operations management activity will become eligible for a **Partner earned credit for services managed** on the customers' Azure estate governed and controlled by the partner.

Benefits of the partner earned credit for partners and customers

- Customers can outsource their Azure infrastructure management and billing to their trusted partner, enabling them to focus on their core business.
- Customers work with a partner who invests in managed services on Azure that help drive cost efficiencies and operational efficiencies involved in consuming Azure.
- Partners are rewarded because they provide a robust managed services portfolio on Azure for their customers.
- Intimate association and management of Customer's Azure projects will bring new opportunities to partner and help drive consumption growth.

Manage, automate, and optimize

As customers transition to cloud computing platforms, they are faced with managing not just a new set of technologies, but also a new way of approaching the management and operations of their digital estate. While the cloud can bring greater business value and agility, it can also bring new concerns, including lack of proper security and cost control.

Your customers look to you to help them get the most from their business hosted in Azure. With managed services, you can regularly provide your customers with white-glove service. Some of the day-to-day operations and support you might provide includes:

- **Cloud operations and management services**: Customers look to Microsoft partners to reduce costs in Azure while reproducing the isolation, security policies, and audit models they have today. They also expect partners to have access to mature tools for identifying workload suitability as well as the one-time deployment and ongoing operational costs of Azure. In addition, customers need support for automation and orchestration, patching updates, configuration management, backup and disaster recovery, and identity management.

- **Cloud monitoring and technical support**: In a cloud consumption world, the tools and requirements have evolved, but the concern for finding the right resource for managing IT infrastructure hasn't changed. Most organizations simply do not have the time, resources, or dedicated staff required to monitor every aspect of IT, and this is where you, as the trusted partner, add the most value. While Azure offers many built-in monitoring capabilities partners who provide additional, deeper monitoring tooling, triage the false positives from the real alerts, and proactively act upon the alerts before any measurable loss in performance are needed.

Included in monitoring and technical support:

- **System health monitoring**: Complete monitoring of VMs, CPU utilization, memory usage, storage IOPs, and OS performance. Includes monitoring of application performance and operation health, and dashboards and reports on system health.

- **Log analytics and alerting**: Every client, device, and user accessing a network produces data that is logged. Analyzing logs can offer deeper insight into performance, security, resource consumption, and other meaningful metrics.

- **Database monitoring**: A view into customer's database that helps partners ensure high availability of database servers. The process involves keeping logs of size, connection time and users of databases, analyzing use trends, and leveraging data to proactively remediate issues.

- **App performance monitoring**: End-to-end tracking of all aspects of an application (or webpage). App monitoring involves watching every part—from shopping carts to registration pages—of a customer's app(s) for performance issues to provide the best user experience possible.

Learn more about how to expand your managed services portfolio with Azure.

These services entail an appropriate level of access for partners into the customer's Azure environment, and our commerce system will measure the access details to calculate the partner earned credit.

> **NOTE**
> Customers have the option to remove any access given to the partners. Partners should not coerce customers to assign them appropriate access for the sole purpose of earning partner earned credit from Microsoft - failure to adhere to this requirement might make the partner ineligible to earn partner earned credit.

For more information

- How the partner earned credit is calculated and paid
- Manage subscriptions and resources under the Azure plan
- Price list for the new Azure commerce experience in CSP

How the partner earned credit is calculated and paid

6/19/2020 • 3 minutes to read

Appropriate roles

- Global admin
- User admin
- Admin agent
- Billing admin
- Sales agent

Partner earned credit for managed services (PEC) recognizes and rewards partners that own the 24x7 IT operational control and management of parts of, or the entire, Azure environment of their customers. By default, in CSP, partners are granted the necessary access rights to the customer's subscription allowing them to perform 24 X 7 operational management and control of the resources on the subscription. Additional ways in which customer can provision access for transacting partner is described in the following section. The monthly invoice amount is net of partner earned credit. Partners can see the PEC details on their monthly recon file. For additional ways in which a customer can provision access for the transacting partner, read Manage subscriptions and resources under the Azure plan.

Also read Reinstate admin privileges for Azure CSP subscriptions

Important eligibility and calculation information

- Partner should have an active MPN agreement and valid RBAC role to receive earned credit for the Azure assets they manage.
- In the case of indirect providers and their indirect resellers, the indirect provider will be eligible for PEC if either the indirect provider, or the indirect reseller or both have 24x7 operational control and management of the customer's Azure resources in CSP.
- PEC is associated to billed (chargeable) consumption of customer's Azure estate in CSP managed by the partner. PEC is made available only to partners in CSP billed by Microsoft (indirect provider and direct bill partner).
- Eligible services: Partner earned credit is applicable to services listed in the **Azure plan consumption pricing** which partners can export from the Azure plan pricing page. Note, there are exceptions including, but not limited to, third-party products identified as **Third Party** in the **Tags** column of the Azure plan consumption price list and Azure Plan reservations, and products in the Marketplace price list.
- PEC is calculated daily and can be viewed in the daily usage file and monthly invoice recon file. A partner (indirect provider or indirect reseller) must have access for the entire day (24x7) to ensure they earn PEC.
- PEC is earned down to the Azure resource level. If the partner has valid access at the subscription, or resource group level, each resource that roles up to the higher entity will earn PEC.
- PEC details will also be available on Azure Cost management

Azure Cost Management

Azure Cost Management (ACM) using Cost Analysis enables you as a partner to view the costs that have received the benefit of PEC.

1. In the Azure Portal, sign into your partner tenant and select **Cost Management + Billing**.
2. Select **Cost management**
3. Select **Cost Analysis**

The Cost Analysis view will display the costs for your billing account, for all the services purchased and consumed at the prices that you pay Microsoft.

4. Select **PartnerEarnedCreditApplied** in the drop down on a pivot chart to see costs that have PEC applied. When **PartnerEarnedCreditApplied** property is True, the associated cost has the benefit of the partner earned credit.

When the PartnerEarnedCreditApplied property is False, the associated cost has not met the required eligibility for the credit or the service purchased is not eligible for partner earned credit.

> **NOTE**
>
> Typically, usage for services takes 8-24 hours to appear in **Cost Management** and the PEC credits will appear within 48 hours from time of access in Azure Cost Management.

5. You can also group by, and filter by, the **PartnerEarnedCreditApplied** property using the **Group by and Add** filter features to drill into costs that have PEC and the costs that have no PEC applied.

Next steps

- Partner earned credit - overview
- Detailed examples of partner earned credit calculations are located on the price list which you can reach through the Partner Center dashboard (sign-in required).
- Move to Azure plan - get started
- Manage subscriptions and resources under the Azure plan
- Revoke or re-instate admin privileges for Azure CSP subscriptions

New commerce experience in CSP - Azure billing

6/19/2020 • 5 minutes to read

Appropriate roles:

- Admin agent
- Billing admin
- Global admin

Billing under the Azure plan is a simplified billing experience using an aligned single billing date and calendar month-based billing period.

Summary of billing essentials

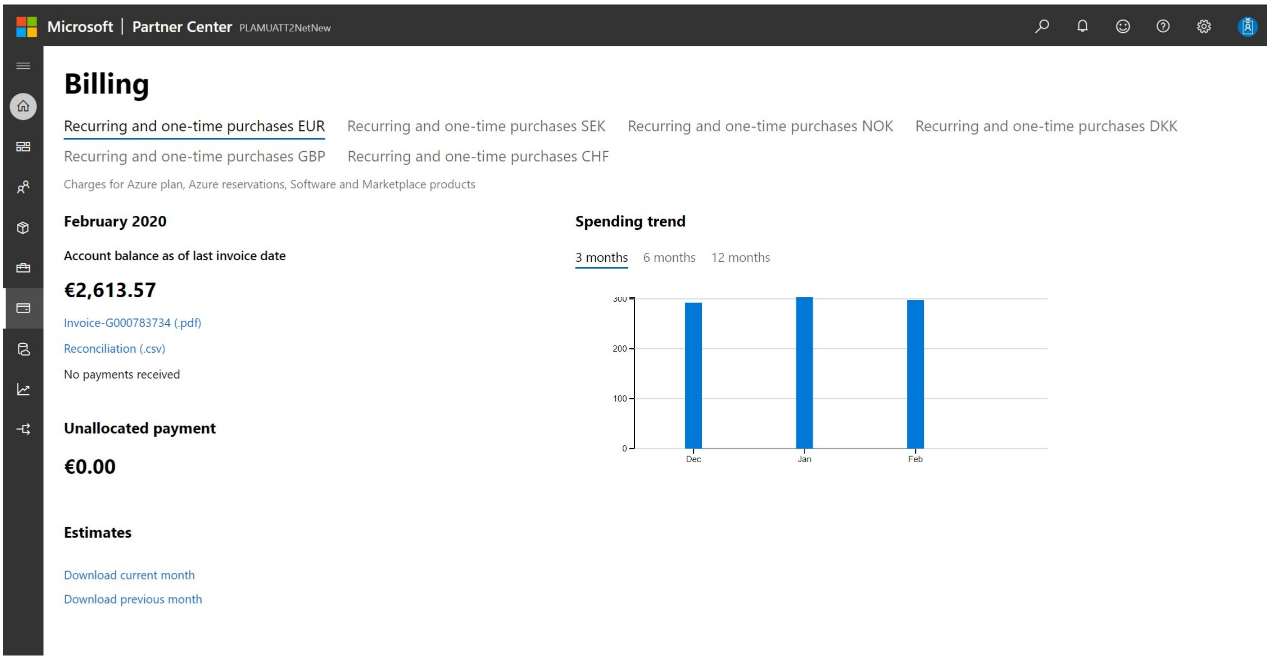
- **Invoice date**: Invoice and reconciliation file will be available in the Partner Center dashboard/API by the 8th (midnight UTC).
- **Invoice billing period**: The invoice billing period is aligned to the calendar month, for example, 10/1-10/31, 11/1-11/30.
- **Charge service periods**: Charges will align to the calendar month. For example, if billed partner adds Azure services through an Azure plan on 10/15 and the customer begins consumption of Azure services on 10/15, then billed partner will receive invoice/recon on 11/8 for customer consumption for the service period 10/15 - 10/31. The next month's invoice that is going to be generated on 12/8 contains all the charges for the service period 11/1- 11/31.
- **Invoice payment term**: Net 60 days.
- **Invoice currency**: Partners will continue to be billed in the customer's country's assigned currency. For example, if the billed partner is in Ireland with customers in the UK, Norway, and Germany, then the billed partner will receive a GBP, NOK, and EUR invoice/recon.
- **Partner incentives**: Paid 45 days from the end of the invoice month.

Access your invoices and reconciliation files

The global admin or billing admin for your company will receive an email when an invoice is ready to view.

To access the invoice and reconciliation file

1. Sign in to the Partner Center dashboard.
2. From the Partner Center menu, select **Billing**.
3. Select the tab for the **Recurring** and **One-time** and the currency you are interested in.



4. Select **Invoice** or **Reconciliation file**.

To view historical invoices and recon files expand the Billing history row below.

Understanding usage data

1. Azure plan is the root or top-level container for usage. All usage is tied back to a single Azure plan.
2. Within a plan, there will be one or more Azure subscriptions. These are containers used for resource management and deployment.
3. Within a subscription, resource groups add to group resources. Every resource is deployed to one resource group.
4. Examples of resources include virtual machines and storage accounts.
5. Resource emit meters: Meters are measurements of consumption of a resource, and one resource may emit usage for multiple meters. Meters are identified by a ProductId, SKUId, and AvailabilityId.

Hierarchy of subscription resource groups and metering

Azure account (tenant)

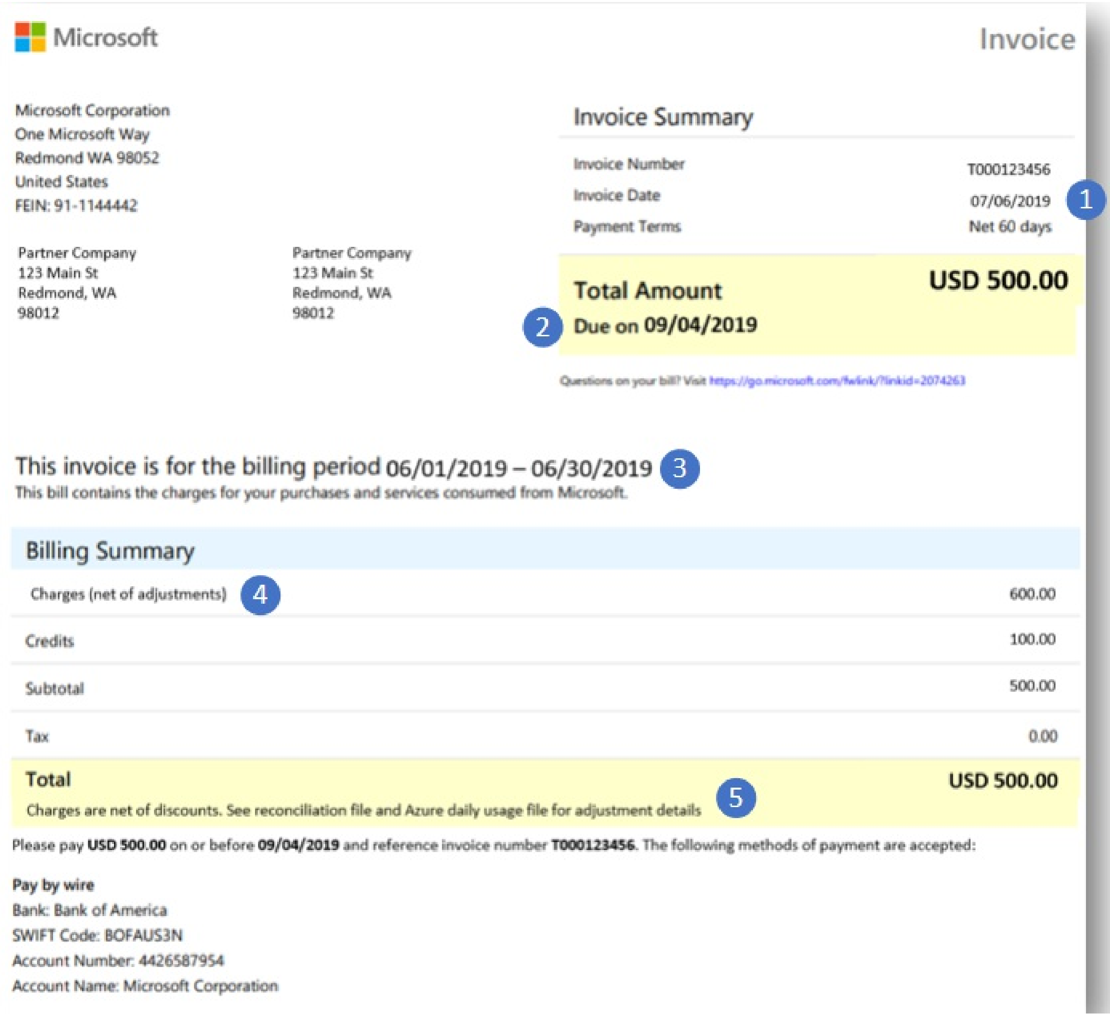
- Subscription A
  - ResourceGroup 1
    - Virtual machine (resource)
      - Compute meter
    - Virtual network (resource)
      - No billing meter
  - ResourceGroup 2
    - Virtual machine (resource)
      - Computer meter
    - Premium SSD-managed disk (resource)
      - Storage capacity meter
      - Storage operations meter
- Subscription B -ResourceGroup 1 - Azure SQL (resource) - DTU meter - VPN Gateway (resource) - VPN

gateway meter

- ResourceGroup 2
  - Virtual Network Interface (resource)
    - No billing meter

Read the invoice

1. Invoice will be available no later than the eighth of each month.
2. Partners have 60 days to remit payment.
3. The billing period will cover a given calendar month, for example, 10/1-10/31.
4. Charges are net of adjustments (amount is net of “Partner earned credit for services managed").
5. Review the invoice recon file and daily rated usage file for additional billing details.



Microsoft

Invoice

Microsoft Corporation
One Microsoft Way
Redmond WA 98052
United States
FEIN: 91-1144442

Partner Company
123 Main St
Redmond, WA
98012

Partner Company
123 Main St
Redmond, WA
98012

Invoice Summary

Invoice Number	T000123456
Invoice Date	07/06/2019
Payment Terms	Net 60 days

1

Total Amount USD 500.00
Due on 09/04/2019

2

Questions on your bill? Visit https://go.microsoft.com/fwlink/?linkid=2074263

This invoice is for the billing period 06/01/2019 – 06/30/2019

3

This bill contains the charges for your purchases and services consumed from Microsoft.

Billing Summary

Charges (net of adjustments) 4	600.00
Credits	100.00
Subtotal	500.00
Tax	0.00
Total	**USD 500.00**

Charges are net of discounts. See reconciliation file and Azure daily usage file for adjustment details

5

Please pay **USD 500.00** on or before **09/04/2019** and reference invoice number **T000123456**. The following methods of payment are accepted:

Pay by wire
Bank: Bank of America
SWIFT Code: BOFAUS3N
Account Number: 4426587954
Account Name: Microsoft Corporation

Read the invoice reconciliation file

1. Each Azure plan and meter combination may have up to two billing lines on the recon file.
2. If the meter qualified for any type of discount or credit (such as tiered discounts or the Partner earned credit for services managed) throughout the entire calendar month, then the recon file will only contain one billing line. The column **PriceAdjusmentDescription** will reference the discount or earned credit.
3. If there are no resources for a particular meter that qualified for discount or partner earned credit, then the recon file will only contain one billing line and the effective unit price will be the retail price (which is the unit price).

4. If the meter, or any resources emitting that meter, qualified for **Partner earned credit for services managed** for a part of the month, the recon file will contain two billing lines. One line will represent the days the meter qualified and the second line will represent the days the meter did not qualify.

Read the daily usage file

- Subscription meters under an Azure plan are rated, and are cumulated, on a daily basis.
- **Partner earned credit for services managed** is determined and applied on a daily basis.
- Every subscription meter will have a row for every day of the month where there was consumption.
- In the example below:
  - Meter qualified for **Partner earned credit for services managed** from 7/1 - 7/3 (note the effective unit price is retail price less partner earned credit.
  - Meter didn't qualify for **Partner earned credit for services managed** from 7/4 - 7/7 (note the effective unit price is retail price).
  - Meter qualified for **Partner earned credit for services managed** from 7/8 - 7/31 (note the effective unit price is retail price less partner earned credit).

AS	AT	AU	AV	AW	AX
EffectiveUnitPrice	PCToBCExchangeRate	PCToBCExchangeRateDate	EntitlementId	EntitlementDescription	PartnerEarnedCreditPercentage
0.016875	0.913951469	10/1/2019	fadc0029-6786-49dc-b8f4-c8edd23c0dae	Partner Subscription	
0	0.913951469	10/1/2019	01d19fd2-319e-4627-8e95-99dfc5bca9d5	Partner Subscription	0
0	0.913951469	10/1/2019	81125f65-7bb5-460e-b3e4-7166d4a56303	Partner Subscription	0
0	0.913951469	10/1/2019	8d1466f6-6d8c-4e7b-bbee-63d22f8e27a7	Partner Subscription	
0	0.913951469	10/1/2019	01d19fd2-319e-4627-8e95-99dfc5bca9d5	Partner Subscription	0
0	0.913951469	10/1/2019	8d1466f6-6d8c-4e7b-bbee-63d22f8e27a7	Partner Subscription	
0	0.913951469	10/1/2019	fadc0029-6786-49dc-b8f4-c8edd23c0dae	Partner Subscription	
0	0.913951469	10/1/2019	01d19fd2-319e-4627-8e95-99dfc5bca9d5	Partner Subscription	0

Invoice in customer currency

Azure services through an Azure plan will be priced in USD and billed in the customer country assigned currency. If the billing currency is non-USD, then the Foreign exchange (FX) rate used will be shown on the last page of the invoice. FX rates are determined monthly and applied to the following invoice. For a full list of country currencies, please view the new commerce offers country availability and customer currency matrix.

Microsoft will use Thomson Reuters to determine the FX rates used to determine pricing currency to billing currency conversion. The FX rates will be refreshed and available on the day before the first of the month for which they apply.

Example: Usage charges for the service period August 1 - August 31 will be billed using the FX rate published on July 31. These charges will appear on the September invoice and the FX rate will be noted on the last page of the invoice.

Azure reservations

If purchasing Azure reservations through an Azure plan, initially, it will only be possible to choose one-time billing in Partner Center. Monthly billing is available on the Azure portal. Monthly billing will be available in Partner Center at a later date.

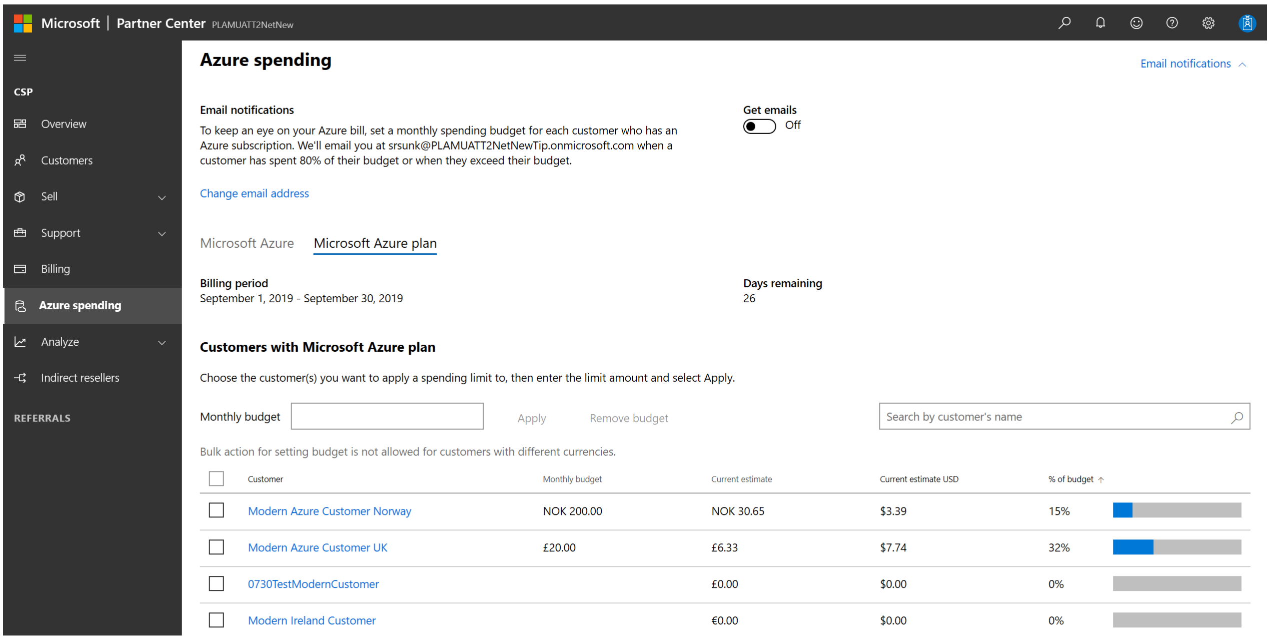
Azure spending

The existing Azure spending experience is updated to support the new Azure plan billing in Partner Center. This enables partners to:

- View, manage, and receive alerts for budget set at a customer level

- View total estimated spending on an Azure plan (broken down by resource and meter level)

Because the billing model for Azure services through an Azure plan is post-pay consumption, to avoid a bigger bill than anticipated, partners can apply a monthly budget and track the percentage of usage. A budget can be applied to one customer or multiple customers at one time.



For more information

- How the partner earned credit (PEC) is calculated is located on the price list available through your Partner Center dashboard (sign in required).
- Purchase the Azure plan
- Price list for the new commerce experience in CSP

Price list for the new commerce experience in CSP for Azure

6/19/2020 • 3 minutes to read

Appropriate roles

- Admin agent
- Billing admin
- Global admin
- Helpdesk agent
- Sales agent
- User management admin

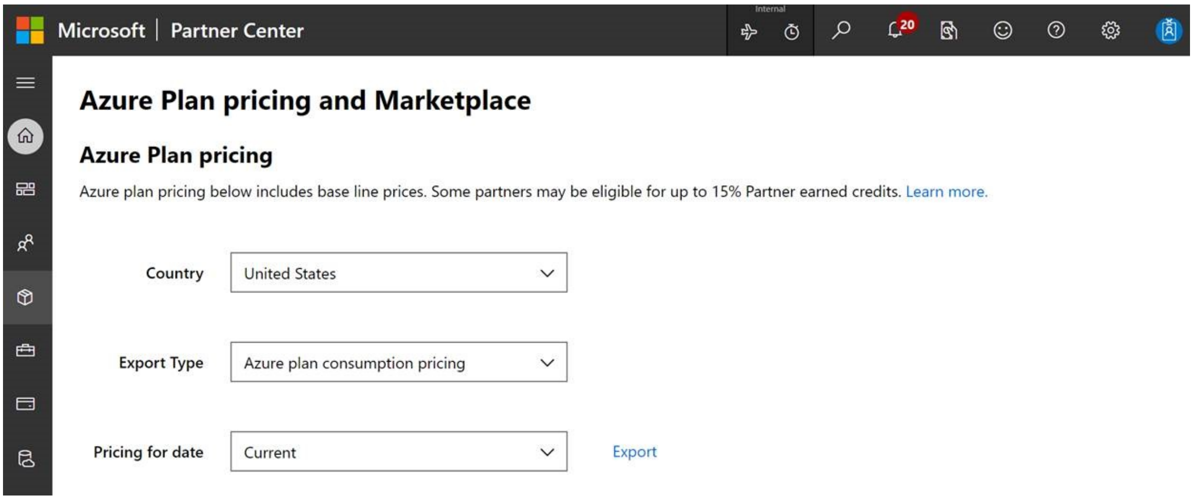
The price list for the new Azure commerce experience in CSP is posted in Partner Center. The price list is dynamically delivered in a real-time accurate file and prices are shown in USD only. Billing, however, is done in the supported currency applicable to the customer's currency location. For more information on the billing in the customer's currency location, read Azure plan - billing.

See pricing for subscriptions under the Azure plan pricing

1. From the Partner Center menu on the left, select **Sell** and then select **Marketplace**.
2. Under Azure plan pricing, select the country for which you want pricing.
3. Next to **Export type**, select **Azure plan consumption pricing**, **Azure plan reservations pricing**, or **FX rates**.

> **NOTE**
> **FX rates** are not country specific.

4. Next to **Pricing for date**, select the date you want, for example, **Current**.



> **NOTE**
> You can export two different price lists - Azure plan pricing and Marketplace third-party pricing.

Azure price list specifics

- Azure plan pricing will be available from the Marketplace page in Partner Center, under **Sell**.
- Exports will be available for Azure Plan consumption services, Azure Reservations, and FX rates.
- Options for export include:
  - **Today's pricing**: This includes all meters and pricing from the 1st of the month to the current date of the current month. This includes new prices, changed prices or removed prices. All prices will have effective start and end dates to explain whether they are new or removed.
  - **Previous month's pricing**: Downloads of each type of resource will be by month. For pricing files, this will include all meters that were available during that month. If a new meter appeared in the middle of the month, I'll show up as a meter with an effective date reflecting its availability. Similar for prices that are discontinued, showing with an effective end date describing when they are no longer available.
  - **FX Rates**: FX rates will be available for download the day before the 1st of the month, 6pm PST. For example, if you want the rates for November, download the rates on October 31. Previous month FX rates will be available also.
- Prices in the price lists are direct prices. Some partners may be eligible for partner earned credits. For information on how the partner earned credit is calculated, read How the partner earned credit is calculated and paid.
- **Eligible services**: Partner earned credit is applicable to services listed in the **Azure plan consumption pricing** partners can export from the Azure plan pricing page. Note, there are exceptions including, but not limited to, third-party products identified as “Third Party" in the Tags column of the Azure plan consumption price list and Azure Plan reservations.

Price list data

FIELD	DESCRIPTION
ProductTitle	Title or name of the product
ProductID	ID of the product
SKuId	ID of SKU
SkuTitle	Title or name of SKU
Publisher	1st party will always be Microsoft
SkuDescription	Description of the SKU
UnitOfMeasure	The units that will be charged or billed

FIELD	DESCRIPTION
TermDuration	For term-based products, the length of the term, applicable to reservations
Market	Market of the pricing
Currency	Currency of the pricing
UnitPrice	Price per unit
PricingTierRangeMin	For tiered pricing, the minimum price applies
PricingTierRangeMax	For tiered pricing, the maximum price applies
EffectiveStartDate	Start date of pricing
EffectiveEndDate	End date of the pricing
MeterIds	Meter ID of the product sku
MeterType	Type of Meter
Tags	Properties for the item, for Azure plan pricing this will be Azure or Azure and Reservations (for reservations specifically)

Price lists for Azure plan can be exported from the Azure plan pricing and Marketplace page

Pricing API for Azure plan

You can use the pricing API to retrieve Azure plan pricing for consumption and reservations programmatically. You can also retrieve foreign exchange rates.

The pricing API is on a different endpoint than the other Partner Center APIs. The pricing information includes meter pricing in USD for Azure plan resources and reservations pricing applied to Azure plan subscriptions.

This API also enables partners to retrieve monthly exchange rates because Azure plan pricing is in USD only. You can use the APIs to retrieve both pricing and foreign exchange rates for the current month or previous months.

> **NOTE**
> The pricing API is specific to Azure plan pricing. You should still use the existing RateCard API and price lists posted to the Partner Center's "Pricing and offers" page for Azure resources or reservations deployed to non-Azure plan subscriptions. The Azure plan pricing API doesn't support software, marketplace or seat-based pricing, such as Microsoft 365 or Dynamics 365.

For more information about Azure plan pricing and foreign exchange rate APIs, see the full pricing API documentation.

Manage subscriptions and resources under the Azure plan

6/19/2020 • 3 minutes to read

When you transition a customer to the Azure plan, you are assigned privileged admin rights in Azure (subscription owner rights through admin on behalf of) by default.

> **NOTE**
> Admin rights to the Azure subscription can be removed by the customer at a subscription, resource group, or workload level.

Partners can gain 24x7 operational control and management of a customer's Azure resources in CSP by using different options provided through the role-based access control feature (RBAC).

- **Admin on Behalf Of (AOBO)** - With AOBO, any user with the Admin Agent role in the partner tenant will have RBAC owner access to Azure subscriptions that you create through the CSP program.
- **Azure Lighthouse**: AOBO doesn't allow the flexibility to create distinct groups that work with different customers, or to enable different roles for groups or users. Using Azure Lighthouse, you can assign different groups to different customers or roles. Because users will have the appropriate level of access through Azure delegated resource management, you can reduce the number of users who have the Admin Agent role (and thus have full AOBO access). This helps improve security by limiting unnecessary access to your customers' resources. It also gives you more flexibility to manage multiple customers at scale. For more information, read Azure Lighthouse and the Cloud Solution Provider program.
- **Directory or Guest Users or Service Principals**: You can delegate granular access to CSP subscriptions by adding users in the customer directory or adding guest users and assigning specific RBAC roles.

Microsoft recommends that users have the minimum permissions they need to perform their work as a security practice. See Azure Active Directory Privileged Identity Management resources.

Link your partner ID (MPN ID)to your credentials for managing customer's Azure resources

The following table shows the methods used to associate your partner ID with various RBAC access options.

CATEGORY	SCENARIO	MPN ID ASSOCIATION
AOBO	CSP direct partner or indirect provider creates the subscription for the customer making the CSP direct partner or indirect provider default owner of the subscription using AOBO.; CSP direct partner or indirect provider give indirect reseller access to the subscription using AOBO.	Automatic (no partner work required)

CATEGORY	SCENARIO	MPN ID ASSOCIATION
Azure Lighthouse	Partner creates a new Managed Services offer in Marketplace. This offer is accepted on the CSP subscription and partner gets access to the CSP subscription.	Automatic (no partner work required)
Azure Lighthouse	Partner deploys ARM template in Azure subscription	Partner needs to associate the MPN ID to the user or service principal in the partner tenant. For more information - Link Partner ID.
Directory or guest user	Partner creates a new user or service principal in the customer directory and gives access to the CSP subscription to the user. Partner creates a new user or service principal in the customer directory. Partner adds the user to a group and gives access to the CSP subscription to the group.	Partner needs to associate the MPN ID to the user or service principal in the customer tenant. For more information - Link Partner ID.

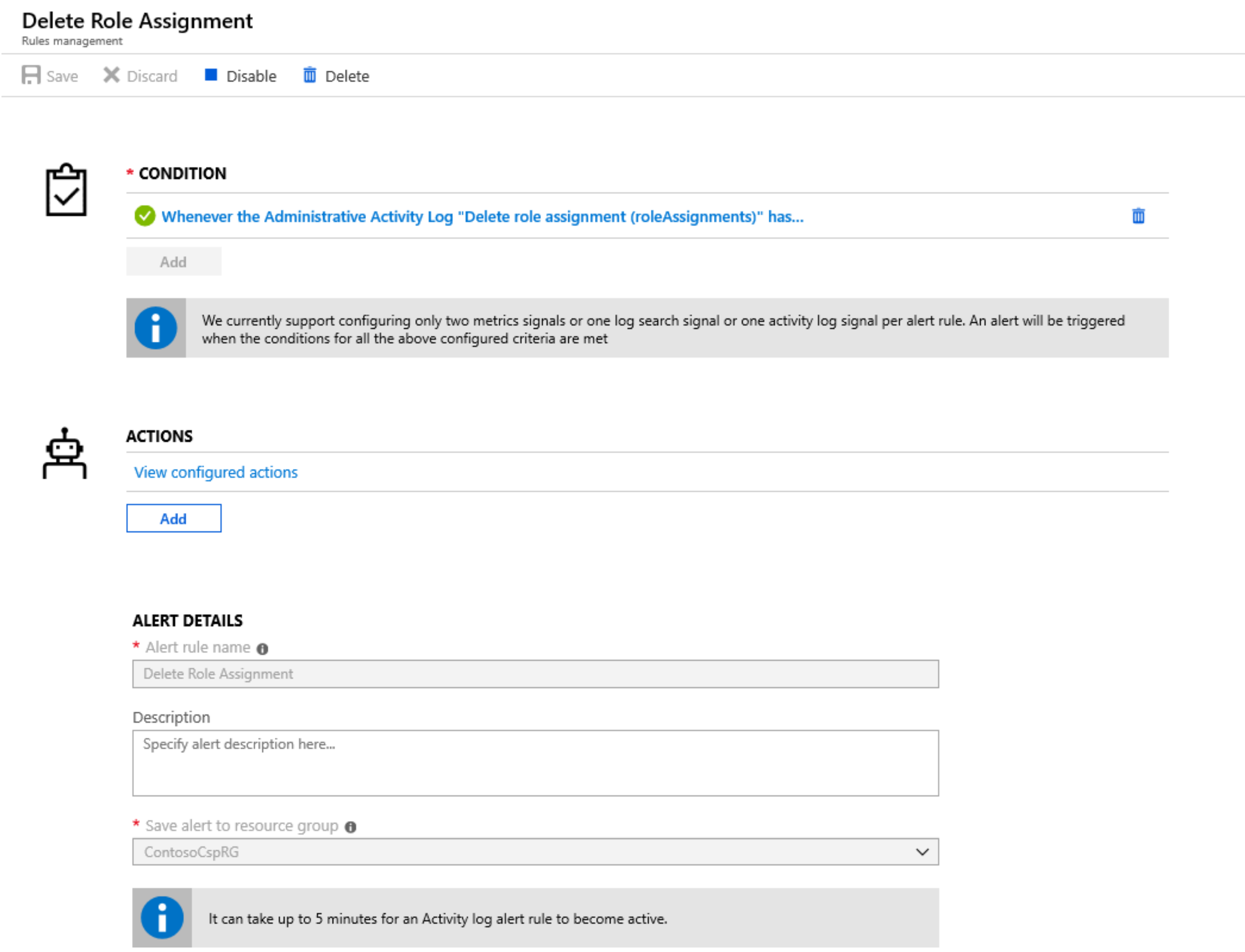
Confirm that you have admin access

You require admin access to manage your customer's services and to received earned credits. Read Partner earned credits for detailed information on earned credits. You have two ways to make sure you know that you have admin access.

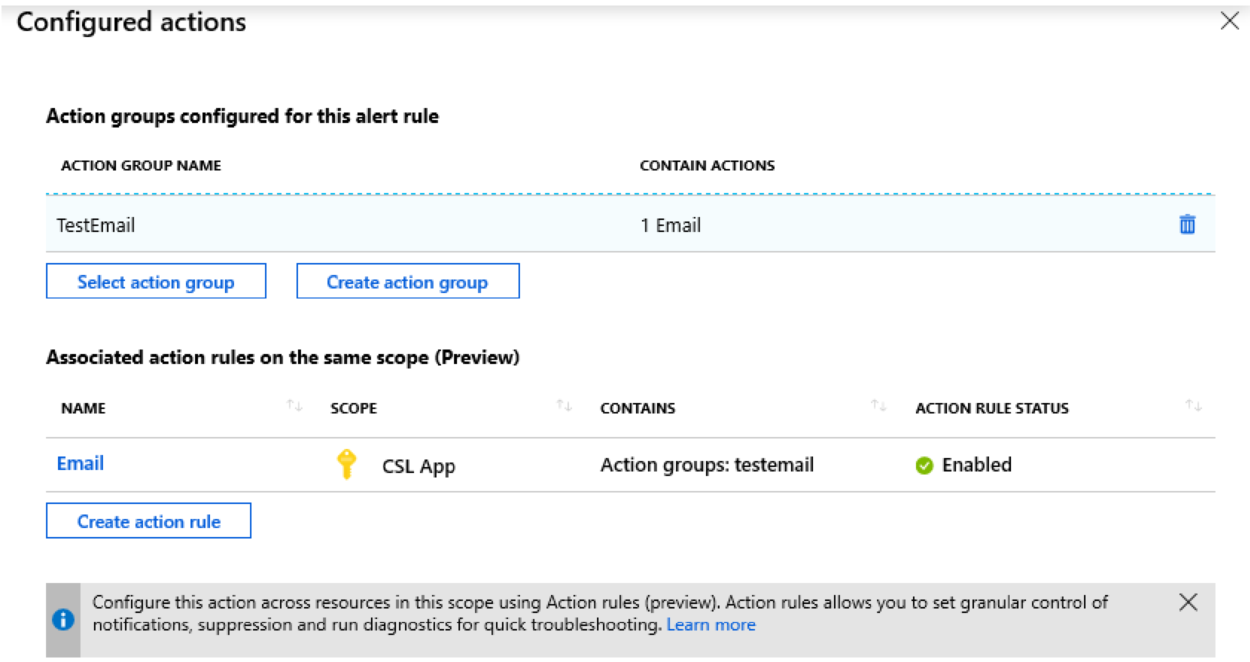
- Review the daily usage file - This can be determined by reviewing the unit price and effective unit price within the daily usage file and confirming if a discount is being applied. If you are receiving the discount you are the admin.
- Create an Azure monitor alert - You can create an Azure Monitor activity log alert to be notified of when your RBAC access is removed from CSP subscription.

Create an Azure monitor alert

1. Create alert.



2. Select the type of action you want the alert to take.For example, if you specify that you want an email, you will receive an email notifying you if any role assignment deletion occurs.



AOBO removal

Customers can manage access to their subscriptions by going to **Access Control** on the Azure portal. From the **Role assignments** tab, they select **Remove access**. If this happens, you can:

- Talk with your customer to see if admin access can be reinstated.
- Use the access provided through role-based access control (RBAC).

- Use access provided through Azure Lighthouse.

Role-based access differs from admin access. Roles delimit precisely what you can and can't do. Admin access is broader.

To see the roles eligible to earn PEC, read Roles and permissions for the partner earned credit.

For more information

- Revoking and reinstating admin privileges for Azure CSP subscriptions
- Partner earned credit - overview
- Partner earned credit for managed services

Reinstate admin privileges for a customer's Azure CSP subscriptions

6/19/2020 • 2 minutes to read

Applicable roles

- Global admin
- Admin agent

As a CSP partner your customers often expect that you will manage their Azure usage and their systems for them. Doing so requires you to have admin privileges. Some privileges are granted these when your reseller relationship with the customer is established. Others are granted to you by your customer.

Admin privileges for Azure in CSP

There are two levels of admin privileges for Azure in CSP.

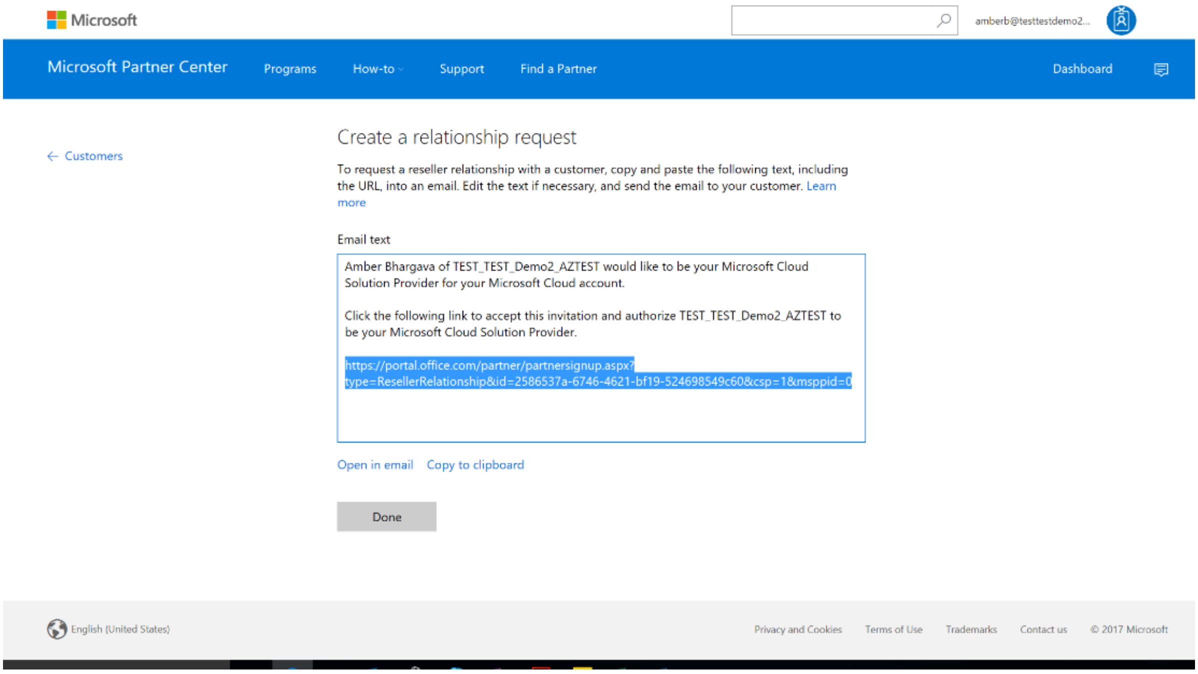
Tenant level admin privileges (**Delegated admin privileges**) - CSP partners get these privileges while establishing CSP reseller relationship with customers. This gives CSP partners access to their customers' tenants, which allows them to perform administrative functions such as add/manage users, reset passwords and manage user licenses.

Subscription level admin privileges - CSP partners get these privileges while creating Azure CSP subscriptions for their customers. Having these privileges gives CSP partners complete access to these subscriptions, which allows them to provision and manage Azure resources.

Reinstate CSP partners' admin privileges

To regain delegated admin privileges, you need to work with your customer.

1. Sign in to Partner Center dashboard and from the Partner Center menu, select **Customers**.
2. Select the customer you are working with and **request a reseller relationship.** This generates a link to the customer who has tenant admin rights.
3. That user needs to select the link and approve the reseller relationship request.



Adding the admin agents group as an owner for the Azure CSP subscription

Your customer will need to add your admin agent group as the owner of the Azure CSP subscription.

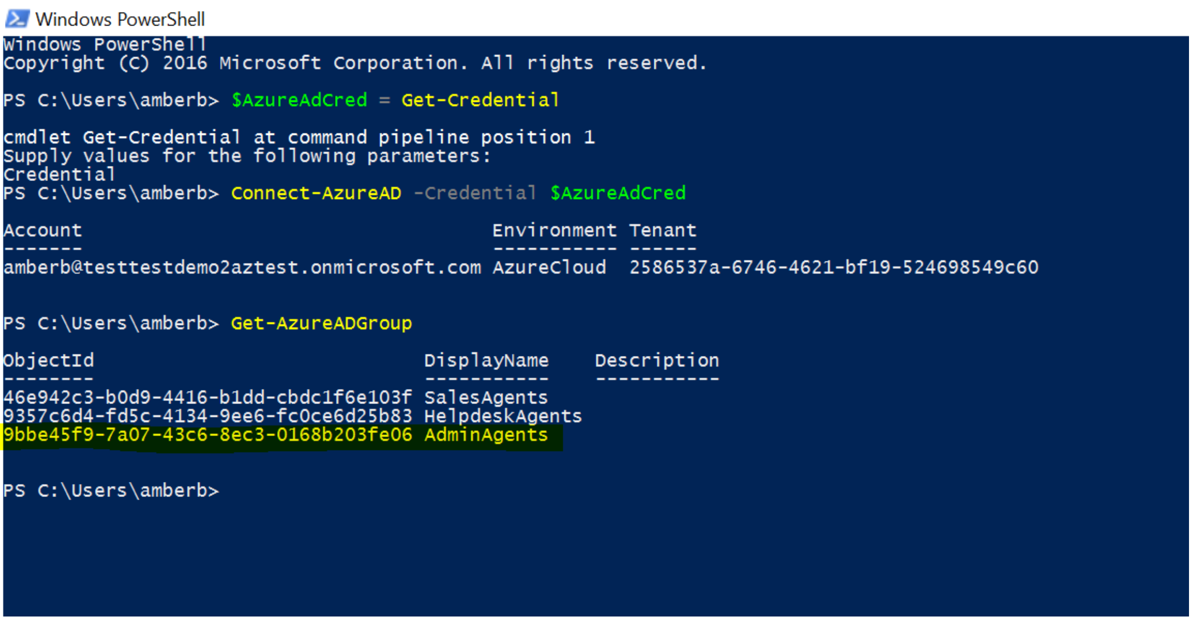
1. Use either PowerShell Console or PowerShell Integrated Scripting Environment(ISE). Ensure that AzureRM and AzureAD modules are installed.

2. Connect to your Azure AD Tenant.

```
Connect-AzureAD
```

3. Get ObjectId of the Admin Agents groups.

```
Get-AzureADGroup
```



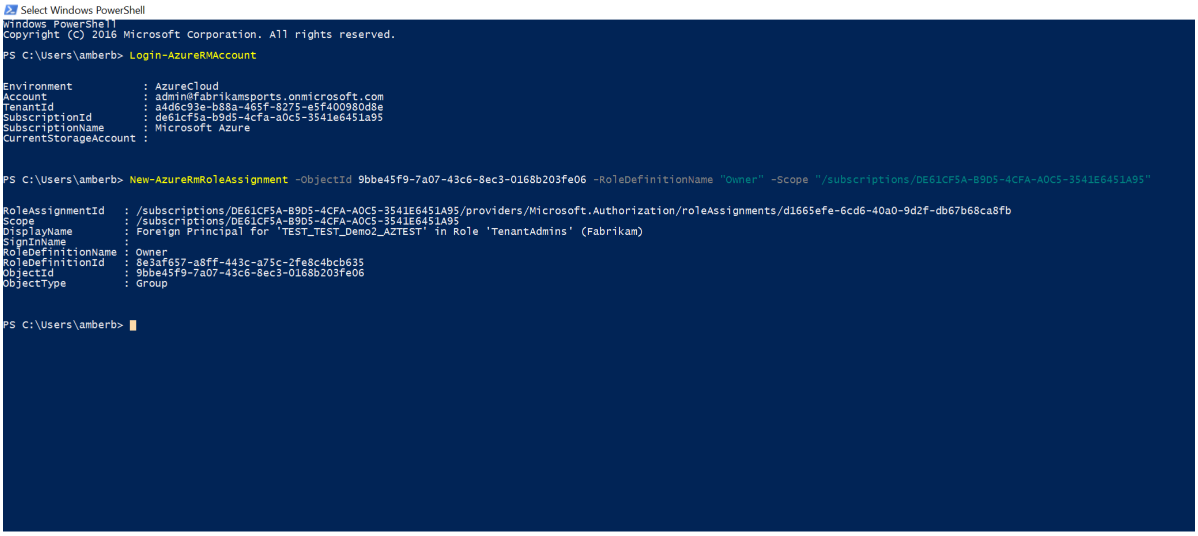
The following steps are performed by the user in your customer's company who has owner access to the Azure CSP subscription.

4. The user with owner access to the Azure CSP subscription,signs in to Azure Resource Manager using her credentials.

```
Login-AzureRMAccount
```

5. She can then add your admin agent group as owner to the CSP Azure subscription.

```
New-AzureRMRoleAssignment -ObjectId <Object Id that you got from step 3> -RoleDefinitionName Owner -
Scope "/subscriptions/<SubscriptionId of CSP subscription>"
```



Next steps

[Manage subscriptions and resources under the Azure plan]

Sell software subscriptions through the Cloud Solution Provider (CSP) program

6/19/2020 • 7 minutes to read

Applies to

- Cloud Solution Providers

Appropriate roles

- Admin agent
- Global admin

With Azure reservations and Server subscriptions (Windows Server and SQL Server subscriptions),partners in the CSP program can better address the fast-growing customer demand for more cost-effective solutions to support highly predictable and persistent cloud workloads.

You can now acquire, provision, and manage Azure reservations and Server subscriptions on behalf of commercial customers through Partner Center and the Azure portal by taking advantage of the Azure Hybrid Benefit.

The Azure Hybrid Benefit helps you get more value from your Windows Server licenses and save up to 40 percent on virtual machines. You can use the benefit with Windows Server Datacenter and Standard edition licenses covered with Software Assurance. Depending on the edition, you can convert or re-use your licenses to run Windows Server virtual machines in Azure and pay a lower base compute rate (Linux virtual machine rates, for example).

Azure reservations unavailable markets

IMPORTANT

Azure reservations **are not** available in the following markets:

Unavailable markets (in alphabetical order)

A TO GI	GR TO PAL	PAP TO Z
Aland Islands	Greenland	Papua New Guinea
American Samoa	Grenada	Pitcairn Islands
Andorra	Guadeloupe	Reunion
Anguilla	Guam	Saba
Antarctica	Guernsey	Saint Barthélemy
Antigua and Barbuda	Guinea	Saint Lucia
Aruba	Guinea-Bissau	Saint Martin
Azerbaijan	Guyana	Saint Pierre and Miquelon
Benin	Haiti	Saint Vincent and the Grenadines

A TO GI	GR TO PAL	PAP TO Z
Bhutan	Heard Island and McDonald Islands	Samoa
Bonaire	Isle of Man	San Marino
Bouvet Island	Jan Mayen	São Tomé and Príncipe
British Indian Ocean Territory	Jersey	Seychelles
British Virgin Islands	Kiribati	Sierra Leone
Burkina Faso	Kosovo	Sint Eustatius
Burundi	Laos	Sint Maarten
Cambodia	Lesotho	Solomon Islands
Central African Republic	Liberia	Somalia
Chad	Madagascar	South Georgia and South Sandwich Islands
China	Malawi	South Sudan
Christmas Island	Maldives	St Helena, Ascension, Tristan da Cunha
Cocos (Keeling) Islands	Mali	Suriname
Comoros	Marshall Islands	Svalbard
Congo	Martinique	Swaziland
Congo (DRC)	Mauritania	Timor-Leste
Cook Islands	Mayotte	Togo
Djibouti	Micronesia	Tokelau
Dominica	Montserrat	Tonga
Equatorial Guinea	Mozambique	Turks and Caicos Islands
Eritrea	Myanmar	Tuvalu
Falkland Islands	Nauru	U.S. Outlying Islands
French Guiana	New Caledonia	Vanuatu
French Polynesia	Niger	Vatican City
French Southern Territories	Niue	Wallis and Futuna
Gabon	Norfolk Island	Yemen
Gambia	Northern Mariana Islands	
Gibraltar	Palau	

Buy software subscriptions on behalf of customers

To buy software subscriptions on behalf of a customer:

1. Sign into the Partner Center dashboard.
2. From the Partner Center menu, select **Customers**, then choose a customer from the list.
3. From the customer's detail page, select **Add products**, and then follow the on-screen instructions to create and pay for your order. All commercial pricing excludes tax with the exception of Australia and Brazil. For Australia and Brazil, the price includes tax.

Activate and manage software subscriptions

After you purchase the software subscription, follow the steps below to download it.

> **NOTE**
>
> You must be an Admin agent to download software and get activation keys.

1. Sign into the Partner Center dashboard.
2. From the Partner Center menu, select **Customers**, then choose a customer from the list.
3. Go to your customer's detail page and then select **Software**. You'll see a list of all the software you've purchased on behalf of the customer.
4. Expand the product you want to download. In the **Select product** field, select the **Version**, **Language**, and **File type/OS** that you want.
5. Select **Submit** to display the specific products.
6. Select **Get keys and downloads**.
7. Select **Download** to begin downloading, or select **Copy link** to copy the link and send it to the customer.

> **NOTE**
>
> This link will expire after two weeks or 50 downloads, whichever comes first. Once the link expires, return to this page and select **Get keys and downloads** again to enable another two weeks or 50 downloads. You can do this as many times as you need to.

View activity for software key access and software downloads

For auditing or compliance purposes, you may need to check a list of users who have either accessed Server subscription software keys or downloaded Server subscription software. Use the procedure below to access this information.

> **NOTE**
>
> You must be a Global administrator, Account admin, Referral admin, or Marketing content admin to see these activity logs.

1. Sign into the Partner Center dashboard.
2. Select the gear icon from the upper right corner.
3. In the menu, select **Activity log**.

4. Enter the date range for the activity you want to see. The activity log will display a list of users who have either accessed software keys or downloaded software during the time you specified.

Cancel a purchase

You can cancel a software purchase within 60 days of the purchase date. If you cancel within this first 60-day period, you will not be charged an early termination fee. After 60 days, you can no longer cancel a purchase. (See Note for key restrictions to this cancellation rule. To learn about what happens after you cancel a software purchase, see also Important note after these steps.)

> **NOTE**
> The following steps to cancel a purchase apply only to software that qualifies for cancellation within a specific cancellation window, such as within the first 60 days after purchase. These steps also do not apply to a SUSE Linux or RedHat software plan in Azure. At this time, you cannot cancel or exchange a SUSE or RedHat software plan. Learn more about using SUSE Linux or RedHat plans.

Follow the steps below to cancel a purchase:

> **NOTE**
> You must be an Admin agent to cancel a purchase. The following steps describe how to cancel a purchase in the Partner Center dashboard. You can also do this using the Partner Center API.

1. Before you start the cancellation process, make sure you have the following:
   - The customer's name, tenant GUID or domain name
   - The name of the product you want to cancel
   - The Order ID
2. Sign into the Partner Center dashboard.
3. From the Partner Center menu, select **Customers**, then choose a customer from the list.
4. On the customer's details page, select **Software** to see the list of software purchased for the customer.
5. Locate the software purchase you want to cancel, and then select **Cancel**. A dialog box will appear.
6. From the Order number drop-down list, select the correct order ID number you want to cancel. (You can learn more information about an order or order ID number from the customer's **Order history** page.)
7. Select the checkbox to acknowledge that you have read the **Important** message concerning cancellation. (Refer to the **Important** note below to learn more about what happens after you cancel a purchase.)
8. Select **Submit** to cancel your purchase. If you want to cancel multiple orders for a customer, you will need to perform Steps 4 through 6 again for each, unique order ID number.

When you attempt to cancel an order, Partner Center may also give you other information (that appears below the Order number drop-down list). This information can include:

- How many days remain for you to cancel that particular order
- Whether you have already passed the cancellation window and can no longer cancel the order
- If we need more information about your cancellation request, you may be given a link to a **customer support request** form.

> **IMPORTANT**
>
> After you cancel an order, a message confirming your cancellation will appear. There may be a delay of up to 15 minutes, however, before the cancellation appears on the Partner Center dashboard.

Post-cancellation details

After you cancel a purchase:

- All related software keys and download links will be revoked. This means neither you nor your customer can use the software keys and download links any longer related to this purchase. You and your customer are responsible for discontinuing the use of all canceled software. You are also responsible for uninstalling the canceled software and removing any, related software downloads and links.
- The canceled item will still appear on the customer's Software details page but the activation key will not be available.
- A credit for the canceled order will appear on your next monthly invoice. Perpetual software will receive a 100% credit and software subscriptions will receive a prorated credit.

Submit a customer support request to cancel a purchase

If you tried to cancel a software purchase via Partner Center but were told to provide more information and fill out a customer support request form, these steps may help you:

1. When you select the **customer support request** link from the Cancel purchase window, the **Report a problem with Partner Center** page will open.
2. Under **Details**, in the Type of problem list, select **CSP Purchase/Refund on behalf of customers**.
3. Fill in the Impact and Title fields.
4. In the Description field, provide the following:
   - The customer tenant GUID or domain name
   - Order ID or Subscription ID
   - Refund reason
   - Amount requested
5. In the Contact field, enter your name, email address, and phone number.
6. If you need to attach a file for any reason, select **Add files**. This step is optional.
7. When you're finished, select **Submit**.

Next steps

- Use Partner Center to sell customers subscriptions to commercial marketplace products
- Assigning Azure subscriptions to customers in Partner Center

Sell on-premise software through the Cloud Solution Provider (CSP) program

5/8/2020 • 2 minutes to read

Appropriate roles

- Admin agent
- Global admin

On-premise software in CSP supports a smooth transition to the cloud by introducing on-premise software in a cloud-focused program. This new offering helps bring the value-added partner to every purchase scenario as they provide a single platform to transact all Microsoft products. As a CSP, you can now sell on-premise software through Partner Center in addition to Open, EA, and other programs currently in use. On-premise software in CSP is a new sales program and is not intended to replace any of Microsoft's other volume licensing programs.

While ensuring the best overall customer value with on-premise software licensing options, we've also made the business model as partner-friendly as possible. Straightforward licensing of on-premise software in CSP means cost predictability and a streamlined sales process for you. This new business model makes it easy to procure, manage, and price on-premise software for your customers, allowing you to focus on winning business with an expanded portfolio of IT management value-added solutions.

> **NOTE**
>
> On-premise software is currently available to limited partners. To find out whether you're eligible, see your Microsoft contact.

Buy software subscriptions on behalf of customers

To buy software subscriptions on behalf of a customer, go to the customer's detail page, select Add products, and then follow the on-screen instructions to create and pay for your order.

Activate and manage software subscriptions

Once you've purchased your software, you and your customers need to download it. Use the following procedure to do this.

> **NOTE**
>
> You must be an Admin agent to obtain keys and downloads.

1. Go to your customer's detail page and then select **Software**. You'll see a list of all the software you've purchased on behalf of the customer.
2. Expand the product you want to download. In the **Select product** field, select the **Version**, **Language**, and **File type/OS** that you want.
3. Select **Submit** to display the specific products.
4. Select **Get keys and downloads**.
5. Select **Download** to begin downloading, or select **Copy link** to copy the link and send it to the customer.

> **NOTE**
>
> This link will expire after two weeks or 50 downloads, whichever comes first. Once the link expires, return to this page and select **Get keys and downloads** again to enable another two weeks or 50 downloads. You can do this as many times as you need to.

Cancel a purchase

Use the following procedure to cancel a purchase. Once the cancellation is complete, the software key will be revoked.

> **NOTE**
>
> You must be an Admin agent to cancel a purchase.

1. Before beginning the process, make sure you have the following:
   - The customer tenant GUID or domain name
   - Order ID or Subscription ID
   - Refund reason
   - Amount requested
2. On the customer's details page, select **Software**. You'll see a list of all the software you've purchased.
3. Locate the software you want to cancel, and select **Cancel**. The **Report a problem with Partner Center** page opens.
4. Under **Details**, in the **Type of problem** list, select **CSP Purchase/Refund on behalf of customers**.
5. Fill in the **Impact** and **Title** fields.
6. In the **Description** field, provide the following:
   - The customer tenant GUID or domain name
   - Order ID or Subscription ID
   - Refund reason
   - Amount requested
7. In the **Contact** field, enter your name, email address, and phone number.
8. If you need to attach a file for any reason, select **Add files**. This step is optional.
9. When you're finished, select **Submit**.

How CSP program partners can sell subscriptions to customers

5/8/2020 • 2 minutes to read

Applies to

- Partner Center

Appropriate roles

- Admin agent
- Global admin
- Helpdesk agent
- Sales agent

As a CSP partner, one of the central things you do is offer subscriptions for Microsoft products to your customers. In Partner Center, you can manage all your subscriptions for each customer. You can add subscriptions, add licenses to existing subscriptions, even offer trial subscriptions to customers who want to test drive the software. In addition, you can view analytics to understand how your customers are using the software, helping you to provide better support.

TO DO THIS	READ THIS
Create and manage subscriptions for existing customers in Partner Center	Create a new subscription
Once you've added the subscription, you can assign licenses to the customer's employees	Assign licenses to users
You can also manage bulk license updates	Assign or revoke licenses to multiple users
As your customer adds new employees, you can add additional licenses to existing subscriptions	Add licenses or services to an existing subscription
Your customer may want to try out software before committing to it, so offer trial subscriptions	Offer your customers trials of Microsoft products
You can start the Azure subscription process within Partner Center	Assign Azure subscriptions in the Partner Center
Find out about special pricing for offers	Get special pricing for offers
Learn how your customers are using their software in order to help them be more effective.	Increase adoption and satisfaction

Create, suspend, or cancel customer subscriptions

6/19/2020 • 6 minutes to read

Applies to

- Partner Center
- Partner Center for Microsoft Cloud for US Government
- CSP partners

Appropriate roles

- Admin agent
- Billing admin
- Global admin
- Helpdesk agent
- Sales agent

After you've created a record of your customer in the Partner Center, you can sell them subscriptions to products in the catalog. This includes products published by Microsoft as well as Software as a Service (SaaS) products published by third-party Independent Software Vendors (ISVs) to the commercial marketplace.

Some offers are limited to one subscription per customer. To see a list of which offers are restricted, visit the Partner Center Pricing and Offers page.

> **IMPORTANT**
> As a partner in the CSP program, you can only purchase **license-based** SaaS subscriptions from ISV publishers within Partner Center. This means you can purchase any **license-based** SaaS offer the ISV publisher has made available to you, including exclusive offers to which you have access. To purchase or manage other, commercial marketplace offers from ISVs (such as **usage-based**, metered, or consumption-based offers involving Azure applications, Containers or VMs), you must go to the Azure management portal. For more information, see Purchase commercial marketplace products.

Create a new subscription

1. Sign into the Partner Center dashboard.
2. From the Partner Center menu, select **Customers**, then choose a customer from the list.
3. Select **Add subscription**. The **Online Services** tab will show all available Marketplace SaaS offers.
4. To see only certain types of subscriptions, make selections in the available filters:
   - **Publisher**: Choose **Microsoft** to see only offers from Microsoft, or **Partner** to see commercial marketplace products published by ISVs.
   - **Billing type**: Select the type of subscription billing you want to use: **License** or **Usage**. See FAQ about new billing features for information that will help you decide between the monthly and annual billing frequency.
   - **Category**: Choose **Enterprise**, **Small business**, or **Trial**. For info about trial subscriptions, see Offer your customers trials of Microsoft products.
5. Select the product subscriptions you want to purchase for your customer. The products you see depend on the type of customer segment (education, government, etc.) and the filters you have applied. Some offers

shown on the Marketplace may not always be available to a specific customer or a specific CSP partner. This can be because:

- The customer already has a subscription to that product and is only allowed one
- The customer's subscription may have been suspended (In this case, you can reactivate the subscription rather than purchase a new one.)
- For ISV SaaS offers, there may be a few reasons why the offer is not available to purchase: The ISV may not support the customer's billing country or region; the ISV may have chosen not to make the offer available through the CSP program; or, the ISV may have made the offer exclusive to only certain CSP partners. The ISV offer may also not be transactable through the Partner Center (for example, containers or some usage-based offers).

6. For each subscription you want to add, enter the number of licenses (if needed) and select **Add to cart**.
7. When you are finished adding subscriptions, select **Review** and review your order.
8. Once you've reviewed your orders and are ready to purchase these subscriptions, select **Buy**.
9. After you buy a subscription for a customer, the following will occur:

   - You can review or edit the subscription by selecting the subscription name from that customer's **Subscriptions** page. From here, you can select add-on licenses if any are available, change the quantity of licenses, or suspend the subscription.

   For ISV SaaS (license-based) subscriptions:

   - You will receive a link to the ISV publisher's site. This link should help you complete the deployment or account setup of the customer's subscription.

   > **NOTE**
   >
   > Neither you nor your customer will receive an email with instructions to complete account set up/provisioning for this type of ISV subscription.)

   - If your subscription comes with a 30-day free trial, the free trial period will be applied automatically. As a partner in the CSP program, you cannot waive the free trial period on offers you purchase for customers. Once the free trial period ends, the subscription term will begin and the subscription will convert to paid status. The subscription will then autorenew according to the same schedule.

Suspend or cancel a subscription

Partners can suspend or cancel a subscription if requested by the customer, or in cases of nonpayment or fraud.

Suspend a subscription

When you change the status of a subscription to **Suspended**, users are not able to sign in or access services.

1. Sign into the Partner Center dashboard.
2. From the Partner Center menu, select **Customers**, then choose a customer from the list.
3. Choose the subscription you want to manage.
4. In the **Status** section, choose **Suspended**. Then **Submit** your changes.
5. All data will be deleted unless the subscription is reactivated within 90 days, or 90 days plus the number of days between the time the account was opened and the first billing period (maximum 120 days).

When you suspend a subscription, the date you see below the **Suspended** button indicates when the subscription would automatically expire if you don't reactivate it. For more information, see FAQ about new billing features.

Cancel a subscription

You have the option to cancel license-based SaaS subscriptions from third-party ISV publishers within the Partner Center commercial marketplace. As long as you cancel within the cancellation period, you will receive a full refund.

For ISV offers billed monthly:

- If you cancel less than 24 hours after you placed the order, you will receive a full credit on the next invoice.
- If you cancel later than 24 hours after you placed the order, the cancellation will be scheduled to occur at renewal.

For offers billed annually:

- If you cancel less than 14 days after you place the order, you will receive a full credit on the next invoice.
- If you cancel later than 14 days after you place the order, the cancellation will be scheduled to occur at renewal.

After these periods are over, you will no longer see the option to cancel the subscription.

> **NOTE**
>
> Usage-based and metered, third-party ISV services (that use virtual machines or containers, for example) are not eligible for return. Usage-based services can be de-provisioned as a cancellation method. Since charges are billed after use, these services are not eligible for a refund.

To cancel a license-based SaaS subscription from an ISV publisher, do the following:

1. Sign into the Partner Center dashboard.
2. From the Partner Center menu, select **Customers**, then choose a customer from the list.
3. Locate the subscription you want to cancel.
4. In the **Status** column, select **Cancel**. Then **Submit** your changes.
5. If a dialog box appears, fill out any relevant details then select **Submit**.
6. To confirm the cancellation, select **Yes, cancel**.

> **NOTE**
>
> You can also choose to cancel an Azure Marketplace subscription using APIs. To do so, see Cancel an Azure Marketplace subscription.

Choose whether to automatically renew a commercial marketplace subscription

By default, active subscriptions are set to automatically renew when the subscription period expires. For subscriptions to commercial marketplace products, you can optionally choose not to automatically renew the subscription.

To stop an active commercial marketplace subscription from automatically renewing:

1. Sign into the Partner Center dashboard.
2. From the Partner Center menu, select **Customers**, then choose a customer from the list.
3. Select **Subscriptions**. This lists any license-based subscriptions you have purchased for the customer.

4. In the **Subscription** column, select the subscription you want to modify.

5. In the subscription details page, locate the **Status** section and uncheck the **Auto-renew** box.

6. Select **Submit**.

Next steps

- Purchase commercial marketplace products for your customers
- Manage commercial marketplace products for your customers
- Commercial marketplace overview

Use promotions to attract new customers and pass the savings on to them

6/19/2020 • 2 minutes to read

Applies to

- Partner Center
- Partners in the Cloud Solution Provider (CSP) program

Appropriate roles

- Admin agent
- MPN partner admin
- Billing admin
- Sales agent

Microsoft occasionally offers promotions on license-based subscriptions, allowing you to pass the savings on to customers and grow your business.

Microsoft offers two kinds of promotions: Those available to all eligible partners in the Cloud Solution Provider (CSP) program, and those available only to partners in a particular geographic region.

Promotion pricing is automatically applied to your net price when you purchase new subscriptions at the promotion price. In addition, any licenses you add to a subscription purchased with promotion pricing are added at the promotion price.

Take a moment to review these important facts about promotions:

- A subscription's promotion price applies only for the duration of the subscription. When a subscription you purchased with promotional pricing expires, the renewal subscription's price reverts to the price in the price list. This means that any subscriptions set up for automatic renewal will renew at the prevailing price. You can find the price list on the **Pricing and offers** page.

- If a subscription is eligible for multiple promotions, the promotion with the highest percentage off is automatically applied.

- Cancellations of promotion-priced subscriptions follow the same process and policy as regularly-priced subscriptions.

See available promotions

You can see which promotions you're eligible for, if any, on your **Promotions** page. Select **Promotions** from your **Partner Center** menu to see a list of current promotions, along with the discount, promotion type, and start and end dates for the subscription. If no promotions are available, you'll see a message indicating this.

> **NOTE**
>
> You can also see promotions when making a purchase. When you select a subscription, the promotion pricing appears on the **Review** page.

Purchase subscriptions at promotion prices

1. On your **Partner Center** menu, select **Customers** and then select the customer who's buying the subscription.
2. Select **Add subscription**.
3. On the **New subscription** page, select the subscription the promotion applies to.
4. Enter the number of licenses the customer needs.
5. Review the order. You'll see the promotion pricing that will be applied in the **Discount** column.
6. Select **Submit** to purchase. Your customer will see the promotion price on their next bill.

Give customers 30-day, free trials of Microsoft products

5/8/2020 • 5 minutes to read

Applies to

- Partner Center

Appropriate roles

- Global admin
- User admin
- Sales agent

A good way to introduce customers to new Microsoft products is to offer 30 day free trials. You can sign up for the trials in the catalog just like many other online services. All partners can participate.

Available trial offers

You can find all of your outstanding trial offers on the **Customer** page. This page lists all subscriptions, including free trials and paid subscriptions. (This feature is not currently available in China.)

Each customer is entitled to one free trial for each available offer. For example, they can get one free trial for Microsoft 365 Business Standard and one free trial for Office 365 E3. However, if the customer already owns the offer, they can't use a free trial for that offer.

Available products

Free trials are available for the following products:

- Microsoft 365 Business Standard
- Office 365 E3
- Office 365 E5 with PSTN
- Office 365 E5 without PSTN
- Enterprise Mobility & Security E5
- Dynamics 365 Customer Engagement Plan 1
- Dynamics 365 Business Central
- Microsoft 365 Business Premium

We provide free trials for these products because they are the most comprehensive and popular business offers. We may add additional free trial offers in the future.

Currently, there are **no free trials** for government offers, education offers, or add-on offers.

Licenses for free trial offers

All free trials provide 25 licenses. You can't change this number during the trial. You can't add or remove seats in the free trial. After the trial is converted to a paid subscription, you can add additional licenses to the subscription.

You should assign trial licenses and seats just as you would for a paid service in Partner Center.

Sign customers up for trials

To sign your customer up for a trial through Partner Center:

1. From **Sell** on the Partner Center, go to **Catalog**.
2. In the catalog, from **Billing frequency**, click **Trial offer**. This enables only free trials to appear and disables other offers that are not free. Trials will show up on the **Trials** tab in the catalog.
3. Select the free trial you want to offer and then select **submit**. All trials are for 30 days during which you will not be billed. You can also convert it to a paid subscription at any time during the trial.

Converting trials to paid subscriptions

A free trial is not automatically converted to a paid subscription. After thirty days, a free trial must be converted to a paid subscription or it will expire. Free trials can't be extended.

You'll need to convert the trial into a paid subscription yourself. You can do this using the Partner Center or through the Partner Center APIs.

> **NOTE**
>
> Customer free trials for the Cloud Solution Provider (CSP) program can't be converted to another program tenant (such as EA, Open or MOSP).

Convert trials using Partner Center

You can convert trials to paid subscriptions using the Partner Center dashboard as follows:

1. Go to the customer's subscription page, and select the free trial.
2. Select **Convert trial to paid subscription**.
3. Enter the desired license quantity and billing frequency, and select **Apply**.
4. Billing for the paid subscription begins on the conversion date, and the subscription auto-renews twelve months from the conversion date.

Convert trials using APIs

You may need to alter your APIs to accommodate the conversion of a free trial to a paid subscription. For more information, see the following developer documentation:

- Convert a trial subscription to paid
- Get a list of trial conversion offers

Trials without conversions

Not all trials can be converted to paid subscriptions. Partners can use a trial that has no conversions until the expiration date. Partners can purchase compatible offers that support the same services as the trial offer. This should be done before the trial expires to ensure the newly purchased offers' services align with the trial's services.

TRIAL	COMPATIBLE SMALL BUSINESS OFFERS	COMPATIBLE ENTERPRISE OFFERS
Microsoft Teams Commercial Cloud (User Initiated) Trial	Microsoft 365 Business Basic, Microsoft 365 Business Standard, Microsoft 365 Business Premium	F3 (formerly F1), Office 365 for Enterprise (E1, E3 and E5), M365 F1/F3, M365 Enterprise (E3)

> **NOTE**
> The offers above have similar service plans with similar functionality, however there may be some differences between the offers.

Expiring offers

You will not be notified of expiring offers. You can track upcoming expiration dates using the customer view on Partner Center or by querying the API. It's a good idea to monitor these dates frequently so you can take the appropriate follow-up actions with customers as they approach a decision point.

After a trial has expired, a customer who attempts to log into that trial will see an expiry message. However, the data is stored in line with data retention standards. After you purchase a new subscription with the same service plans, your customer's information can be accessed again from the newly activated subscription.

Billing

Annual billing and free trials are the same in sovereign clouds and the public cloud. The only difference is the trial SKUs available at the time of launch.

Billing for free trials

Free trials can be used for both monthly and annually billed subscriptions. You can select the billing frequency when you convert the trial to a paid subscription.

The subscription start date is based on the conversion date. If the free trial is converted to a paid offer with annual billing, the subscription renewal date will be twelve months from the conversion date. If the free trial is converted to a paid offer with monthly billing, the subscription renewal date will be twelve months from the billing date following the conversion date.

Invoices

You won't see free trials listed in your invoice or license-based reconciliation file. Free trials will only appear on your invoice and license-based reconciliation file after you convert a free trial to a paid subscription. The converted subscription will appear in the same way as any new subscription.

Incentives

Free trials do not have an impact on incentives.

Support

For support on free trials, submit a service request through Partner Center.

Use Partner Center to sell customers subscriptions to commercial marketplace products

6/19/2020 • 2 minutes to read

Applies to

- Partner Center
- CSP partners

As a partner in the CSP program, you can use Partner Center to sell customers subscriptions to Software as a Service (SaaS) products that have been published to the commercial marketplace (Microsoft AppSource and Azure Marketplace) by Independent Software Vendors (ISVs).

This can help differentiate your business and provide your customers with software bundles that address their specific business needs. You manage licenses and subscriptions for these Marketplace SaaS products just as you do for Microsoft products.

To learn how partners in the CSP program can use the commercial marketplace, see the Commercial marketplace overview for Cloud Solution Providers.

Or, to learn about the different role of ISVs in the commercial marketplace, see Marketplace FAQs.

Assigning Azure subscriptions to customers in Partner Center

6/19/2020 • 2 minutes to read

Applies to

- Partner Center

Assign Azure subscriptions to your customers

1. Select **Customers** from your **Partner Center** menu and locate the customer you want to manage.
2. Select the down arrow at the end of the row to expand the customer's record and then select **Microsoft Azure Management Portal**. You will be directed to the Azure portal where you can manage the customer's subscriptions.
3. From the Azure portal, select **Subscriptions**.
4. Select the subscription you would like to assign, then select **Access Control**.
5. Select **Add** to add a user to the subscription.
6. After you add the user to the subscription, you can assign the user a role and the specific account that user will have access to.

Enable customers to manage their Azure subscriptions

After you create a Microsoft Azure subscription for a customer, you can enable them to manage the subscription. To do this, you'll need to log on to the customer's Microsoft Azure Management portal.

1. To open the customer's Azure portal, either expand the customer's listing in your customer list or select the customer's name and then select **Microsoft Azure Management Portal**.

   > **NOTE**
   >
   > If you are prompted to log onto the Azure portal, you may not have delegated administrative privileges. Select **Request a relationship** to invite the customer to identify you as their Partner of Record. After the customer accepts your invitation, you are automatically granted delegated administrative privileges.

2. In the Azure portal, open the customer's subscriptions list and select the customer's Azure subscription.
3. Assign a role to any of the customer's users so that they can create and manage resources under their subscription.

User management tasks for customer accounts in Partner Center

6/19/2020 • 2 minutes to read

Applies to

- Partner Center

Appropriate roles

- Global admin
- User management admin
- Admin agent
- Sales agent
- Helpdesk agent

You can create and delete new users in a customer's account. You can also restore one or more user accounts that you previously deleted within 30 days of the deletion. The user's previous subscription assignments will also be restored (assuming their previous allocations are available).

When you buy new subscriptions for a customer, the customer should give you a list of all the users who will need accounts, their user permissions, and which services each user needs.

You can assign subscriptions to multiple users at one time by importing the names using an Excel-compatible .csv spreadsheet file.

Create user accounts for a customer

1. Sign into the Partner Center dashboard.
2. From the Partner Center menu, select **Customers**, then choose a customer from the list.
3. In the customer menu, select **Users and licenses**.
4. For each user you add, select **Add subscription**, then fill out the information, including permissions and licenses. **Save** your changes.
5. Be sure to record the user name and temporary password to send to the user.
6. If you are adding multiple users one at a time use **Add another user**.
7. You can also add multiple users at once by importing an Excel-compatible .csv spreadsheet file. You can wait until you're done with the whole set before emailing or printing the names and passwords from the confirmation screen.

Add or remove user licenses for a customer

The following steps apply to adding or removing user licenses for Microsoft products. To add or remove user licenses for license-based SaaS subscriptions in the commercial marketplace, see Add or remove licenses for a SaaS subscription.

1. Sign into the Partner Center dashboard.
2. From the Partner Center menu, select **Customers**, then choose a customer from the list.

3. In the customer menu, select **Users and licenses**.
4. Choose one or more users from the list. If, for example, the customer just purchased new licenses and you wanted to assign them to people who don't have them yet, you can use the **Filter users by...** option to find the right group.
5. Select **Manage licenses**. Make your changes, then **Save**.

> **NOTE**
> For Azure Marketplace products, license assignment and activation is managed through the Independent Software Vendor (ISV) who published the product.

Reset a user's password for a customer

1. Sign into the Partner Center dashboard.
2. From the Partner Center menu, select **Customers**, then choose a customer from the list.
3. In the customer menu, select **Users and licenses**. Choose the user from the list.
4. At the bottom of the screen, select **Reset password**.
5. Send the new temporary password to the user.

Delete user accounts for a customer

1. From the **Partner Center** menu, select **Customers**. Choose the customer from the list.
2. In the customer menu, select **Users and licenses**. Choose the user from the list.
3. At the bottom of the screen, select **Delete user account**.

If you need to restore this account, you can find it in the **Deleted users** tab of the Customer's **Users and licenses** list. You have 30 days to restore a deleted user.

Restore deleted user accounts

1. From the **Partner Center** menu, select **Customers**, then choose the customer from the list.
2. Select **Users and licenses**.
3. Select the **Deleted users ( )** tab. It should read **(1)** or greater when there are deleted users that can be restored.
4. Select one or more of the deleted users' checkboxes and then select **Restore**.

   All selected user accounts will reappear in the **Users and licenses** page.

Related topics

Assign or revoke licenses to multiple users

Create multiple users for a customer account

Add licenses, seats, or more services to a customer's subscription

6/19/2020 • 2 minutes to read

Applies to

- Partner Center
- Cloud Solution Provider program partners

Appropriate roles

- Global admin
- User management admin
- Admin agent
- Sales agent
- Helpdesk agent

If your customer needs more seats than their current subscription provides, or a different version with additional services, you may be able to upgrade the subscription. For more details, see Switch to a different Microsoft 365 Apps for business plan.

The following upgrades are supported in Cloud Solution Provider:

OFFER	POSSIBLE UPGRADES
Microsoft 365 Apps for business	• Microsoft 365 Business Premium[1] • Microsoft 365 Apps for enterprise • Office 365 Enterprise E3 • Office 365 Enterprise E5
Microsoft 365 Business Standard	• Office 365 Enterprise E3 • Office 365 Enterprise E5
Microsoft 365 Business Basic	• Microsoft 365 Business Standard[1] • Office 365 Enterprise E1 • Office 365 Enterprise E3 • Office 365 Enterprise E5
	[1] Microsoft 365 Apps for business India and Microsoft 365 Business Basic India can be upgraded to Microsoft 365 Business Standard India, not to Microsoft 365 Business Standard.

Subscriptions can be upgraded if these conditions apply:

- The subscription must be active (not suspended or canceled).
- You must have delegated admin privileges for this customer and service. Learn how to Request delegated admin privileges.

- The customer can't already have subscriptions that include the additional services.
- The customer can't already have the subscriptions you are trying to upgrade them to.

It is possible, in the latter two cases that the customer may have purchased those subscriptions or services from another partner or another channel, and they won't be able to purchase them from you unless they cancel their existing ones first. For more information, see multi-channel.

For more information about the impact this will have on billing, see the details about canceling a subscription and adding a new subscription in Common billing scenarios.

Upgrade a subscription

1. To see if a subscription is eligible for upgrading, choose your customer, then open their list of subscriptions.
2. If the subscription can be upgraded, you will see an informational icon right after the subscription name. Hover over this icon, then select **Upgrade now**.
3. Select the new offer, then choose **Submit**.
4. There may be additional work to transition some user accounts for certain services. If so, the Partner Center provides a list of accounts and services that were affected. For help, see the knowledge base article Problems in reassigning licenses while you switch plans in Office 365.

Assign or revoke licenses at the same time to multiple users in a customer account

6/19/2020 • 2 minutes to read

Applies to

- Partner Center

Appropriate roles

- Admin agent
- Global admin
- Helpdesk agent
- Sales agent
- User management admin

You can assign licenses and services to a user, or to multiple users at once in a customer account, and revoke license assignments to users.

The Partner Center tracks and shows all customer-owned license entitlements.

In this section

- Assign licenses to multiple users
- Revoking users' license assignments

Assign licenses to multiple users

1. From the **Partner Center** menu, select **Customers**, and then choose a customer from the list.

2. Select **Users and licenses**.

3. Select the check box for two or more users from the list. (To select all users on the current page, select the check box at the top of the **Users** column.)

   You can find and select users across multiple pages using the **First**, **Previous**, **Next** and **Last** tools.

4. Select the **Selected Users** link. The displayed list shows the selected users.

5. Select the **Manage licenses** link.

   The Manage licenses page shows the list of license entitlements for the customer accounts, and the count of **Available licenses** for each product.

   - The check boxes in the **Product** column show the status of all selected users for the customer-entitled products:

     - When all selected users already have a license, the product's check box is filled.
     - If some of the selected users have a product license, the product's check box is partially filled.
     - If none of the selected users have a product license, the check box is clear.
   - Each selected user appears in a small box near the top of the page. Users appear in sorted order.

   - Select any link in the **Assigned** column to view a tooltip list showing the selected users that already have a license.

- Any product without available licenses shows a **Buy more** link. You can purchase more licenses when customers require them.

6. Under **Assign and revoke licenses**, select the product licenses for the new users. For example, if none of the selected users have Office 365 Enterprise licenses and you want to add them, select the check box. You need enough licenses for each selected product.

7. Select more than one product for the users by selecting each product's check box.

   - Select **View service plans** for any product, to view and select the service plans that the users need.

8. Select **Save**. The Partner Center opens a **Licenses updated** confirmation page listing the users and their new licenses.

> **NOTE**
>
> Some Microsoft products may not be available in certain locations. Other products are dependent on other products or services, or can't be assigned together to the same user. After you save, the confirmation page lists all users' results from successful license assignment, and any errors from the license assignment.

Revoking users' license assignments

1. From the **Partner Center** menu, select **Customers**, and then choose a customer from the list.

2. Select **Users and licenses**.

3. Select the check box for two or more users from the list. (To select all users on the current page, select the check box at the top of the **Users** column.)

   Page through the **First**, **Previous**, **Next** and **Last** tools to find and select other users. You can select across multiple pages.

4. After selecting the users, choose the **Selected Users** link. The displayed list shows only the selected users.

5. Select the **Manage licenses** link.

6. Under **Assign and revoke licenses**, clear the check boxes for products assigned to the users. For example, if all of the selected users have Office 365 Enterprise licenses and you want to revoke them, select the check box to clear it.

7. Select **Save**.

Next steps

Assign licenses to a user

Move license-based customers from other channels & partners to the Cloud Solution Provider program

6/19/2020 • 2 minutes to read

Applies to

- Partner Center

If your customer wants to hire multiple partners, transfer their subscriptions to another partner, or manage their subscriptions purchased elsewhere, you can move them manually. You can also move customers into Partner Center from another channel.

Move your customer's license-based subscriptions to the Cloud Solution Provider Program (CSP)

1. Select **Customers** from the Partner Center menu and then select **Request a reseller relationship**. To provide support for multi-channel accounts, you do the same thing.

2. Once the customer accepts your invitation, you'll be able to provision the desired subscriptions and seats for the customer (for example, the same Office 365 offer that the customer purchased previously).

3. The customer can either allow its original subscriptions to expire or cancel them. However, since there are no refunds on canceled subscriptions, it's best to wait until the customer's subscriptions are near the natural expiration dates.

4. The customer will then continue forward with the subscriptions you have provisioned without interruption.

If you provision the same offers as the offers your customer has been using, there is no need to reassign licenses, and there will be no disruption to end users. The offers must be the same to ensure no data loss. As long as the total number of licenses remains the same and the offer is equivalent your customers will feel no impact.

If you transfer customers who are on offers that have been discontinued, you will need to find an equivalent offer in order to prevent data loss. If you move the customer to a different offer, you will need to update their license assignment.

> **NOTE**
>
> You, the CSP partner, must be in the same region as the customer tenant to transition that customer to you.

Sell Minecraft: Education Edition subscriptions to education customers

12/9/2019 • 2 minutes to read

Applies to

- Partner Center

Appropriate roles

- Global admin
- User admin
- Sales agent
- Admin agent

Partners who work with education institutions can offer **Minecraft: Education Edition** subscriptions to them. You purchase the subscription on the customer's behalf in Partner Center, and then the customer downloads the software from the Microsoft Store for Education.

> **IMPORTANT**
>
> To sell education offers to education customers, you must be enrolled in the Cloud Solution Provider (CSP) program and be an Authorized Education seller (AEP). Additionally, your customer must be a Qualified Education User.

Buy **Minecraft: Education Edition** on behalf of your customer

Follow the steps below to buy **Minecraft: Education Edition** subscriptions in the Partner Center (sign in required):

1. Select **Customers** from the the Partner Center menu.

2. Select your education customer from your customer list and then select **Add subscriptions**.

3. Choose the billing frequency that best meets your needs, and then select **Education** in the **Catalog** section.

4. Select the Minecraft subscription you want to buy on behalf of your customer and enter the number of licenses. Select **Next: Review**.

   > **NOTE**
   >
   > You'll be able to see and manage these licenses in Partner Center. Your cucstomer will see and manage these licenses from their inventory under the Minecraft: Education Edition details page (you must be signed in to the Store for Education to see the details page).

5. If the order is correct, select **Submit**. If you need to make changes to the order, select **Cancel** and make the desired changes.

6. After you've successfully bought the subscription, direct your education customer to their inventory on the Microsoft Store for Education to download the software and distribute the licenses.

   If your customer needs more information about distributing software licenses to their users, they can learn more here.

If your customer isn't familiar with the Store for Education, they can learn more about it on this overview page.

Sell to specialized industries like education, non-profit, and government users

6/19/2020 • 2 minutes to read

Applies to

- Partner Center

Appropriate roles

- Global admin
- Admin agent
- Sales agent

Microsoft provides special, reduced pricing for select groups of customers, including education customers, non-profit customers, small businesses, and government entities. Both you and your customer must be qualified before you can offer them special pricing.

Requirements to sell to specialized industries

SPECIAL PRICING	RESELLER REQUIRED QUALIFICATIONS	CUSTOMER REQUIRED QUALIFICATIONS
Education	None	Must be a Qualified Education User.
Government	To sell Azure, enroll using the Microsoft US Government Cloud Validation form. To sell license-based subscriptions to government, there is no required qualification.	None
Nonprofit	None Must have a non-profit Azure Active Directory tenant. Learn more about nonprofit special offers.	Sign up through the Microsoft nonprofit program to be eligible.

Check your reseller qualifications

The following steps are applicable only to indirect providers and direct bill partners. Indirect resellers need to connect with an indirect provider to deliver academic-priced offers to qualified education users.

1. In your Partner Center dashboard, select the gear icon in the upper right corner of the window to open **Account settings**.
2. In your **Partner profile**, in the **Program info** section, look for **Reseller qualifications**.
3. If you do not see **Reseller qualifications**, you have not yet been authorized to purchase any special offers.

Check the customer qualifications

1. From the **Partner Center** menu, select **Customers**. Choose the customer from the list.

2. In the customer menu, select **Account**. In the **Company info** section, look for **Special qualifications**.

3. If **Special qualifications** is set to **None**, but the customer does in fact meet the qualifications, you can **Update** their details to include them.

Where to find special offers

Once you and your customer are qualified for a special offer program, follow the steps to add a subscription. In the **Catalog** section of the **New subscription** page, select a specialized industry to see the special offers you can sell.

Purchase rules for special segments

Partners can only sell special offers to customers if they meet certain criteria.

- Education offers can only be purchased if the Customer is authorized as an Educational institution. An Education customer can only receive Education and Commercial offers, but not Non-profit nor Government community cloud (GCC).
- Partners can only purchase GCC subscriptions for GCC customers. Once a customer has a GCC subscription, partners cannot purchase commercial, education nor non-profit subscriptions.
- Partners can only purchase commercial or non-profit subscriptions for non-profit customers. Partners cannot purchase GCC nor education subscriptions for non-profit customers.

Purchase rules for selling special offers to customers:

CUSTOMER TYPE	CAN BE SOLD	CANNOT BE SOLD
Commercial	Commercial	Non-profit, Education or Government Community Cloud
Non-profit	Commercial, Non-profit	Education or Government Community Cloud
Education	Commercial, Education	Non-profit or Government Community Cloud
Government Community Cloud	Government Community Cloud	Non-profit, Education or Commercial

Next steps

- Sell Minecraft: Education Edition subscriptions to education customers
- Partner Center for Microsoft Cloud for US Government

How to sell offers to education customers & how to create an education customer in Partner Center

6/19/2020 • 2 minutes to read

Applies to

- Partner Center

Appropriate roles

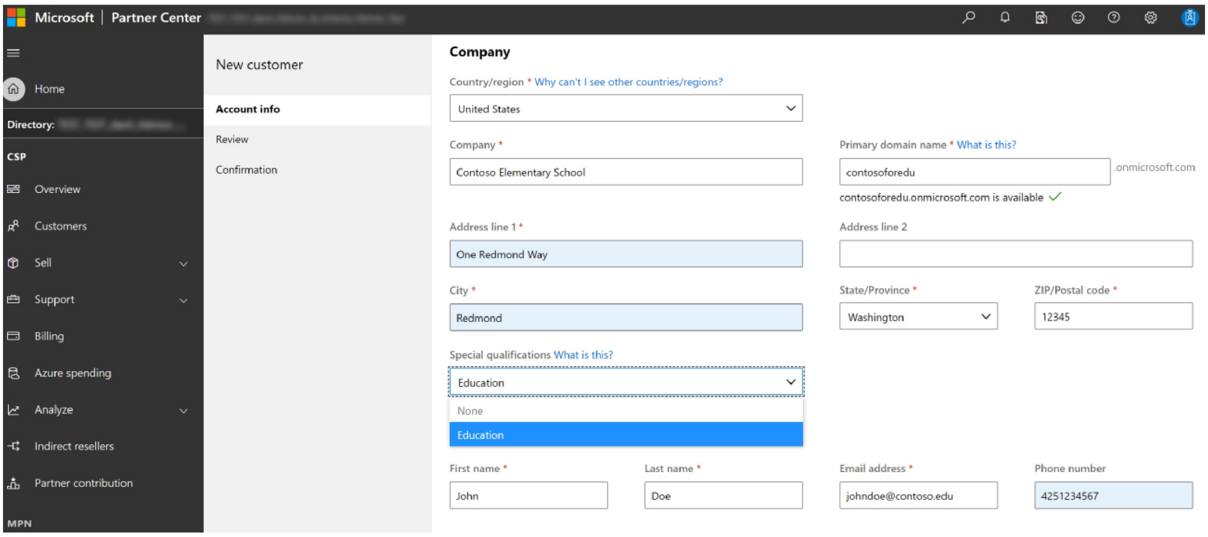
- Global admin
- Admin agent
- Sales agent

Create an education customer

This article explains how to create an education customer in Partner Center and sell education products to them. It also covers how to view the vetting status and resubmit the vetting request if necessary.

> **IMPORTANT**
>
> Microsoft vets each newly created education customer tenant to ensure they are qualified for education offers. Be sure you enter the required information as accurately and completely as possible to prevent delays in the vetting process.

1. Sign in to Partner Center.
2. Select **Customers** and then select **Add a customer**. Select **Education** from the **Special qualifications** dropdown. Fill in the rest of the account information as required. Key fields that assist the vetting process include:
   - **Company name**: ENTER LEGAL ENTITY NAME - Required for vetting
   - **Country/region and Address lines**: ENTER FULL ENTITY MAILING ADDRESS – required for vetting
   - **Email address**: Enter the Entity owned email – not a free or on.microsoft.com email – required for vetting
   - **Customer contact information**: these details will be used as part of the vetting process
   - **Primary domain name**: Used to create customer's account and email addresses. Choose a name similar to the company name with no spaces or special characters. This name cannot be changed later.
3. When you're finished, select **Review**.

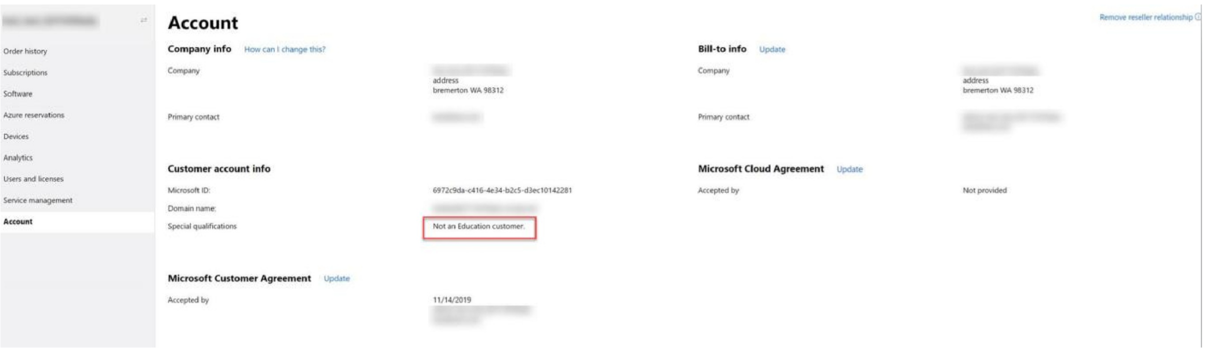


Confirm your education customer's vetting status

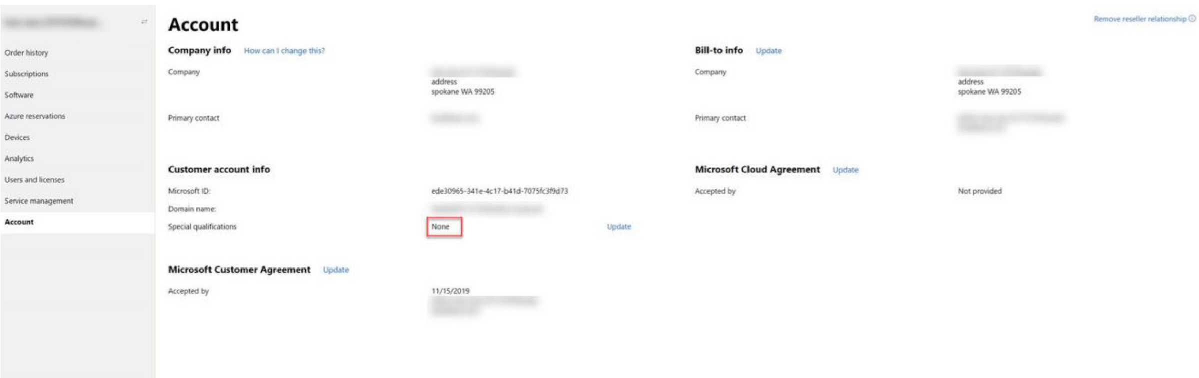
On the customer's Account page, see **Special qualification status**. Status examples:

- If customer passed vetting: Education

- If customer did not pass vetting: Not an education customer



- If customer was not tagged as an Education customer: None



Correct the customer account info and resubmit for vetting

If your customer fails the initial vetting, you can now correct information and resubmit it.

Correct the customer account information

You must have Global admin privileges to update the customer's information. You update the info on the Office 365 portal because this data can't be updated from the Partner Center portal.

1. On the Account page, you will see information stating that the customer qualification is regarded as "Not an education customer".
2. Refresh your browser to reset the page. There will be an **Update** button and **Special qualifications status** is set to **None**.
3. Select **Update**. On the **Service Management** page, select **Office 365**.
4. You will be redirected to the Office 365 admin center on a new tab of your browser. You may be requested to sign in with your credentials.
5. Select **Settings**.
6. Select the **Organization profile** tab at the top of the screen and then **Organization information**. You can now update the customer details.
7. Select **Save changes** at the bottom of the sidebar.

Resubmit for revetting

1. Navigate to your Partner Center tab and to the customer **Account** page. Refresh the browser. and verify that the Company page updated to the new information. Select **Update** button to request education revetting.
2. If the updated customer details are eligible for Education offers, you will see the **Special qualifications** updated to **Education**. If you still see **Not an Education Customer**, contact Support for manual verification.

Next steps

- Sell to specialized industries
- Add a new customer
- Sell Minecraft: Education Edition subscriptions to education customers

Use metrics in Partner Center to increase adoption and satisfaction

6/19/2020 • 2 minutes to read

Applies to

- Partner Center
- Cloud Solution Provider program

Appropriate roles

- Global admin
- User admin
- Admin agent
- Sales agent

Our partners use many metrics to gauge whether their business is growing and where to focus investment. Partner Center can help by providing data about if and how your customers are using the licenses that they've purchased. This information is available for Office products (including OneDrive for Business, which is counted together with SharePoint).

You can see data for all of your customers through the Cloud Solution Provider program. Some customers may buy licenses from other partners or directly from Microsoft. For these situations, you will see the total licenses across all partners. To see only your own licenses, go to the customer's subscriptions instead.

> **NOTE**
>
> Currently, we only show data for Office 365 and Dynamics 365. We will be enabling data for additional products in the future.

Find license and user data

For a single customer

- Select **Customers** from the **Partner Center**, choose a customer, then select **Customer insights**.

Across your portfolio

1. On the **Partner Center**, select **Analyze**.
2. Download deployment and usage data across your entire customer set by selecting the **export** options.

Terminology:

- **Entitlement:** a license that the user is entitled to use (it is not suspended for fraud or non-payment, it hasn't been upgraded to a different license, it hasn't been canceled by the user, etc.)
- **Active:** if the subscribed user has used the entitlement for a task in the last 28 calendar days.
- **Deployment %** = assigned licenses/sold licenses
- **Usage %** = active entitlements/total entitlements

  Sometimes the usage % is inflated, or greater than 100%. This can happen for several reasons:

- If the customer had employee turnover and the license was transferred to a new user.
- If the customer has two subscriptions for a SKU, but one is In Grace Period, Disabled, or De-provisioned, entitlements in both subscriptions may register active usage during the 28-day period but only one is counted in the total.
- If the customer has a trial subscription, activity is counted but the subscription isn't counted towards the total entitlements.
- If some customers are using Yammer significantly more than they are entitled to by their license it can skew the data dramatically.

Next steps

If you are fielding many Help and How-to questions, the adoption numbers on your account are low, or you're looking for upsell opportunities, you may want to consider offering training courses. By teaching your customers how to better use the cloud solution software they have purchased, you're more likely to see an increase in productivity and satisfaction, and a decrease in support needs.

Problem: The user adoption rate is low, and many licenses aren't being used.

What to consider: Customers might not understand the value that the software could provide. They need help envisioning the ways they could incorporate it into their day to simplify tasks that they're already doing, or to enable new kinds of productivity.

What to try: Case studies, user testimonials about specific scenarios, tutorial blogs, or videos.

Problem: There is a high volume of support calls for help and how-to questions.

What to consider: Customers may be new to the software, to the product version, or to their task.

What to try: You can use a dual strategy of offering training (in person or online) to increase customer's overall expertise, while also promoting some of the self-service options available to customers.

You may want to redesign your support site to also include the self-service options described in the topic Customer self-support in addition to your support contact information.

Use Windows Autopilot profiles on new devices to customize a customer's out-of-box experience

6/19/2020 • 7 minutes to read

Applies to

- CSP direct-bill partners, indirect providers, and indirect resellers

Appropriate roles

- Admin agent
- Global admin
- Sales agent
- User management admin

If you manage customer devices, you may need to customize the out-of-box experience (OOBE) for the customer's users. You can pre-configure new devices with Windows Autopilot profiles before delivering the devices to customers and apply new profiles to devices customers have already purchased.

Note that OEMs have started including a shipping label on the outside of the Autopilot device box that shows the device's **Product Key ID (PKID)**. This 1-dimensional, readable barcode provides downstream partners with a way to register devices for Autopilot without having to unbox the device(s) and harvest the device ID by alternative means.

This article explains how to create and apply Autopilot profiles to devices in Partner Center.

If you're not already familiar with Autopilot, review the information in these articles:

- Overview of Windows Autopilot
- Autopilot deployment reference guide

Overview

With the Windows Autopilot feature in Partner Center, you can create custom profiles to apply to customer devices. The following profile settings were available at the time this article was published:

- Skip privacy settings. This optional Autopilot profile setting enables organizations to not ask about privacy settings during the OOBE process.

- Disable local admin account creation on the device. Organizations can decide whether the user setting up the device should have administrator access once the process is complete.

- Automatically set up device for work or school. All devices registered with Autopilot will automatically be considered work or school devices, so this question will not be asked during the OOBE process.

- Skip Cortana, OneDrive, and OEM registration setup pages. All devices registered with Autopilot will automatically skip these pages during the out-of-box experience (OOBE) process.

- Skip End User License Agreement (EULA). Starting in Windows 10 version 1709, organizations can decide to skip the EULA page presented during the OOBE process. See Windows Autopilot EULA dismissal below for important information to consider about skipping the EULA page during Windows setup.

The following profile and device management permissions and limitations apply:

- CSP partners can continue to manage Autopilot profiles for existing customers with whom they have reseller relationships, even if the customers have removed the partner's delegated administration privileges.
- You can manage existing devices for your customers that you have added.
- You can't manage devices your customer has uploaded to Microsoft Store for Business or the Microsoft Intune Portal.

Create and manage Autopilot profiles in Partner Center

In Partner Center, you can create Windows Autopilot deployment profiles and apply them to devices.

> **NOTE**
> Only admin agents can create and apply profiles.

Create a new Autopilot profile

1. Select **Customers** from the Partner Center menu and then select the customer you're creating the Autopilot profile for.
2. On the customer's detail page, select **Devices**.
3. Under **Windows Autopilot profiles** select **Add new profile**.
4. Enter the profile's name and description and then configure the OOBE settings. Choose from:
   - Skip privacy settings in setup
   - Disable local admin account in setup
   - Automatically skip pages in setup
     (Includes *Automatically select setup for work or school* and *Skip Cortana, OneDrive, and OEM registration setup pages*)
   - Skip end user license agreement (EULA)

   > **IMPORTANT**
   > See Windows Autopilot EULA dismissal below for important information to consider about skipping the EULA page during Windows setup.

5. Select **Submit** when finished.

Apply an Autopilot profile to customer devices

> **NOTE**
> The instructions below assume that you've already added the customer's devices to Partner Center and that you can access their device list. If you haven't already added the customer's devices, follow the instructions in Add devices to a customer's account and then follow the steps below.

After you create an Autopilot profile for a customer, you can apply it to the customer's devices.

1. Select **Customers** from the Partner Center menu and then select the customer you created the Autopilot profile for.
2. On the customer's detail page, select **Devices**.

3. Under **Apply profiles to devices** select the devices or device groups you want to add profiles to and then select **Apply profile**. The profile you just applied appears in the **Profile** column.

4. Follow the steps below to verify that the profile will be applied successfully to the device.

   a. Connect a device to the network and turn it on.

   b. Verify that the appropriate OOBE screens (if any) appear.

   c. When the OOBE process stops, reset the device to its factory default settings to prepare it for a new user.

Remove an Autopilot profile from a customer's device

1. Select **Customers** from the Partner Center menu and then select the customer you created the Autopilot profile for.

2. On the customer's detail page, select **Devices**.

3. Under **Apply profiles to devices** select the devices you want to remove the profile from and then select **Remove profile**.

   > **NOTE**
   >
   > Removing a profile from a device does not delete the profile from your list. If you want to delete a profile, follow the instructions in Update or delete an Autopilot profile.

Update or delete an Autopilot profile

If a customer wants to change the out-of-box experience after you've shipped the devices to them, you can change the profile in Partner Center.

When the customer's device connects to the internet, it will download the latest profile version during the OOBE process. Also, any time a customer restores a device to its factory default settings, the device will again download the latest profile version during the OOBE process.

1. Select **Customers** from the Partner Center menu and then select the customer who wants you to change an Autopilot profile.

2. On the customer's detail page, select **Devices**.

3. Under **Windows Autopilot profiles** select the profile you need to update. Make the required changes and then select **Submit**.

To delete this profile, select **Delete profile** from the upper right corner of the page.

Add devices to a customer's account

> **NOTE**
>
> Sales agents and admin agents can add devices to a customer's account.

Before you can apply custom Autopilot profiles to customer devices, you must be able to access the customer's device list.

If you plan to use the OEM name, serial number, and model combination, be aware of these limitations:

- This tuple works only for newer devices (4k hashes, for example) and is not supported for 128b hashes (RS2 and prior devices).

- The tuple registration is case sensitive, so the data in the file must match the model and manufacturer names *exactly* as provided by the OEM provider (hardware provider).

Follow the instructions below to add devices to a customer's account in Partner Center.

1. Select **Customers** from the Partner Center menu and then select the customer whose devices you want to manage.
2. On the customer's detail page, select **Devices**.
3. Under **Apply profiles to devices** select **Add devices**.
4. Enter a name for the device list and then select **Browse** to upload the customer's list (in .csv file format) to Partner Center.

   > **NOTE**
   >
   > You should have received this .csv file with your device purchase. If you didn't receive a .csv file, you can create one yourself by following the steps in Adding devices to Windows Autopilot.

5. Upload the .csv file and then select **Save**.

If you get an error message while trying to upload the .csv file, check the format of the file. You can use the hardware hash only, or the OEM name, serial number, and model (in that column order), or the Windows Product ID. You can also use the sample .csv file provided from the link next to **Add devices** to create a device list.

Your .csv file should look something like this:

```
Device Serial Number,Windows Product ID,Hardware Hash,Manufacturer name,Device model
```

```
{serialNumber},,,Microsoft Corporation,Surface Laptop
```

> **NOTE**
>
> "Manufacturer name" and "Device model" are case-sensitive.

If you don't know what value to put for Manufacturer name and Device Model, you can run this on the device to gather the correct values:

```
md c:\\HWID

Set-Location c:\\HWID

Set-ExecutionPolicy -Scope Process -ExecutionPolicy Unrestricted

Install-Script -Name Get-WindowsAutoPilotInfo

Get-WindowsAutoPilotInfo.ps1 -OutputFile AutoPilotHWID.csv -Partner -Force
```

Windows Autopilot EULA dismissal

IMPORTANT INFORMATION

Windows Autopilot allows you to configure customized installations of Windows on devices you manage for your customers. If authorized to do so by the customer, you can suppress or hide certain set-up screens that are normally presented to users when setting up Windows, including the EULA (End User License Agreement) acceptance screen.

By using this function, you agree that suppressing or hiding any screens that are designed to provide users with notice or acceptance of terms means that you have obtained sufficient consent and authorization from your customer to hide terms, and that you, on behalf of your customer (whether an organization or an individual user as the case may be), consent to any notices and accept any terms that are applicable to your customer. This includes agreement to the terms and conditions of the license or notice that would be presented to the user if you did not suppress or hide it using this tool. Your customer may not use the Windows software on those devices if the customer has not validly acquired a license for the software from Microsoft or its licensed distributors.

Migrate Dynamics 365 and Customer Engagement Plan from Basic (qualified offers) to newer versions

6/19/2020 • 4 minutes to read

Applies to

- Partner Center

Appropriate roles

- Global admin
- User admin
- Admin agent
- Sales agent

Effective January 1, 2019, customers with Dynamics 365 for Sales/ Customer Engagement Plan from Basic (Qualified Offers) subscriptions can no longer renew these legacy offers; existing subscriptions will not renew automatically when they expire. On the subscription's detail page, the subscription status will change to "Expires on [date]" from "Auto renews on [date]".

To ensure continuity for customers, you should transition those with expiring subscriptions to a supported option, listed below. We recommend moving customers to new subscriptions before the subscription's yearly end date to avoid any service outages for customers.

If you use the API (either CREST or Partner Center), you can find expiring subscriptions by evaluating the end date of the subscription along with the auto renew = False property. The subscriptions in question will be set to auto renew=False on Jan 1, 2019. You can move customers to a new plan at any time.

The Dynamics 365 offers being retired

- Dynamics 365 for Sales Enterprise Edition CRMOL Basic (Qualified Offer)
- Dynamics 365 for Sales Enterprise Edition CRMOL Basic (Qualified Offer) for Faculty
- Dynamics 365 for Sales Enterprise Edition CRMOL Basic (Qualified Offer) for Students
- Dynamics 365 for Sales Enterprise Edition (Government Pricing) CRMOL Basic (Qualified Offer)
- Dynamics 365 for Sales Enterprise Edition From SA for CRM Basic (Qualified Offer)
- Dynamics 365 for Sales Enterprise Edition From SA for CRM Basic (Qualified Offer) for Faculty
- Dynamics 365 for Sales Enterprise Edition From SA for CRM Basic (Qualified Offer) for Students
- Dynamics 365 for Sales Enterprise Edition (Government Pricing) From SA for CRM Basic (Qualified Offer)
- Dynamics 365 for Sales Enterprise Edition Add-On for CRM Basic (Qualified Offer)
- Dynamics 365 for Sales Enterprise Edition Add-On for CRM Basic (Qualified Offer) for Faculty
- Dynamics 365 for Sales Enterprise Edition Add-On for CRM Basic (Qualified Offer) for Students
- Dynamics 365 for Sales Enterprise Edition (Government Pricing) Add-On for CRM Basic (Qualified Offer)
- Dynamics 365 Customer Engagement Plan Enterprise Edition CRMOL Basic (Qualified Offer)
- Dynamics 365 Customer Engagement Plan Enterprise Edition (Government Pricing) CRMOL Basic (Qualified Offer)
- Dynamics 365 Customer Engagement Plan Enterprise Edition CRMOL Basic (Qualified Offer) for Students
- Dynamics 365 Customer Engagement Plan Enterprise Edition CRMOL Basic (Qualified Offer) for Faculty
- Dynamics 365 Customer Engagement Plan Enterprise Edition From SA for CRM Basic (Qualified Offer)
- Dynamics 365 Customer Engagement Plan Enterprise Edition (Government Pricing) From SA for CRM Basic

(Qualified Offer)

- Dynamics 365 Customer Engagement Plan Enterprise Edition From SA for CRM Basic (Qualified Offer) for Students
- Dynamics 365 Customer Engagement Plan Enterprise Edition From SA for CRM Basic (Qualified Offer) for Faculty
- Dynamics 365 Customer Engagement Plan Enterprise Edition Add-On for CRM Basic (Qualified Offer)
- Dynamics 365 Customer Engagement Plan Enterprise Edition (Government Pricing) Add-On for CRM Basic (Qualified Offer)
- Dynamics 365 Customer Engagement Plan Enterprise Edition Add-On for CRM Basic (Qualified Offer) for Students
- Dynamics 365 Customer Engagement Plan Enterprise Edition Add-On for CRM Basic (Qualified Offer) for Faculty

Dynamics 365 for Sales/ Customer Engagement Plan from Basic (Qualified Offers) replacement plans

Retired offers

- Dynamics 365 for Sales from CRM Basic or CRMOL Basic (Qualified Offer)
- Dynamics 365 Customer Engagement Plan from CRM Basic or CRMOL Basic (Qualified Offer)

Replacement options

- Dynamics 365 for Sales Professional (NEW)
- Dynamics 365 for Sales Professional (NEW)
- Dynamics 365 for Customer Service
- Dynamics 365 Customer Engagement Plan or
- Dynamics 365 Team Members

Transition customers to new product plans

Moving customers from retired SKUs to newer ones requires the following steps in this order:

- Purchase the new subscription
- Reassign current user licenses
- Cancel old subscription

Purchase the new plan for your customer

1. Select **Customers** from the left nav and then select the customer you want to move to the new subscription.
2. Select **Add Subscription**.
3. Select the subscription you want to purchase from the catalog (in this case, one of the options above), enter the number of licenses, and then select **Submit**.

Your customer will now have both the old subscription and the new one. Your next step is to reassign licenses to the customer's users.

1. Select **Customers** from the left nav and then select the customer you are moving.
2. Select **Users and licenses**.
3. To reassign a license to a user, select the user and then select **Manage licenses**.
4. On the **Manage licenses** page, clear the Dynamics 365 for Sales/ Customer Engagement Plan from Basic (Qualified Offer) license check box and select a new service plan for the subscription the customer is moving to.
5. Select **Submit**. You will do this for each user who needs the new license.

Once you've moved the licenses over to the new subscription you can cancel the old subscription.

1. Select **Customers** from the left nav and then select the customer you are moving.
2. On the subscription detail page, set the old subscription to **Suspended** and select **Submit**.

The old subscription is now suspended, and the new subscription is active. The suspended subscription will be de-provisioned automatically after 120 days. Your customer will incur no additional costs for the old subscription.

Migrate Dynamics 365 Business Edition Offers to newer versions

6/19/2020 • 2 minutes to read

Applies to

- Partner Center

Appropriate roles

- Global admin
- User admin
- Admin agent
- Sales agent

Effective January 1, 2019, customers with Dynamics 365 Business Edition subscriptions can no longer renew into these legacy offers; existing subscriptions will not renew automatically when they expire. On the subscription's detail page, the subscription status will change to "Expires on [date]" from "Auto renews on [date]".

To ensure continuity for customers, you should transition those with expiring subscriptions to a supported option, listed below. We recommend moving customers to new subscriptions before the subscription's yearly end date to avoid any service outages for customers.

If you use the API (either CREST or Partner Center), you can find expiring subscriptions by evaluating the end date of the subscription along with the auto renew = False property. The subscriptions in question will be set to auto renew=False on Jan 1, 2019. You can move customers to a new plan at any time.

The Dynamics 365 Business Editions being retired

- Dynamics 365 for Finance and Operations, Business edition
- Dynamics 365 for Team Members, Business edition

Dynamics Business Central - the Dynamics 365 Business Edition new offers

With the new Dynamics Business Central offers, your customers can connect their financials, sales, service, and operations to streamline business processes, improve customer interactions, and make better decisions. Dynamics 365 Business Central is cloud-based and available through Cloud Solution Provider (CSP) program partners only. Dynamics 365 Business Edition customers are eligible to receive discounted transition pricing for the new Business Central offers until June 30, 2020.

Transition customers to new product plans

Moving customers from retired SKUs to newer ones requires the following steps in this order:

- Purchase the new subscription
- Reassign current user licenses
- Cancel old subscription

Purchase the new plan for your customer

1. Select **Customers** from the left nav and then select the customer you want to move to the new subscription.
2. Select **Add Subscription**.
3. Select the subscription you want to purchase from the catalog (in this case, one of the options above), enter the number of licenses, and then select **Submit**.

Your customer will now have both the old subscription and the new one. Your next step is to reassign licenses to the customer's users.

1. Select **Customers** from the left nav and then select the customer you are moving.
2. Select **Users and licenses**.
3. To reassign a license to a user, select the user and then select **Manage licenses**.
4. On the **Manage licenses** page, clear the Dynamics 365 for Sales/ Customer Engagement Plan from Basic (Qualified Offer) license check box and select a new service plan for the subscription the customer is moving to.
5. Select **Submit**. You will do this for each user who needs the new license.

Once you've moved the licenses over to the new subscription you can cancel the old subscription.

1. Select **Customers** from the left nav and then select the customer you are moving.
2. On the subscription detail page, set the old subscription to **Suspended** and select **Submit**.

The old subscription is now suspended, and the new subscription is active. The suspended subscription will be de-provisioned automatically after 120 days. Your customer will incur no additional costs for the old subscription.

Migrate Office 365 E4 subscriptions to newer Office 365 versions

6/19/2020 • 3 minutes to read

Applies to

- Partner Center

Appropriate roles

- Global admin
- User admin
- Admin agent
- Sales agent

The Office 365 Enterprise E4 plan is retired, effective April 7, 2017. You can no longer purchase new Office 365 E4 subscriptions after this date, and existing E4 subscriptions will not renew automatically when they expire.

When E4 subscriptions end, they will be canceled. To ensure continuity for customers, you should transition customers with expiring E4 subscriptions to a supported SKU option, listed below. We recommend moving customers to new subscriptions before the subscription's yearly end date to avoid any service outages for customers.

> **NOTE**
> Both Office 365 Enterprise E4 commercial and government SKUs are retired.

On the subscription's detail page, the E4 subscription status has changed to "Expires on [date]" from "Auto renews on [date]".

If you use the API (either CREST or Partner Center), you can discover expiring subscriptions by evaluating the end date of the subscription along with the auto renew = False property.

The E4 subscriptions will be set to auto renew=False in April 7, 2017. You can move customers to a new plan at any time.

Office 365 Enterprise E4 edition replacement plans

You can choose to maintain the same functionality with E4 or have your customers take advantage of newer features and functionality in Office 365 and Skype for Business Online. Pricing details are found on the price list and offer list matrix in Partner Center. Secure Product Enterprise E3 or Secure Productive Enterprise E5 may be substituted in the following options for Office 365 Enterprise E3 or Office 365 Enterprise E5 respectively.

- Option 1: Office 365 Enterprise E5
- Option 2: Office 365 Enterprise E3 + Skype for Business Cloud PBX
- Option 3: Office 365 Enterprise E3 + Skype for Business Plus CAL (price and functionality parity with E4)
- Option 4: Office 365 Enterprise E3

FEATURE	OPTION 1	OPTION 2	OPTION 3	OPTION 4
Get all the features included in Office 365 Enterprise E4?	Yes	Yes	Yes	No
Phone numbers managed in Office 365?	Yes	Yes	No	No
Phone numbers managed both on-premises and in Office 365 (hybrid deployment)?	Yes	Yes	No	No
Option to add a PSTN voice calling plan?	Yes	Yes	No	No
PSTN Conferencing?	Yes	No	No	No
Advanced tools for collaboration, analytics, and security?	Yes	No	No	No
Interactive reports, dashboards, and data visualizations?	Yes	No	No	No
More control over data security and compliance with built-in privacy, transparency, and refined user controls?	Yes	No	No	No

Transition customers to new product plans

Microsoft continuously offers new products and services to our partners. In these cases, you may need to upgrade customers to new services or migrate their subscriptions from SKUs that will eventually be shut down. Migrating customers from retired SKUs to newer ones requires the following steps:

- Purchase the new subscription
- Reassign current user licenses
- Cancel the old subscription

Follow these steps to migrate a customer's Office 365 Enterprise E4 subscription to one of the options in the table above.

Step 1 - Purchase the new subscription

1. From the **Partner Center** menu, select **Customers**, select the customer you wish to move, and then select **Add subscriptions**.
2. Select the subscription you want to purchase from the catalog (in this case, one of the options above), enter the number of licenses, and then select **Submit**.

Your customer should now have both old and new subscriptions, the old Office 365 Enterprise E4 subscription and the new 'target' subscription, for example, Option 1 - Office 365 Enterprise E5.

Step 2 - Reassign the customer's users' licenses

1. From the **Partner Center** menu, select **Customers**, select the customer you wish to move, and then select **Users and licenses**. The customer's Users and Licenses page opens.
2. To re-assign user licenses, select the user to reassign and then select **Manage licenses**.
3. On the **Manage licenses** page, clear the **Office 365 Enterprise E4** license check box and select a new service plan for the subscription the customer is moving to.
4. Select **Submit**. A confirmation page lists the new license assignments.
5. Continue the same steps with any other customer users that need license reassignment.

After moving the user licenses to the new service, you can safely cancel the retired subscription at the top Customer level.

Step 3 - Cancel the old subscription

1. From the **Partner Center** menu, select **Customers**. Select the customer you want to move, and select the subscription you want to cancel.
2. In the subscription details page, set the subscription status to **Suspended**.
3. Select **Submit**.

The old subscription is suspended and the new subscription is active. The suspended subscription will be de-provisioned automatically after 120 days. The customer incurs no additional costs for the old subscription.

Migrate Skype for Business Online Plan 1 subscriptions to newer Office 365 versions

6/19/2020 • 3 minutes to read

Applies to

- Partner Center

The Skype for Business Online Plan 1 will be retired, effective August 1, 2018. After that date customers can no longer purchase new Skype for Business Plan 1 subscriptions, and existing subscriptions will not renew automatically when they expire and will not provide a renewal option. On the subscription's detail page, the Skype for Business Online Plan 1 subscription status has changed to "Expires on [date]" from "Auto renews on [date]".

To ensure continuity for customers, you should transition customers with expiring Skype for Business Online Plan 1 subscriptions to a supported SKU option, listed below. We recommend moving customers to new subscriptions before the subscription's yearly end date to avoid any service outages for customers.

> **NOTE**
> Both Skype for Business Online Plan 1 commercial and government SKUs are retired.

If you use the API (either CREST or Partner Center), find expiring subscriptions by evaluating the end date of the subscription along with the auto renew = False property. The Skype for Business Online Plan 1 subscriptions will be set to auto renew=False on September 1, 2018. You can move customers to a new plan at any time.

Skype for Business Online Plan 1 replacement plans

With the new plans, your customers take can advantage of newer features and functionality in Office 365. Pricing details are found on the price list and offer list matrix in Partner Center.

- Option 1: Office 365 Enterprise F1
- Option 2: Microsoft 365 Enterprise F1
- Option 3: Other Office 365 plans

FEATURE	OPTION 1	OPTION 2	OPTION 3
Get all the features included in Skype for Business Online Plan 1	Yes	Yes	Yes
IM and presence	Yes	Yes	Yes
Peer-to-peer Audio and Video over IP	Yes	Yes	Yes
Join meetings as an authenticated user	Yes	Yes	Yes

Transition customers to new product plans

Microsoft continuously offers new products and services to our partners. In these cases, you may need to upgrade customers to new services or migrate their subscriptions from SKUs that will eventually be shut down. Migrating customers from retired SKUs to newer ones requires the following steps:

- Purchase the new subscription
- Reassign current user licenses
- Cancel old subscription

Migrate your customers to new plans

1. To purchase the new subscription, from the **Partner Center menu**, select **Customers**, select the customer you want to move, and then select **Add subscriptions**.

2. Select the subscription you want to purchase from the catalog (in this case, one of the options above), enter the number of licenses, and then select **Submit**.

Your customer should now have both old and new subscriptions, the old Skype for Business Online Plan 1 subscription and the new 'target' subscription, for example, Option 1 - Office 365 Enterprise F1.

3. To reassign the customer's users' licenses, from the **Partner Center** menu, select **Customers**, select the customer you are moving, and then select **Users and licenses**. The customer's Users and Licenses page opens.

4. To reassign user license, select the user to reassign and then select **Manage licenses.**

5. On the **Manage licenses** page, clear the Skype for Business Online Plan 1 license check box and select a new service plan for the subscription the customer is moving to.

6. Select **Submit**. A confirmation page lists the new license assignments. Continue this same process for other users who need license assignments.

After moving the user license to the new service, you can safely cancel the retired subscription at the customer level.

7. From the **Partner Center** menu, select **Customers**. Select the customer whose subscription you are canceling.

8. In the subscription detail page, set the subscription to **Suspended**.

9. Select **Submit.**

The old subscription is suspended, and the new subscription is active. The suspended subscription will be de-provisioned automatically after 120 days. The customer incurs no additional costs for the old subscription.

Learn how to transfer a customer's Azure subscriptions to another partner

6/19/2020 • 3 minutes to read

Applies to

- Partner Center for Microsoft Cloud for US Government
- Partner Center for Microsoft Global Cloud
- Partners in the Cloud Solution Provider (CSP) program

This article describes how a customer can switch their Microsoft Azure services from one Cloud Solution Provider (CSP) to another.

To switch a customer's Azure services or subscriptions to a different partner, follow these manual steps. Both the partner and the customer need to complete the steps.

> **NOTE**
>
> Currently, only Direct or Indirect Providers can transfer subscriptions. You can't change partners for Cloud Solution Provider subscriptions associated with Azure plan, Office 365, Enterprise Mobility Suite, or Microsoft Dynamics CRM subscriptions.

Switch partners for Azure subscriptions

1. To transfer an Azure subscription to a new partner, the customer must start the process and contact their current partner of record in writing.

   > **NOTE**
   >
   > It is the current partner's responsibility to create the service ticket that initiates the transfer process. Microsoft cannot intervene on behalf of the customer or the new partner. The customer should plan to work closely with the current partner to make the transition go smoothly.

2. The partner for the subscription needs to do the following tasks:

   Create an Azure service ticket from Partner Center to request a subscription transfer:

   - From the Partner Center menu, select **Customers**, select your customer from the list, and then select **Service management**. Under the **Support tickets** section, select the **New ticket** dropdown and choose **Microsoft Azure**.
   - From the Azure portal, select **New support request**.

     In Step 1, choose **Subscription management** as the issue type, specify the Subscription ID you want transferred, and choose **Cloud Solution Provider** as the support plan.

     In Step 2, select **C-Minimal impact** and choose **Other General Questions** as the problem type.

     Download the CSP Subscription Transfer form.

3. The partner for the subscription: Fill in the CSP Subscription Transfer form, sign it, and then send it to the customer. To fill in the form, you'll need the following information:

- The current partner's contact information and Microsoft ID. In the Partner Center menu, select **Account settings** > **Organization profile**, and use the **Microsoft ID**, **Organization name**, and **Address** listed there.

- The customer's Microsoft ID. In the Partner Center menu, select **Customers**, then expand the customer's listing to see their **Microsoft ID**.

- The subscription ID to transfer. In the expanded customer listing, select **View Subscriptions**, then expand the chosen subscription to see the **Subscription ID**.

> **NOTE**
>
> Transferring a subscription results in two subscription IDs which you will see on the **Edit Subscription** page of the transferred subscription: **1** - The Partner Center Subscription ID is used for billing purposes. **2** - The original Azure Subscription ID is retained and will appear in Partner Center as well as in the Azure Management portal. This ID will appear in your recon file. **When logging support tickets, you need to use both IDs.**

4. The customer and new partner for the subscription:

   Review the form, fill in information about the new partner, and sign it. Confirm that the new customer has a contract agreement in place. Send the form back to the current partner of record.

   Important: If the new CSP Partner doesn't have a reseller relationship with the customer, they must establish one before the subscription is transferred. You can find information on how to do this here.

   > **NOTE**
   >
   > The new CSP partner and the customer tenant must be in the same country.

5. Current partner:

   Make sure the form includes contact information for both partner admins. Microsoft Support will contact both admins to verify the transfer. Make sure you have all three signatures. Then use the **File Upload** option to attach the completed form to your existing service request. A Microsoft support engineer will get back to you within eight business hours to validate receipt and completion.

6. New partner:

   Update the Azure subscription settings to remove the old partner from the account. To see which role assignments are provisioned, run two PowerShell Commandlets.

   - Add the new partner as the reseller on the account:

     ```
     Add-AzureRMAccount -tenant "CustomerDomainName"
     ```

     To find the customerDomainName: in the Partner Center menu, select **Customers**. Select the customer from the customer list. In the customer menu, select **Account**, and use the **Domain name**.

   - View roles on the account, including previous CSP partners:

     ```
     Get-AzureRMRoleAssignment
     ```

7. Remove outdated access permissions

   - In the Partner Center menu, select **Customers**.

- Expand the customer's listing and select **View subscriptions**.
- In the customer menu, select **Service management**.
- Under **Microsoft Azure**, click the link to go to the **Microsoft Azure Management Portal**.

Migrate Kaizala Pro Standalone subscriptions to Microsoft365 or Office 365 versions

6/19/2020 • 3 minutes to read

Effective July 1, 2020, Microsoft is ending sales of the Kaizala Pro standalone service. Customers will no longer be able to purchase new Kaizala Pro subscriptions after this date, and existing Kaizala Pro subscriptions will not renew automatically when they expire.

To ensure continuity for customers, you should transition customers with expiring Kaizala Pro standalone subscriptions to a supported SKU option, listed below. We recommend moving customers to new subscriptions before the subscription's yearly end date to avoid any service outages for customers.

If you use the API (either CREST or Partner Center), you can discover expiring subscriptions by evaluating the end date of the subscription along with the auto renew property set to false: `auto renew = False`.

The E4 subscriptions will be set to `auto renew=False` on July 1, 2020. You can move customers to a new plan at any time.

Kaizala Pro Standalone replacement plans

With the new plans, your customers can take advantage of newer features and functionality in Microsoft 365. Pricing details are found on the price list and offer list matrix in Partner Center.

- Microsoft 365 for Business, including:
  - Microsoft 365 Business Basic
  - Microsoft 365 Business Standard
  - Microsoft 365 Business Premium
- Microsoft 365 for Frontline, including:
  - Microsoft 365 F3 (formerly Microsoft 365 F1) and Office 365 F3
- Microsoft 365 for Enterprise, including:
  - Office 365 E1
  - Microsoft 365 E3 and Office 365 E3
  - Microsoft 365 E5 and Office 365 E5
- Microsoft 365 for Education, including:
  - Microsoft 365 A1 and Office 365 A1
  - Microsoft 365 A3 and Office 365 A3
  - Microsoft 365 A5 and Office 365 A5

Transition customers to new product plans

Microsoft continuously offers new products and services to our partners. In these cases, you may need to upgrade customers to new services or migrate their subscriptions from SKUs that will eventually be shut down. Migrating customers from retired SKUs to newer ones requires the following steps:

A. Purchase the new subscription

B. Reassign current user licenses

Migrate your customers to new plans

A. Purchase the new subscription

1. To purchase the new subscription, from the **Partner Center** menu, select **Customers**, select the customer you want to move, and then select **Add subscriptions**.

2. Select the subscription you want to purchase from the catalog (in this case, one of the options above), enter the number of licenses, and then select **Submit**.

Your customer should now have both old and new subscriptions, the old Kaizala Pro Standalone subscription and the new 'target' subscription, for example, Option 1 - Office 365 Enterprise F1.

B. Reassign current user licenses

1. To reassign the customer's users' licenses, from the **Partner Center** menu, select **Customers**, select the customer you are moving, and then select **Users and licenses**. The customer's Users and Licenses page opens.

2. To reassign user license, select the user to reassign and then select **Manage licenses**.

3. On the **Manage licenses** page, clear the Kaizala Pro Standalone license check box, and select a new service plan for the subscription the customer is moving to.

4. Select **Submit**. A confirmation page lists the new license assignments. Continue this same process for other users who need license assignments.

C. Cancel old subscription

After moving the user license to the new service, you can safely cancel the retired subscription at the customer level.

1. From the **Partner Center** menu, select **Customers**. Select the customer whose subscription you are canceling.

2. In the subscription detail page, set the subscription to **Suspended**.

3. Select **Submit**.

The old subscription is suspended, and the new subscription is active. The suspended subscription will be de-provisioned automatically after 120 days. The customer incurs no additional costs for the old subscription.

Use analytics to learn more about customer license use and how you can help meet their needs

6/19/2020 • 2 minutes to read

Applies to

- Partner Center
- MPN partners
- Partners in the CSP program

Appropriate role

- MPN Partner admin

Planning ways to develop your CSP business includes understanding how your customers use their Microsoft products. You have several options for gathering data in Partner Center, and you can gather data on both your business and on if and how your customers are using the licenses they've purchased. If you are in the CSP direct model, you have the opportunity to install and use the Partner Center Analytics app for Power BI to gather additional data.

Access to user analytics

In Partner Center, only the MPN partner admin has access to user analytics. If someone in your company needs this access (for example, a billing admin), you can grant it by assigning that person the MPN Partner Admin role.

> **NOTE**
>
> To grant access, you must be an MPN partner admin.

Grant access to user analytics in Partner Center

1. Sign into the Partner Center dashboard.
2. From the Partner Center menu, On the Partner Center **User management** page, use the Search box to find the person who needs access.
3. In the search results, select the person's name to open the **User details** page.
4. Under **Roles and permissions**, select **MPN partner admin** and then select **Update**.

Access data in Partner Center

TO GET DATA ON	DOWNLOAD THIS	READ THIS	APPLIES TO
How your customers are using the licenses they purchased	Deployment and usage data from Partner Center => Product analytics	Increase adoption and satisfaction	CSP partners
Customer activity regarding subscriptions	Activity logs	View customer activity logs	CSP partners

TO GET DATA ON	DOWNLOAD THIS	READ THIS	APPLIES TO
Growth of customer base, usage, Azure consumption and more	Partner Center app for Power BI	Partner Center Analytics app for Power BI (direct partners in CSP)	CSP direct partners

Overview and FAQs for the Partner Center Analytics app for Power BI (direct partners in CSP)

6/19/2020 • 2 minutes to read

Applies to

- Partner Center

Appropriate roles

- Global admin
- User admin
- Sales agent
- Admin agent

Get a visual representation of your business data with the Partner Center Analytics app for Power BI. The app, designed for direct partners in the Cloud Solution Provider program (CSP), plugs in to the familiar Power BI framework.

> **NOTE**
> You're a direct partner if you do business directly with Microsoft and with customers.

Install the app to get graphic views of:

- Growth of your customer base, subscriptions, and licenses
- Usage of Office 365, Microsoft Dynamics, and Microsoft Azure products
- Daily consumption units for each metered resource in each Azure subscription for the last 60 days
- Estimated cost based on latest rate card
- Ability to export data sets and create custom reports, including per customer

Frequently asked questions

We recommend that you review our answers to frequently asked questions before you install the app.

QUESTION	ANSWER
What does the app cost?	The app itself is free. To preview the app, you can sign up for the free Power BI service and use it to customize dashboards and reports. To allow others in your company to use the app, you need to have an active subscription to either Microsoft Power BI Professional or Microsoft Power BI Premium.
Who can connect to the Partner Center Analytics app?	This version of the app is designed for direct partners (tier 1) in the Cloud Solution Provider program. You're a direct partner if you do business directly with Microsoft and with customers. To install the app, you must be a global admin, admin agent, or billing admin for your company's account.

QUESTION	ANSWER
I am an indirect provider; can I use the app?	Yes. Your global admin, admin agent, or billing admin can install the app and see data about your direct customers. Future releases may include features that would allow you to see data about your indirect resellers as well.
How can I learn about future releases?	Announcements and preview releases are made available through the Partner Center early adopter program. You can also share your feedback through the early adopter program. If you're not already participating in the program, learn how to join. See Join the Partner Center API and SDK Early Adopter Program.
Who can customize the dashboards and reports in the app?	Only the global admin, admin agent, or billing admin who installed the app can customize the dashboard or create new reports in the Power BI web interface.
Who can view the dashboards and reports in the app?	The global admin, admin agent, or billing admin who installed the app can share the app's data with anyone who has an active subscription to either Microsoft Power BI Professional or Microsoft Power BI Premium.
Can I use the app to view data from multiple Azure AD tenants, across locations?	With this release, you can view only data from the Azure AD tenant your global admin or admin agent signed in to.
When will the app be available in additional languages?	Roadmap announcements are released through the Partner Center early adopter program. If you're not already participating in the program, sign up for it now at https://partnercenter.microsoft.com/partner/early-adopter-program. You can also share your feedback through the early adopter program.

Next steps

Install and preview the Partner Center Analytics app for Microsoft Power BI

View your business data with the Partner Center Analytics app for Microsoft Power BI

Partner Center Insights - a dashboard that shows how a Microsoft commercial partner is doing

6/19/2020 • 3 minutes to read

Appropriate roles

- Global admin
- Account admin
- Executive report viewer
- Report viewer

Introduction

Insights is a unified reporting dashboard in Partner Center for Microsoft's Commercial partners who are enrolled in the Microsoft Partner Network (MPN) program. The Insights dashboard provides 360-degree view of your key performance indicators (KPI) across Cloud products such as Office, Azure, Dynamics, and licensing models such as CSP and EA. It exposes a rich set of KPI reports that can help you make data driven decisions for your organization.

Role-based access control to the Insights dashboard

There are two new roles in Partner Center designed specifically for access to Insights: **Report Viewer** and **Executive Report Viewer**. Users in the Executive Report Viewer role have access to all reporting data sets, while users in the Report Viewer role will not have access to sensitive data sets such as revenue and customer/employee personal data.

The Global admin or the Account admin can assign users these roles and are assigned either for the entire company or for a specific MPN location.

> **NOTE**
>
> Users who were MPN admins as of Jan 20th, 2020 were automatically added to the company-wide report viewer role. They are able to access the reports as a report viewer without any explicit action required by Global admin or Account admin. The Global admins or account admin can override these assignments if necessary.

Reports available

The following reports are available as part of the Insights dashboard.

Overview: The Overview report presents a snapshot view of various KPIs of interest to you such as Customer count, Active Subscriptions count, Azure Consumption Revenue, Active licenses etc.

Customer: The Customer report presents analytics around your customers such as Customer acquisition data, Active customers, etc.

Product - Subscriptions: The Subscriptions report presents acquisition and usage analytics for your Cloud subscriptions (such as O365, Azure, Dynamics etc.)

Product- Licenses: The Licenses dashboard presents license analytics for license-based Cloud products such as O365, Dynamics, Power BI etc.

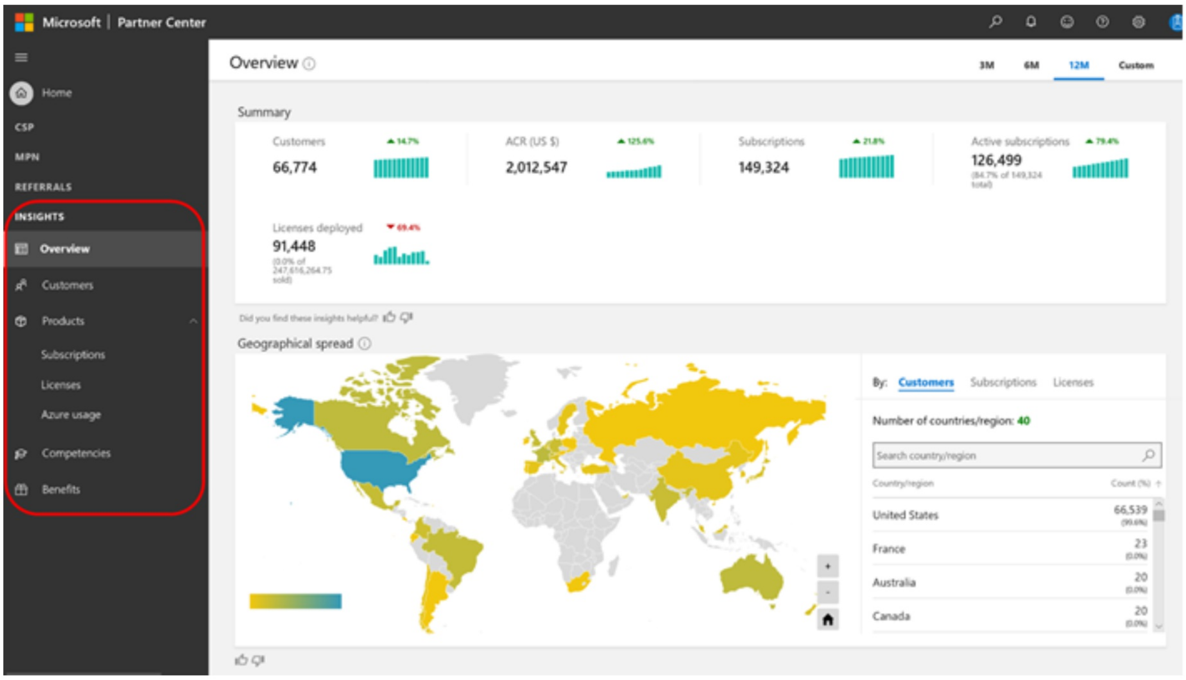
Product - Azure usage: The Azure Usage report presents metrics related to your customers' Azure subscriptions including Azure consumption revenue and usage by meter categories.

Competencies: The Competencies report presents metrics on your Active, Qualified, and At-risk competencies.

Benefits: The Benefits report presents analytics on partner benefits you have earned vs consumed.

Navigating the Insights reports

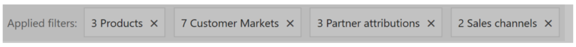
Date range filters: You can find a date range selection at the top-right corner of each page. The output of the overview page graphs can be customized by selecting a date range based on the past 3, 6, or 12 months, or by selecting a custom date range. The default date range selection is 12 months.



Feedback button: Each chart/control in all the Insights reports is incorporated with a feedback button to let you provide instance feedback on a report feature.

Page level filters: Except for the Overview, Benefits, and Competencies reports, all Insights reports enable you to apply page level filters.

- The filters selected will be applicable for all charts and metrics on a page, including the summary section. A filter item will be available if you have any data within that filter criteria.
- Default selection of each filter list is **all**. For example, if you have not selected a specific product in products filter, default selection will be all products.
- Filters selected will be displayed at the top of the page.



Filters definitions:

- Products: List of all Microsoft Cloud products sold/managed by your organization, for example, O365, Azure, D365, EMS, PowerBI etc.
- Customer markets: List of customer countries
- Partner attributions: Your association type with your customers subscriptions, for example, Digital partner of record (DPOR), Delegated admin privilege (DAP), Partner Admin link (PAL) etc.
- Partner locations: List of all your organization's MPN locations.
- Sales channels: All sales channel/pricing through which you are purchasing/provisioning products and services namely CSP, EA, CSP indirect, Direct, Advisor, Open, others
- Customer segments: List of customer segments across the partners customer base.

Read about each of the dashboards and reports:

- Partner Center Insights - Overview dashboard
- Partner Center Insights - Customer dashboard
- Partner Center Insights - Subscriptions report
- Partner Center Insights - Licenses report
- Partner Center Insights - Azure usage report
- Partner Center Insights - Competencies report
- Partner Center Insights - Benefits report

Overview dashboard reports available in Partner Center Insights

6/19/2020 • 3 minutes to read

The Insights Overview dashboard provides a snapshot view of the Key Performance Indicators such as Customers, Subscriptions, Azure Consumption Revenue, Licenses etc. You can visualize the following charts in the Overview report.

- Summary
- Geographical spread of your customers, subscriptions and licenses
- Customers growth trend
- Subscriptions growth trend
- Azure consumed revenue growth trend
- Licenses growth trend

Summary

- Customers: Current count of all customers, with at least one active subscription, that your company is associated to through different attribution types across all cloud products.
- Growth % of customers during the selected date range

The Micro chart presents month over month trend of the customer count- over the selected date range.

- Azure Consumed Revenue (ACR): Total Azure Consumed Revenue (US$) attributed to you over the selected date range Growth or decline % of attributed ACR US$ during selected date range.

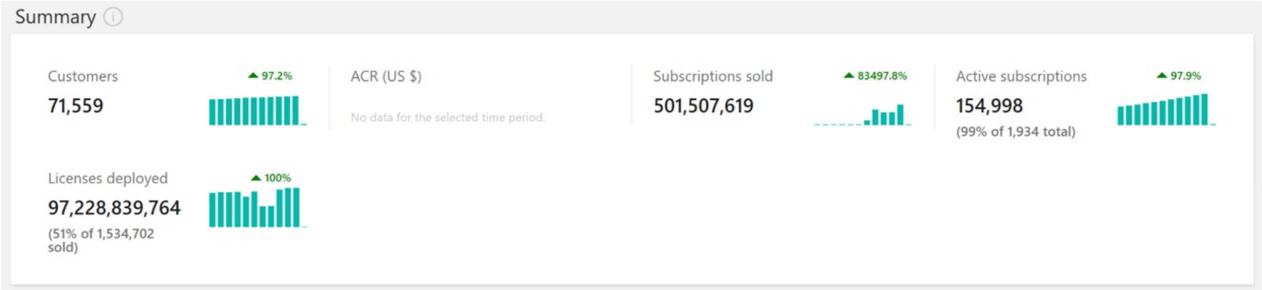
Micro chart presents a monthly trend of ACR US$ attributed to you over the selected date range

> **NOTE**
>
> Azure Consumed Revenue (ACR) data is available to users who have been assigned the Executive Report Viewer Role

- Subscriptions: Total current count of Cloud product subscriptions (active and inactive) sold or managed by you.
  Growth or decline % of subscriptions during selected date range Micro chart presents month over month trend of total subscription count over the selected date range.

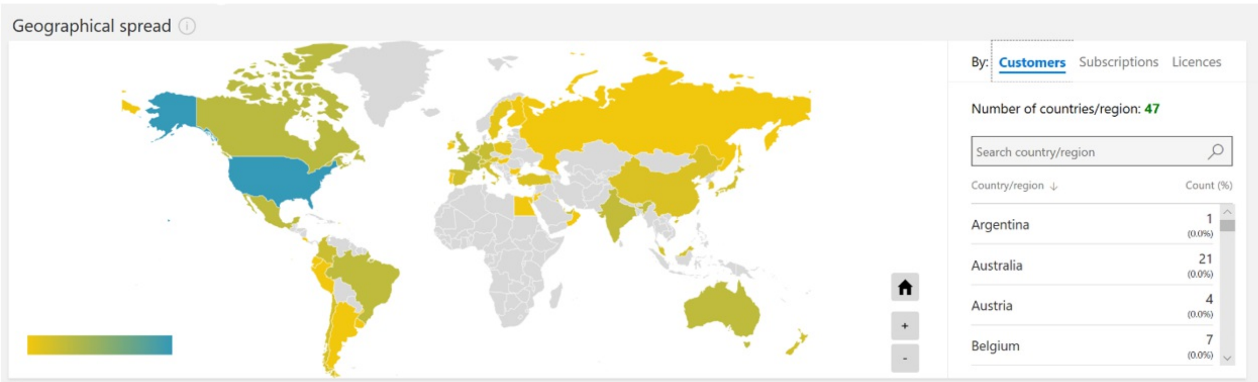
- Active subscriptions: Current count of Cloud product subscriptions with Active usage measured based on product telemetry. This excludes all trial subscriptions in the case of Azure subscriptions.
  Growth % of Active subscriptions over the selected date range Micro chart presents month over month trend of active subscriptions over the selected date range

- Licenses Deployed: Count of all Cloud product licenses deployed in your customer subscriptions over the selected time period. Growth or decline % of these licenses during the selected date range. Micro chart presents month over month trend of these assigned licenses count over the selected date range.



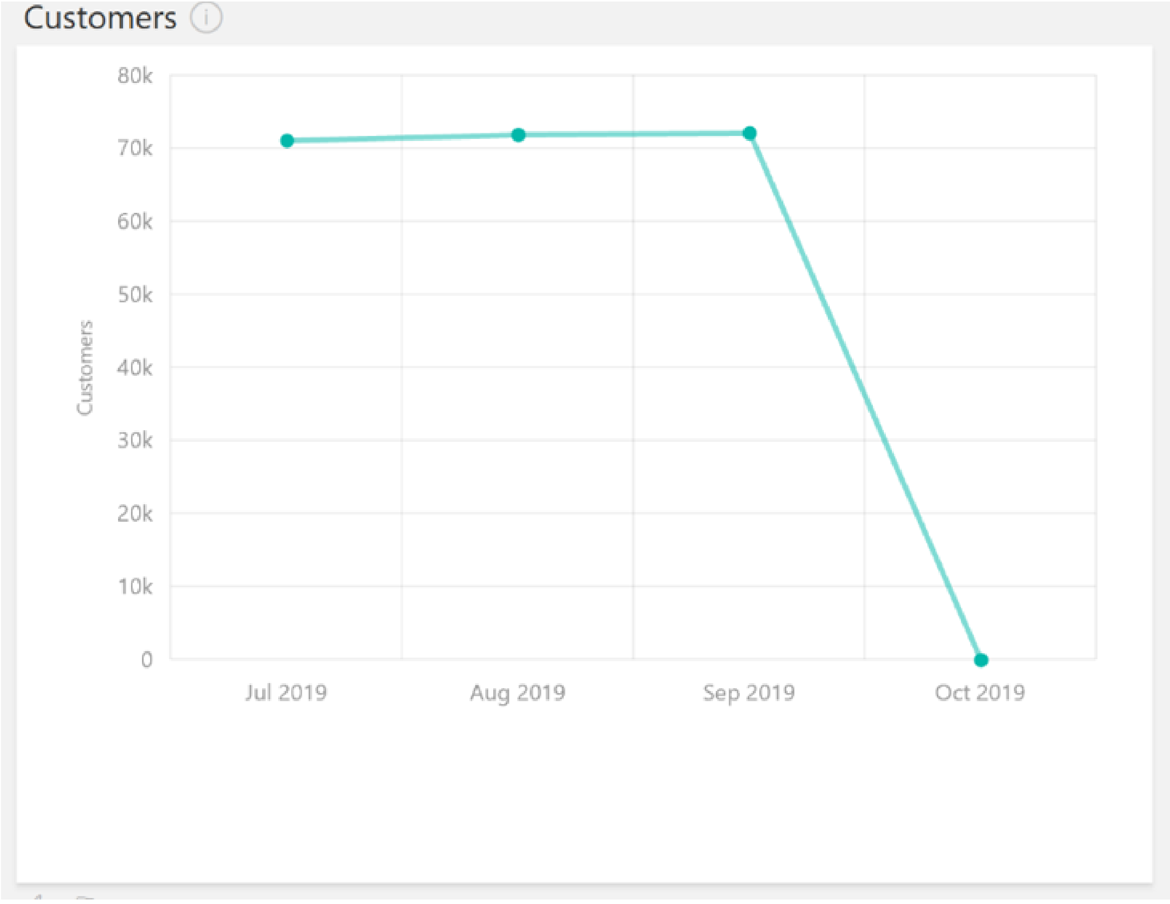
Geographical spread of your customers, subscriptions, and licenses

This view is a geographical distribution of total customers, subscriptions, and licenses by customer country. Click on the different tabs to view each of these insights on the map. You can search and select a country in the grid to zoom to the location in the map. Revert to the original view by pressing the Home button on the map. Clicking each tab (e.g. Customers, Subscriptions) shows the value of the metric for each country as well as the % of Total for the country.



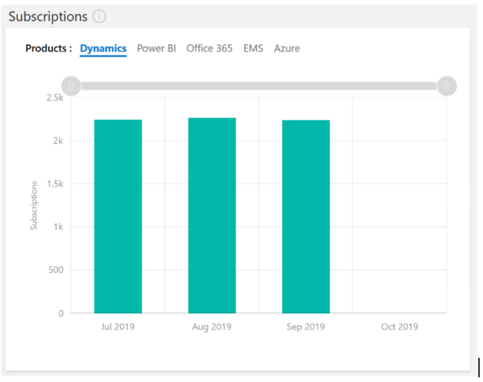
Customers growth trend

Monthly trend of total customers counts for the selected date range. X-axis represents months of the selected date range and Y-axis represents total customer count for that month.



Subscriptions growth trend

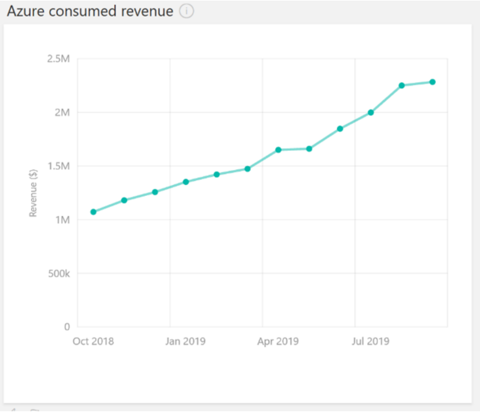
This indicates the trend of your customer subscriptions count for the selected date range. X-axis represents months of the selected date range and Y-axis represents subscriptions count of the product have selected. Scroll through the slider on top of the chart to zoom the chart to specific time period.



Azure Consumed Revenue growth trend

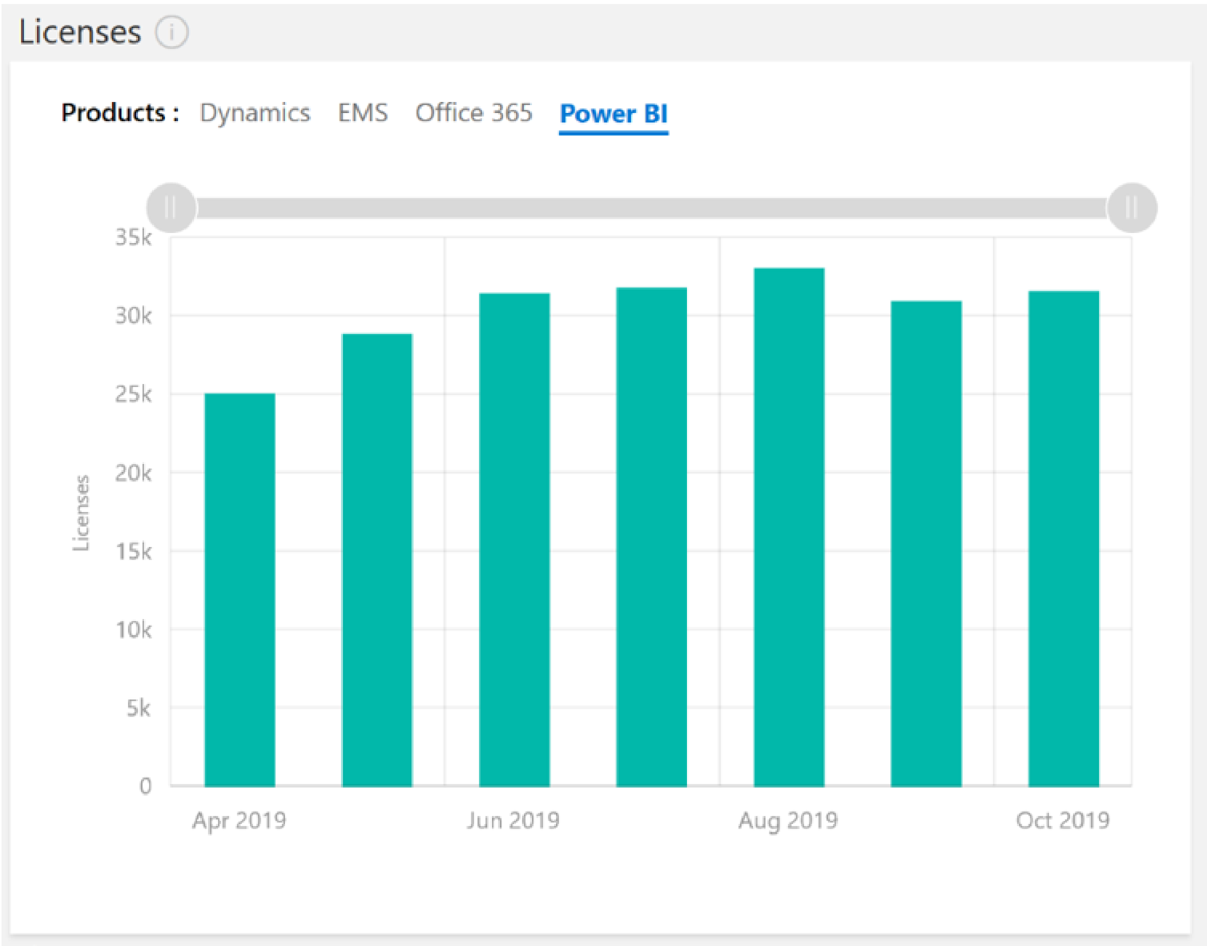
Monthly trend of Azure consumed revenue US$ attributed to you over the selected date range. X-axis represents months of the selected date range and Y-axis represents total Azure consumed revenue US$ attributed to you during the month.

> **NOTE**
>
> Azure Consumed Revenue (ACR) will only be visible to users who have been assigned the Executive Report Viewer Role.



Licenses growth trend

Trend of licenses assigned by all customers during the selected date range. X-axis represents months of the selected date range and Y-axis represents licenses count of the product you have selected. Scroll through the slider on top of the chart to zoom the chart to specific time period.



Next steps

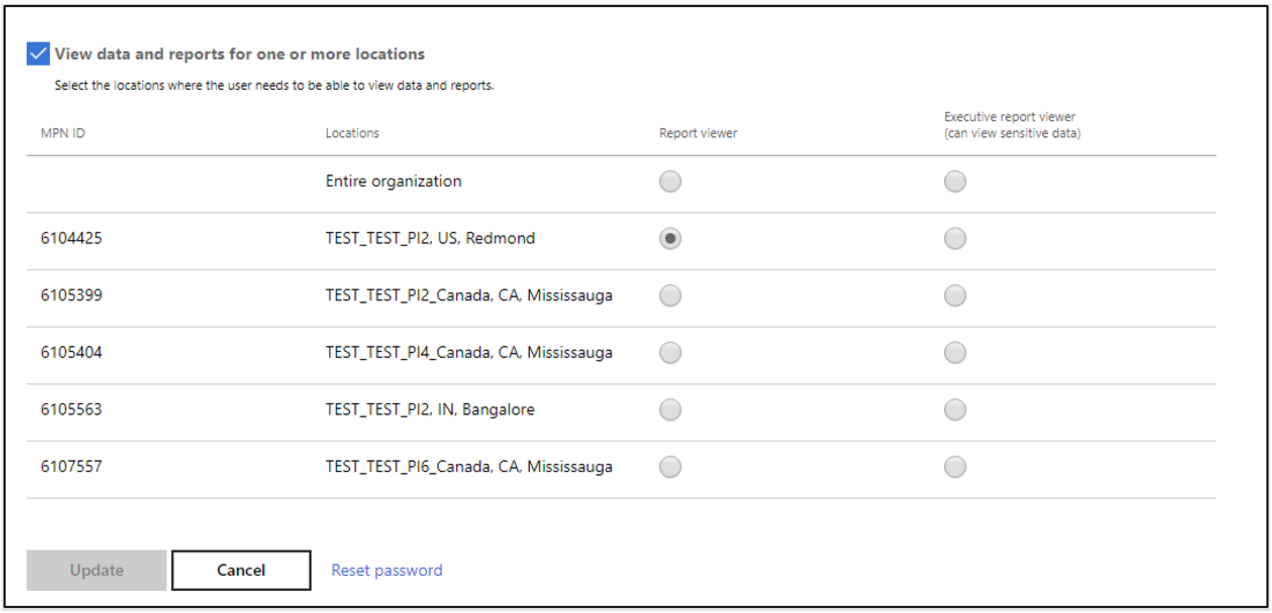
- For more reports, see Partner Center Insights.

Role-based access control to the Partner Center Insights dashboard

6/19/2020 • 2 minutes to read

The Insights dashboard uses two new roles in Partner Center to manage employee access to the reports - Executive Report Viewer and Report Viewer. Users in the Executive Report Viewer role have access to all reporting datasets, while users in the Report Viewer role will not have access to sensitive data sets such as revenue and customer/employee personal data.

As with other Partner Center roles, the Global admin or the Account admin will be able to assign users to those roles on the User management page. The roles can be applicable across the entire company or for specific MPN location(s). Roles assigned for specific MPN location(s) limits the user to viewing reporting data associated only with the selected MPN location(s). Partner can select one or multiple locations from the below view.



NOTE

Users who are MPN admins as of Jan 20th, 2020 are automatically added to the company-wide **Executive Report Viewer** role for all locations for that tenant. These users are thus able to access the reports as an Executive Report viewer without any explicit action required by Global admin or Account admin. The Global admins and Account admins can override the auto-assigned roles of these users to further increase or limit their capabilities.

Next steps

- Learn more about Partner Center Insights and its various reports.

Customers dashboard reports from Partner Center Insights

6/19/2020 • 3 minutes to read

Customers dashboard presents data of your customers who have either acquired Cloud products such as Office, Azure, Dynamics etc. through you or used you to deploy and manage these products in their tenants.

The customers dashboard has the following sections:

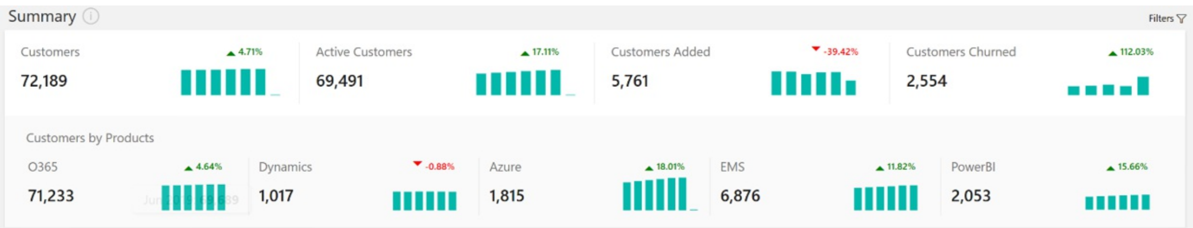
- Summary
- Geographical spread of your customers
- Customers add/churn trends
- Customers distribution by partner locations, customer segments, sales channel, partner attribution type
- Customer distribution by product
- Customers distribution trends by partner locations, customer segments, pricing model, partner attribution type
- Active customers trend

Summary:

The summary section presents a snapshot view of various KPIs related to your customers such as Customers, Active customers, Subscriptions, Customer adds, customers churned and customers by each product. Page level filters are applicable for each section.

Customers

- Current count of all customers your organization is associated through different attribution types across all cloud products such as Office, Azure, Dynamics etc. A customer is counted if they have at least one subscription with Active status.
- Decline % of customers during the selected date range
- Micro chart presents month over month trend of customers count over the selected date range



Active Customers:

- Current count of customers with any active product usage, such as active usage on any of the Cloud products.
- Growth or decline % of active customers during the selected time period -Micro chart presents a month-over-month trend of active customers count over the selected date range. Customers added:
- Count of all customers added during the selected time period.
- Growth or decline % of customers added during selected sate range.
- Micro chart presents month over month trend of customers added over the selected date range.

Customers churned:

- Count of all customers churned each month during the selected time period. A customer is considered lost if the customer does not have a single subscription with active status.

- % of customers churned during the selected date range
- Micro chart presents a month over month trend of customers churned over the selected time period

Customers by products:

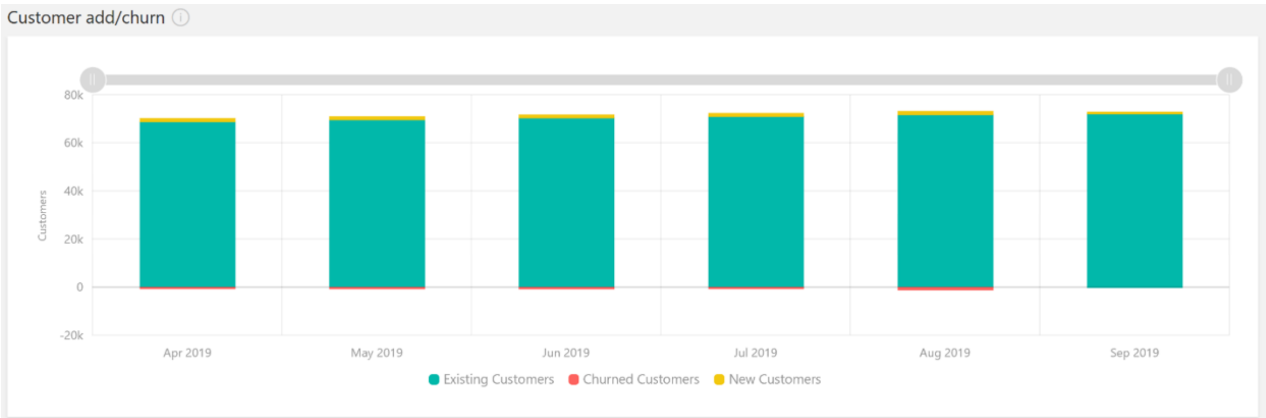
- Current count of customers distributed across the various Cloud products such as O365, Azure, Dynamics etc.

Geographical spread of your customers

Count of current customers, current active customers, and customers newly added during the selected date range are geo-mapped using the customer's country. The percentages displayed below the metric indicate the percentage contribution of that country of the Total for that metric. You can hover on map to view total, active, new customers for that country. You can search and select a country in the grid to zoom to the location in the map. Revert to original view by selecting the **Home** button on the map. All columns in the grid are sortable.

Customer adds and churns

Trend of customers with breakdown into new, existing, and churned for the selected date range. X-axis represents months of the selected date range and Y-axis represents customers count. Churned customers are represented on negative scale of Y-Axis. Stacked column chart presents breakup of new, existing, and churned customers for the month. You can rebuild the column chart with specific stack items, by selecting those in the legend. You can leverage slider on top of the chart to zoom in to a specific period.

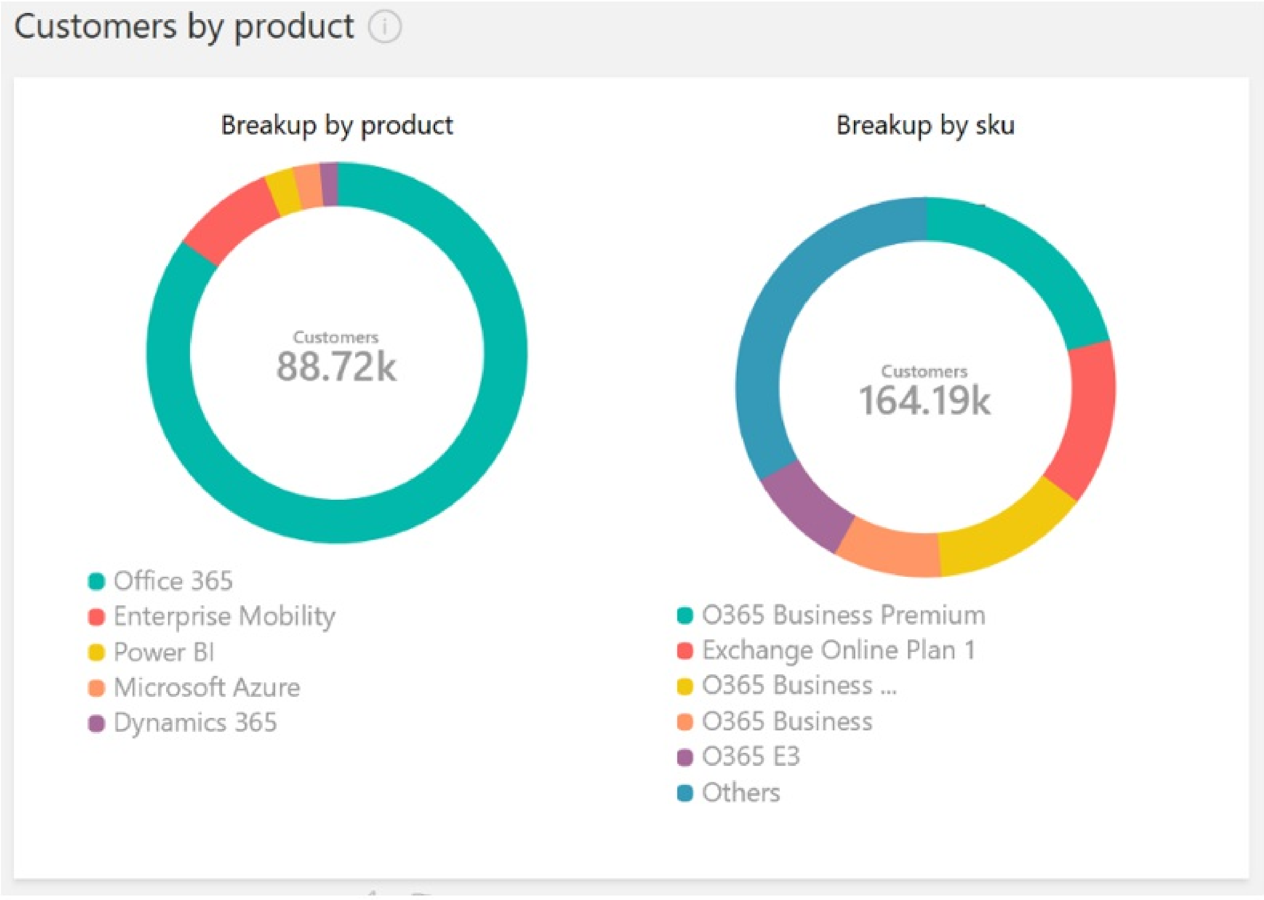


Customer distribution

Breakdown of your current customers by your MPN locations, customer segments, sales channel/Azure pricing model, and the attribution type (e.g. DPOR, DAP etc.). Click on the respective tabs above the chart to view the breakdown by these categories. You can rebuild the chart by selecting/unselecting specific dimensions by selecting the legend items.

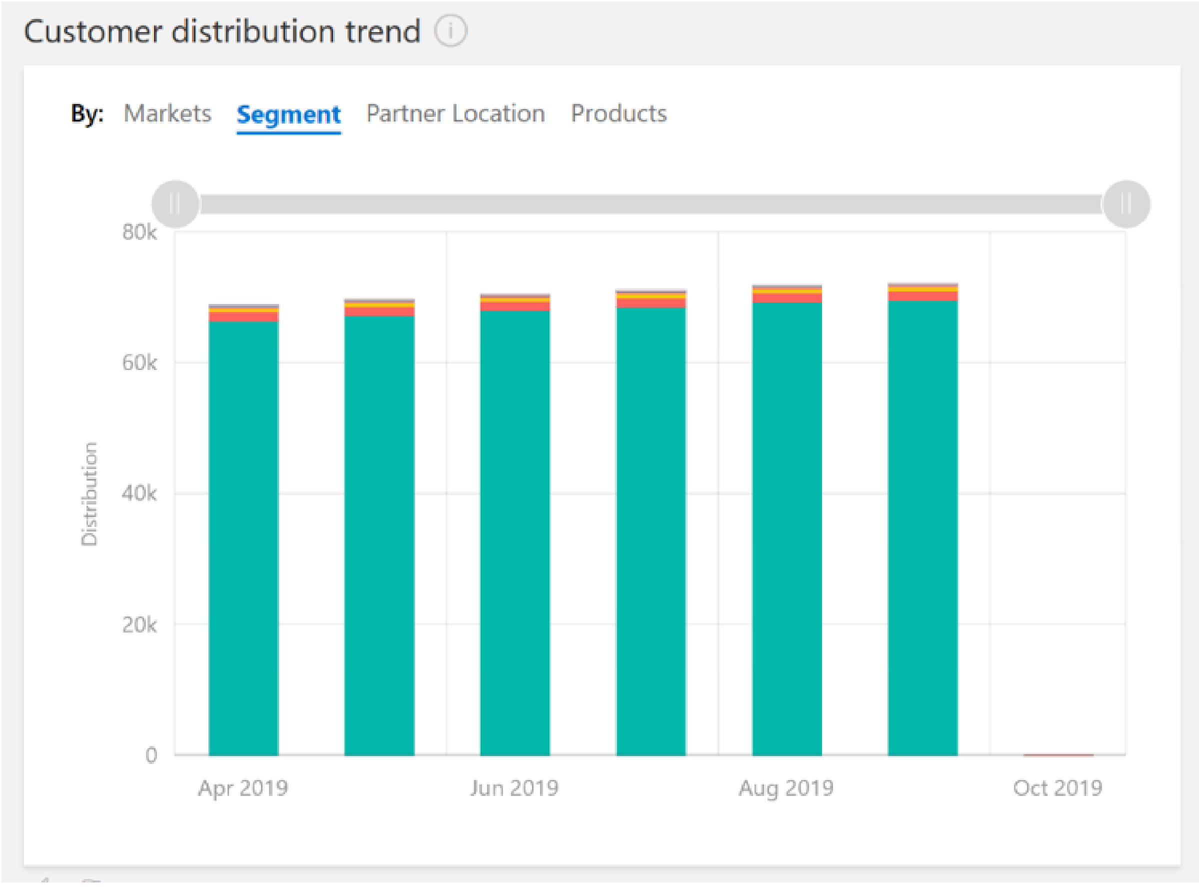
Customers by products

Breakdown of your current customers count by products and SKUs/plans. Select a product in the product breakup pie chart to view the breakup by SKUs/plans in the chart next to it.



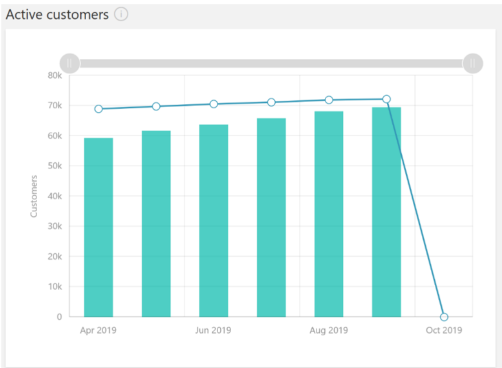
Customer distribution trend

Monthly trend of the distribution of your customers during the selected date range by markets, segments, your MPN locations and products they have acquired. Click on the respective tabs in the chart to view the trend by these categories. X-axis represents the months for the date range you have selected, and Y-axis has the count of customers for the selected category (Tab selection). You can hover on the chart columns to view the values breakup of each stack. You can leverage slider on top of the chart to zoom in to a specific period.



Active customers

Monthly trend chart comparing active and total customers for the selected date range. Columns represent active customer counts each month and the line represents total customers each month.



Next steps

For more reports, see Partner Center Insights.

Product Subscriptions report available from the Partner Center Insights dashboard

6/19/2020 • 4 minutes to read

Appropriate roles

- Global admin
- Admin agent
- Report Viewer
- Executive Report Viewer

The Product Subscriptions report presents analytics on cloud subscriptions that you have sold or that you manage for your customers. This is a product-specific report which includes performance of subscriptions associated with cloud products such as Office 365, Azure, Dynamics, etc.

You can view the following sections from the Product Subscriptions report.

- Summary
- Geographical spread of subscriptions
- Subscriptions add/churn trend
- Subscription distribution by partner locations, sales channel, SKUs, partner attach type, segment
- Trend by subscription states
- Products trend

> **NOTE**
> This report is available from the Insights dashboard. To view this report, you must be assigned a specific role in Partner Center, such as Global Admin, Account Admin, Report Viewer or Executive Report Viewer. For more information, see your company's Global Admin. Specific types of data in this report may also be available only to users with Executive Report Viewer privileges.

Summary

The summary section presents a snapshot view of the key performance indicators (KPIs) related to subscriptions sold or managed by you for your customers.

- Subscriptions: Current count of the cloud product subscriptions sold or managed by you. Percentage growth or decline of subscriptions during your selected date range.

The Micro chart presents a month-over-month trend of subscriptions count during your selected date range.

- Active subscriptions: Current count of cloud product subscriptions with Active usage measured based on product telemetry. This excludes all trial subscriptions in the case of Azure subscriptions. Percentage growth or decline of active subscriptions over the selected time period.

The Micro chart presents a month-over-month trend of active subscriptions during your selected date range.

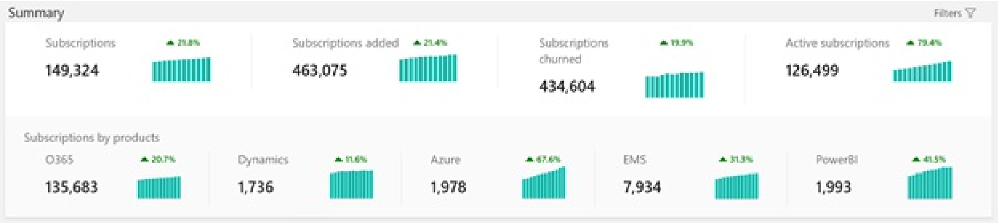
- Subscriptions added: Total customer subscriptions added (sold or managed) by you during the selected date range. New subscriptions with **Active** or **Renewed** state are counted as Subscriptions added. Percentage growth or decline of subscriptions added in the last full month compared to the first full month.

The Micro chart presents a monthly trend of subscriptions added during your selected date range.

- Subscriptions churned: Total customer subscriptions churned during your selected date range. Subscriptions with state **Deprovisioned** or **Suspended** in that month are counted as a churned subscription. Percentage of subscriptions churned during the selected date range.

The Micro chart presents a monthly trend of subscriptions churned over the selected date range.

- Subscriptions by products: Breakdown of the current subscription count by cloud products.

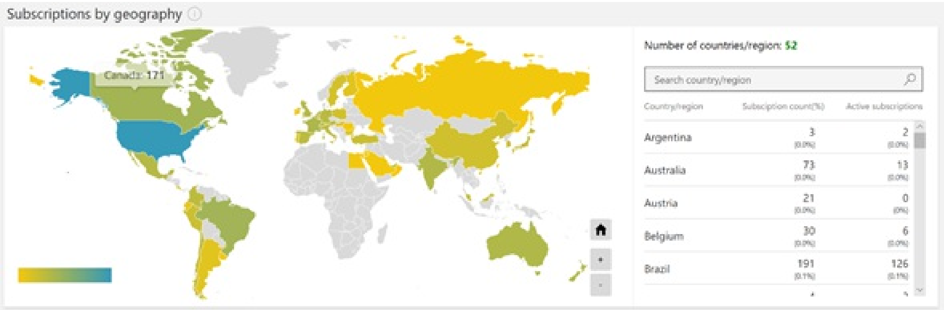


Geographical spread of subscriptions

The **Subscriptions by geography** view shows the geographical distribution of total subscriptions by customer markets. The total subscription amount includes both sold subscriptions and active subscriptions.

The **Number of countries/region** table presents the total countries/regions where you have subscriptions and the amount per country of total and active subscriptions.

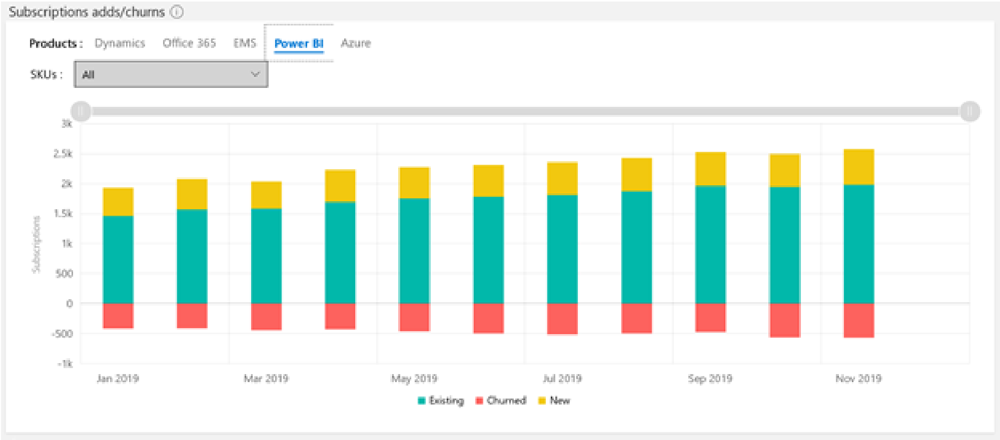
You can search and select a country in the grid to zoom to the location in the map. Press the **Home** option on the map to revert to the original view. Hover on the map to view all subscriptions and active subscriptions by country. Both fields on the grid are sortable.



Subscription adds/churns

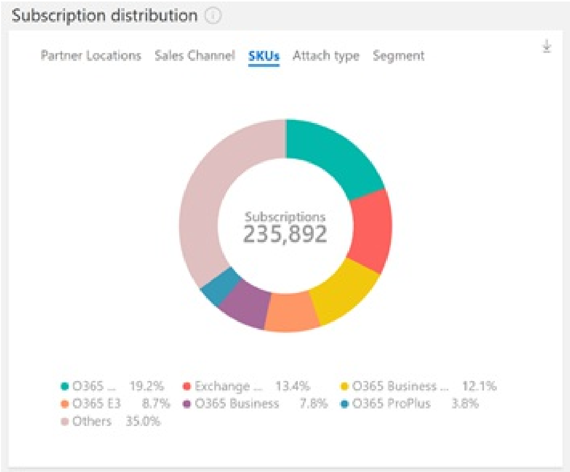
This view presents a trend of subscriptions. These are broken down into different categories (New, Existing, Churned) for the selected date range. The X-axis represents months of the selected date range. The Y-axis represents subscription count. Churned subscriptions are represented on the negative scale of the Y-axis.

The stacked column chart presents a breakdown of new, existing and churned subscriptions for the month. You can rebuild the column chart, broken down with specific stack items. To do so, select those specific items in the legend. You can also leverage the slider on top of the chart to zoom into a specific period.



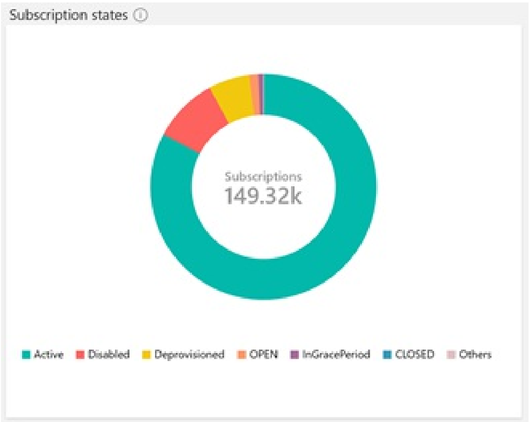
Subscription distribution

This view presents a breakdown of your current subscriptions by your MPN locations, customer segments, sales channel/Azure pricing model and the attribution type (e.g. DPOR, DAP etc.). Click on the respective tabs to view the breakdown by these categories. To build the pie chart with a breakdown of specific item categories, select those item categories in the legend.



Subscription state distribution

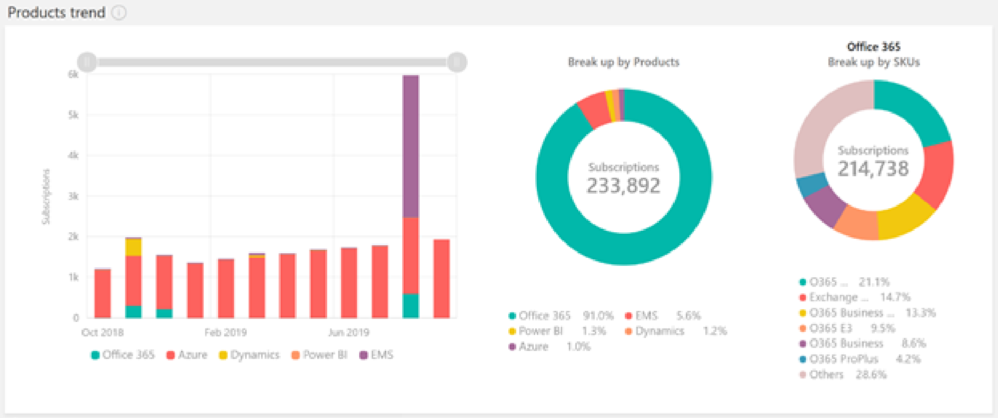
This view shows distribution of your current customer subscriptions by subscription state or status. This includes the following subscription states: **Active**, **Disabled**, **Deprovisioned**, **Open**, **InGracePeriod**, **Closed**, and **Others**.



Products trend

This view shows a bar chart and two pie charts. The bar chart presents a monthly trend of subscriptions broken down by commercial products, such as Azure, Office, Dynamics, etc.

The two pie charts show a breakdown of your current customer subscriptions. The first pie chart breaks down subscriptions by products. The second pie chart breaks down subscriptions by SKUs or plans. When you select a product in the breakdown **by Products** pie chart, the adjacent pie chart will show you a breakdown of that product's subscriptions by SKUs.



> **NOTE**
>
> The subscription count broken down by SKUs may not always match the total subscription count for that product. This may occur if a customer has purchased multiple SKUs under the same product subscription.

Next steps

- For more reports, see Partner Center Insights.

Product Licenses report in the Partner Center Insights dashboard

6/19/2020 • 2 minutes to read

Appropriate roles

- Global admin
- Admin agent
- Report Viewer
- Executive Report Viewer

The Product Licenses report presents license analytics for seat-based cloud products, such as O365, Dynamics, M365, Power BI, etc. Analytics presented here are associated with usage of the licenses that you have sold or that you manage for your customers. You can view the following sections from the Product Licenses report.

- Summary
- Geographical spread of licenses
- License adds
- License distribution by partner locations, sales channel, SKUs, partner attach type, segment

NOTE

This report is available from the Insights dashboard. To view this report, you must be assigned a specific role in Partner Center, such as Global Admin, Account Admin, Report Viewer or Executive Report Viewer. For more information, see your company's Global Admin. Specific types of data in this report may also be available only to users with Executive Report Viewer privileges.

Summary

The summary section provides a snapshot view of key performance indicators (KPIs) associated with cloud product licenses sold, deployed and used. This helps you track the active usage against the licenses sold to your customers.

- Licenses: Current count of all licenses sold or managed by you for seat-based cloud products, such as O365, Dynamics, M365, Power BI, etc. Percentage growth or decline of these licenses over the selected date range.

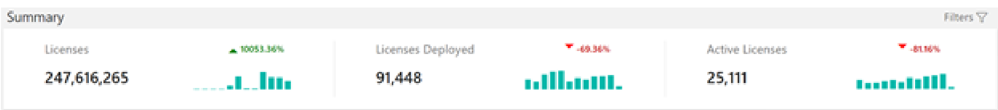
The Micro chart presents the month-over-month trend of license counts during the selected date range

- Licenses deployed: Current count of all assigned licenses of your customer. Percentage growth or decline of these licenses during the selected time period.

The Micro chart presents the month-over-month trend of assigned license counts during the selected date range.

- Active licenses: Current count of all customer licenses with any active usage over the last 30 days during the selected date range. Percentage growth or decline of these licenses during the selected date range.

The Micro chart presents the month-over-month trend of licenses counts during the selected date range.

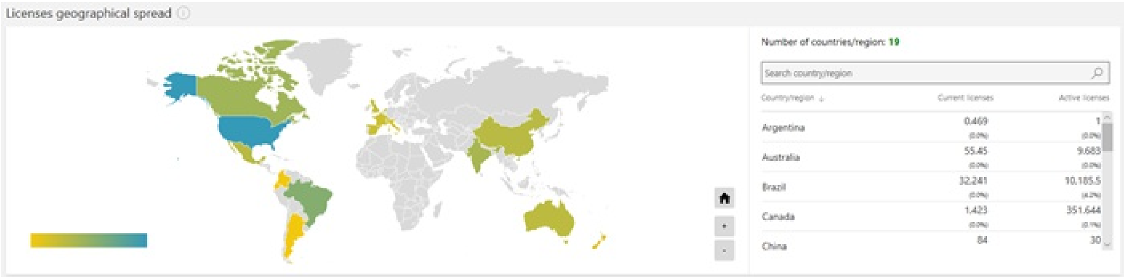


Geographical spread of licenses

The **Licenses geographical spread** view shows the geographical distribution of current licenses and active licenses by customer markets. (The **Current** licenses count also includes unassigned licenses.)

Number of countries/region presents the total countries/regions where you have current and active customer licenses.

You can search and select a country in the grid to zoom to the location in the map. Press the **Home** option on the map to revert to the default view. Hover on the map to view current licenses and active licenses by customer country. Both fields on the grid are sortable.

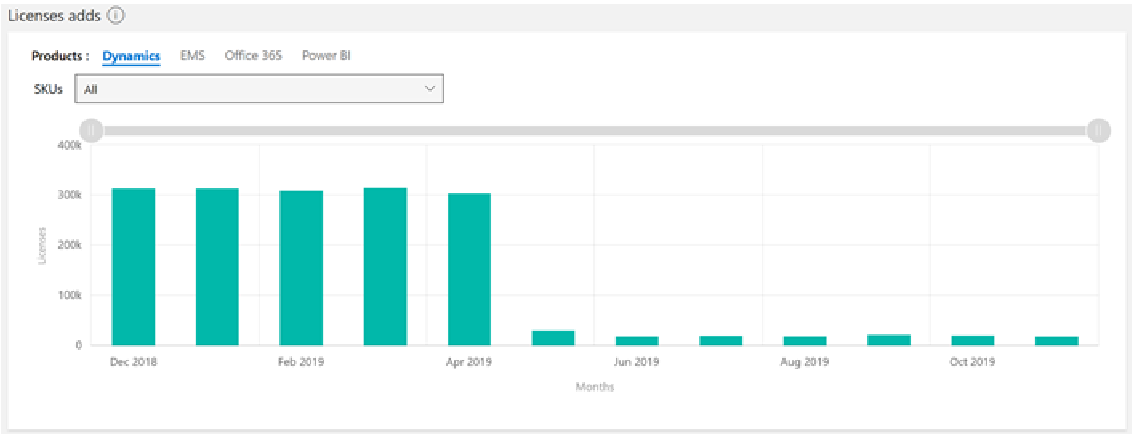


License adds

This view shows the trend of licenses added during the selected date range.

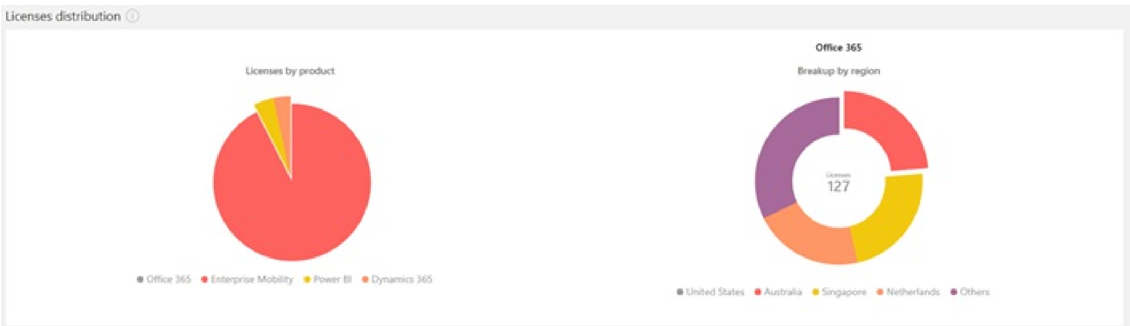
To present the trend by product and service/workload, select a Product at the top of the screen and a service/workload from the SKUs dropdown list.

The X-axis represents months of the selected date range. The Y-axis represents the count of licenses added. To zoom into a specific period, use the slider on the top of the chart.



License distribution

This view shows a breakdown of your customer licenses by product and customer country/region. When you select a product in the **License by product** pie chart, the adjacent chart will show you a license breakdown by customer region.



Next steps

For more reports, see Partner Center Insights.

Azure Usage report available from the Partner Center Insights dashboard

6/19/2020 • 2 minutes to read

Appropriate roles

- Global admin
- Admin agent
- Report Viewer
- Executive Report Viewer

The Azure Usage report presents metrics related to your customers' Azure subscriptions. This includes Azure consumption revenue and usage by meter categories. You can view the following sections from the Azure Usage report.

- Summary
- Azure usage by geography
- Azure utilization

> **NOTE**
> This report is available from the Insights dashboard. To view this report, you must be assigned a specific role in Partner Center, such as Global Admin, Account Admin, Report Viewer or Executive Report Viewer. For more information, see your company's Global Admin. Specific types of data in this report may also be available only to users with Executive Report Viewer privileges.

Summary

The summary section presents a snapshot view of the key performance indicators (KPIs) related to Azure subscriptions sold or managed by you for your customers.

- Azure Subscriptions: Current count of Azure customer subscriptions sold or managed by you Percentage growth or decline of Azure subscriptions during the selected date range.

The Micro chart presents a month-over-month trend of Azure subscriptions count for your selected date range

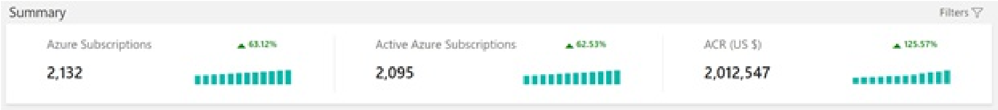
- Active Azure Subscriptions: Current count of Azure subscriptions sold or managed by you that had active usage over the last 30 days. Percentage growth or decline of these subscriptions during the selected date range.

The Micro chart presents a month-over-month trend of the Azure active subscription count during your selected date range.

- Azure Consumed Revenue (ACR): Total Azure Consumed Revenue (US$) attributed to you over the selected date range. Percentage growth or decline of attributed ACR US$ during the selected date range.

The Micro chart presents a monthly trend of ACR US$ attributed to you over the selected time period

> **NOTE**
> Azure Consumed Revenue (ACR) will only be visible to users who have been assigned the Executive Report Viewer Role.

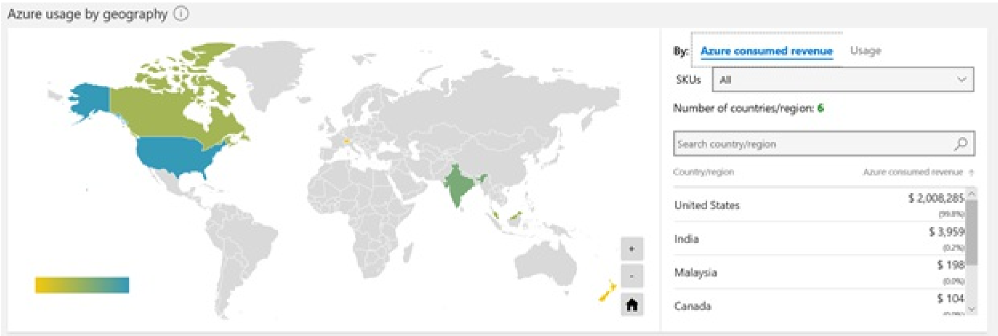


Azure usage by geography

The **Azure usage by geography** view shows the geographical distribution of Azure consumption revenue (ACR US$) or usage hours for all or selected Azure service level/meter categories. Lighter colors on the map represent lower values, while darker colors represent higher values. You can search and select a country in the grid to zoom to

The **Number of countries/region** table presents the total countries/regions where Azure usage events are generated.

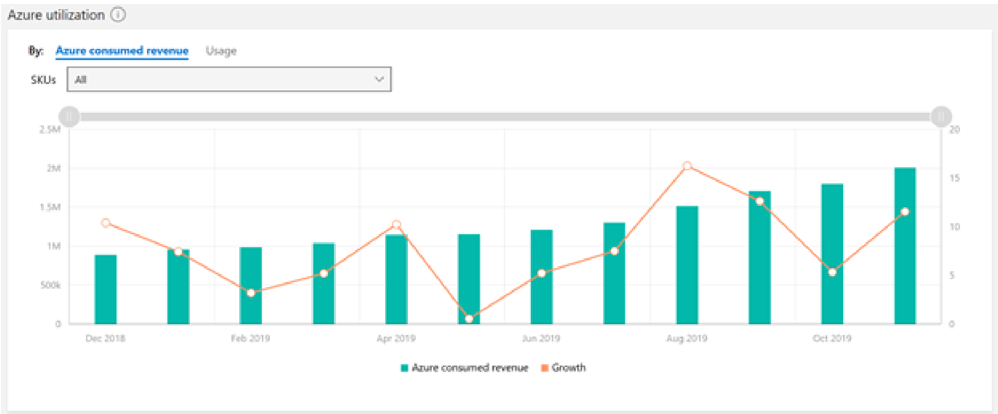
You can search and select a country in the grid to zoom to the location in the map. Select the **Home** option on the map to revert to the original view.



Azure utilization

This view shows the month-over-month Azure consumption revenue or usage hours trends by selected Azure service level/meter categories.

The bar chart presents the monthly revenue/usage hour trend. The line chart presents the growth trend compared to the previous month for the selected Azure service level/meter categories.



Next steps

- For more reports, see Partner Center Insights.

Trainings dashboard

6/19/2020 • 2 minutes to read

Appropriate roles

- Executive report viewer
- Report viewer

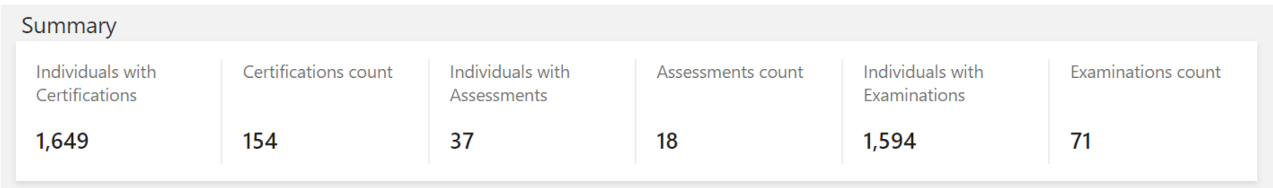
The Trainings dashboard provides insights about the certifications, assessments, and examinations taken by your company employees company. The Trainings dashboard includes the following sections:

- Summary
- Training Performance split by certifications, assessments, exams
- Individuals by credentials like certifications, assessments, exams
- Activity details

> **NOTE**
>
> This report is available under the Insights hub in Partner Center. To view this report, you should be assigned the role of Report Viewer or Executive Report Viewer. Few sections of this report will only be visible for users who are Executive Report Viewers. For more information regarding access control for the Insights reports, please see PCI roles.

Summary

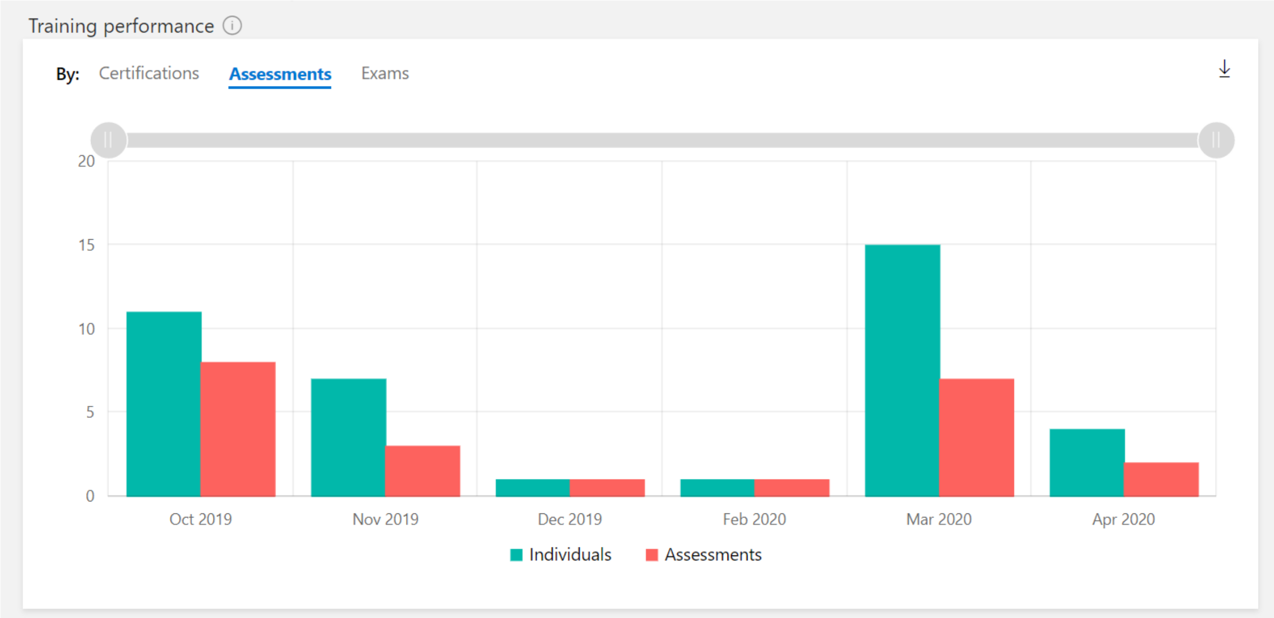
The summary section presents a numerical snapshot view of various performance indicators related to your trainings. The various performance indicators are Certified Individuals, Certifications, Individuals with Exam Credentials, Exam Credentials, Individuals with Assessment Credentials and Assessment Credentials. The data in this section refreshes based on the selected date range, which can be three months (3M), six months (6M) & 12 months (1Y) or a custom data range (Custom).



- **Individuals with certifications**: represents the number of distinct individuals with certifications in your company.
- **Certifications count**: represents the total number of certifications taken by individuals in your company.
- **Individuals with assessments**: represents the number of distinct individuals with assessment credentials in your company.
- **Assessments count**: represents the total number of assessments taken by individuals in your company.
- **Individuals with examinations**: represents the number of distinct individuals with examination credentials in your company.
- **Examination count**: represents the total number of examinations taken by individuals in your company.

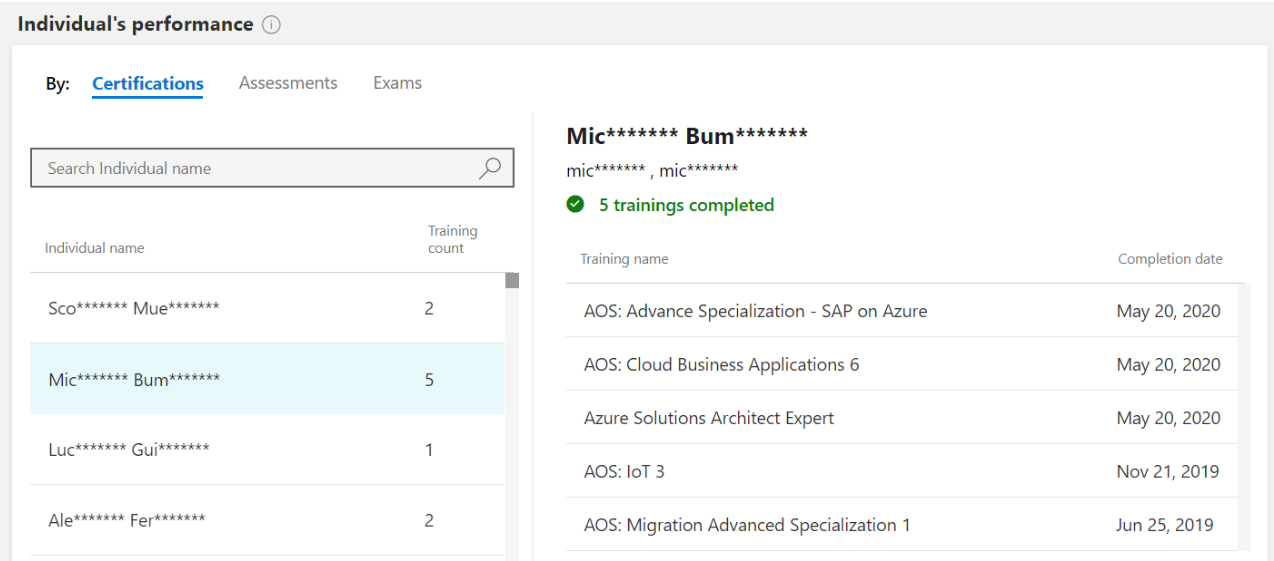
Training performance

Training performance presents the month over month count of individuals and the trainings completed by individuals in your company. It is split by certifications, assessments, and exams in the form of a chart for the selected date range. The X-axis represents the months for the date range selected. The Y-axis represents the distinct count of individuals and number of trainings taken, for the selected training type. Click on the respective tabs above the chart to view the breakdown by training type. The chart data can be downloaded through the download icon in .tsv format for the selected date range.



Individuals' performance

The Individuals' performance section presents the details of training taken by individuals in your company, for the selected date range. Search and select an individual's name in the left panel of the section. The training details for the selected individual are displayed on the right panel of the section.



> **NOTE**
>
> The Individuals performance section is available only to users who are executive report viewers.

Next Steps

> **NOTE**
>
> You can download the raw data powering this report from the Download Reports section in the Insights dashboard. Learn More

Competencies report available from the Partner Center Insights dashboard

6/19/2020 • 3 minutes to read

Appropriate roles

- Global admin
- Admin agent
- Report Viewer
- Executive Report Viewer

Competencies allow your company to demonstrate your technical capability to deliver Microsoft solutions. Microsoft competencies are designed to meet your customers' needs and showcase your expertise to prospective customers. They come with a wealth of benefits from Microsoft, such as included quantities of Azure consumption, entitlements for Cloud products such as O365, technical support, Go-to-Market offers, etc. There are a total of 19 competencies today across the following categories: **App and Infrastructure**, **Business applications**, **Data and AI** and **Modern workplace**. Competencies are tiered into Silver or Gold levels, for instance. There is a higher bar for Gold competency and an associated higher level of marketing resources, offers, and programs available.

Competency life cycle

From a life-cycle standpoint, partners begin by building on the key performance indicators (KPIs) that are required to attain specific competencies. Once they reach the threshold set for a given competency across all the required metrics, they become **qualified** for a competency. Partners can then pay for the competency offer (Silver or Gold) to attain the competency and become **Active** in that competency. The competency **Active** status is valid for one year from the date of attainment of the competency (this is called the **Anniversary date** for the competency). At the end of the anniversary year, partners need to meet the competency requirements. If they do not meet these requirements again, they will lose the competency. An **At risk** status for a previously attained competency means certain key metrics are projected to fall below the threshold at that competencies **Anniversary date**.

Competency attainment

Each competency has a specific set of requirements to fulfill. Cloud competency requirements fall into two categories: skills and performance.

- Skills: Requirements often include exams, assessments, or certifications which individuals within your company must pass.
- Performance: To be eligible for a competency, your company must meet certain performance thresholds aligned to competency area. For example, your company may need to meet a minimum amount of Azure consumption over the trailing 12 months.

Competencies report details

You can see the following sections from the Competencies report:

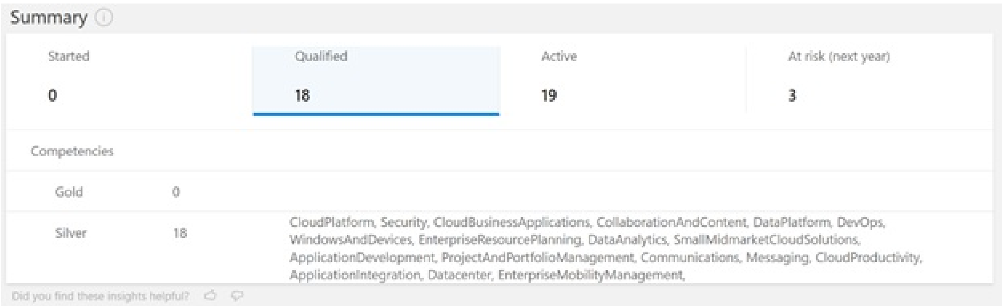
- Summary
- Competency metrics analysis
- Competency history

> **NOTE**
>
> This report is available from the Insights dashboard. To view this report, you must be assigned a specific role in Partner Center, such as Global Admin, Account Admin, Report Viewer or Executive Report Viewer. For more information, see your company's Global Admin. Specific types of data in this report may also be available only to users with Executive Report Viewer privileges.

Summary

The Summary view presents a count of competencies with their names at each competency level (Gold/Silver) across all the stages of the competency life cycle. Stages of the competency life cycle include: **Started**, **Qualified**, **Active**, and **At risk**. Example: Cloud Competency requirements fall under two categories: skills and performance.

- Started: Count of competencies for which you have one or more of the underlying requirements in progress. Breakdown of started competencies count by competency level (Silver/Gold) with competency names.
- Qualified: Competencies for which you have met the requirements, but might or might not yet have purchased the associated Silver/Gold offer. Breakdown of qualified competencies count by competency level (Silver/Gold) with competency names.
- Active: Competencies for which you have met the requirements and purchased a Silver/Gold offer. Breakdown of active competencies count by competency level (Silver/Gold) with competency names.
- At risk (next year): Count of competencies that are currently **Active** but also **At risk** of not meeting requirements for next year. Breakdown of competencies (by competency level, such as Silver/Gold, with competency names) which are at risk of not qualifying for next year.

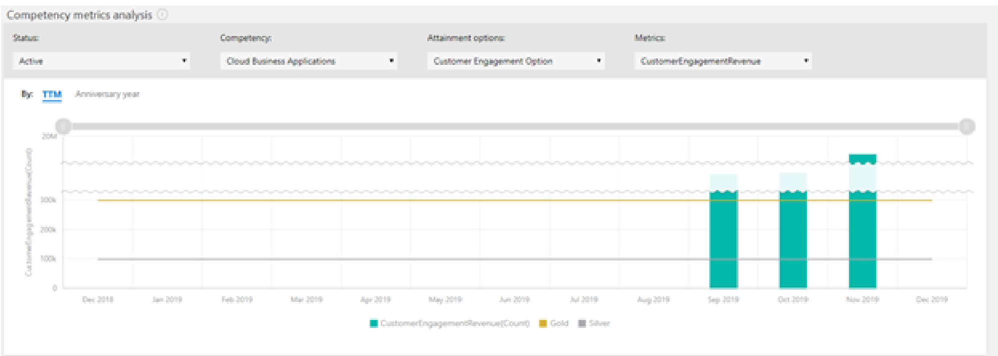


Competency metric analysis

This view shows the status of competency metrics against the thresholds required for partners to attain/retain the competency at the Silver/Gold level.

The report can be pivoted by the following, two date ranges:

1. TTM view: This enumerates the partner performance over the last twelve months (TTM).
2. Anniversary Year view: This enumerates the partner performance from the previous Anniversary date to the next Anniversary date.



NOTE

Not all metrics are covered in the analysis. Currently, metrics associated with learning and certification are not supported in the Competencies report. Cloud Business Applications (CBA) competencies are also not currently supported in the metric analysis for the **Active** competency status.

Competency history

This view shows a detailed table of all competencies you have attained so far, with competency level and competency stage.

Competency history

Competency	Competency level	Attainment date	Action
Security	Gold	2019-08-12	Attained
CloudBusinessApplications	Gold	2019-04-08	Attained
ApplicationIntegration	Gold	2019-02-15	Attained
ApplicationDevelopment	Gold	2019-02-15	Attained
CollaborationAndContent	Gold	2019-02-15	Attained
DataAnalytics	Gold	2019-02-15	Attained
CloudPlatform	Gold	2019-02-15	Attained
WindowsAndDevices	Gold	2019-02-15	Attained
ProjectAndPortfolioManagement	Gold	2019-02-15	Attained
DevOps	Gold	2019-02-15	Attained

1 2 Next >

Next steps

- For more reports, see Partner Center Insights.

Benefits report available from the Partner Center Insights dashboard

6/19/2020 • 2 minutes to read

Appropriate roles

- Global admin
- Admin agent
- Report Viewer
- Executive Report Viewer

As a Microsoft Partner, you can access a host of benefits that use the latest technology and innovations to help you enhance your team's skills, improve efficiency, and grow your business. Benefits packages include: allocations of licensed software, cloud services, Visual Studio subscriptions, and support. These packages can also include certain Go-To-Market resources, offers, and programs. The Benefits report presents trends of the benefits you have accessed and their utilization during the selected date range.

You can visualize the following charts in the Benefits report:

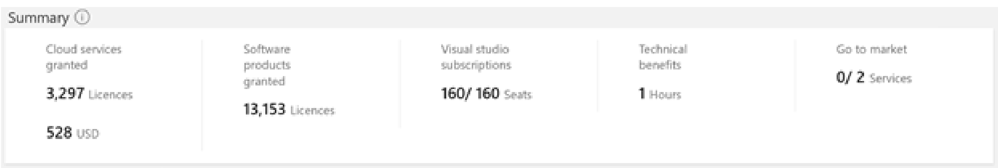
- Summary
- Cloud services granted
- Software products
- Visual Studio subscriptions
- Technical benefits
- Go-to-market

> **NOTE**
>
> This report is available from the Insights dashboard. To view this report, you must be assigned a specific role in Partner Center, such as Global Admin, Account Admin, Report Viewer or Executive Report Viewer. For more information, see your company's Global Admin. Specific types of data in this report may also be available only to users with Executive Report Viewer privileges.

Summary

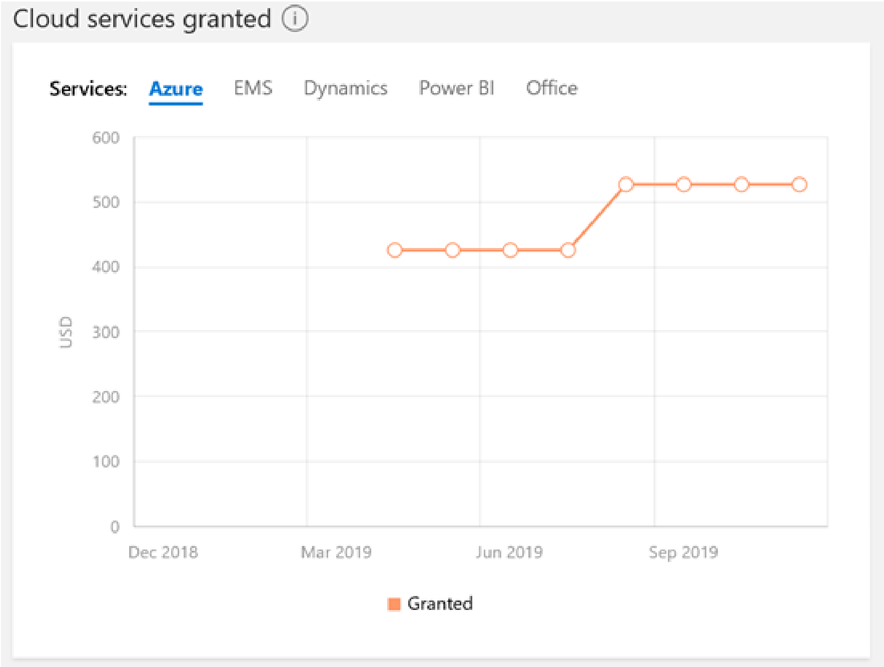
The Summary section presents the benefits granted in terms of licensed software, cloud services (non-Azure), Visual Studio subscriptions, technical support and certain Go-To-Market services or offers.

Example: Microsoft Partner Network (MPN) membership partners are eligible for technical support of on-premise products and cloud products. Partners who attain Silver competency are granted technical support for 15 incidents for on-premise products. They can consume this support as needed.



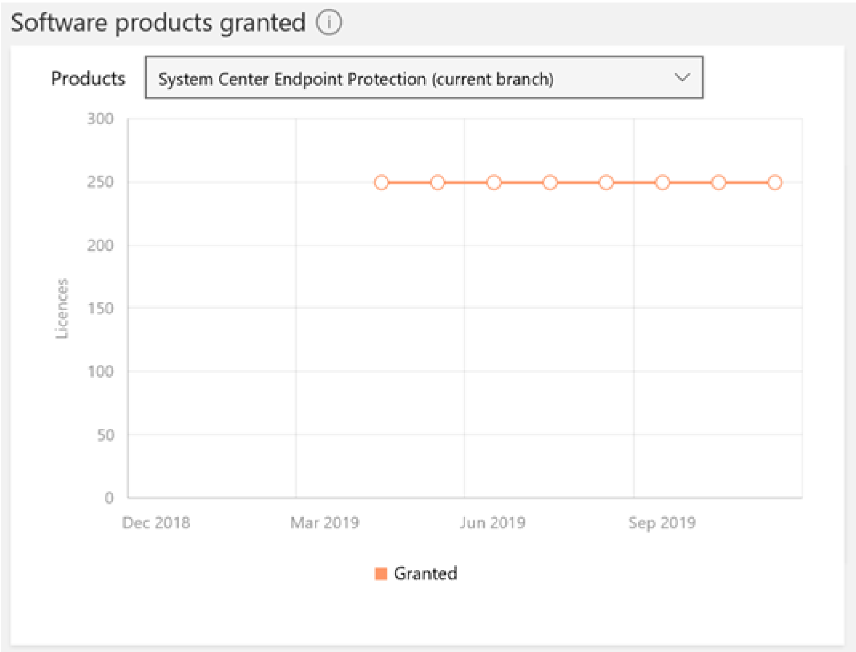
Cloud services granted

This chart presents the monthly trend of licenses granted during the selected date range for license-based subscriptions of the selected cloud service. Select a cloud service from the **Services** tab to view the chart for a specific cloud service. The line graph represents the overall licenses granted to your company.



Software products

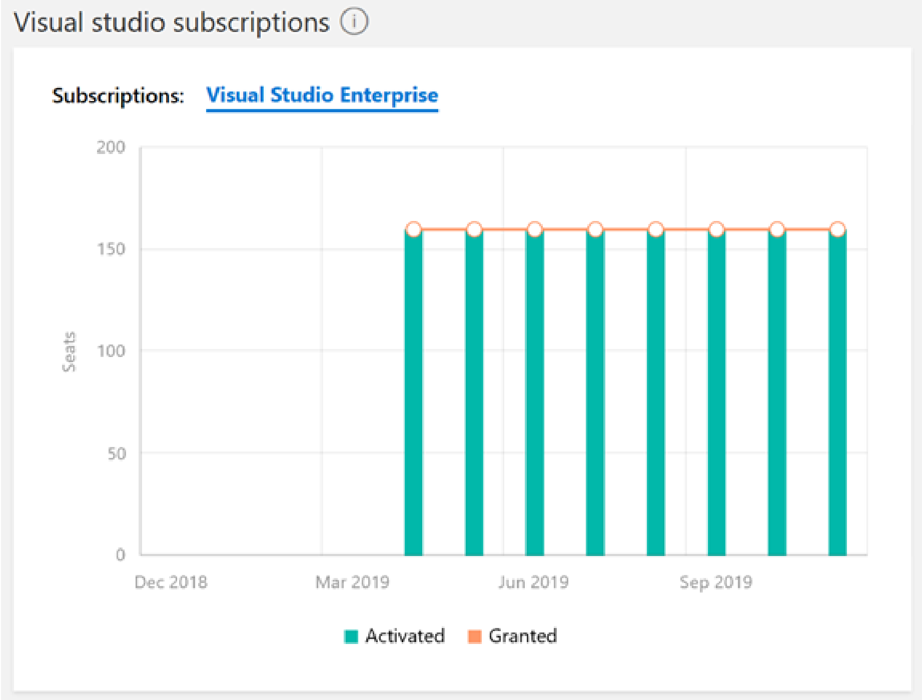
This chart presents the monthly trend of licenses granted during the selected date range for a specific software product. Select a software product from the dropdown list on top of the chart in order to view the trend of a specific software product you are granted as benefits. The line graph represents the overall licenses granted to your company.



Visual Studio subscriptions

This chart presents the monthly trend of Visual Studio subscriptions activated against subscriptions you were allocated during the selected date range.

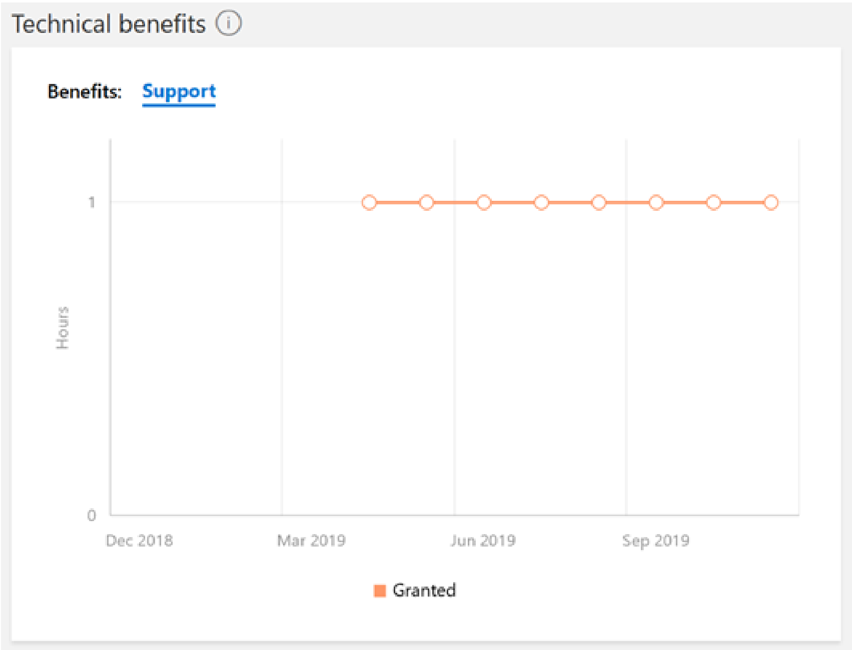
Select a tab on top of the chart to view the trend of a specific Visual Studio subscription you are granted as benefits. Columns in the chart represent seats consumed for the subscription. The line graph represents the overall seats assigned for the subscription.



Technical benefits

This chart presents the monthly trend of Support benefits granted during the selected date range.

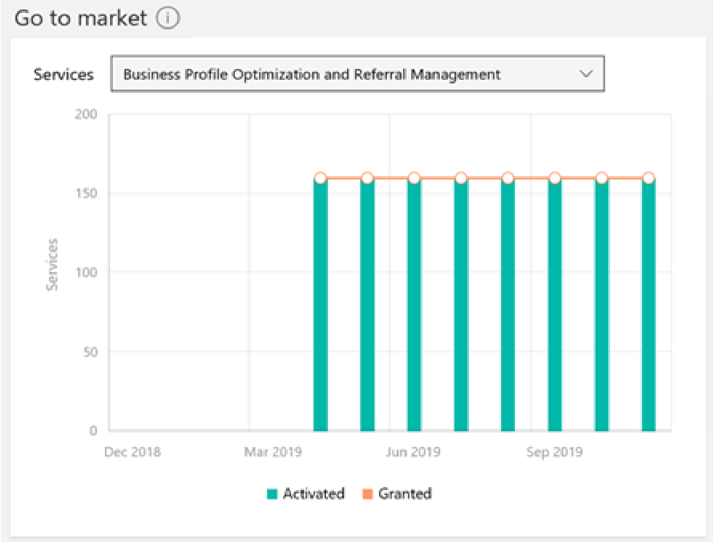
Select a tab on top of the chart to view the trend of a specific support benefit you are granted. The line graph represents the overall hours of support assigned for the selected support benefit.



Go-To-Market offers or services

This chart presents the monthly trend of Go-To-Market offers or services activated against allocated during the selected date range and for a selected Go-To-Market offer or service category.

Select a Go-To-Market offer or service category from the dropdown list on top of the chart to view the trend of the selected Go-To-Market services granted to your company. Columns in the chart represent Go-To-Market offers or services activated. The line graph represents the overall Go-To-Market offers or services granted to your company.



Next steps

- For more reports, see Partner Center Insights.

Known issues with Partner Center Insights

6/19/2020 • 2 minutes to read

This relates to any known issues viewing or rendering reports associated with Insights.

- There is no supported way to enable the Insights reports for CSP-only tenants. Only tenants with access to the MPN program can access these reports.
- The reports have rendering issues with Internet Explorer. They work well with Microsoft Edge and other browsers.
- The performance data for Cloud Business Application competency is incomplete due to an upstream data issue.

Next steps

- Learn more about Partner Center Insights.

Download reports

6/19/2020 • 2 minutes to read

Appropriate roles

- Executive report viewer
- Report viewer

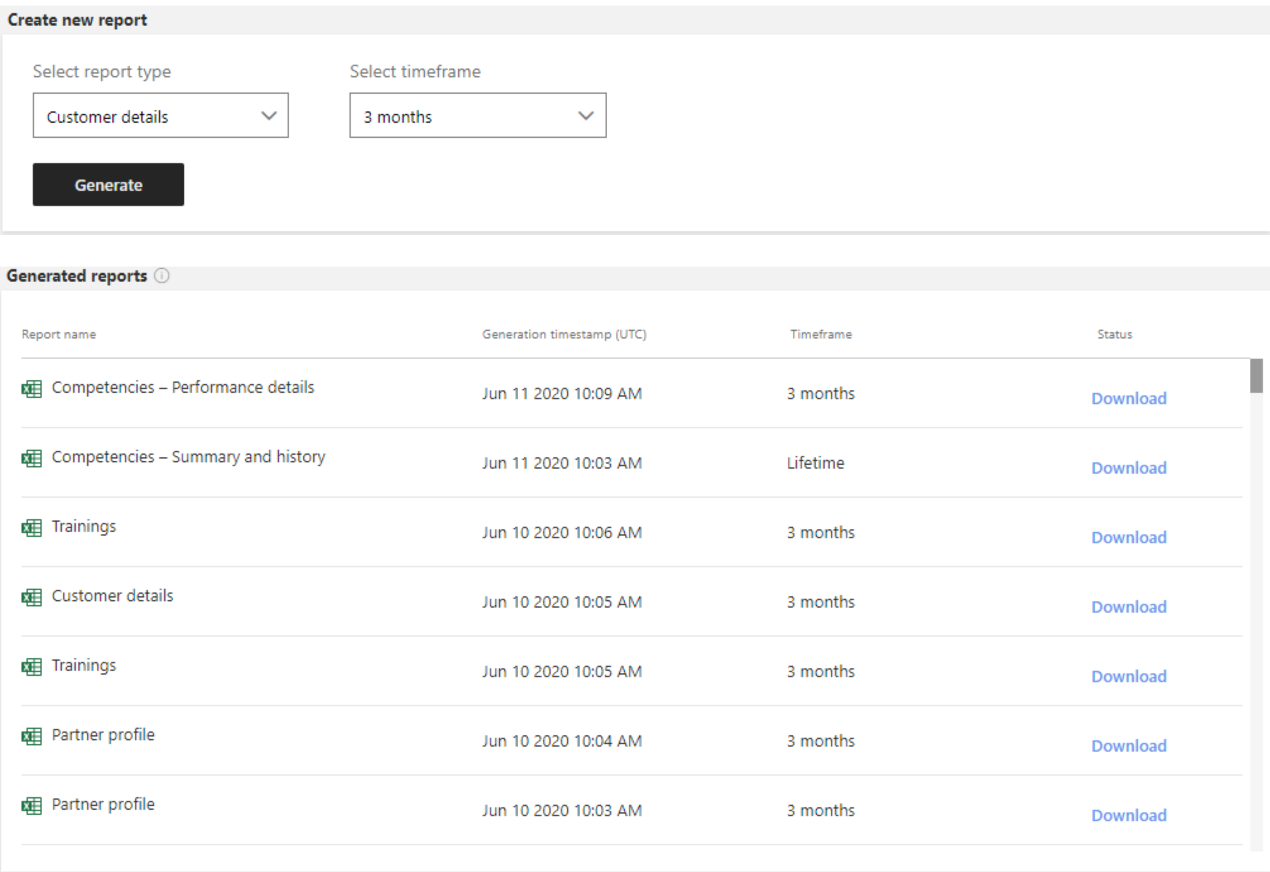
Introduction

The Download Reports hub in the Insights dashboard enables you to export the raw data sets that power the Partner Center Insights reports, in tab-separated value (TSV) format. This lets you do deeper analysis on the data, based on the business needs.

Once generated, the report will be available in the **Generated reports** section for you to download and analyze using tools like Microsoft Excel.

Create new report

To generate a report, first select the report from the **Select report** drop-down. Then, select the date range from the **Select date range** dropdown. Select **Generate**. The report will be generated in tab-separated value (TSV) format and will be available for download in the **Generated reports** section within a few minutes. Reports generated during the previous 14 days will be available for download.



NOTE

Only those users who are executive report viewers can download reports. For more information on role-based access to the Insights dashboard reports, please refer to PCI roles.

Available reports

The following reports are available for download:

Partner profile provides the details related to the partner. Details like Partner ID, Partner name, Partner city, Partner country, and so on are available in the report. No aggregation or lookback will be applicable for this report.

Customer details provides the details of customers that a Partner is associated. It also provides key metrics like licenses sold, aggregated ACR and so on. The report is aggregated on a monthly basis.

Subscriptions details provides the details of the subscriptions sold or managed by the Partner along with customer information. The report is aggregated on a monthly basis.

Azure usage provides the Azure usage details. These details are for the Azure subscriptions sold or managed by the Partner. The usage details are split by meter category and other key dimensions. The report is aggregated on monthly basis.

Office365 -License Usage provides the usage details of O365 licenses sold or managed by the Partner. It also provides customer information and key metrics such as active entitlements, qualified entitlements and so on. The report will be aggregated on a monthly basis.

Enterprise Mobility –License Usage provides the usage details of Enterprise Mobility licenses sold or managed by the Partner. It also provides customer information and key metrics such as active entitlements, qualified entitlements and so on. The report is aggregated on a monthly basis.

Dynamics 365 –License Usage provides the usage details of D365 licenses sold or managed by the Partner. It also provides customer information and key metrics such as active entitlements, qualified entitlements and so on. The report is aggregated on a monthly basis.

Power BI -License Usage provides the usage details of Power BI licenses sold or managed by the Partner. It also provides customer information and key metrics such as active entitlements, qualified entitlements and so on. The report is aggregated on a monthly basis.

Trainings provides the details like exams, certifications, assessments, tracks, courses completed or taken up by employees of the partner.

Microsoft Learn provides the details about the modules, learning path completion details along with user details for the partner.

Competencies – Summary and history provides details of all the competencies that are either active, in progress or at risk for this Partner. Also includes history of all the competencies achieved by the partner.

Competencies – Performance details provides detail on how the partner is doing with respect to the KPIs for achieving a certain set of competencies.

Partner contribution indicators (PCI) - shows partner impact on key measures of customer success

6/19/2020 • 3 minutes to read

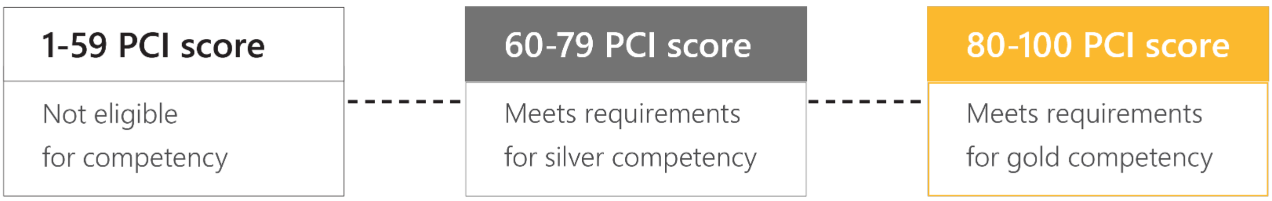
Partner Contribution Indicators (PCI) provides a holistic measure of a partner's impact in driving successful customer outcomes and therefore greater differentiation in the market when a partner attains and maintains the Cloud Business Applications competency. Partners receive credit for key measures of customer success, such as successful deployments and increasing usage, and are rewarded for continuing to invest in and scale out their technical capabilities.

Scoring

PCI provides a sophisticated view of a partner's technical capabilities, their ability to drive customer success, and their sales performance. PCI measures your company's prior-year performance across seven key indicators:

1. **Net new revenue**: Net new revenue across all sales channels for Microsoft Dynamics 365 products.
2. **Net customer adds**: Net customers acquired for Dynamics 365 across all sales channels.
3. **Functional consultants**: Number of individuals holding a currently active Functional Consultant Associate certification for Dynamics 365.
4. **Functional consultant growth**: Growth in the number of Functional Consultant Associates. The baseline snapshot for the Functional consultant growth metric in PCI will now be taken on October 1, 2020.
5. **Developers**: Number of individuals holding a currently active Developer Associate certification for Dynamics 365.
6. **New large deployments**: Number of production tenants that cross the high-usage threshold over the past 12 months.
7. **Monthly active user growth**: Growth in monthly active users across all your customers over the past 12 months.

Points are granted for each achieved indicator, resulting in a single-number PCI score. 100 maximum points are possible. PCI score determines competency eligibility:



Each indicator brings a score that is added to the total. Here are the maximum scores for each indicator:

Performance

- 10 Net new revenue
- 10 Net customer adds

Capability

- 15 Functional consultants
- 15 Functional consultant growth
- 5 Developers

Customer success

- 20 New large deployments
- 25 Monthly active user growth

Thresholds

Each PCI metric has Microsoft-set thresholds that can earn your company maximum points. These thresholds differ for the Customer Engagement and Finance & Operations paths for attaining the Cloud Business Applications competency. The thresholds also differ for partners operating in developed markets versus those that operate exclusively in developing markets. The developed or developing market categorization of a country is based on the Microsoft Partner Network definitions.

Points across each metric are tallied to yield a distinct PCI score for Customer Engagement and Finance & Operations that will be updated monthly.

Partners can earn the maximum points for a given metric if they meet or exceed the thresholds indicated below. Partial points can be earned for all metrics except for Functional consultant growth. For example, a developed market partner with $150,000 in Net New Revenue will earn half ($150,000/$300,000) of the maximum 10 pts.

Table 1: Customer Engagement Thresholds

	Performance		Capability			Customer Success	
PCI Metric	Net new revenue	Net customer adds	Functional consultants	Functional consultant growth*	Developers	New large deployments	Monthly active user growth
Max pts	10 pts	10 pts	15 pts	15 pts	5 pts	20 pts	25 pts
Developed	$300,000	10	15	* See note	5	5	25%
Developing	$150,000	5	5	* See note	2	1	25%

* Growth targets differ based on the number of baseline consultants. See Table 3 for growth targets.

Table 2: Finance and Operations Thresholds

	Performance		Capability			Customer Success	
PCI Metric	Net new revenue	Net customer adds	Functional consultants	Functional consultant growth*	Developers	New large deployments	Monthly active user growth
Max pts	10 pts	10 pts	15 pts	15 pts	5 pts	20 pts	25 pts
Developed	$300,000	3	15	* See note	5	3	25%
Developing	$150,000	1	5	* See note	2	1	25%

* Growth targets differ based on the number of baseline consultants. See Table 3 for growth targets.

Table 3: Functional Consultant Growth		
Functional Consultant baseline needed to be eligible to earn points. Baseline snapshot date will be taken October 1, 2020.		Growth needed to earn all 15 points*
Developed	Developing	
15 - 29	5 - 14	35%
30 - 49	15 - 24	25%
50 and above	25 and above	15%

Detailed definitions of PCI metrics

Net new revenue	Summed up over trailing 12-months	Maximum of 10 points
Net new billed revenue across all sales channels for qualifying Dynamics 365 products. Calculated as billings minus credits and aggregated over 12 months. **Customer Engagement** qualifying products include Sales, Customer Service, Field Service, Project Service Automation, Marketing, Microsoft Relationship Sales, Plan 1, Talent, and Enterprise Team Member. **Finance and Operations** qualifying products include Unified Operations, Finance, Supply Chain Management, Retail, Commerce, Plan 2, Mixed Reality, Talent, and Enterprise Team Member. Sales channels include Enterprise Agreement (EA), Cloud Solution Provider (CSP), and Web Direct. Enterprise Agreement revenue only includes revenue from the first year of the agreement. Recurring revenue from the second and third year is not included.		

Net customer adds	Summed up over trailing 12-months	Maximum of 10 points
Net customers added across all sales channels. Calculated monthly as customers added minus customers lost and aggregated over 12 months. A customer add is when a customer has no paid seats across all their subscriptions in a prior month but has at least one paid seat in the current month. A customer lost is when a customer has at least one paid seat across all their subscriptions in a prior month but does not have any paid seats in the current month. Sales channels include Enterprise Agreement (EA), Cloud Solution Provider (CSP), and Web Direct. When multiple partners are associated with a customer through different subscriptions, all partners associated with the customer get credit for a new customer add in the month the customer is added. Subsequent partners associating with the same customer via old or new subscriptions will not get new customer add credit for that customer. When multiple partners are associated with a customer through different subscriptions, all partners associated with the customer lose credit for a new customer add in the month the customer is lost. Any partner associating with the same customer subsequently, via old or new subscriptions, will get new customer add credit for that customer. If a customer is already working directly with Microsoft and has met the new customer add criteria, partners associating with the same customer subsequently, via old or new subscriptions, will not get new customer add credit for that customer.		

Functional consultants	Current month snapshot	Maximum of 15 points
Number of individuals holding a currently active Functional Consultant Associate certification. **Customer Engagement** Functional Consultant certification requires and individual to pass MB-200 **AND** MB-210 **OR** MB-220 **OR** MB-230 **OR** MB-240 **OR** MB6-898. **Finance and Operations** Functional Consultant certification requires and individual to pass MB-300 **AND** MB-310 **OR** MB-320 **OR** MB-330 **OR** MB6-897 **OR** MB6-898.		

Functional consultant growth	Current month vs October 1, 2020 baseline	0 or 15 points
Growth in the number of certified Functional Consultant Associates since a baseline snapshot. Baseline snapshot date will be taken October 1, 2020. The baseline snapshot will subsequently be reset on the next Cloud Business Applications competency renewal date. To be eligible for points, must have a minimum of **15** Functional Consultant Associates for Developed market partners and **5** for Developing market partners when the baseline snapshot is taken. **No partial points awarded**. Growth on top of the baseline snapshot must meet or exceed the thresholds indicated in **Table 3.**		

Developers	Current month snapshot	Maximum of 5 points
Number of individuals holding a currently active Developer Associate certification. **Customer Engagement** Developers get credit when they pass both MB-200 **AND** MB-400 **OR** MB2-716. **Finance and Operations** Developers get credit when they pass both MB-300 **AND** MB-500 **OR** MB6-894.		

New large deployments	Summed up over trailing 12-months	Maximum of 20 points
For **Customer Engagement**, this is the number of production instances under a tenant that has crossed **250** monthly active users for Developed & **150** Monthly active users for Developing market partners. For **Finance & Operations**, this is the number of production instances under a tenant that has crossed **100** monthly active users for Developed & **50** Monthly active users for Developing market partners. A tenant is considered to have crossed the monthly active user threshold if it was below the specified threshold 12 months ago and crossed that threshold at least once over the subsequent 11 months. Monthly active users are counted at the tenant level and summed up across only the paid subscriptions under the tenant. Monthly active users are calculated at the end of every month. Partners are associated to tenants at the subscription level. Subscriptions are mapped to Customer Engagement or Finance and Operations products. All partners associated to any paid subscription under a tenant will get credit for all the Customer Engagement or Finance and Operations production instances under that tenant.		

Monthly active user growth	Current month vs baseline from 12 months ago	Maximum of 25 points
Growth of monthly active users across the entire customer base over the past 12 months. Monthly active users are counted at the tenant level and summed up across only the paid subscriptions under the tenant. Monthly active users are calculated at the end of every month For **Customer Engagement**, Developed market partners must have a baseline of at least **250** monthly active users, and Developing market partners must have a baseline of **150** monthly active users across their entire customer base 12 months ago to be eligible for points. For **Finance and Operations**, Developed market partners must have a baseline of at least **100** monthly active users, and Developing market partners must have a baseline of **50** monthly active users across their entire customer base 12 months ago to be eligible for points. Partners are associated to tenants at the subscription level. Subscriptions are mapped to Customer Engagement or Finance and Operations products. All partners associated to any paid subscription under a tenant will get credit for all the Customer Engagement or Finance and Operations monthly active users summed up across all paid subscriptions under that tenant.		

Customer-to-partner association

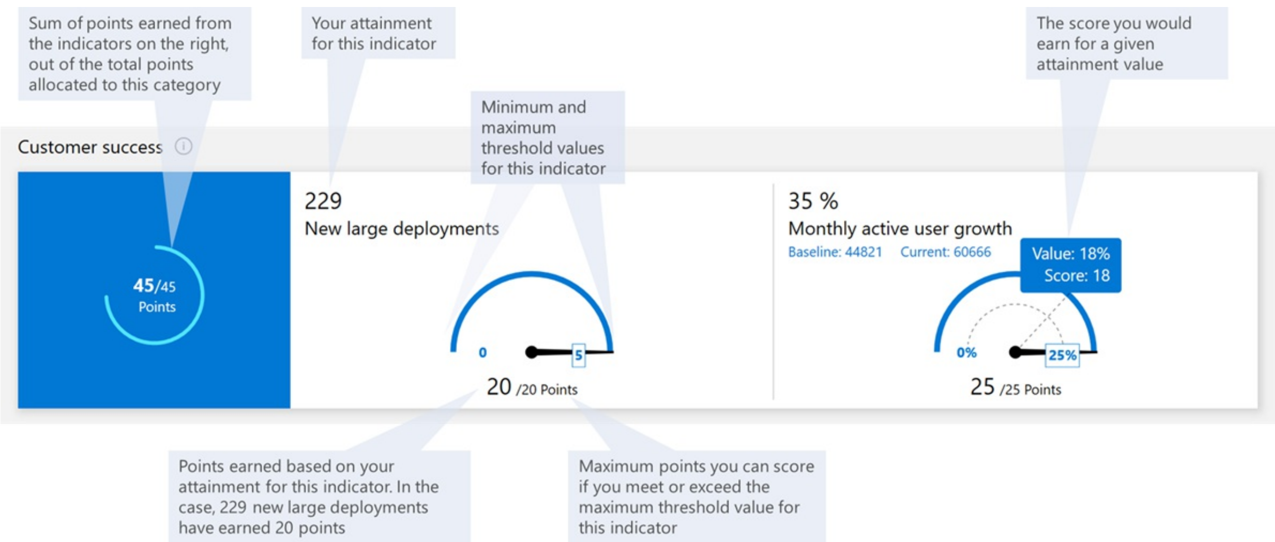
You receive credit for Net new revenue, Net customer adds, New large deployments, and Monthly active user growth for a given customer, within the bounds of the metric definition, only if you are the Cloud Solution Provider (CSP), the Claiming Partner of Record (CPOR), or Digital Partner of Record (DPOR) for a paid subscription belonging to the customer's tenant.

A partner becomes the CPOR if they have established association with a customer at the subscription level via the Dynamics 365 Online Services Advisor (OSA) incentive or Dynamics 365 Online Services Usage (OSU) incentive.

A partner becomes the DPOR if they have established association with a customer at the subscription level within the product.

When both CPOR and DPOR exist for a given subscription, the CPOR will receive credit for the relevant PCI metrics associated with that subscription. The CPOR receives the credit for Net new revenue and Net customer adds if the association was via OSA. If the association was via OSU, the CPOR receives the credit for New large deployments and Monthly active user growth.

How to read the charts



Next Steps

Visit the Partner Contribution Indicators resource collection where you can find detailed training videos, presentations, FAQs, and fact sheets.

Get data about how well your customers and Azure subscriptions are doing

6/19/2020 • 2 minutes to read

Applies to

- Partner Center
- Cloud Solution Provider program partners

Appropriate roles

- Global admin
- User management admin
- Admin agent
- Sales agent

Data drives business decisions. Use the metrics in the **Azure usage** page to identify your successes and areas that need more attention. Use this information as you plan new business goals.

> **NOTE**
> Azure usage analytics is available only for partners in the Cloud Solution Provider program.

We are tracking the following metrics:

Summary

- **Total Azure subscriptions sold**: Number of subscriptions sold in the specified time period
- **Customers with usage**: Number of customers with Azure usage in the specified time period
- **Customers without usage**: Number of customers without Azure usage in the specified time period

Top 5 customers in category

- The top 5 customers for the specified category

Azure subscriptions at risk

This section indicates the predicted churn risk to Azure subscriptions. This information can be used by partners to engage with customers and minimize churn

Subscriptions without usage

- List of specific subscriptions without Azure usage in the specified time period

Azure subscription churn

- **Active subscriptions**: Count of active subscriptions by date
- **Deprovisioned subscriptions**: Count of subscriptions deprovisioned or suspended by date

Customer count

- New customers acquired during the specified time period

Azure subscription retention

- The number of subscriptions that were renewed.

Use analytics to analyze performance of your indirect resellers

6/19/2020 • 2 minutes to read

Applies to

- Partner Center
- Cloud Solution Provider program partners

Appropriate roles

- Global admin
- User management admin
- Admin agent
- Sales agent

Data drives business decisions. Use the metrics in the **Reseller analytics** page to identify your successes, your indirect resellers' successes, and areas that need more attention. Use this information as you plan new business goals.

> **NOTE**
> Indirect resellers analytics is available only for partners in the Cloud Solution Provider program.

We are tracking the following metrics:

Summary

- **Total resellers**: Count of active resellers on the last day of the subscription
- **New resellers**: Count of new indirect resellers for the specified time period
- **Active resellers**: Count of indirect resellers where the MPNID is at least 1 subscription, and where the subscription status is not deprovisioned
- **Transacting resellers**: Count of indirect resellers with a subscription sold in the specified time period

Resellers by market

- Total resellers by geographic location

Top resellers by subscriptions sold

- A list of resellers, sorted by the number of subscriptions they've sold

Top products by subscription count

- **Dynamics 365**: Dynamics 365 products sorted by subscriptions sold
- **EMS**: Number of Enterprise Management Services subscriptions sold
- **Microsoft 365**: Number of Microsoft 365 subscriptions sold
- **Office 365**: Office 365 products sorted by subscriptions sold

New subscriptions

- The number of new subscriptions added by date

Subscription churn

- **New subscriptions**: Count of new subscriptions added by date
- **Deprovisioned subscriptions**: Count of subscriptions deprovisioned or suspended by date

New reseller details

- **Reseller name**: Names of indirect resellers
- **Location**: Markets where the indirect resellers operate
- **Subscriptions**: Number of subscriptions the reseller has sold
- **Licenses**: Total number of licenses the reseller has sold across all subscriptions

Analyze subscriptions and licenses

6/19/2020 • 2 minutes to read

Applies to

- Partner Center
- Cloud Solution Provider program partners

Appropriate roles

- Global admin
- User management admin
- Admin agent
- Sales agent

Data drives business decisions. Use the metrics in the **Subscription and license analytics** page to identify your successes and areas that need more attention. Use this information as you plan new business goals.

> **NOTE**
> Subscription license analytics is available only for partners in the Cloud Solution Provider program.

This report can pivot based on the following products:

- **Dynamics 365**: Dynamics 365 data
- **EMS**: Enterprise Management Services data
- **Microsoft 365**: Microsoft 365 data
- **Office 365**: Office 365 data

We are tracking the following metrics:

Summary

- **Subscriptions sold**: Count of subscriptions created for the specified time period
- **Licenses sold**: Count of licenses sold for the specified time period
- **Subscriptions renewing in 30 days**: Count of subscriptions where the status is active for the specified time period and where **Autorenew** is true
- **Active subscriptions**: Subscriptions where the status is **Active**
- **Suspended subscriptions**: Count of suspended subscriptions, there is no date filter

Product breakdown

- **Subscription count**: Top 5 products sorted by subscriptions sold
- **License count**: Top 5 products by sorted licenses sold

Subscription Retention

- **Renewed subscriptions**: Subscriptions that renewed in the last 30 days

Subscription churn

- **New subscriptions**: count of new subscriptions for the time period, excluding trial offers

- **Deprovisioned subscriptions**: Count of subscriptions deprovisioned or suspended by date

Suspended subscriptions

- List of all subscriptions with a status of **Suspended**, excluding trial offers

Active subscriptions

- List of all active subscriptions

Trial subscription conversions

- **Trial conversion**: Count of all **Active** subscriptions where trial paid to conversion occurred during the specified time period

Trial subscriptions ending in 30 days

- List of trials that were started, where the end date is within 30 days, and there is no paid start date associated with the subscription

The Microsoft Learn analytics report shows the status of learners in your company

6/19/2020 • 5 minutes to read

Appropriate roles

- Global admin
- MPN partner admin

The Microsoft Learn report provides you with information on the learners in your company including the modules they've completed and the learning paths they are on. The report displays the status of each individual learner. The global admin and the MPN admin for your company can view the data.

How to read the report

Summary charts

These charts summarize count and monthly cumulative trends for trained individuals, module completions, and learning paths.

Trained individuals count: A count of all distinct learners who have completed at least one module during the selected date range

Trained individuals trend mini chart: Month over month cumulative count of the active learners

Module completions count: Count of Module completions by the learners in the partner's company during the selected date range. For example, if “Module 1" is completed by 15 individuals, and the “Module 2" has been completed by the same 15 individuals, the module completions count will be 30. The module completion date should fall in the date range selected.

Module completions trend mini chart: Month over month cumulative count of the module completions

Learning path completions count: Count of Learning path completions by the learners in the partner's company during the selected date range. For example, if Learning Path “Path 1" is completed by 20 individuals, and the Learning Path “path 2" has been completed by the same 20 individuals, the Learning Path completion count will be 40. The Learning path completion date should fall within the selected date range.

Learning path completions trend mini chart: Month over month cumulative count of the learning path completions

Trained individuals' monthly trend

This data is the trend of your company's users who have completed a module for the first time in that month.

X-Axis is month for the time filter selected.

Y-Axis is count of active learners who have registered (first-time completion of a module) during that month. This is not cumulative.

Module completions monthly trend

This data is the trend of modules completed by all your company's users during that month. (not cumulative)

X-Axis is month for the time filter selected.

Y-Axis is count of the module completions during that month. This is not cumulative.

Learning path completions monthly trend

This data is the trend of learning paths completed by your company's users during that month. (not cumulative)

X-Axis is month for the time filter selected.

Y-Axis is count of module completions in that month. This is not cumulative.

Learning path completion tabs

Module tab

This tab includes breakdown of modules completed in your company by top 5 module names; the product to which the module is associated; and the user role pertinent to the module.

- Module completions donut chart: breakdown of the module completions (count displayed in the summary section) by the module names.

Number displayed in the center of the chart is the total modules completed

- Completions by role: breakdown of the module completions by the role of the module. If a module is associated with multiple roles, then each of the roles is added to the count of module completions.

Number displayed in the center of the chart is the number of distinct roles for the module completions.

- Completions by product: breakdown of the module completions by the product the module is mapped to. If a module is associated with multiple products, then each of the products is added to the count of module completions.

Number displayed in the center of the chart is the number of distinct products for the module completions.

Learning path tab

This tab includes a breakdown of learning paths completed in your company by top 5 module names; the product the learning path is mapped to; and the role pertinent to this learning path.

- Learning paths completions donut chart: breakdown of the Learning path completions (count displayed in the summary section) by name.
- Completions by role*: breakdown of the learning paths completions by the role. If a module is associated with multiple roles, then each of the roles is added to the count of module completions.
- Completions by product: breakdown of the learning paths completions by the Product to which the learning path is mapped. If a module is associated with multiple products, then each of the products is added to the count of module completions.

Completions by learning individuals

This lists the trained users in your company and details of their completed modules and learning paths.

Microsoft Learn identifies learners with a User Object ID. Under the **Modules tab**, all learners are sorted by the modules completed. They are displayed with their Microsoft Learn username, Object ID, and modules count. You can search using username.

Under the **Learning paths tab** all learners sorted by learning paths completed, are displayed with the learner display name, Object ID, and module count.

To get a learner's details using the User Object ID:

1. Sign in to Graph Explorer. (You must be the global admin of your company's Azure AD tenant.)
2. Copy the user object ID to the area highlighted in Graph Explorer.

FAQ

1. I am unable to see my company's Learning details.

This report is available to partners who have an account in Partner Center. If you are still in Partner Membership Center, you'll not be able to see this report.

2. Who in our company can view this report?

The global admin and the MPN admin can view the report.

3. How can I make sure all our users associate their Microsoft Learn accounts with their Partner Center account?

After the global admin adds a new user, that user needs to go to their **My profile** to associate their Microsoft Learn account.

- Select the **Your account** icon in the right corner of the dashboard, and then select **My profile**.
- Under **Your learning** a user will be able to associate their Microsoft Learning account and connect their Microsoft account to Partner University.

3. Can I see all the company's users who sign into Microsoft Learn with an MSA account in this report?

Currently, the best way to do this is to add these users to your Azure AD tenant and add them to Partner Center so that they can associate their Microsoft Learn account through **My profile** in Partner Center.

For users who only use their MSA account for training, in the near future, the Microsoft Learn team will enable the ability for them to associate their work email to their Microsoft Learn profile.

View your business data with the Partner Center Analytics app for Microsoft Power BI

6/19/2020 • 5 minutes to read

Applies to

- Partner Center

Appropriate roles

- Global admin
- User admin
- Sales agent
- Admin agent

View your business data

Get a visual representation of your business data with the Partner Center Analytics app for Power BI, including:

- Growth of your customer base, subscriptions, and licenses
- Usage of Office 365, Microsoft Dynamics, and Microsoft Azure products
- Daily consumption units for each metered resource in each Azure subscription for the last 60 days
- Estimated cost (based on latest rate card)
- Ability to export datasets and create custom reports, including per customer.

About the Partner Center Analytics app preview release

- This app is for direct partners in the Cloud Solution Provider program only. Other partners in CSP (indirect resellers, for example) will not be able to sign in.
- Any estimated costs are pre-tax billing / invoice data, and are not legally binding. Estimated costs are meant to be used for data insights only.
- Customer information is based on subscriptions. Any customers that you've recently created accounts for, but who do not yet have subscriptions, are not included in counts.
- Estimated cost is based on latest rate card, which is based on CSP pricing.
- Days are calendar days.

Business Insights report

- **Customer tenants**: Number of distinct Azure AD tenants of customers that have purchased subscriptions
- **New (last 30 days)**: New customers purchasing at least one subscription in last 30 days
- **Churn (last 30 days)**: Customers without any “active", “in grace" or “disabled" subscriptions
- **New (last 24 hours)**: New customers purchasing at least one subscription in last 24 hours
- **Estimated monthly cost over last 12 months**: Month over month trend of estimated pre-tax invoice dollar amount aggregated monthly over the period of last 12 months

- **Estimated cost by product over last 12 months**: Products sold sorted by estimated pre-tax invoice dollar amount aggregated over the period of last 12 months. This status indicates top products bringing most revenue.
- **Customers over last 12 months**: Month over month trend of new customers and churn customers aggregated monthly over the period of last 12 months
- **Estimated cost by customer over last 12 months**: Customers sorted by estimated pre-tax invoice dollar amount aggregated over the period of last 12 months. This status indicates top customers bringing most revenue.
- **Customer count by product**: Products sold sorted by associated customers. This status indicates top products sold to most customers.

Subscription Insights report

- **Subscription status**:
- Active: Subscriptions belonging to either “active" or “in grace" state
  - Suspended: Subscriptions belonging to “disabled" state
  - De-provisioned: Subscriptions belonging to “de-provisioned" or “expired" status
- **Expiry status**:
  - Expired: Subscriptions that have already expired (where subscription end date is in past)
  - Expiring after 30 days: Subscriptions that will expire after 30 days (where subscription end date is after next 30 days)
  - Expiring in 30 days: Subscriptions that will expire within next 30 days (where subscription end date is between today and next 30 days)
- **Total subscriptions**: Subscriptions in “active," “in grace" or “disabled" status
- **New (last 30 days)**: New subscriptions purchased by customers within last 30 days
- **New (last 24 hours)**: New subscriptions purchased by customers within last 24 hours
- **Expiring in 30 days**: Subscriptions that will expire within next 30 days
- **Churn (last 30 days)**: Subscriptions that have been de-provisioned or Suspended (disabled) within last 30 days
- **Distribution by subscription types**: % distribution of total subscriptions by License based and usage-based subscription type
- **Active subscription count by product**: Products sold sorted by active subscriptions count
- **Subscriptions over last 12 months**: Month over month trend of new subscriptions and churn subscriptions aggregated monthly over the period of last 12 months
- **Customer subscription details**: Detailed view of the customers, subscriptions, and offers

License Insights report:

- **Total licenses**: Total number of licenses aggregated across all license-based subscriptions
- **New (last 30 days)**: License addition within last 30 days
- **Churn (last 30 days)**: License reduction within last 30 days
- **New (last 24 hours)**: License addition within last 24 hours

- **Licenses over last 90 days**: Month over month trend of license additions and reductions aggregated monthly over the period of last 90 days
- **Active license count by product**: Products sold sorted by active license count
- **Active license count by customer**: Customers sorted by active license count
- **Customer license event details over last 90 days**: Detailed view of the customers, subscriptions, and subscription events including event date, event name, quantity, and change in quantity.

Licenses Usage report:

- **Licenses assigned by product**: Products sold sorted by license assignment count
- **Licenses in use by product**: Products sold sorted by license usage count
- **Customer distribution of licenses assigned**: % distribution of total customers broken in buckets of 20% range by license assignment %
- **Customer distribution of licenses in use**: % distribution of total customers broken in buckets of 20% range by license usage %
- **Licenses assigned by customer**: Detailed view of licenses sold and licenses assigned by customers and products
- **Licenses in use by customer**: Detailed view of licenses sold and licenses in use by customers and products

Azure Insights report:

- **Usage-based customers over last 12 months**: Month over month trend of new usage-based customers and churned usage-based customers aggregated monthly over the period of last 12 months
- **Usage-based subscriptions over last 12 months**: Month over month trend of new usage-based subscriptions and churned usage-based subscriptions aggregated monthly over the period of last 12 months
- **Estimated cost of usage by customer over last 60 days**: Usage-based customers sorted by estimated pre-tax invoice dollar amount aggregated over the period of last 60 days. This status indicates top usage-based customers bringing most revenue
- **Estimated cost of usage by category over last 60 days**: Meter categories of usage-based subscriptions sorted by estimated pre-tax invoice dollar amount aggregated over the period of last 60 days.
- **Estimated cost of usage by subscription over last 60 days**: Usage-based subscriptions by estimated pre-tax invoice dollar amount aggregated over the period of last 60 days.
- **Customer estimated usage cost by spending budget**: Customers sorted by percentage of their current usage spending budget exceeding threshold (100%).

Azure Resource Usage report:

- **Usage of Azure resources by day for selected period**: Daily consumption units for each metered resource in each usage-based subscription for selected period within the last 60 days.
- **Estimated usage cost of Azure resources for selected period**: Estimated cost based on latest rate card for each metered resource in each usage-based subscription for selected period within the last 60 days.

Next steps

- Partner Center Analytics for Power BI app overview

- Install and preview the Partner Center Analytics app for Microsoft Power BI

Install and preview the Partner Center Analytics app for Microsoft Power BI

6/19/2020 • 2 minutes to read

Applies to

- Partner Center

Appropriate roles

- Global admin
- User admin
- Sales agent
- Admin agent

Before you begin

Select the application that is most relevant to your business from the following list of available Power BI apps:

- Direct Provider
- Indirect Provider
- Indirect Reseller

Before you install the Partner Center Analytics app preview version, be sure that you meet the following requirements.

- You pick the correct Power BI app for your business.
- You have a Power BI pro license.
- You have permissions to install template apps on your tenant.
- You can sign in to Power BI.
- You can sign in as a global admin, admin agent, or billing admin to your company's Azure Active Directory (Azure AD) tenant.

To install the app

1. Click on the app source link given (Direct Provider/Indirect Provider/Indirect Reseller) in the above section.
2. Click on **GET IT NOW**.
3. Agree terms and conditions by clicking **Continue**.
4. Under Already have an account? select **Sign In**.
5. On the next page, enter your Power BI user name and password and then select Sign In.
6. Install the workspace by providing the workspace name.
7. You can find the template apps installed under Apps Section.
8. Click on Apps and choose the installed apps.

9. Get Started with your new app screen opens.

10. To connect to the data Click **Connect**.

11. On the **Connect to Partner Center Analytics** pop-up window, verify that the **Authentication method** is set to **oAuth2** or select **oAuth2** from the list if it's not.

> **NOTE**
>
> This window may take a few minutes to appear.

12. On the **Partner Center Analytics Connector** page, sign in with global admin, admin agent, or billing admin credentials for your company's Azure AD tenant, and then select **Sign In**.

13. When prompted for access, select **Accept**.

Once the Partner Center Analytics service is connected to Power BI, data will begin to load. Depending on the amount of data, this can take up to 10 minutes.

After the data finishes loading, you can start using the Partner Center Analytics app dashboard and reports in Power BI.

Next steps

View your business data with the Partner Center Analytics app for Microsoft Power BI

Different ways you can work with other partners in Partner Center

6/19/2020 • 2 minutes to read

Applies to

- Partner Center

Microsoft's Cloud Solution Provider (CSP) program offers opportunities for partners to work together in these ways.

Indirect provider-indirect reseller model

In this model, also known as the two-tier model, indirect providers and indirect resellers work together to sell Microsoft cloud-based services to organizations in multiple locales, verticals, and industries.

Indirect providers

Indirect providers (also known as distributors) purchase products and subscriptions directly from Microsoft and then offer these solutions to customers through resellers. Working with indirect resellers allows providers to expand their reach and customer base.

If you're an approved indirect provider in CSP, see Partner with indirect resellers in CSP to learn more about connecting with indirect resellers and customers.

Indirect resellers

Indirect resellers work with indirect providers, who have a direct relationship with Microsoft and have the infrastructure to provide customer support and billing. Partnering with indirect providers allows indirect resellers to work with experienced technology providers to go to market without having to make a large capital investment, and to offer a broader portfolio of Microsoft solutions.

If you're an indirect reseller or if you're interested in enrolling in CSP as an indirect reseller, see Partner with indirect providers in CSP to learn more about connecting with indirect providers and customers.

Not sure whether to enroll in CSP as an indirect reseller or as a direct partner? See Explore the indirect model on the Microsoft Partner Network website.

Multi-partner support

Partner Center's multi-partner feature supports scenarios when a customer needs to work with more than one partner. For example, they may want to hire one partner for their expertise in Office 365, but also hire a different partner who specializes in Microsoft Azure. See Multi-partner support for more information.

Multi-partner support is also available in Microsoft's national cloud offerings.

Multi-channel support

Partner Center's multi-channel feature supports scenarios when a customer wants to hire a partner to provision and support a subscription they purchased elsewhere. See Multi-channel support for more information.

Multi-channel support is also available in Microsoft's national cloud offerings.

IMPORTANT

A partner in the CSP program cannot resell online services to another partner in the CSP program currently. Microsoft continuously reviews the policies and capabilities of all programs. Any news about feature releases or policy changes will be announced through the usual communications channels, including Partner Center announcements.

Partner with indirect resellers in the Cloud Solution Provider program

5/14/2020 • 6 minutes to read

Appropriate roles

- Global admin
- User admin
- Admin agent
- Sales agent

With such a complex and rapidly changing technology marketplace, customers want the competitive edge that technology solutions can give them. In such a climate, it makes sense for partners to invest in partner-to-partner engagement to extend offerings and enable customers to do even more.

New resellers are entering the market and seeking ways to offer their solutions to customers outside of their markets and locales. As an established technology provider, you're well-positioned to be their route to market. Partner with indirect resellers in the Cloud Solution Provider (CSP) program to connect with other partners, bring new solutions to the market, and advance customers' adoption of cloud services.

In the indirect provider-reseller (two-tier) model, you partner with indirect resellers to offer Microsoft cloud solutions to customers. You purchase products and subscriptions directly from Microsoft and then offer these solutions to customers through your resellers.

As an indirect provider, you use the Partner Center to:

- Connect with indirect resellers who can help expand your reach and customer base
- Establish partnerships with indirect resellers that allow you both to serve common customers
- Designate indirect resellers to manage specific customers and subscriptions
- Manage your relationships with Microsoft, customers, and indirect resellers all in one place

For information on what's required to participate in the CSP program as an indirect reseller, see Get started as an indirect reseller on the Microsoft Partner Network website.

Indirect provider tasks in the Partner Center

Complete the following steps to establish and manage your partnership with indirect resellers and customers. Steps two and three are described in more detail below.

1. Review your company's profile on Microsoft's official indirect providers list.
   - To make changes to your company's indirect provider profile, contact your Microsoft representative.
2. Connect with indirect resellers
   - Before you can interact and transact with resellers, you must establish partnerships with them in the Partner Center.
3. Connect with customers
   - Associate new customers and subscriptions to resellers
   - Establish reseller relationships with existing customers

After you complete these steps, you can manage your reseller partnerships on the **Indirect resellers** page from your **Partner Center** menu.

> **IMPORTANT**
>
> Before you can start working with resellers, they must be enrolled as indirect resellers in the CSP program and have Partner Center accounts. Point your resellers to Partner with indirect providers in CSP for information about enrolling in CSP.

Connect with indirect resellers

To interact and transact with indirect resellers in the Partner Center, you must establish a partnership with them. Having a partnership with an indirect reseller allows you and the reseller to both serve common customers.

To establish a partnership, email a partnership request to the reseller. Be sure to have the reseller's email address on hand before you get started.

On the subscription details page, in the Reseller (MPN ID) field, add the reseller you want to work with. Be sure to use the MPN ID associated with the reseller's Partner Location Account they used to onboard to Partner Center. This ensures that the reseller will receive the appropriate incentives and they have an active Microsoft Partner Agreement to engage in the transaction.

1. Select **Indirect resellers** from your **Partner Center** menu.
2. On the **Indirect resellers** page, select **Request a partnership**. A draft email message appears.
3. Select **Open in email** to open the message in your default email application, or select **Copy to clipboard** to copy and then paste the message into an email. Select **Done** when finished.

   > **IMPORTANT**
   >
   > You can edit the text in the email message, but be sure to include the link as it is personalized for your Partner Center account.

4. After the reseller accepts your partnership request, they'll appear in your indirect resellers list, then you can:
   - Add new customers on their behalf
   - Submit orders on behalf of their customers
   - Associate them with a subscription so they can manage it on behalf of the customer who purchased it
   - Designate them as the customer's support contact for specific subscriptions

Depending on the level of access and involvement you want the reseller to have, you may want to take one or more of the actions described below.

For existing subscriptions, if you decide to work with an indirect reseller, you can update the subscription details to include the indirect reseller.

- On the subscription details page, in the **Reseller (MPN ID)** field, add the reseller you want to work with. This ensures that the reseller will receive the appropriate incentives.

TO ACCOMPLISH THIS	DO THIS	WHERE
Enable the reseller to manage a customer's account and have administrator permissions to manage their subscriptions	Associate a reseller to a customer account when adding a new customer	On the **New customer** page
Enable the reseller to manage an Azure customer's account	Associate a reseller to an Azure customer account when adding a new customer	On the **Azure service portal**, select User Settings to give the indirect reseller **tenant owner** permissions
Give the reseller credit for incentives	Associate the reseller to the subscription (new or existing)	On the **New subscription** page
Delegate customer support for specific subscriptions to the reseller	Select the reseller from the **Designated support contact** list	On the subscription's detail page: Select the customer from your **Customers** page, then select the subscription from the customer's **Subscriptions** page

Connect with customers

When you get new customers, you need to create accounts for them in Partner Center. When you add a new customer account, you can designate a specific reseller to manage the account and administer the customers' subscriptions and services on their behalf.

When you associate a reseller with a new customer account, you are delegating account and subscription management to the reseller. This means that the reseller has administrator access to the customer's subscriptions and services and can manage them on behalf of the customer.

Add new customers and associate them with indirect resellers

1. Select **Indirect resellers** from your **Partner Center** menu.
2. Find the indirect reseller that you want to assign new customers to and then select **Add new customer**. Note that the indirect reseller is already selected for you on the customer detail form. Provide the customer's details and then select **Next: Subscriptions**.
3. On the **New subscription** page, select the subscription(s) the customer wants to buy and then enter the number of licenses the customer needs.
4. Select **Next: Review**.
5. If the order is correct, select **Submit**. If the order is incorrect, select **Cancel** to cancel the entire operation and start over.
6. After you submit the order, the **Confirmation** page appears. Under **Setup info**, the admin user account name and temporary password are displayed. Copy down the user account name and password information so you can send it on to the new customer.

> **IMPORTANT**
>
> Be sure to make a note of the user account name and password as you can't access this information again after you close this page.

7. Select **Done**. The new customer appears in your customer list, associated with the indirect reseller. The reseller now has admin access to the customer's account information and subscriptions and can manage the subscriptions on the customer's behalf.

Add new subscriptions to customer accounts

When customers want to buy new subscriptions, upgrade existing ones, or buy additional licenses, you make these changes in the customer's account.

1. Select **Customers** from your **Partner Center** menu.
2. Find the customer whose account you want to change. You can filter the list by indirect reseller to narrow your choices. Expand the customer's record by selecting the down arrow, and then selecting **Add subscription**.
3. On the **New subscription** page, select the subscription(s) and enter the number of licenses the customer wants to purchase.
4. To associate the subscription with a reseller, select the reseller's name from the list and then select **Submit**. Associating the reseller with the subscription enables them to earn incentives, if applicable.
5. The new subscription(s) appears in the customer's subscriptions list.
6. If you want the reseller to handle customer support requests for the new subscription, select the subscription and then select the reseller from the **Designated support contact** list.
7. Select **Submit** when finished.

Next steps

For more information about managing customer accounts and subscriptions, see:

- Customer accounts
- Customer subscriptions

Learn how to partner with indirect providers in the Cloud Solution Provider program

5/13/2020 • 11 minutes to read

Appropriate roles

- Global admin
- User admin
- Admin agent
- Sales agent

The rapidly growing demand for cloud-based solutions and services provides many opportunities for Microsoft partners of all sizes to build profitable cloud solution businesses. Partners who are ready to enter the market, but who don't want to have to manage multiple vendors, or who may not have an end-to-end customer relationship management infrastructure in place, can enroll in Microsoft's Cloud Solution Provider (CSP) program as indirect resellers.

As an indirect reseller in CSP, you work with indirect providers (also known as distributors) who have a direct relationship with Microsoft and can provide you with customer support and billing. Working with indirect providers means you don't have to start your own. Instead, you can work with an experienced technology provider to help ensure your success. In the provider-reseller (two-tier) model, the provider buys cloud solutions and services from Microsoft. You then resell them to customers.

Different indirect providers offer various support and services. Evaluate the providers in your area to determine which ones best meet your needs. Generally, most providers will:

- Provide you with technical training and assistance
- Help you market your products and services
- Help you establish financing and credit terms

If you're not already working with a provider (also known as a distributor), you can search the list of official Microsoft providers to find one.

For more information about what's required to sell in the CSP program as an indirect reseller, see Get started as an indirect reseller on the Microsoft Partner Network website.

Enroll as an indirect reseller in the Cloud Solution Provider program

NOTE

If you are already enrolled in CSP, you may need to provide only customer support contact information to create a reseller account on the Partner Center.

Before you begin

If you are new to CSP, you'll need to enroll in the program as an indirect reseller. You then need to create an account in the Partner Center. To do so, you'll need to provide the following information during the enrollment process. You may want to take a few minutes to gather these items before you get started:

- **Global administrator credentials for your work account**

You'll need to provide the user name and password you use to sign into Office 365, Microsoft Azure, or Microsoft Dynamics CRM. If you don't have a work account, you can create one during the enrollment process. If you don't know whether you already have a work account, see Work accounts and the Partner Center.

- **The user name and password you use to sign in to the Partner Membership Center site**

  We use this information to link your organization's Microsoft Partner Network ID (MPN ID) with your new Partner Center account. You can then manage your membership benefits and data in the Partner Center.

- **Your organization's legal business name, address, primary contact, and support details**

  We need this information to confirm that your organization has an established profile with Microsoft and that you are authorized to act on its behalf.

  It can take us several days to review and verify the information you've provided. We'll email your primary contact when we've completed our review.

Get started

1. To kick off the process, go to the **Welcome page** to register.

2. Review the **Welcome page** to be sure you have the information you need to enroll, and then select **Next**.

3. Sign in with your work account. Select **Sign in** and then enter the user name and password you use to sign in as a global admin for Office 365, Microsoft Azure, or Microsoft Dynamics CRM.

   If you don't have a work account, select **Create one** to set one up now. After creating your work account, sign in using the global admin credentials for your new account.

4. Review the information about how to associate your Microsoft Partner Network ID (MPN ID) with your new Partner Center account. We need to link your organization's MPN ID with your new Partner Center account so that you can manage your membership benefits and incentives on the Partner Center. Select **Sign in**.

5. Enter the user name you use to sign in to the Partner Membership Center (PMC) site. The Partner Membership Center site is where you currently manage your Microsoft partner account. Signing in to Partner Membership Center allows us to retrieve your MPN ID and associate it to your new Partner Center account. Select **Next**.

6. Enter the password for your Partner Membership Center account and then select **Sign in**.

7. Select the organization profile with the MPN ID linked to your incentives, membership benefits, and competencies. We can then move this information to your Partner Center account. Select **Continue**.

   If the MPN ID you want to use is not listed on this page, select **Cancel** and sign in again with the user name and password for the organization profile you want to use.

   > **IMPORTANT**
   >
   > Select the MPN ID associated with an active organization profile that's located in the same country/region as your Azure AD tenant.

8. Provide or update your organization's legal business profile, primary contact information, and customer support information. Select **Enroll now**.

   The primary contact should be the person in your organization we can contact about your application. The primary contact can be you or another person in your organization. Note: We don't accept email addresses from Web-based email services such as Gmail, Yahoo! Mail, iCloud Mail, AOL Mail, or Outlook Mail.

> **IMPORTANT**
>
> To help ensure your organization's security and privacy, we'll email your primary contact to verify that (1) he or she signed up for a Partner Center account, and (2) that this email address belongs to your organization. After the primary contact verifies his or her email address, we'll continue our review of the information you provided. We'll email enrollment status updates to the primary contact.

9. When your Partner Center account is ready to use, verify that you've been added to the admin agent group. To finish setting up your account, including adding other users, you must have admin agent permissions. Follow these steps to view or update your permissions:

   a. In your **Partner Center**, select the **Settings** icon and then select **User management**.

   b. Select your name from the list of users. Then select **Admin agent** if it's not already selected. Select **Update**.

Add a new user

1. In your **Partner Center**, select the **Settings** icon and then select **User management**.

2. Select **Add user**.

3. Enter the user's full name and unique email address.

4. Select the type of agent and the type of admin. Partner Center access is role-based, so you can assign permissions to customize the user's view to show only the features the user needs to complete specific tasks. For more information about what each role can do, see Assign user permissions.

5. Select **Add** to create the user account. Confirm the user's details on the next page.

> **IMPORTANT**
>
> Make a note of the new user's sign-in information displayed on this page. Be sure to copy and send this information to the new user as you will not be able to access it again later.
>
> The user will need to sign in to the Partner Center with their user name and temporary password. When the user signs in to the Partner Center for the first time, they are prompted to change their password.

Assign user permissions

Partner Center access is role-based, so you can assign permissions to customize your organization's users' view to show only the features they need to complete specific tasks. To find out how best to assign roles, see Create user accounts and set permissions.

Connect with an indirect provider

Working with an indirect provider allows you to offer a broader selection of Microsoft's cloud-based services and solutions to your customers. Indirect providers have the systems and infrastructure to offer a robust level of billing and support. Relying on them in this way lets you focus on your technology solutions and customer engagements.

If you're not already working with a provider (also known as a distributor), you can search the list of official Microsoft providers to find one. When you find a provider you want to partner with, contact them directly to discuss their reseller programs, level of support, and terms. If both you and the provider want to work together, you'll need to connect your accounts on the Partner Center.

If an indirect provider wants to connect with you on the Partner Center, they'll kick off the following workflow:

1. The indirect provider emails you an invitation to authorize them to be your indirect provider. The email includes a link to the Partner Center and will associate your account to the provider's account.
2. To accept the invitation, follow the link in the provider's email. You may need to sign in to the Partner Center again.
3. To confirm the partnership with the provider, check the box and then select **Authorize indirect provider**. The provider is now listed on your **Indirect providers** page and your company is now listed on the provider's **Indirect resellers** page.

> **NOTE**
> When you establish a partnership with an indirect provider, you're authorizing them to submit orders and add subscriptions on behalf of your customers, and you're granting them administrator access to your company's work account. After your partnership with the provider has been established, you can remove the provider's administrator access to your work account in the Office 365 portal.

4. Select **Indirect providers** from your **Partner Center** menu to see a list of the providers you have a partnership with.
5. Select **View customers** to see a list of the customers you and the provider share.
6. Select **Invite new customers** to ask a new customer to authorize reseller relationships with both you and your indirect provider at the same time. Be sure to have the customer's email address on hand so you can email the invitation to them.

> **IMPORTANT**
> Your indirect provider needs to have a reseller relationship with your customers to submit orders on their behalf.

Connect with customers

To transact with customers on the Partner Center, your customers must have Partner Center accounts and you must establish reseller relationships with them. To allow your indirect provider to purchase subscriptions and services on your customers' behalf, the provider must also have reseller relationships with your customers.

Connect with existing customers

Once you successfully enroll as an indirect reseller, you will see the same customers in the Partner Center that you already do business with in other portals. Such other portals include Office 365 admin center or the Azure portal. To see your customer list, select **Customers** from your **Partner Center** menu.

When you connect with an indirect provider, you do not automatically gain customers of the indirect provider. Likewise, the customers you work with either on your own or through your indirect provider, but not through the Partner Center, will not automatically appear in your customer list when you enroll in the Partner Center. You will need to establish a reseller relationship with customers to transact in the Partner Center. To do so, you email them an invitation to connect with you on the Partner Center, as described below.

Invite a customer to establish a reseller relationship with you

1. Select **Customers** from your **Partner Center** menu and then select **Request a reseller relationship**.
2. On the next page, review the draft email message. You can open the draft message in email or you can copy the message to your clipboard and paste it into an email.

   You can edit the text in the email, but be sure to include the link as it is personalized to link the customer directly to your account. Select **Done** when you've completed this step.

3. Send the email to your customer.

4. After the customer accepts your invitation, they'll appear on your **Customers** page. You can then manage their subscriptions and service from there.

5. To manage the customer's account, services, users, and licenses, expand the customer's record by selecting the down arrow near their name.

Connect with new customers

When you attract new customers, you'll need to connect with them on the Partner Center. You may get new customers through multiple channels, including:

- Your own marketing activities
- Microsoft referrals
- Indirect providers

To manage a customer's subscriptions and services on their behalf, you need to have a reseller relationship with them. To allow your indirect provider to submit orders on your customer's behalf, the indirect provider must also have a reseller relationship with them.

To get administrator permissions to manage a new customer's subscriptions and services **and** allow your indirect provider to submit new orders on their behalf, you can invite the customer to establish a reseller relationship with both you and your provider at the same time.

Invite a customer to establish a reseller relationship with you and with your indirect provider at the same time

1. Select **Indirect providers** from your **Partner Center menu**.

2. Select **Invite new customers** to invite a customer to establish a reseller relationship with both you and the indirect provider at the same time. The provider needs to have a reseller relationship with your customer so they can submit orders on your customer's behalf when the customer wants to buy new subscriptions or add new licenses to existing subscriptions.

3. On the next page, review the draft email message. You can open the draft message in email or you can copy the message to your clipboard and paste it into an email.

   You can edit the text in the email. Just be sure to include the link as it is personalized to link the customer directly to both your account and your provider's account. Select **Done** when you've completed this step.

4. After the customer authorizes you and your provider to be their resellers of record, you'll have administrator permissions to manage their subscriptions, licenses, and users on their behalf. Your indirect provider can also submit orders on their behalf.

5. To manage the customer's account, services, users, and licenses, expand the customer's record by selecting the down arrow near their name.

Next steps

- Manage your Partner Center account
- Manage customers and their subscriptions
- Create a business profile
- Learn about partner incentives on Partner Center

Learn how partners can work with other partners in the CSP program

5/14/2020 • 6 minutes to read

Applies to

- Partner Center
- Partners in the CSP program

This article describes the key types of partner relationships in the Microsoft Cloud Solution Provider (CSP) program. It also describes various use cases, benefits, and supported transaction scenarios for CSP program partners.

Being a partner in the CSP program allows you to go beyond reselling licenses so that you can be more involved in your customers' business. The CSP program puts partners at the center of the relationship with the customer. This leads to deeper engagement with your customers, an insider's view to a customer's business, and the chance to uncover new sales opportunities. It can even help you accelerate your customer's digital transformation.

Being a CSP program partner also means you can harness additional profitability streams. You can do so by integrating Microsoft (first-party) offers and third-party offers with your own, value-added services. This expands your business portfolio and better positions you to meet growing customer demands.

Types of partner relationships in the CSP program

As a partner in the CSP program, you can decide how you want to interact with Microsoft and with others. The CSP program currently supports three, main types of transactional relationship:

- Indirect providers
- Indirect resellers
- Direct-bill partners

Indirect providers (also known as distributors) purchase first-party offers and third-party offers from the Microsoft marketplace. As an indirect provider, you can purchase and integrate these offers into your own, existing commerce or marketplace. This then lets your indirect resellers procure such offers and resell them to their own customers. Being an indirect provider means you have the infrastructure and capabilities to support indirect resellers at scale. It also means you can provide additional services to customers on behalf of your indirect resellers, such as customer support and billing. To learn more about how indirect providers connect with indirect resellers, see Partner with indirect resellers in the CSP program.

Indirect resellers are partners in the CSP program who vary in size and business scope, but who don't have a direct billing relationship with Microsoft. As an indirect reseller, you depend on indirect providers to transact in the CSP program. Some indirect resellers may also be able to offer managed services, support, and billing solutions to customers. You can receive several benefits from your partnership with indirect providers. By working with experienced technology providers, you can go to market without having to make a large capital investment. As an indirect reseller, you can also access a broader portfolio of Microsoft and third-party solutions. To learn more about becoming an indirect reseller, see Indirect reseller tasks in Partner Center.

Direct-bill partners are partners with a direct billing relationship with Microsoft. As a direct-bill partner, you can purchase first-party offers and third-party offers directly from the Microsoft marketplace, then sell them to your customers. You need to fulfill certain programmatic requirements for the role of direct-bill partner. This includes the ability to integrate with Microsoft using APIs. You also need to be able to provide billing, support, and managed services to customers on an on-going basis. For more information, please see Enroll as a direct-bill partner.

CSP program requirements: Signing the Microsoft Partner Agreement (MPA)

As part of the Cloud Solution Provider program's continuous enhancements, we've updated the existing agreements for partners who want to join the CSP program.

The **Microsoft Partner Agreement (MPA)** gives partners a streamlined, digital agreement that supports new business scenarios, a reduced need for multiple partner contracts, and easier compliance with global, legal requirements.

> **IMPORTANT**
>
> Starting February 1, 2020, the Microsoft Partner Agreement must be signed by all partners who transact in the CSP program. This includes indirect providers, direct-bill partners, and indirect resellers.

An indirect reseller needs to sign the MPA before the reseller can participate in the following activities:

- Before an indirect provider can associate the indirect reseller's MPN ID to a new CSP subscription
- Before an indirect provider can transact new business with that reseller

In fact, indirect resellers need to do three things before they can transact new business in the Cloud Solution Provider program:

- Onboard into Partner Center
- Enroll as an indirect reseller
- Sign the Microsoft Partner Agreement (MPA)

For more information, see Microsoft Partner Agreement (MPA) for CSP partners.

Supported partner transactions in the CSP program

Partners in the CSP program are offered many opportunities to work together. The following section describes how a few, sample partner scenarios may or may not be supported in the CSP program.

Sample scenario 1: What if a partner wants to sell to the customer, own the end-to-end relationship, and be responsible for billing and customer support?

This scenario is supported by two types of transactional relationship:

- **Relationship 1:** Microsoft sells to the direct-bill partner. The direct-bill partner then sells to the end customer.
- **Relationship 2:** Microsoft sells to the indirect provider. The indirect provider then sells to the indirect reseller. The indirect reseller then sells to the end customer.

Sample scenario 2: What if a partner has a customer who needs a specific service or solution offered by another CSP program partner?

The end customer can purchase different services from different partners, based on the customer’s business needs. For more information, see Multi-partner support.

Sample scenario 3: What if a partner is contacted by a customer who wants to hire them to manage and support their subscription(s)?

The customer can engage multiple partners to manage their subscription(s). For more information, see Mult-channel support.

Sample scenario 4: What if a partner in the CSP program (either an indirect provider, indirect reseller, or direct-bill partner) wants to buy Microsoft or third-party offers for their own use (as an end-customer)? Can the partner buy such offers from another CSP program partner?

The partner can buy as a customer from either an indirect reseller or from a direct-bill partner. To do so, however, they must use a different tenant than the one used for CSP.

In this case, services bought by the partner need to be provisioned to a tenant designated as a Customer type (a tenant for internal use only). Such services **cannot** be provisioned to the existing partner's CSP tenant (the tenant used by the partner in the Cloud Solution Provider program).

Sample scenario 5: What if a partner in the CSP program wants to sell to themselves as an end-customer?

By contract, partners in the CSP program are not allowed to sell Microsoft or third-party offers to themselves (as end-customers) or to their affiliate organizations (as end-customers).

Sample scenario 6: What if an indirect reseller wants to purchase as an end-customer?

Certain indirect reseller(s) may want to purchase licenses for their own use from an indirect provider in the CSP program. For this scenario, the indirect reseller's organization may have already established an indirect provider-indirect reseller relationship. Doing so prevents the partner from establishing any new relationship type as an end-customer with the same indirect provider.

In this case, the indirect reseller can use one of the following options:

- **Option 1:** Partners can set up another Azure AD tenant that is a separate environment for their customers.
- **Option 2:** The indirect reseller can end the relationship with one indirect provider and establish a new CSP relationship with another indirect provider. Doing so allows the indirect reseller to purchase subscriptions for their company's own use from a different CSP direct-bill partner.

  > **NOTE**
  > To end the relationship between an indirect provider and an indirect reseller, contact Microsoft Support.

- **Option 3:** The reseller can keep their customer relationship with the existing indirect provider and establish another indirect reseller relationship with another indirect provider.

Sample scenario 7: What if an indirect reseller wants to sell to a customer who is in a different region?

A partner in the CSP program can only sell to customers from the same region. For more information, see Cloud Solution Provider program regional markets and currencies.

Sample scenario 8: What if an indirect provider wants to establish a relationship with an indirect reseller in a different region?

A partner can only establish a relationship with a partner from the same region.

Next steps

- Partner with indirect resellers in the CSP program
- Indirect reseller tasks in Partner Center
- Enroll as a direct-bill partner

Multi-channel support - using other partners to support customer subscriptions purchased elsewhere

6/19/2020 • 2 minutes to read

Applies to

- Partner Center
- Partner Center for Microsoft Cloud for US Government

Appropriate roles

- Global admin
- User admin
- Sales agent

The Partner Center's multi-channel feature supports scenarios when a customer wants to hire a partner to manage and support a subscription they purchased elsewhere. Multi-channel support applies when the customer:

- Already purchased subscriptions directly from Microsoft or through the Advisor, Open, or EA programs.
- Purchased the subscriptions from a third party not in the Cloud Solution Provider program or not a Microsoft Syndication Partner. Customers can't switch existing license-based subscriptions to a different partner in the Cloud Solution Provider program-they must wait until the end of their subscription period or cancel before moving.

TO SUPPORT THESE SERVICES	DO THIS:
License-based services	To provide support for multi-channel accounts, you must request permissions from the customer to manage their subscriptions. For more information, see Request a reseller relationship with a customer.
Usage-based services	For a customer who already has a subscription to Microsoft Azure from another channel, such as Advisor, Open, or EA, you'll need to create a new Azure subscription in Partner Center, manually enter the subscription details, and then cancel the individual services or the entire subscription. Azure CSP can coexist with different channels. For a customer who already has a subscription to Microsoft Azure from another partner, for example, you can switch Azure services to the other partner. For more information, see Switch Azure subscriptions to a different partner.

IMPORTANT
A CSP partner cannot resell online services to another CSP partner currently. Microsoft continuously reviews policies and capabilities of all programs. Any announcements about feature releases will be announced through the usual communication channels, including the Partner Center.

Next steps

Work with other partners

- If you're an indirect reseller, see Partner with indirect providers.
- If you're an indirect provider, see Partner with indirect resellers.

Multi-partner support for customers who want to work with more than one partner

6/19/2020 • 2 minutes to read

Applies to

- Partner Center
- Partner Center for Microsoft Cloud for US Government

Appropriate roles

- Global admin
- User admin
- Sales agent

The Partner Center's multi-partner feature supports scenarios when a customer wants to work with more than one partner. For example, a customer may want to hire one partner for their expertise in Office 365, but hire a different partner who specializes in Microsoft Azure.

An Azure CSP tenant can include an additional Azure subscription from a different CSP partner.

To use the multi-partner feature in the Partner Center, invite the customer to give you delegated administration privileges. See Request a relationship with a customer for information about how to establish a relationship with a customer who is already working with a partner.

Multi-partner functionality does not:

- Change any of the customer's existing subscriptions
- Transition the customer's existing subscriptions or account ownership
- Change the terms or customer's obligations for any of their existing subscriptions
- Change the partner of record for a subscription

> **IMPORTANT**
> A partner in the CSP program cannot resell online services to another partner in the CSP program currently. Microsoft continuously reviews the policies and capabilities of all programs. Any news about feature releases or policy changes will be announced through the usual communications channels, including Partner Center announcements.

Support from Microsoft - when to escalate issues, how to report them, or how to check service health

6/19/2020 • 2 minutes to read

Applies to

- Partner Center
- Partner Center for Microsoft Cloud for US Government

If you encounter problems with a Microsoft service or with Partner Center, you can escalate to Microsoft for help, and track the issue until it's resolved.

Partner Center support - Get help and create tickets for all Partner Center programs.

Support on behalf of customers - Get help and report problems on your customer.

Check service health - Check if there are any current known service outages in Partner Center.

Get automated service notifications with our APIs - Cloud solution providers can get automated service notifications for their customer's services.

How to report problems with Partner Center and submit any log or diagnostics information

6/19/2020 • 2 minutes to read

Applies to

- Partner Center
- Partner Center for Microsoft Cloud for US Government

Contact Partner Center Support if you find problems or need help with Partner Center.

Report a problem with the Partner Center

1. From your **Partner Center** dashboard, select **Support** and then select **Partner support requests**.
2. Select **New request** and then search for the issue type that best describes your problem. Select the issue type and **Review solutions**.
3. Review the **Recommended solutions** page for steps or related documents that may help you solve your issue.
4. If the **Recommended solutions** solved your problem, you can select **return to the Dashboard**. If you still need help you can continue and **Provide issue details**.
5. Complete the **issue details** and then **Submit**. A Partner Support representative will follow up with you.

Send diagnostics

If an error occurs while you're on a Partner Center page, you may be prompted to gather log information. Select **Collect more information** from the link that drops down from the top of the page to open the Client Diagnostic tool. This tool gathers information that the Partner Support team needs to determine the cause of the error.

> **NOTE**
> On Partner Center pages that include **/pcv/** in the URL, you can open the tool manually to collect this information.

1. Go to the page with the issue.
2. Press **Ctrl+Alt+D** to open the Client Diagnostic tool.

You can preview the diagnostic information and then save it to a file that you can attach in your support request. To send us the information:

3. Review the information in the file before sending it as it can contain personally identifiable information that you may want to remove.

   > **NOTE**
   > In some browsers, the **Page View** section at the bottom of the **Preview** page may appear empty. This is OK.

4. Follow the on-screen instructions to save the file.
5. Attach the file to your support request.

Partner Support may ask you to run this tool several times so they can get the most up-to-date information.

Report a service problem on behalf of a customer - including when and how to do so

6/19/2020 • 5 minutes to read

Applies to

- Partner Center
- Partner Center for Microsoft Cloud for US Government

If your customer is experiencing a service problem that you can't resolve, and that meets the criteria described in Escalate problems to Microsoft, file a support ticket for them. This process is also useful for escalating billing issues or disputes, and for fraud concerns.

Submit a service request for a customer

1. From the **Partner Center** menu, select **Service requests** and then **Customer request**.
2. On the Customer requests page, search for the customer you want.
3. From the **New request** dropdown menu, select either **Azure** or **Office 365, Dynamics 365, Enterprise Mobility Suite**. You will be redirected to either the Microsoft Azure portal or the Office 365 admin center.

Microsoft Azure

> **IMPORTANT**
>
> When you need to create a service request for your customer in Azure, be aware of the following:
>
> - In order for you to create service requests for your customer in Azure, your indirect provider must grant you access to the customer's Azure account. This is different from administering on behalf of customers for Office 365.
> - Although the Helpdesk admin in Partner Center can't create service requests in the Azure service portal, what they can do is create a support group in the Azure service portal and give that group permissions to log support requests.

1. Select **New support request**.
2. Fill out the support request with the appropriate information, and then select **Create**:
   - In the **Basics** section of the support request, make sure to select **Cloud Solution Provider** in the **Support plan** field.
   - In the **Contact** information section of the support request, enter your information, not your customer's information.
3. Later, review your customer's service requests within the Microsoft Azure portal by selecting **Manage support requests**.

You may need to create a support request for a customer when you do not have administrator permissions for that customer. This could happen in one of two scenarios:

- You did not request administrator privileges when you first established the relationship.
- You manage a customer's Azure subscriptions and no others, which does not require you to have administrative permissions.

In either of these cases, you can use the following procedure to create a support request.

1. Copy the customer's domain name from their account page in Partner Center.
2. Go to https://portal.azure.com/[customerdomainname].
3. Select the Azure subscription that requires support.
4. Select **New support request**, and then follow the prompts to create the request.

Office 365, Microsoft Dynamics CRM Online, Enterprise Mobility Suite

1. In the **Create a service request** section, choose the appropriate support topic category. You may need to select **More...** to view additional topics.
2. Complete the service request form, and select **Submit**.

> **TIP**
>
> Make sure to include your contact information, not your customer's.

3. Later, review your customer's service requests by going to the Office 365 admin center and selecting **See all support tickets**.

Support for commercial marketplace products

Microsoft does not provide product support for commercial marketplace products. You'll need to contact the Independent Software Vendor (ISV) who published the product to get support.

To find the ISV's contact info:

1. On the **Marketplace** page, select the product you need help with.
2. On the product's page, you'll find support contact info. This may be one or more of the following:
   - A link to a support entry point on the ISV's website
   - A support email
   - A support contact phone number

FAQ

What is included as part of the Support Entitlement?

Service requests should be filed through Partner Center, and are available for Azure, Microsoft Office 365, Microsoft Dynamics CRM Online, and Enterprise Mobility Suite. As a partner participating in the Cloud Solution Provider program, you can expect priority response time to your major issues.

Support for your own partner tenant is not included as part of the CSP support benefit. However, Office 365, Microsoft Dynamics CRM Online, and Enterprise Mobility Suite do not charge a separate support subscription fee for partners or customers. Azure does charge a fee, but if you are entitled to Signature Cloud Support or other Microsoft Partner Network (MPN) benefits you may use these to pay that fee.

This benefit applies to all partners participating in the Cloud Solution Provider program, whether paid or on a trial period. Billing and subscription management support is also included as a free component of this package.

How quickly will I get an initial response?

Our initial response times depend on the severity of the incident submitted. The severity of an issue is determined by your indication of business impact when you submit a service request.

Initial response times for **technical break-fix incidents** are as follows:

- Critical Impact (severity A): 2 hours (Significant loss or degradation of services. Production services down.)
- Moderate Impact (severity B): 4 hour (Moderate loss or degradation of services. Production services partially impacted.)
- Minimal Impact (severity C): 8 hour (Minimal loss or degradation of services. Services still available or non-production services impacted.)

Initial response times are for English-speaking support only. Local language support is provided during business hours. For incidents that fall within the boundaries of the support entitlement but are not considered break-fix incidents, the initial response time may be up to one business day.

Can I submit a service request by phone?

No, phone support is not offered for this program.

What happens if I sign into the Azure portal and bypass Partner Center?

If you sign into the Microsoft Azure portal directly, you are viewing the center in your own context, not a customer's context. Therefore, you should only sign directly into the Microsoft Azure portal when you are creating a service request for your own subscriptions.

Your CSP program support entitlement does not provide for support on your own Partner subscription, so when creating a service request that concerns your own Partner subscription, you must provide your valid support plan entitlement. Examples include MPN contract ID, Premier, or a Azure support plan. Please refer to the Azure Support FAQ.

What happens if I sign into the Office 365 admin center portal and bypass Partner Center?

If you sign into the Office 365 admin center directly, you are viewing the center in your own context, not a customer's context. Therefore, you should only sign directly into the Office 365 admin center when you are creating a service request for your own subscriptions.

How do I get additional Dynamics 365 support?

If you are experiencing issues related to: Dynamics 365 Plan Subscriptions, Licensing, Billing, Finance & Operations, Dynamics 365 product licenses or you require further technical support:

Contact Dynamics Support

Read Microsoft Dynamics Support

Use APIs for automated service notifications for Azure Insights & Office 365 service communications

6/19/2020 • 2 minutes to read

Applies to

- Partner Center

Appropriate roles

- Admin agent
- Global
- Sales agent
- Helpdesk agent

Office 365 and Microsoft Azure each provide an API that partners can use to retrieve real-time service health, message center communications, and planned maintenance events. These APIs are publicly available, and partners can use them on behalf of their customers because of their delegated admin privileges.

These APIs are available for your developers:

Office 365 service communications API

Azure Insights REST API: code and API reference

Providing different types of support to your customers

6/19/2020 • 2 minutes to read

Applies to

- Partner Center
- Partner Center for Microsoft Cloud for US Government

Microsoft partner support guidance

Partners transacting in the CSP model are the trusted advisor to their customers and, if you are a direct bill partner, own the relationship end-to-end. Indirect resellers should work with their indirect providers to support customers. This relationship includes supporting your customers when they have questions or issues. By providing support to your customers, you have the opportunity to learn more about them and their business. This will help you identify new services and solutions that drive value.

To fulfill the support requirement, you may resell support from another company, outsource all or part of the support structure and/or set up a structure to provide support directly. You may charge for all or part of the support provided to customers. Be sure you explain to your customers the types of support you will provide, the service hours, contact method, and the pricing (if charging for support).

CSP customers can't create support tickets themselves. They need to contact you for support. CSP Partners are required to receive incoming support requests from their customers, diagnose issues to the best of your ability and then resolve issues that are within scope of the baseline support boundaries. If you are unable to resolve an issue, you can escalate issues to Microsoft via the following support vehicles:

- **Commercial** issue support is available to all partners in the CSP program
- **Technical** issue support is available through:
  - Premier Support for Partners (fee base)
  - Advanced Support for Partners (fee base)
  - Signature Cloud Support (included with Gold/Silver competency)

Providing billing, subscription management, and technical support

Each online service has specific and detailed requirements for providing billing, subscription management, and technical support to customers. For more information, see the following documents.

- Dynamics 365 subscriptions sold through CSP
- Azure subscriptions sold through CSP
- Microsoft Office 365 subscriptions sold through CSP

Check service health for a customer reporting a potential service problem or outage

6/19/2020 • 2 minutes to read

Applies to

- Partner Center

Appropriate roles

- Admin agent
- Global admin
- Helpdesk agent
- Sales agent

One of the first things you can do when a customer is experiencing problems with a service is to check the service health.

Check service health

1. Select the **Customer** that is having the issue from the **Customer list**.
2. Select **Service management** from the left menu. This will list the services provisioned for the customer and the service health for each. Partners can click the service they are interested in to get more information.

> **NOTE**
> Service health links on the **Service management** pages will take the partner to either the M365 admin center or the Azure portal as **delegated admin**. Once the partner gets to either destination, the partner can navigate to the service health pages in either portal for more details about the outage.

During a service outage, Microsoft provides regular updates as we work to address the problem. These notifications are also displayed on either the Microsoft Azure portal or the Microsoft 365 admin Center.

If the problem persists after the end of the service outage, submit a service request. See Report problems on behalf of a customer.

Microsoft 365 and Microsoft Azure each provide APIs that partners can use to retrieve real-time service health, message center communications, and planned maintenance events.

Provide billing support for your customers and help answer their billing questions

6/19/2020 • 2 minutes to read

Applies to

- Partner Center
- Partner Center for Microsoft Cloud for US Government

Appropriate roles

- Global admin
- User admin
- Helpdesk agent
- Billing admin
- Sales agent

You own the billing relationship with your customers and you're responsible for answering billing-related questions from your customers.

- You are responsible for on-time payment to Microsoft.
- We recommend establishing a clear collections policy with customers that details your collections process and when access to the customer's subscriptions, services, or software will be impacted.
- If necessary, you can disable your customer's access to a product for non-payment.

Microsoft partner support guidance

Partners transacting in the CSP model are the trusted advisor to their customers and own the relationship end-to-end, including support when their customer has a question or issue. Through support touch points partners can learn more about the customer, and their business, to identify new services and solutions that drive value.

To fulfill the support requirement, the partner may resell support from another entity, they may outsource all or part of their support structure and/or they may set up a structure to provide support directly. The partner may charge for all or part of the support provided to customers. The partner should articulate to their customers the support they will provide, the service hours and contact method, as well as the pricing (if charging for support).

> **NOTE**
> If you are not a CSP and have questions about customer billing, please see the specific portal for the appropriate products or services.

Partners are required to receive incoming support requests from customers, diagnose issues to the best of the partner's ability and then resolve issues that are within scope of the baseline support boundaries. If the partner is unable to resolve an issue, they can escalate issues to Microsoft via the following support vehicles:

- **Commercial** issue support is available to all partners in the CSP program
- **Technical** issue support is available through:
  - Premier Support for Partners (fee base)

- Advanced Support for Partners (fee base)
- Signature Cloud Support (included with Gold/Silver competency)

Providing billing, subscription management, and technical support

Each online service has specific and detailed requirements for providing billing, subscription management, and technical support to customers. For more information, see:

- Dynamics 365 subscriptions sold through CSP
- Azure subscriptions sold through CSP
- Office 365 subscriptions sold through CSP

Provide technical support to help customers configure, manage, and use their subscriptions

6/19/2020 • 2 minutes to read

Applies to

- Partner Center
- Partner Center for Microsoft Cloud for US Government

Appropriate roles

- Global admin
- User admin
- Helpdesk agent
- Admin agent

As a Cloud Solution Provider partner, you have Delegated Admin Privileges that give you access to your customers' environments. These privileges provide you with the ability to directly support, configure, and manage your customers' subscriptions.

In Partner Center, you can:

- View customer service health
- View customer service incidents

Perform admin tasks for your customers

1. From the **Partner Center** menu, select **Customers**. Choose your customer from the list.
2. In the customer menu, select **Service Management**.
3. In the **Administer services** section, choose the service you need to work in to open the management portal for the service.
4. If you find a problem with a customer's account, like services being down or a degraded experience, start by checking the service health. See Check service health.
5. To escalate an ongoing problem to Microsoft, file a service request. See Report problems on behalf of a customer.

Microsoft partner support guidance

Partners transacting in the CSP model are the trusted advisor to their customers and own the relationship end-to-end, including support when their customer has a question or issue. Through support touch points partners can learn more about the customer, and their business, to identify new services and solutions that drive value.

To fulfill the support requirement, the partner may resell support from another entity, they may outsource all or part of their support structure and/or they may set up a structure to provide support directly. The partner may charge for all or part of the support provided to customers. The partner should articulate to their customers the support they will provide, the service hours and contact method, as well as the pricing (if charging for support).

Partners are required to receive incoming support requests from customers, diagnose issues to the best of the partner's ability and then resolve issues that are within scope of the baseline support boundaries. If the partner is unable to resolve an issue, they can escalate issues to Microsoft via the following support vehicles:

- **Commercial** issue support is available to all partners in the CSP program
- **Technical** issue support is available through:
  - Premier Support for Partners (fee-based)
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  - Signature Cloud Support (included with Gold/Silver competency)

Providing billing, subscription management, and technical support

Each online service has specific and detailed requirements for providing billing, subscription management, and technical support to customers. For more information, see:

- Dynamics 365 subscriptions sold through CSP
- Azure subscriptions sold through CSP
- Office 365 subscriptions sold through CSP

Customer communication from Microsoft

6/19/2020 • 2 minutes to read

Applies to

- Partner Center
- Partner Center for Microsoft Cloud for US Government

In general, we expect all communications with the customer to come from the Cloud Solution Provider partner. Because you own the customer billing relationship, Microsoft will not send communications directly to your customers related to their subscriptions.

Microsoft may communicate directly with customers about service incidents or other operational information.

For customers that already have existing commercial relationships with Microsoft, Microsoft will continue to communicate directly with them about their non-CSP products and services.

Customer self-support through Microsoft Office 365 admin center or through the Azure portal

6/19/2020 • 2 minutes to read

Applies to

- Partner Center
- Partner Center for Microsoft Cloud for US Government

Customers can sign into their own Microsoft Office 365 admin center or into the Azure portal to manage their own accounts:

- View in-product communications and notifications, such as service health information, in the Message Center.
- Perform all the service configuration and admin tasks as if they had purchased directly from Microsoft. This includes configuring Exchange Online, SharePoint Online, Skype for Business, or other services that they have purchased.

To purchase additional subscriptions or cancel their subscriptions, customers should contact their Cloud Solution Provider partner. Customers cannot change their own subscriptions directly with Microsoft.

When customers need help with products, they can find product resources on Support. We encourage partners to point their customers to these resources as a first step.

Escalate problems to Microsoft and learn which issues are more-suited to Microsoft escalation

6/19/2020 • 2 minutes to read

Applies to

- Partner Center
- Partner Center for Microsoft Cloud for US Government

Appropriate roles

- Admin agent
- Global admin
- Sales agent
- Helpdesk agent

It is expected that you will solve problems on behalf of your customers. Your first steps should be to check service health for existing, documented problems. If that doesn't address the customer issue, then you can use your admin privileges to troubleshoot the software, settings, and configuration.

However, there are several categories of issues that you will need to hand off to Microsoft to fix:

- Undocumented problems with services that aren't operating according to service descriptions.
- Unavailable services
- Bugs and other irregularities that affect service appearance or operation
- Large scale network disruptions
- Regional issues with multi-tenant impact

Submit a support request

1. Sign into the Partner Center dashboard.
2. From the Partner Center menu, select **Customers**, then select the customer who needs support.
3. Select **Service management** and select **Service requests**.
4. Select **New request** and then select **Microsoft Office 365**.
5. You are taken to the Office 365 portal where you need to sign in using your Partner Center credentials.
6. Select **Support**, **New service request** from left hand menu.
7. Select the support topic.

> **NOTE**
> It is important to start from the Partner Center dashboard so that the relationship between partner and customer is maintained.

For information on reporting problems on behalf of the customer, see Report problems on behalf of a customer.

Partner security requirements for partners using Partner Center or Partner Center APIs

6/19/2020 • 8 minutes to read

Applies to

- All partners in the Cloud Solution Provider program
  - Direct bill
  - Indirect provider
  - Indirect reseller
- All Control Panel Vendors
- All Advisors

Appropriate users

- All enabled users including guest users

Greater privacy safeguards and security are among our top priorities. We know that the best defense is prevention and that we are only as strong as our weakest link. That is why we need everyone in our ecosystem to act and ensure appropriate security protections are in place. To help safeguard partners and customers, we are introducing a set of mandatory security requirements for Advisors, Control Panel Vendors, and partners participating in the Cloud Solution Provider program.

Overview

Partners are required to enforce multi-factor authentication for all user accounts in their partner tenant. The terms associated with the partner security requirements have been added to the Microsoft Partner Agreement. As it relates to Advisors, the same contractual requirements will be in place.

Partners who do not implement the mandatory security requirements will not be able to transact in the Cloud Solution Provider program or manage customer tenants leveraging delegated admin rights, once these requirements are enforced. In addition, partners who do not implement the security requirements may put their participation in programs at risk.

To protect you and your customers, we are requiring partners to take the following actions immediately:

1. **Enable Multi-Factor Authentication (MFA) for all user accounts in your partner tenant**. All user accounts in your partner tenant(s) must be challenged by multi-factor authentication (MFA) when they sign into Microsoft commercial cloud services or when they transact in the Cloud Solution Provider program through Partner Center or via APIs.

2. **Adopt the Secure Application Model framework**. Adopt the Secure Application Model framework. All partners integrating with Partner Center API must adopt the Secure Application Model framework for any app + user auth model applications.

> **IMPORTANT**
>
> We strongly recommend that partners implement the Secure Application Model for integrating with a Microsoft API such as Azure Resource Manager, Microsoft Graph, or leveraging automation such as PowerShell using user credentials, to avoid any disruption when MFA is enforced.

Enabling Multi-Factor Authentication (MFA) and adopting the Secure Application Model framework will help protect your infrastructure and safeguard your customer's data from potential security risks such as identify theft or other fraud incidents.

Actions that you need to take

To comply with the partner security requirements, you must enforce multi-factor authentication for each user account in your partner tenant. You can do this one of the way following ways:

- Implementing Azure AD security defaults.
- Purchasing Azure Active Directory Premium for each user account. For more information, see Planning a cloud-based Azure Multi-Factor Authentication deployment.
- Using a third-party solution to enforce multi-factor authentication for each user account in your partner tenant. To ensure the solution will provide the expected solution, see how the security requirements will be enforced.

> **NOTE**
> Although multi-factor authentication is not contractually required for a sovereign cloud (21Vianet, US Government, and Germany) it is highly recommended you adopt these security requirements.

Security defaults

Security defaults policy is one of the options that partners can choose to implement MFA for the security requirements depending on their business needs. It offers a basic level of security enabled at no extra cost. Review how to enable MFA for your organization with Azure AD and the key considerations below before enabling the security defaults.

- Baseline policies will stay for the next couple of months, and deprecated targeting at the end of Feb 2020.
- Partners who already adopted baseline policies need to take action to transition to security defaults.
- Security defaults are the general availability replacement of the preview baseline policies. Once a partner enables the security defaults, they will no longer be able to enable baseline policies.
- With security defaults, all policies will be enabled at once.
- For partners who use conditional access, security defaults will not be available.
- Blocking legacy authentication will not be enforced for partners at this time. However, as most events related to compromised identities come from sign-in attempts using legacy authentication, partners are encouraged to move away from these older protocols.
- Azure AD Connect synchronization account is excluded from security defaults.
- For detailed information, read Enable Multi-Factor Authentication for your organization and Azure Active Directory security defaults.

> **NOTE**
> Azure AD security defaults is the evolution of the baseline protection policies simplified. If you have already enabled the baseline protection policies, then it is highly recommended that you enable security defaults.

To transition from baseline policies to security defaults, read What are security defaults?.

Consideration

Because these requirements apply to all user accounts in your partner tenant, you need to consider several things to ensure a smooth deployment, including identifying user accounts in Azure Active Directory that cannot perform multi-factor authentication, as well as applications and devices used by your organization that do not support modern authentication.

Prior to performing any action, we recommend you identify the following:

Do you have an application or device that does not support the use of modern authentication?

When you enforce multi-factor authentication legacy authentication use protocols such as IMAP, POP3, SMTP, etc. will be blocked because they don't support multi-factor authentication. To address this limitation a feature known as app passwords can be used to ensure the application or device will still authenticate. You should review the considerations for using app passwords documented here to determine if they can be used in your environment.

Do you have users using Office 365 provided by licenses associated with your partner tenant?

Prior to implementing any solution, we recommend that you determine what version of Microsoft Office is being used by users in your partner tenant. Review plan for multi-factor authentication for Office 365 Deployments before taking any action. There is a chance your users will experience connectivity issues with applications like Outlook. Before enforcing multi-factor authentication, it is important to ensure that Outlook 2013 SP1, or later, is being used and that your organization has modern authentication enabled. See Enable modern authentication in Exchange Online for more information.

To enable modern authentication for any devices running Windows, that have Microsoft Office 2013 installed, you will need to create two registry keys. See Enable Modern Authentication for Office 2013 on Windows devices.

Is there a policy preventing any of your users from using their mobile devices while working?

It is important to identify any corporate policy that prevents employees from using mobile devices while working because it will influence what multi-factor authentication solution you implement. There are solutions, such as the one provided through the implementation of Azure AD security defaults, that only allow the use of an authenticator app for verification. If your organization has a policy preventing the use of mobile devices, then consider one of the following options:

- Deploy a time-based one-time base password (TOTP) application that can run on secure system
- Implement a third-party solution that enforces multi-factor authentication for each user account in the partner tenant that provides the most appropriate verification option
- Purchase Azure Active Directory Premium licenses for the impacted users

What automation or integration do you have to leverage user credentials for authentication?

Since the requirement is to enforce MFA for each user, including service accounts, in your partner directory any automation or integration that leverages user credentials for authentication will be impacted. So, it important that you identify what accounts are being used in these situations. See the following list of sample applications or services to consider:

- Control panel used to provision resources on behalf of your customers
- Integration with any platform that is used for invoicing (as it relates to the CSP program) and supporting your customers
- PowerShell scripts that utilize the Az, AzureRM, Azure AD, MS Online, etc. modules

The above list is not comprehensive. So, it important that you perform a complete assessment of any application or service in your environment that leverages user credentials for authentication. To contend with the requirement for multi-factor authentication, you should implement the guidance in the Secure Application Model framework where possible.

Accessing your environment

To better understand what or who is authenticating without being challenged for multi-factor authentication, we recommend you review the sign-in activity. Through Azure Active Directory Premium, you can leverage the sign-in report. See sign-in activity reports in the Azure Active Directory portal for more information. If you do not have Azure Active Directory Premium, or you are looking for a way obtain this through PowerShell, then you will need to leverage the Get-PartnerUserSignActivity cmdlet from the Partner Center PowerShell module.

How the requirements will be enforced

The partner security requirements will be enforced by Azure Active Directory, and in turn Partner Center, by checking for the presence of the MFA claim to identify that multi-factor authentication verification has taken place. Starting November 18, 2019, Microsoft will activate additional security safeguards (previously known as "technical enforcement") to partner tenants.

Upon activation, users in the partner tenant will be requested to complete multi-factor authentication (MFA) verification when performing any admin on behalf of (AOBO) operations. We will continue to extend the scope of the security safeguards to additional scenarios and user roles, providing partners with advance notice. For more information, please refer to this document, which will be updated frequently. Partners who have not met the requirements should implement these measures as soon as possible to avoid any business disruptions.

If you are using Azure Multi-Factor Authentication or Azure AD security defaults, there are no additional actions you need to take.

When using a third-party multi-factor authentication solution, there is a chance the MFA claim may not be issued. If this claim is missing, Azure Active Directory will not be able determine if the authentication request was challenged by multi-factor authentication. For information on how to verify your solution is issuing the expected claim, read Testing the Partner Security Requirements.

IMPORTANT

If your third-party solution does not issue the expected claim, then you will need to work with the vendor who developed the solution to determine what actions should be taken.

Resources and support

See the following resources for support and sample code:

- Partner Center Security Guidance Group community: The Partner Center Security Guidance Group community is an online community where you can learn about upcoming events and ask any questions that you might have.
- Partner Center .NET Samples: This GitHub repository contains samples, developed using .NET, that will demonstrate how you can implement the Secure Application Model framework.
- Partner Center Java Samples: This GitHub repository contains samples, developed using Java, that will demonstrate how you can implement the Secure Application Model framework.
- Partner Center PowerShell - Multi-Factor Authentication: This Multi-Factor Authentication article provides details on how to implement the Secure Application Model framework using PowerShell.

Mandating Multi-factor Authentication (MFA) for your partner tenant

6/19/2020 • 15 minutes to read

Applies to

- All partners in the Cloud Solution Provider program
  - Direct bill
  - Indirect provider
  - Indirect reseller
- All Advisors

Affected roles

- Admin agent
- Sales agent
- Helpdesk agent
- Billing administrator
- Global administrator

The intent of this feature is to help partners secure their access to customer resources against credentials compromise. Partners are required to enforce Multi-factor Authentication(MFA) for all user accounts in their partner tenant including the guest user, with this feature these partner roles will be mandated to complete MFA verification for the following areas:

- Partner Center Dashboard (Starting May 1, 2020)
- Partner Center API (Starting May 1, 2020)
- Partner Delegated Administration

Greater and ongoing security and privacy safeguards are among our top priorities and we continue to help partners protect their customers and tenants. All partners participating in the Cloud Solution Provider (CSP) program, Control Panel Vendors (CPVs) and Advisors should implement the Partner Security Requirements to stay compliant.

Microsoft began the activation of additional security safeguards for partner tenants. This activation of safeguards can help partners secure their tenants and their customers by mandating multi-factor authentication (MFA) verification to prevent unauthorized access.

We successfully completed the activation for partner Delegated Administration capabilities to all partner tenants. To further help protect partners and customers, starting May 1, 2020, we will begin the activation for Partner Center transactions in CSP, helping partners protect their businesses and customers from identity-theft related incidents.

This documentation provides partners with detailed experience and guidance regarding the activation of security safeguards.

Partner Center dashboard

Certain pages in the Partner Center dashboard will be MFA-protected, including:

- All pages under the **Customers** tab, e.g all pages that can be accessed through the following URL:

https://partner.microsoft.com/commerce/*

- All pages under the **Support > Customer requests** tab, e.g the page accessed under https://partner.microsoft.com/dashboard/support/csp/customers/*
- Billing page

If you try to access any of these pages and you haven't completed MFA verification earlier, you will be required to do so.

> **NOTE**
>
> Other pages on Partner Center such as Overview page, Service Health Status check page will not be MFA-protected.

The following user types are authorized to access these MFA-protected pages and are therefore affected by this feature

MFA PROTECTED PAGES	ADMIN AGENTS	SALES AGENTS	HELPDESK AGENTS	GLOBAL ADMINISTRATOR	BILLING ADMINISTRATOR
All pages under Customers tab	x	x	x		
All pages under Support > Customer requests tab	x		x		
Billing page	x			x	x

Examples

To illustrate how verification works, consider the following two examples.

Example 1: Partner has implemented Azure AD MFA

1. Jane works for CSP Contoso. Contoso has implemented MFA for all their users under Contoso partner tenant using AAzure Active Directory (Azure AD) MFA.
2. Jane starts a new browser session and navigates to Partner Center dashboard overview page (which isn't MFA-protected). Partner Center redirects Jane to Azure AD to sign in.
3. Due to the existing Azure AD MFA setup by Contoso, Jane is required to complete MFA verification. Upon successful sign in and MFA verification, Jane is redirected back to Partner Center dashboard overview page.
4. Jane tries to access one of the MFA-protected pages in Partner Center. Since Jane has already completed MFA verification during sign-in earlier, Jane can access the MFA-protected page without being required to go through MFA verification again.

Example 2: Partner has implemented third-party MFA using identity federation

1. Trent works for CSP Wingtip. Wingtip has implemented MFA for all their users under Wingtip partner tenant using third-party MFA, which is integrated with Azure AD via identity federation.
2. Trent starts a new browser session and navigates to Partner Center dashboard overview page (which isn't MFA-protected). Partner Center redirects Trent to Azure AD to sign in.
3. Since Wingtip has setup identity federation, Azure AD redirects Trent to the federated identity provider to complete sign-in and MFA verification. Upon successful sign in and MFA verification, Trent is redirected back to Azure AD and then to Partner Center dashboard overview page.
4. Trent tries to access one of the MFA-protected pages in Partner Center. Since Trent has already completed MFA verification during sign-in earlier, Trent can access the MFA protected page without being required to go

through MFA verification again.

Example 3: Partner hasn't implemented MFA

1. John works for CSP Fabrikam. Fabrikam hasn't implemented MFA for any user under Fabrikam partner tenant.
2. John starts a new browser session and navigates to Partner Center dashboard overview page (which isn't MFA-protected). Partner Center redirects John to Azure AD to sign in.
3. Since Fabrikam hasn't implemented MFA, John isn't required to complete MFA verification. Upon successful sign in, John is redirected back to Partner Center dashboard overview page.
4. John tries to access one of the MFA-protected pages in Partner Center. Since John hasn't completed MFA verification, Partner Center redirects John to Azure AD to complete MFA verification. Since this is the first time John is required to complete MFA, John is also requested to register for MFA. Upon successful MFA registration and MFA verification, John can now access the MFA-protected page.
5. Another day before Fabrikam implementing MFA for any user, John starts a new browser session and navigates to Partner Center dashboard overview page (which isn't MFA-protected). Partner Center redirects John to Azure AD to sign in without MFA prompt.
6. John tries to access one of the MFA-protected pages in Partner Center. Since John hasn't completed MFA verification, Partner Center redirects John to Azure AD to complete MFA verification. Since John has registered MFA, so this time he is only asked to complete the MFA verification.

> **NOTE**
>
> Action: Company administrator should implement MFA now via any of those options suggested by Partner Center.

Partner Center API

Partner Center API supports both App-only authentication and App+User authentication.

When App+User authentication is used, Partner Center will require MFA verification. More specifically, when a partner application wants to send an API request to Partner Center, it must include an access token in the Authorization header of the request.

> **NOTE**
>
> Secure Application Model is a secure, scalable framework for authenticating CSP partners and CPVs through the Microsoft Azure MFA architecture when you calling Partner Center API, you need to implement it before enabling MFA on your tenant.

When Partner Center receives an API request with an access token obtained using App+User authentication, the Partner Center API will check for the presence of the *MFA* value in the *Authentication Method Reference (AMR)* claim. You can use a JWT decoder to validate whether an access token contains the expected authentication method reference (AMR) value or not:

```
{
  "aud": "https://api.partnercenter.microsoft.com",
  "iss": "https://sts.windows.net/df845f1a-7b35-40a2-ba78-6481de91f8ae/",
  "iat": 1549088552,
  "nbf": 1549088552,
  "exp": 1549092452,
  "acr": "1",
  "amr": [
    "pwd",
    "mfa"
  ],
  "appid": "23ec45a3-5127-4185-9eff-c8887839e6ab",
  "appidacr": "0",
  "family_name": "Adminagent",
  "given_name": "CSP",
  "ipaddr": "127.0.0.1",
  "name": "Adminagent CSP",
  "oid": "4988e250-5aee-482a-9136-6d269cb755c0",
  "scp": "user_impersonation",
  "tenant_region_scope": "NA",
  "tid": "df845f1a-7b35-40a2-ba78-6481de91f8ae",
  "unique_name": "Adminagent.csp@testtestpartner.onmicrosoft.com",
  "upn": "Adminagent.csp@testtestpartner.onmicrosoft.com",
  "ver": "1.0"
}
```

If the value is present, Partner Center concludes that MFA verification was completed and processes the API request. If the value isn't present, Partner Center API will reject the request with the following response:

```
HTTP/1.1 401 Unauthorized - MFA required
Transfer-Encoding: chunked
Request-Context: appId=cid-v1:03ce8ca8-8373-4021-8f25-d5dd45c7b12f
WWW-Authenticate: Bearer error="invalid_token"
Date: Thu, 14 Feb 2019 21:54:58 GMT
```

When App-Only authentication is used, the APIs which support App-Only authentication will be continuously working without requiring MFA.

Partner Delegated Administration

Using service portals

Partner accounts, including Admin Agents and Helpdesk Agents, can use their Partner Delegated Admin Privileges to manage customer resources through Microsoft Online Services Portals, command-line interface (CLI), and APIs (using App+User authentication).

When accessing Microsoft Online Services Portals using the Partner Delegated Admin Privileges(Admin-On-Behalf-Of) to manage customer resources, many of these portals require the partner account to authenticate interactively, with the customer Azure Active Directory tenant set as the authentication context - the partner account is required to sign into the customer tenant.

When Azure Active Directory receives such authentication requests, it will require the partner account to complete MFA verification. There are two possible user experiences, depending on whether the partner account is a managed or federated identity:

- If the partner account is a **managed** identity, Azure Active Directory will directly prompt the user to complete MFA verification. If the partner account has not registered for MFA with Azure Active Directory before, the user will be asked to complete MFA registration first.
- If the partner account is a **federated** identity, the experience is dependent on how the partner administrator

has configured federation in Azure Active Directory. When setting up federation in Azure Active Directory, the partner administrator can indicate to Azure Active Directory whether the federated identity provider supports MFA or not. If so, Azure Active Directory will redirect the user to the federated identity provider to complete MFA verification. Otherwise, Azure Active Directory will directly prompt the user to complete MFA verification. If the partner account has not registered for MFA with Azure Active Directory before, the user will be asked to complete MFA registration first.

The overall experience is similar to the scenario where an end customer tenant has implemented MFA for its administrators. For example, the customer tenant has enabled Azure AD security defaults, which requires all accounts with administrative rights to sign into the customer tenant with MFA verification, including Admin Agents and Helpdesk Agents. For testing purposes, partners can enable the Azure AD security defaults in the customer tenant and then try using Partner Delegated Administration Privileges to access the customer tenant.

> **NOTE**
>
> Not all Microsoft Online Service Portals require partner accounts to sign into the customer tenant when accessing customer resources using Partner Delegated Admin Privileges. Instead, they only require the partner accounts to sign into the partner tenant. An example is the Exchange Admin Center. Over time, we expect these portals to require partner accounts to sign into the customer tenant when using Partner Delegated Admin Privileges.

Using service APIs

Some Microsoft Online Services APIs (such as Azure Resource Manager, Azure AD Graph, Microsoft Graph, etc.) support partners using Partner Delegated Admin Privileges to programmatically manage customer resources. To leverage Partner Delegated Admin Privileges with these APIs, the partner application must include an access token in the API request Authorization header, where the access token is obtained by having a partner user account to authenticate with Azure AD, with the customer Azure AD set as the authentication context. The partner application is required to have a partner user account sign in to the customer tenant.

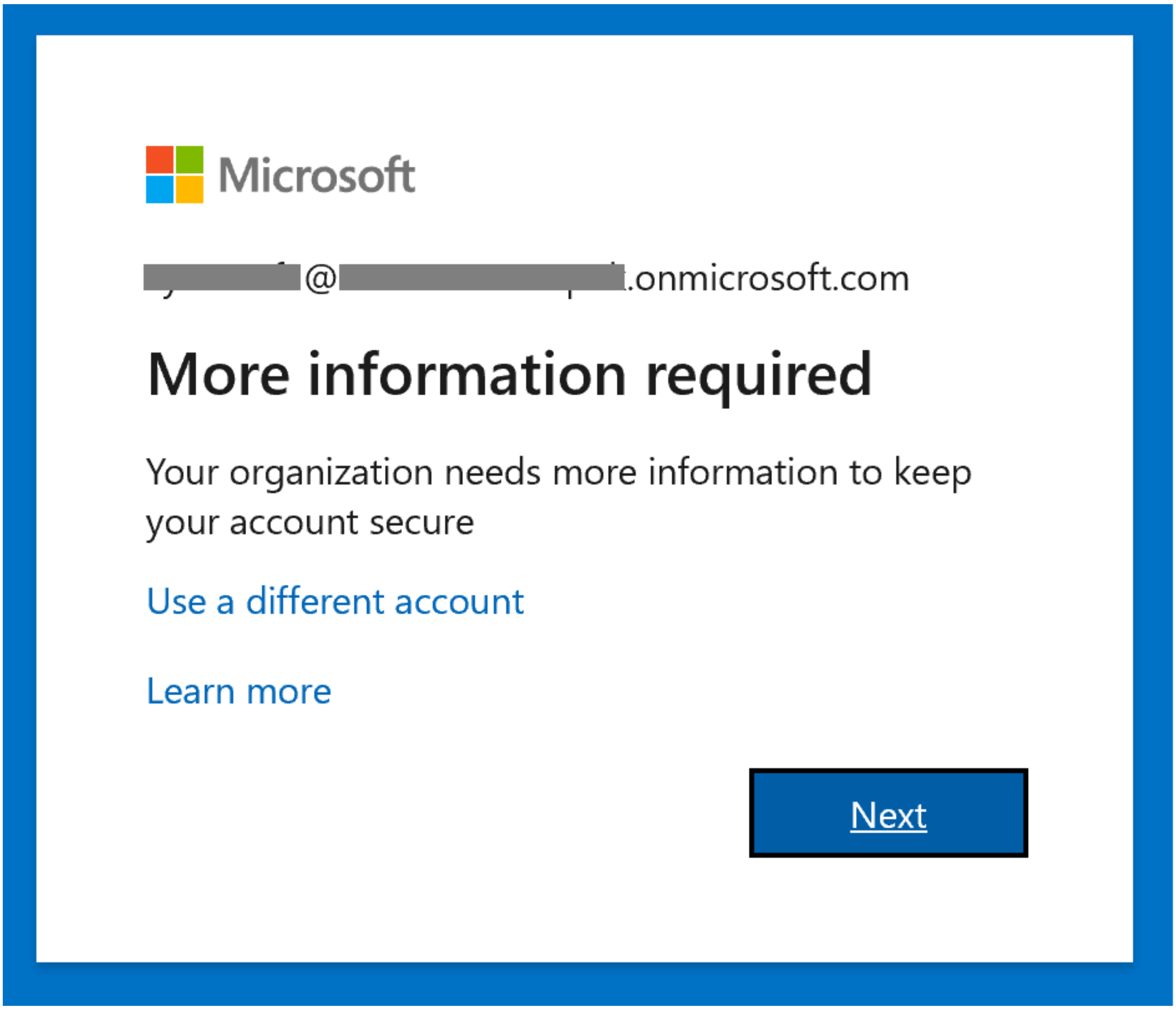
When Azure AD receives such as authentication request, Azure AD will require the partner user account to complete MFA verification. If the partner user account hasn't registered for MFA before, the user account will be prompted to complete MFA registration first.

All partner applications that are integrated with these APIs using Partner Delegated Admin Privileges are affected by this feature. To ensure partner applications can continue to work with these APIs without interruption:

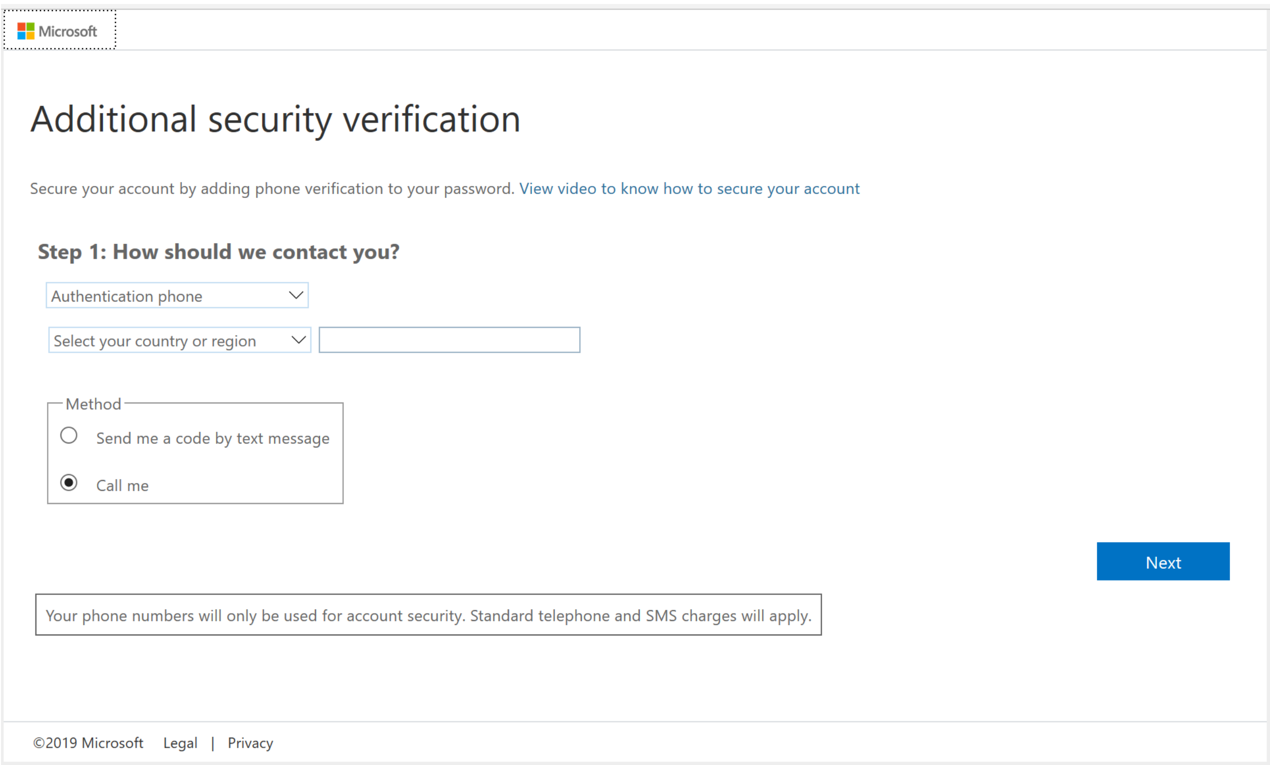
- Partner must avoid using non-interactive user authentication method with Azure AD to obtain the access token. When using non-interactive user authentication method such as Password Flow, Azure AD will not be able to prompt the user to complete MFA verification. Partner must switch to using interactive user authentication method such as OpenID Connect flow instead.
- During interactive user authentication method, partner should use a partner user account that is already enabled for MFA. Alternatively, when prompted by Azure AD, partner can complete MFA registration and MFA verification during sign-in.
- This is similar to the scenario where an end customer tenant has implemented MFA for its administrators. For example, the customer tenant has enabled Azure AD security defaults, which requires all user accounts with administrative rights to sign into the customer tenant with MFA verification, including Admin Agents and Helpdesk Agents. For testing purposes, partners can enable the Azure AD security defaults in the customer tenant and then try using Partner Delegated Administration Privileges to programmatically access the customer tenant.

MFA registration experience

During MFA verification, if the partner account hasn't registered for MFA before, Azure AD will prompt the user to complete MFA registration first:



After clicking **Next**, the user will be asked to choose from a list of verification methods.



Upon successful registration, the user is then required to complete MFA verification based on the verification chosen by the user.

Request for technical exception

Partners can apply for technical exception to suppress MFA verification if they are encountering technical issues with Microsoft Online Services and there are no feasible solution or workaround. Before doing so, review the following sections:

- List of common issues reported by partners
- How to submit a request for technical exception

List of common issues reported by partners

Before applying for technical exception, review the list of common issues reported by other partners to understand whether they are valid reasons for technical exception or not.

Issue 1: Partner needs more time to implement MFA for their partner agents

A partner hasn't started or is still in the process of implementing MFA for their partner agents who require access to Microsoft Online Services Portals using Partner Delegated Administration Privileges to manage customer resources. The partner needs more time to complete MFA implementation. Is this issue a valid reason for technical exception?

Answer: No. Partner needs to make plans to implement MFA for their users to avoid disruption.

> **NOTE**
>
> Even though the partner hasn't implemented MFA for their partner agents, the partner agents can still access Microsoft Online Services Portals using Partner Delegated Administration Privileges provided they can complete MFA registration and MFA verification when prompted during sign-in to customer tenant. Completing MFA registration does not automatically enable the user for MFA.

Issue 2: Partner has not implemented MFA for user accounts not using Delegated Admin Privileges

A partner has some users in their partner tenants who do not require access to Microsoft Online Services Portals to manage customer resources using Partner Delegated Administration Privileges. The partner is in the process of implementing MFA for these users and needs more time to complete. Is this issue a valid reason for technical exception?

Answer: No. Since these user accounts are not using Partner Delegated Administration Privileges to manage customer resources, they will not be required to sign in to customer tenant. They will not be affected by Azure AD requiring MFA verification during sign-in to customer tenant.

Issue 3: Partner has not implemented MFA for user service accounts

A partner has some user accounts in their partner tenants, which are being used by devices as service accounts. These are low privileged accounts which do not require access Partner Center nor Microsoft Online Services Portals to manage customer resources using Partner Delegated Administration Privileges. Is this issue a valid reason for technical exception?

Answer: No. Since these user accounts are not using Partner Delegated Administration Privileges to manage customer resources, they will not be required to sign in to customer tenant. They will not be affected by Azure AD requiring MFA verification during sign-in to customer tenant.

Issue 4: Partner cannot implement MFA using MS Authenticator App

A partner has "clean desk" policy, which does not permit employees bringing their personal mobile devices to their work area. Without access to their personal mobile devices, the employees cannot install the MS Authenticator App, which is the only MFA verification supported by Azure AD security defaults. Is this issue a valid reason for technical exception?

Answer: No, this isn't a valid reason for technical exception. The partner should consider following alternatives, so that their employees can still complete MFA verification when accessing Partner Center:

- Partner can also sign up for Azure AD Premium or third-party MFA solutions (compatible with Azure AD) which can provide additional verification methods.

Issue 5: Partner cannot implement MFA due to the use of legacy authentication protocols

A partner has some partner agents who are still using legacy authentication protocols, which aren't MFA compatible. For example, the users are still using Outlook 2010, which is based on legacy authentication protocols. Enabling MFA for these partner agents will disrupt the use of legacy authentication protocols.

Answer: No, this isn't a valid reason for technical exception. Partners are strongly encouraged to move away from the use of legacy authentication protocols because of potential security implications since these protocols cannot be protected with MFA verification and are much more susceptible to credential compromise. If moving away from the use of legacy authentication protocols is not an option, partners should consider signing up for Azure AD Premium, which supports the use of Application Passwords. Application Passwords are one-time system-generated passwords, and are usually stronger than human-generated passwords. By using Application Passwords, partners can implement MFA for their users, while falling back to Application Passwords for legacy authentication protocols only.

Read the post about the Basic Auth and Exchange Online to understand latest plan on supporting legacy authentication for Outlook, and follow the Exchange team blog to get the upcoming news.

> **NOTE**
>
> Even though the partner hasn't implemented MFA for their partner agents, the partner agents can still access Microsoft Online Services Portals using Partner Delegated Administration Privileges provided they can complete MFA registration and MFA verification when prompted during sign-in to customer tenant. Completing MFA registration does not automatically enable the user for MFA.

Issue 6: Partner has implemented third-party MFA that isn't recognized by Azure AD

A partner has implemented MFA for their users using a third-party MFA solution. However, the partner is unable to correctly configure the third-party MFA solution to relay to Azure AD that MFA verification has been completed during user authentication. Is this a valid reason for technical exception?

Answer: Yes, this issue may be considered as a valid reason for technical exception. Before submitting a request for technical exception, confirm with the third-party MFA solution provider that the MFA solution cannot be configured to flow the *authenticationmethodsreferences* claim (with value *multipleauthn*) to Azure AD to indicate that MFA verification has been completed during user authentication. While submitting a request for technical exception, you must provide details of the third-party MFA solution used, and indicate method of integration (such as through identity federation or use of Azure AD Custom Control), and provide the following information in the technical exception request as the supporting documents:

- The third-party MFA configurations.
- The result of Test the Partner Security Requirements running by the third-party MFA enabled account.
- The purchase order of the third-party MFA solution you are using or you plan to use.

How to submit a request for technical exception

To submit a request for technical exception:

1. Log in to Partner Center as Global Admin or Admin Agent.
2. Create a new partner service request by navigating to **Support** > **Partner support requests** and clicking **New request**.
3. Search for **MFA - Request for exception** in the search box; or select **CSP** from Category, then select **Accounts, Onboarding, Access** from Topic, then select **MFA - Request for exception** from the sub topic, then select **next step**.
4. Provide details requested to submit a service request for technical exception and click **Submit**.

Microsoft may take up to three working days to provide a response to request for technical exception.

Partner security requirements status - get answers and check reports about current status

6/19/2020 • 8 minutes to read

Applies to

- All partners in the Cloud Solution Provider program
  - Direct bill
  - Indirect provider
  - Indirect reseller
- All Control Panel Vendors
- All Advisors

Appropriate users

- All enabled users including guest users

Greater privacy safeguards and security are among our top priorities. We know that the best defense is prevention and that we are only as strong as our weakest link. That is why we need everyone in our ecosystem to act and ensure they have appropriate security protections in place. To help safeguard partners and customers, we're introducing a set of mandatory security requirements for Advisors, Control Panel Vendors, and partners participating in the Cloud Solution Provider program.

Starting August 1, 2019, all partners are required to enforce multi-factor authentication for all users, including service accounts, in their partner tenant. For more detailed information on the new security policies, read Partner Security Requirements.

We want to ensure that each user has an MFA challenge for every single authentication. This experience can be accomplished through one of the following ways:

- Implementing Azure AD Premium to ensure that MFA is enforced for each user
- Implementing the Azure AD security defaults
- Implementing a third-party solution to ensure MFA is enforced for each user

Partner security requirements status

This report can help you verify the security requirements status by providing a way to see where you might be falling short. The tracking is regularly updated.

> **NOTE**
>
> The Partner security requirements status report is supported only in Partner Center. It's not available in the Microsoft Cloud for US Government or Microsoft Cloud Germany. We strongly recommend that all partners transacting through a sovereign cloud (21Vianet, US Government, and Germany) adopt these new security requirements immediately. However, these partners are not required to meet the new security requirements effective August 1, 2019. Microsoft will provide additional details regarding the enforcement of these security requirements for sovereign clouds in the future.

Multi-factor authentication ("MFA") report

The Partner Center MFA report offers insights into partner MFA implementation by providing two types of metrics based on MFA configuration and Partner Center activities of the CSP tenant:

MFA configuration on a CSP tenant

This metric is related to the MFA configuration on a CSP tenant that captured and reported on a daily basis. It measures the percentage of enabled user accounts with MFA enforced using any of those MFA options. For example:

- Contoso is a CSP partner with 110 user accounts in the tenant, 10 of those user accounts are disabled.
- Out of the rest of 100 user accounts, 90 are enforced MFA using the provided MFA options. Hence, the metric shows 90%.

Partner Center activities with MFA

Each time your employees sign in to Partner Center to work or, through APIs, get or send data through Partner Center, their security status is challenged and tracked. Also included in security-status tracking, are your applications and any control panel vendor applications. The status displayed is for the previous seven days.

MFA verification completed by users

This metric is related to activities within the Partner Center dashboard. It measures the percentage of operations made by users who have completed MFA verification. For example:

- Contoso is a CSP partner with two admin agents, Jane and John.
- On the first day, Jane logged in to Partner Center dashboard without MFA verification and made three operations.
- On the second day, John logged in to Partner Center dashboard without MFA verification and made five operations.
- On the third day, Jane logged in to Partner Center dashboard with MFA verification and made two operations.
- There were no operations made by either agent on the remaining four days.
- Out of the 10 operations made in the 7-day window, two were made by user with MFA verification. Hence, the metric shows 20%.

Use the file **Portal requests without MFA** to understand which user logged in to Partner Center dashboard without having MFA verification, and time of last visit during the reporting window.

App+User authentication

This metric is related to the use of Partner Center API requests made using App+User authentication. It measures the percentage of API requests made using an access token with MFA claim. For example:

- Fabrikam is a CSP partner and has a CSP application that uses a mix of App+User authentication and app-only authentication methods.
- On the first day, the application made three API requests, which were backed by an access token obtained through App+User authentication method without MFA verification.
- On the second day, the application made five API requests, which were backed by an access token obtained using App-only authentication.
- On the third day, the application made two API requests, which were backed by an access token obtained using App+User authentication method with MFA verification.
- There were no operations made by either agent on the remaining four days.
- The five API requests on the second day, which were backed by an access token obtained through App-only authentication are omitted from the metric since it does not make use of user credentials. Out of the remaining five operations, two of them were backed by an access token obtained with MFA verification. Hence, the metric shows 40%.

If you want to understand which App+user activities results in the non 100% on this metric, use files:

- **API requests summary** to understand the overall MFA status by application.
- **All API requests** to understand the detail of each API requests made by users of your tenant, the result is

limited to maximum 10,000 most recent requests for better downloading experience.

What should I do if the metrics under MFA report aren't 100%

It is possible that the metrics under Partner Center MFA report may not be 100% for partners who have implemented MFA. To understand why, here are some factors to consider.

> **NOTE**
>
> You will need to work with somebody from your organization who is familiar with identity management and MFA implementation for your partner tenant.

Have you implemented MFA for your partner tenant?

If not, you need to implement MFA for your partner tenant first. For details on how to implement MFA, refer to article Partner Security Requirement.

Have you only recently completed MFA implementation?

The metrics are calculated on a daily basis and take into account operations performed in the last seven days. If you only recently completed MFA implementation for your partner tenant, the metrics may not be 100%.

Have some user accounts been excluded from MFA implementation?

Understand whether your current MFA implementation covers all user accounts or only some. Some MFA solutions are policy-based and support user exclusion, while others might require you to explicitly enable MFA on a per-user basis. Verify you have not excluded any user from your current MFA implementation. Any user account that is excluded and logs in to Partner Center to perform any CSP-related activity can cause the metrics to not be 100%.

Is MFA only required when certain conditions are met?

Understand whether your current implementation only enforces MFA under specific conditions only. Some MFA solutions provide flexibility to only enforce MFA when certain conditions are met. For example, user is accessing from unknown device or unknown location. A user, who is enabled for MFA but isn't required to complete MFA verification when accessing Partner Center, can cause the metrics to not be 100%.

> **NOTE**
>
> For partners who have implemented MFA using Azure AD security defaults, it is important to note that for non-admin user accounts multi-factor authentication will be enforced based on risk. Users will be prompted for MFA only during risky sign-in attempts (for example, user is signing in from a different location). In addition, users will have up to 14 days to register for MFA. Users who have not complete MFA registration will not be challenged for MFA verification during the 14-day period. Therefore, it is expected that the metrics may not be 100% for partners who have implemented MFA using Azure AD security defaults.

Are you using third-party MFA solution?

If you are using third-party MFA solution, identify how you are integrating it with Azure AD. In general, there are two methods, including federation and custom controls:

- **Identity federation** - When Azure AD receives an authentication request, Azure AD will redirect the user to the federated identity provider for authentication. Upon successful authentication, the federated identity provider will redirect the user back to Azure AD along with a SAML token. In order for Azure AD to recognize that the user has completed MFA verification when authenticating to the federated identity provider, the SAML token must include the *authenticationmethodsreferences* claim (with value *multipleauthn*). Check whether that the federated identity provider supports issuing such a claim. If so, check whether the federated identity provider has been configured to do so. If the claim is missing, Azure AD (and therefore Partner Center) will not know that the user has completed MFA verification and missing the claim can cause the metric to not be 100%.

- **Custom Control** - Azure AD Custom Control cannot be used to identify whether a user has completed MFA verification through a third-party MFA solution. As a result, any user who has completed MFA verification through a custom control will always appear to Azure AD (and in turn Partner Center) as not having completed MFA verification. Where possible, it is recommended that you switch to using Identity Federation as opposed to Custom Control when integrating with Azure AD.

Identify which users have logged into Partner Center without MFA

It may be helpful to identify which users are logging in to Partner Center without MFA verification and verify them against your current MFA implementation. You can use Azure AD sign-in report to find out whether a user has completed MFA verification or not. Azure AD sign-in report is currently only available to partners who have subscribed to Azure AD Premium or any O365 SKU, which includes Azure AD Premium (for example, EMS).

For more information

- Partner Center security guidance group community
- Partner Center security requirements
- Partner Center security requirements FAQ

Frequently asked questions about the partner security requirements

6/19/2020 • 19 minutes to read

Appropriate users

- All enabled users including guest users

This article contains some frequently asked questions for the partner security requirements.

Partner Security Requirements

What are the partner security requirements and why should partners implement?

Greater and ongoing security and privacy safeguards are among our top priorities and we continue to help partners protect their customers and tenants. We continue to see more sophisticated, increasing number of security attacks, primarily related to identity compromise incidents. As preventive controls play a key role in an overall defense strategy to thwart security attacks, we introduced mandatory security requirements in 2019. All partners participating in the Cloud Solution Provider (CSP) program, Control Panel Vendors, and Advisors should implement the requirements to stay compliant.

What are the key timelines and milestones?

The terms associated with these security requirements are included with the Microsoft Partner Agreement in 2019. You will need to implement these security requirements as soon as possible to stay compliant with your participation in the CSP program.

What will happen if I don't implement these partner security requirements?

The Microsoft Partner Agreement requires that you enforce multi-factor authentication for user accounts, and adopt the secure application model for interacting with the Partner Center API.

Partners who don't abide by these security practices may lose their ability to transact in the CSP program or manage customer tenants using delegate admin rights.

Does this apply to all geographies?

Yes, this applies to all geographies. We strongly recommend that all partners transacting through a sovereign cloud (21Vianet, US Government, and Germany) act and adopt these new security requirements immediately. However, these partners aren't required to meet the new security requirements effective August 1. Microsoft will provide additional details regarding the enforcement of these security requirements for sovereign clouds in the future.

Is it possible to get an exclusion for an account?

No, it is not possible to exclude any user account from the requirement of having MFA enforced. Given the highly privileged nature of being a partner, the Microsoft Partner Agreement requires that multi-factor authentication be enforced for each user account in your partner tenant.

How do I know if I have met the partner security requirements?

You need to complete below steps

- You will need to meet all requirements outlined in the partner security requirements
- You need to ensure all user accounts in your partner tenant have multi-factor authentication enforced.

To help identify the key areas where you can take actions, we are providing the security requirements status report that is available through Partner Center.

See partner security requirements status for more information on the status report.

Required Actions

What are the key actions I need to take to meet the requirements?

All partners in the CSP program (direct bill, indirect provider, and indirect reseller), Advisors, and Control Panel Vendors must meet the requirements.

1. **Enforce MFA for all users**

   All partners in the CSP program, Advisors, and Control Panel Vendors are required to enforce MFA for all users in their partner tenant.

   Additional considerations:

   - Indirect providers need to work with indirect resellers to onboard to Partner Center if they have not done so already and encourage their resellers to meet the requirements.
   - Azure MFA is being made available to all users in the partner tenant at no cost through Azure AD security defaults with the only verification method of an authenticator application that supports time-based one time passwords (TOTP).
   - Additional verification methods are available through the Azure Active Directory Premium SKUs, if other methods such as a phone call or text message are required.
   - Partners can also leverage a third-party MFA solution for each account when accessing Microsoft commercial cloud services.

2. **Adopt the Secure Application Model framework**

   All partners who have developed custom integration using any APIs (such as Azure Resource Manager, Microsoft Graph, Partner Center API, etc.) or implemented custom automation using tools such PowerShell, will need to adopt the Secure Application Model framework to integrate with Microsoft cloud services. Failure to do so may result in a disruption due to MFA deployment. The following resources provide an overview and guidance regarding how to adopt the model.

   - Secure Application Model overview
   - Partner Center: Secure Application Model guide
   - Partners in CSP program: .NET sample code for enabling Secure Application Model
   - Partners in CSP program: Java sample code for enabling Secure Application Model
   - Partner Center authentication document
   - Partner Center PowerShell Multi-Factor Authentication (MFA) document

   Consult with the vendor if you're using a control panel regarding the adoption of the Secure Application Model framework.

   Control panel vendors are required to onboard to Partner Center as control panel vendor and start implementing this requirement immediately. Refer to the Partner Center: Secure Application Model framework. Control panel vendors must accept and manage CSP partners' consent instead of credentials and purge all existing CSP partners' credentials.

Multi-Factor Authentication

What is Multi-Factor Authentication (MFA)?

MFA is a security mechanism though which individuals are authenticated through more than one required security and validation procedure. It works by requiring two or more of the following authentication methods:

- Something you know (typically a password)
- Something you have (a trusted device that is not easily duplicated, like a phone)

- Something you're (biometrics)

What is the cost of enabling MFA?

Microsoft provides MFA at no cost through the implementation of Azure AD security defaults. The only verification option available through this version of MFA is an authenticator application. If a phone call or SMS message is required, then an Azure Active Directory Premium license will need to be purchased. Alternatively, you can utilize a third-party solution to provide MFA for each user in your partner tenant - in this case, it is your responsibility to ensure your MFA solution is being enforced and that you're compliant.

What actions do I need to take if I already have an MFA solution?

Through these security requirements users in a partner tenant will be required to authenticate using MFA when accessing Microsoft commercial cloud services. Third-party solutions can be used to fulfill these requirements. Microsoft no longer provides validation testing to independent identity providers for compatibility with Azure Active Directory. To test your product for interoperability, refer to these guidelines.

> **IMPORTANT**
>
> When you're using a third-party solution, it is important to verfiy that the solution is issuing the authentication method reference (AMR) claim that includes the MFA value. See Testing the Partner Security Requirements for details on how validating your third-party solution is issuing the expected claim.

I use multiple partner tenants to transact. Do I need to implement MFA on them all?

Yes, you'll need to enforce MFA for each Azure Active Directory tenant associated with the CSP program or the Advisor program. To purchase an Azure Active Directory Premium license, a license must be purchased for the user in each Azure Active Directory tenant.

Does each user account in my partner tenant need to have MFA enforced?

Yes, each user will need to have MFA enforced. However, if you're using Azure AD security defaults, then there is no additional action required because that feature enforces MFA for all user accounts. Enabling security defaults is a free and easy way to ensure your user accounts are MFA-compliant and not impacted when MFA is enforced.

I am a direct bill partner with Microsoft. What do I need to do?

Direct bill Cloud Solution Provider partners must enforce MFA for each user in their partner tenant.

I am an indirect reseller and only transact though a distributor. Do I still have to do this?

All indirect resellers are required to enforce MFA for each user in their partner tenant. This is an action that the indirect reseller must perform.

I don't use the Partner Center API. Do I still need to implement MFA?

Yes, this security requirement is for all users including partner admin users and end users in a partner tenant.

Which third-party vendors provide MFA solutions compatible with Azure Active Directory?

When reviewing MFA vendors and solutions, partners must ensure the solution they choose is compatible with Azure Active Directory.

Microsoft no longer provides validation testing to independent identity providers for compatibility with Azure Active Directory. If you would like to test your product for interoperability, refer to these guidelines.

For more information, see the Azure AD federation compatibility list.

How can I test MFA in our integration sandbox?

The Azure AD security defaults feature should be enabled or alternatively you can leverage third-party solution that utilizes federation.

Will enabling MFA affect how I interact with my customer's tenant?

No. The fulfillment of these security requirements will not impact how you manage your customers. Your ability to perform delegated administrative operations will not be interrupted.

Are my customers subject to the partner security requirements?

No, it is not required that you enforce MFA for each user in your customer's Azure AD tenants. However, it is recommended that you work with each customer to determine how best to protect their users.

Can any user be excluded from this requirement?

No, each user, including service accounts, in your partner tenant will be required to authenticate using MFA.

Do the partner security requirements apply to the integration sandbox?

Yes, the partner security requirements apply to the integration sandbox. This means you'll need to implement the appropriate MFA solution for users in the integration sandbox tenant. It is recommended that you implement of Azure AD security defaults to provide MFA.

How do I configure an emergency access (break glass) account?

It is considered a best practice to create one or two emergency access accounts to prevent being inadvertently locked out of your Azure AD tenant. With respect to the partner security requirements, it is required that each user authenticate using MFA. This means you'll need to modify the definition of an emergency access account. It could be an account that is leveraging a third-party solution for MFA.

Is Active Directory Federation Service (ADFS) required if I am using a third-party solution?

No, it is not required to have Active Directory Federation Service (ADFS) if you're using a third-party solution. It is recommended that you work with the vendor of the solution determine what the requirements for their solution are.

Is it a requirement to enable Azure AD security defaults?

No, it is not required that you enable Azure AD security defaults.

Can conditional access be used to meet the MFA requirement?

Yes, you can use conditional access to enforce MFA for each user, including service accounts, in your partner tenant. However, given the highly privileged nature of being a partner we need to ensure that each user has an MFA challenge for every single authentication. This means you'll not be able to leverage feature of conditional access that circumvents the requirement for MFA.

Will the service account used by Azure AD Connect be impacted by the partner security requirements?

No, the service account used by Azure AD Connect will not be impacted by the partner security requirements. If you experience an issue with Azure AD Connect as result of enforcing MFA, then open a technical support request with Microsoft support.

Secure Application Model

Who should adopt the secure application model to meet the requirements?

Microsoft is introducing a secure, scalable framework for authenticating Cloud Solution Provider (CSP) partners and Control Panel Vendors (CPV) that leverages Multi-Factor Authentication. See the Secure Application Model guide for more information. All partners who have developed custom integration using any APIs (such as Azure Resource Manager, Microsoft Graph, Partner Center API, etc.) or implemented custom automation using tools such PowerShell, will need to adopt the Secure Application Model framework to integrate with Microsoft cloud services.

What is the Secure Application Model?

Microsoft is introducing a secure, scalable framework for authenticating Cloud Solution Provider (CSP) partners and Control Panel Vendors (CPV) that leverages Multi-Factor Authentication. See the Secure Application Model guide for more information.

How do I implement the Secure Application Model?

All partners who have developed custom integration using any APIs (such as Azure Resource Manager, Microsoft Graph, Partner Center API, etc.) or implemented custom automation using tools such PowerShell, will need to adopt the Secure Application Model framework to integrate with Microsoft cloud services. Failure to do so may result in a disruption due to MFA deployment. The following resources provide an overview and guidance regarding how to adopt the model.

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If you're using a control panel, then you need to consult with the vendor regarding the adoption of the Secure Application Model framework.

Control panel vendors are required to onboard to Partner Center as control panel vendor and start implementing this requirement immediately. Refer to the Partner Center: Secure Application Model framework. Control panel vendors must accept and manage CSP partners' consent instead of credentials and purge all existing CSP partners' credentials.

Does the Secure Application Model need to be implemented for the Partner Center API/SDK only?

By enforcing multi-factor authentication for all user accounts, any automation or integration that is intended to run non-interactively will be impacted. While the partner security requirements require you to enable the secure application model for the Partner Center API it can be leveraged to address the need for a second factor of authentication with automation and integration.

> **NOTE**
>
> Resources being accessed will need to support access token-based authentication.

I am using automation tools such as PowerShell. How do I implement the Secure Application Model?

You will need to implement the Secure Application Model if your automation is intended to be run non-interactively and relies on user credentials for authentication. See Secure Application Model | Partner Center PowerShell for guidance on how to implement this framework.

> **NOTE**
>
> Not all automation tools provide the ability to authenticate using access tokens. Post a message on the Partner Center Security Guidance group if you need help understanding what changes need to be made.

What user credentials should the application administrator provide when performing the consent process?

It is recommended that you use a service account that has been assigned the least privileged permissions. With respect to the Partner Center API this means you should use an account that has either been assigned to the Sales Agent or Admin Agents role.

Why should the application administrator not provide global admin user credentials when performing the consent process?

It is a best practice to use least privileged identifies that way you're reducing the risk. It is not recommended to use an account that has global admin privileges because that would be providing more permissions than what is required.

I am a CSP partner. How do I know if my Control Panel Vendor (CPV) is working on implementing the solution or not?

For partners using a Control Panel Vendor (CPV) solution to transact in the Cloud Solution Provider (CSP) program, it is your responsibility to consult with your CPV.

Who is a Control Panel Vendor (CPV)?

A Control Panel vendor is an independent software vendor that develops apps for use by CSP Partners to integrate with Partner Center APIs. A Control Panel vendor is not a CSP Partner with direct access to the Partner Center dashboard or APIs. A detailed description is available within the Partner Center: Secure Applications Model guide.

I am a CPV. How do I enroll?

To enroll as a control panel vendor (CPV), follow the guidelines provided here.

CPVs must contact CPVHelp@microsoft.com to receive the enrollment link and provide a Microsoft employee sponsor who has a business relationship with the CPV or knows their business. For example, a Partner Development Manager (PDM).

Once you enroll in Partner Center and register your applications, you'll have access to Partner Center APIs. You will receive your sandbox information via a Partner Center notification if you're a new CPV. Once you have completed enrollment as a Microsoft CPV and accepted the CPV agreement, you can:

1. Manage multi-tenant application (add applications to Azure portal, register and un-register applications in Partner Center).

   > **NOTE**
   >
   > CPVs must register their applications in Partner Center to get authorized for Partner Center APIs. Adding applications to the Azure portal alone does not authorize CPV applications for Partner Center APIs.

2. View and manage your CPV profile.
3. View and manage your users who need access to CPV capabilities. The only role a CPV can have is a Global Admin role.

I am using the Partner Center SDK. Will SDK automatically adopt the Secure Application Model?

No, you'll need to follow the guidelines provided in the Secure Application Model guide.

Can I generate a refresh token for the secure application model with accounts that don't have MFA enabled?

Yes, a refresh token can be generated using an account that does not have MFA enforced. However, this should not be done because any token generated using an account that does not have MFA enabled will not be able to access resources due to the requirement for MFA.

How should my application obtain an access token if we enable MFA?

You will need to follow the Secure Application Model guide which provides detail on how to do so whilst complying with the new security requirements. You can find .NET sample code here and Java sample code here.

As a CPV, do I create an Azure AD application in our CPV tenant or the tenant of the CSP partner?

The CPV will need to create the Azure Active Directory application in the tenant associated with their enrollment as a CPV.

I am a CSP that is using app only authentication. Do I need to make any changes?

App only authentication is not impacted as user credentials aren't being used to request an access token. If user credentials are being shared, then control panel vendors (CPVs) must adopt the Secure Application Model framework and purge any existing partner credentials they have.

As a CPV can I leverage the app only authentication style to get access tokens?

No, Control Panel Vendor partners cannot utilize the app only authentication style to request access tokens on the behalf of partner. They should implement the secure application model, which utilizes the app + user authentication style.

Technical Enforcement

What is the activation of security safeguards?

All partners participating in the Cloud Solution Provider (CSP) program, Control Panel Vendors (CPVs), and Advisors should implement the mandatory security requirements to stay compliant.

To provide additional protection, Microsoft began the activation of security safeguards that helps partners secure their tenants and their customers by mandating multi-factor authentication (MFA) verification to prevent unauthorized access.

We successfully completed the activation for admin-on-behalf-of (AOBO) capabilities to all partner tenants. To further help protect partners and customers, targeting Q2 CY2020, we will begin the activation for Partner Center transactions in CSP, helping partners protect their businesses and customers from identity-theft related incidents.

For more information, visit Mandating Multi-factor Authentication (MFA) for your partner tenant page.

I am using a third-party MFA solution and I am being blocked, what should I do?

To validate that the account accessing resources was challenged for multi-factor authentication, we will be checking the authentication method reference claim to see if MFA is listed. Some third-party solutions don't issue this claim or don't include the MFA value. If the claim is missing, or the MFA value is not listed, then there is no way to determine if the authenticated account was challenged for multi-factor authentication. You will need to work with the vendor for your third-party solution to determine what actions need to be taken so the solution will issue the authentication method reference claim.

See Testing the Partner Security Requirements if you're unsure if your third-party solution is issuing the expected claim or not.

MFA is blocking me from supporting my customer using AOBO, what should I do?

The technical enforcement for the partner security requirements will be checking if the authenticated account has been challenged for multi-factor authentication. If the account has not been, then you'll be redirected to the login page and prompted to authenticate again. Check out more detailed experience and guidance in this Mandating Multi-factor Authentication (MFA) for your partner tenant documentation. In the scenario where your domain is not federated, after successfully authenticating, you'll be prompted to set up multi-factor authentication. Once that is completed you'll be able to manage your customers using AOBO. In the scenario where your domain is federated, then you'll need to ensure the account is being challenged for multi-factor authentication.

Security Defaults Transition

How can I transition from baseline policies to security defaults or other MFA solutions?

Azure Active Directory (Azure AD) "baseline" policies are being removed and replaced with "security defaults", a more comprehensive set of protection policies for you and your customers. Security defaults can help protect your organization from identity-theft related security attacks.

Your multi-factor authentication (MFA) implementation will be removed due to the baseline policies retirement if you haven't transitioned from baseline policies to the security defaults policy or other MFA implementation options. Any users in your partner tenants performing MFA protected operations will be requested to complete MFA verification. Review more detailed guidance here. To stay compliant and minimize disruptions, take one of the following actions:

- Transition to security defaults
  - Security defaults policy is one of the options that partners can choose to implement MFA. It offers a basic

level of security enabled at no extra cost.
  - Learn how to enable MFA for your organization with Azure AD and review the security defaults key considerations.
  - Enable security defaults policy if it meets your business needs.
- Transition to Conditional Access
  - If security defaults policy does not serve your needs, enable Conditional Access. For more information, review the Azure AD Conditional Access documentation.

Key Resources

How to get started

- Partner security requirements: step-by-step guide.
- Direct your questions and feedback to this Partner Center Security Guidance Group.
- Attend upcoming partner office hours and webinars. Check the detailed schedule and resources here.

Resources for adopting secure application model

- Secure Application Model overview
- Partner Center: Secure Application Model guide
- Partners in CSP program: .NET sample code for enabling Secure Application Model
- Partners in CSP program: Java sample code for enabling Secure Application Model
- Partner Center authentication document
- Partner Center PowerShell Multi-Factor Authentication (MFA) document

Support

Where can I get support?

For support resources to meet the security requirements, if you have Advanced Support for Partners (ASfP) contact your Service Account Manager; for Premier Support for Partners agreement (PSfP), contact your Service Account Manager and Technical Account Manager.

How do I get technical information and support to help me adopt secure application model framework?

Technical product support options for Azure Active Directory are available through your MPN benefits. Partners with access to an active ASfP or PSfP subscription can work with their associated account manager (SAM/TAM) to best understand the options available to them.

How do I contact support when I've lost access to Partner Center?

Go to Microsoft Partner Support, then choose `Show all support options`. You will see the available options for contacting Microsoft Partner Support. These include a phone number to call support, and an option to chat with support.

Where can I find more information about technical common issues?

Information regarding the technical common issues can be found here.