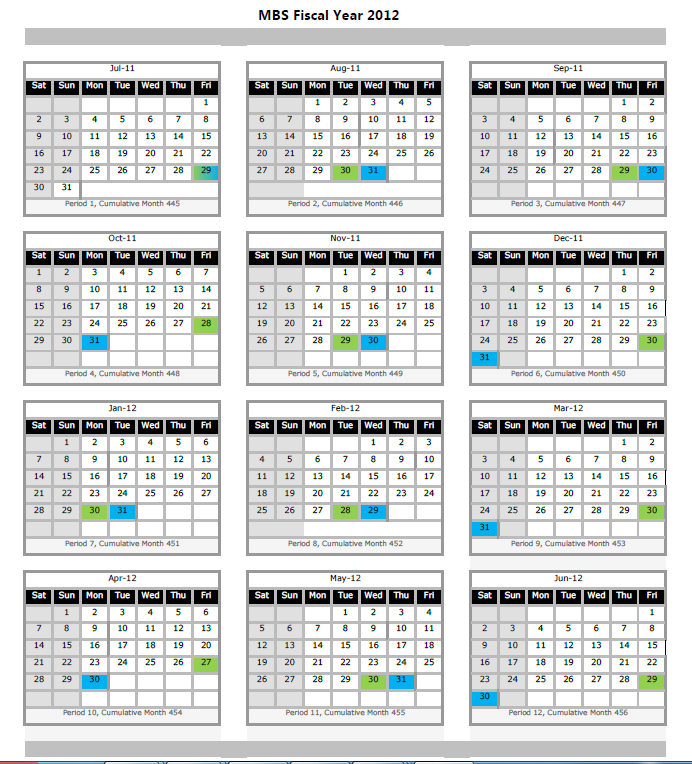
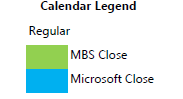
**Global Partner Operational Guidelines**

**November 2011**



**MICROSOFT DYNAMICS® – FISCAL CALENDAR FY12**





**MICROSOFT DYNAMICS® QUICK REFERENCE GUIDE**

**KEY CONTACTS / LINKS @ YOUR FINGERTIPS**

|  |  |  |  |
| --- | --- | --- | --- |
| SUBJECT | AOC | EOC | APOC |
| OPERATIONALTRAINING | [PARTNER OPERATIONAL TRAINING LINK](https://mbs.microsoft.com/partnersource/ordering/orderingnews/partner_training.htm) | | |
| SOLUTION PROVIDER AGREEMENT | [SPA GUIDE](https://mbs.microsoft.com/partnersource/partneressentials/spa/SPA.htm) | | |
| MICROSOFT PARTNER NETWORK | [MICROSOFT PARTNER NETWORK (MPN) WEBSITE](https://partners.microsoft.com/Partnerprogram/Welcome.aspx) | | |
| SPA RE-ENROLMENT | [HERE](https://mbs.microsoft.com/partnersource/partneressentials/spa/spa.htm) | | |
| PARTNER SPA DISCOUNT | [AOC](https://mbs.microsoft.com/downloads/partner/SPAdocs/AmericasSPADiscountSchedule_MAR_2010.pdf) | [EOC](https://mbs.microsoft.com/downloads/partner/SPAdocs/SPADiscountSchedulesEMEA_MAR_2010.pdf) | [APOC](https://mbs.microsoft.com/downloads/partner/SPAdocs/SPA_Discount_Schedules_APAC_MAR_2010.pdf) |
| PARTNER INCENTIVE PROGRAM | [HERE](https://mbs.microsoft.com/partnersource/partneressentials/partnerprogram/octannouncement) | | |
| CHANGING PARTNER NAME/ DETAILS - EMAIL | [mbsagree@microsoft.com](mailto:mbsagree@microsoft.com) | [mbscon@microsoft.com](mailto:mbscon@microsoft.com). | [mbslques@microsoft.com](mailto:mbslques@microsoft.com) |
| CREDIT LIMITS | [mbscredi@microsoft.com](mailto:mbscredi@microsoft.com) | [mbsecoll@microsoft.com](mailto:mbsecoll@microsoft.com) | [mbscce@microsoft.com](mailto:mbscce@microsoft.com) |
| LKC TOOL  ON VOICE | [LICENSE KEY CONFIGURATION (LKC) TOOL / VOICE](https://mbs2.microsoft.com/Members/Registration/LicenseKeyConfigurations.aspx?x=OQZSRROYTXYYRRQWUYYMMSRPTWXZRLOKZQZQVROYOQLVLMNLRUVVXYQRVMPOQZNNOMQTUSRWXZSOLZUQ&MNPVisible=false&wa=wsignin1.0) | | |
| CUSTOMER EVALUATION LICENSES | [EVALUATION SOFTWARE LICENSE TERMS (SLT) & ORDER FORM](https://mbs.microsoft.com/Cms/Templates/document/General.aspx?NRMODE=Published&NRNODEGUID=%7b300A6472-8E2E-4EA7-BE0F-0BA8B0540630%7d&NRORIGINALURL=/partnersource/partneressentials/agreements/MSDYN_AX2009EvalLicense.htm&NRCACHEHINT=Guest&wa=wsignin1.0) | | |
| PARTNERSOURCE | [LINK TO PARTNERSOURCE](https://mbs.microsoft.com/partnersource) | | |
| CHAT NOW | [CHAT NOW](https://mbs.microsoft.com/partnersourceapp/chatnow.aspx?wa=wsignin1.0) | | |
| MIMOS/ON-LINE CALL LOGGING TOOL | [MIMOS/ON-LINE CALL LOGGING TOOL](https://mbs2.microsoft.com/Support/OperationsIncidents.aspx?Mode=Create) (Not applicable to APOC) | | |
| VOICE | [HOW TO USE VOICE](https://mbs.microsoft.com/partnersource/how_to_use_voice) | | |
| WINDOWS LIVE ID | [WINDOWS LIVE ID](https://accountservices.passport.net/reg.srf) | | |
| CUSTOMER SOURCE | [HERE](https://mbs.microsoft.com/customersource) | | |
| PRICING / PLACING ORDER | [NOTIFICATIONS RE NEW PRICELISTS & CHANGES](https://mbs.microsoft.com/Cms/Templates/document/General.aspx?NRMODE=Published&NRNODEGUID=%7b3E6E5CFA-C347-4720-A2FC-229B88259E19%7d&NRORIGINALURL=/partnersource/newsevents/news/newsgeneral/newpricelistpub.htm&NRCACHEHINT=Guest&wa=wsignin1.0) | | |
| PRICING / PLACING ORDER  CURRENT PRICELISTS | [PARTNERSOURCE](https://mbs.microsoft.com/partnersource) ⇨ [Pricing](https://mbs.microsoft.com/partnersource/worldwide/asiapacific/pricing/) ⇨ Price Sheets | | |
| ORDER CENTRAL | [ORDER CENTRAL](https://mbs.microsoft.com/orderprocessing) | | |
| APOC CONTACT EMAIL |  |  | [mbslques@microsoft.com](mailto:mbslques@microsoft.com) |
| BRL & BREP | [BRL & BREP INFORMATION (ERP LICENSING GUIDE)](https://mbs.microsoft.com/partnersource/partneressentials/guides/MSDYERP_LicencingGuide?r=13&l=2) | | |
| PROTECTED LIST PRICE | [HERE](https://mbs.microsoft.com/customersource/worldwide/us/serviceplans/customerserviceplans/plppolicies.htm?printpage=false&sid=0z1yvovj4sv0tlnwjoskb4vd&stext=protected%20list%20price%20policy) | | |
| MESA & CSG | [MS ELECTRONIC SERVICES AGREEMENT & CUSTOMER SERVICE GUIDE INFO](https://mbs.microsoft.com/partnersource/partneressentials/serviceplans/customerserviceplans/Services_Guidebook) | | |
| MY MESSAGES | [PARTNERSOURCE - MY MESSAGES](https://mbs.microsoft.com/partnersource) | | |
| MY MESSAGES INFO | [MY MESSAGES INFO - POWERPOINT PRESENTATION](https://mbs.microsoft.com/partnersource/MyMessages) | | |
| AUTOBILL TRAINING | [HERE](https://mbs.microsoft.com/partnersource/partneressentials/partnerprogram/OctAnnouncement.htm) | | |
| PARTNER SERVICE PLANS | [SERVICE PLANS AND PRICING INFO](https://mbs.microsoft.com/partnersource/partneressentials/serviceplans/partnerserviceplans/) | | |
| LOCAL MICROSOFT OFFICE | [LOCAL MICROSOFT OFFICE](http://www.microsoft.com/dynamics/worldwide.mspx) | | |
| MBS CONTRACTS TEAM | [mbsagree@microsoft.com](mailto:mbsagree@microsoft.com) | [mbscon@microsoft.com](mailto:mbscon@microsoft.com). | [mbslques@microsoft.com](mailto:mbslques@microsoft.com) |
| TRANSITIONS POLICY INFO | [HERE](https://mbs.microsoft.com/partnersource/partneressentials/licensingpolicies/md_transitions.htm) | | |
| TRANSITIONS POLICY RE UPGARDE AX 2012 | [**MICROSOFT DYNAMICS AX 2012 UPGRADE POLICY**](https://mbs.microsoft.com/downloads/partner/partneressentials/MicrosoftDynamicsAX2012UpgradePolicy.pdf) | | |
| AX 2012 BUSINESS VALUE LICENSES (BVL) | [BVL](https://mbs.microsoft.com/partnersource/partneressentials/licensingpolicies/businessvaluelicensing.htm) | | |
| MS DYNAMICS AX PRICE SHEETS | [AX PRICELIST](https://mbs.microsoft.com/partnersource/pricing/pricesheets/dynAXpricesheet.htm). | | |
| MICROSOFT RESOURCE DIRECTORY | <https://solutionfinder.microsoft.com>. | | |
| DYNAMICS® AX 2009 FOR RETAIL INFO | [AX 2009 FOR RETAIL INFO](https://mbs.microsoft.com/partnersource/marketing/marketingcollateral/messagingframeworks/msdyaxretail_prk.htm?printpage=false&stext=dynamics%20ax%20for%20retail) | | |
| SPLA | [SERVICES PROVIDER LICENSE AGREEMENT INFO](http://www.microsoft.com/dynamics/partners/hosting.mspx) | | |
| ENROL MPN MEMBER | [ENROL MPN AS REGISTERED MEMBER](https://partner.microsoft.com/global/30000104) | | |
| MS HOSTING PROGRAM | [LINK](http://www.microsoft.com/serviceproviders/programs/windowswebhosting.mspx) | | |
| ENROL MPN PARTNER | [ENROL MPN AS CERTIFIED PARTNER](https://partner.microsoft.com/global/30000104) | | |
| SPLA CONTACT INFO | [GET STARTED WITH MS SPLA LICENSING](http://www.microsoft.com/serviceproviders/licensing/howto.mspx) | | |
| PLLP INFO | [HERE](https://mbs.microsoft.com/partnersource/partneressentials/pllp) | | |
| DYNAA TEAM | [EMAIL](mailto:dynaa@microsoft.com) | | |
| DYNAA WEBSITE | [MS DYNAMICS ACADEMIC ALLIANCE AGREEMENT WEBSITE](http://www.microsoft.com/education/academic_alliance.mspx) | | |
| MULTISITE AGREEMENT FORM | [HERE](https://mbs.microsoft.com/partnersource/partneressentials/agreements/multisiteagreements.htm) | | |
| CHANGE OF PARTNER/CUSTOMER TRANSFER REQUEST | [CHANGE OF PARTNER FORM](https://mbs.microsoft.com/partnersource/partneressentials/agreements/changepartnerform.htm?printpage=false&stext=Partner%20Change) | | |
| LICENSE TRANSFERS | [HERE](https://mbs.microsoft.com/Cms/Templates/document/General.aspx?NRMODE=Published&NRNODEGUID=%7b8F52EEA6-35CE-4ED4-8965-2CBC52E4CE8B%7d&NRORIGINALURL=/partnersource/partneressentials/licensingpolicies/msdy_policytransferlicenses.htm?printpage=false&NRCACHEHINT=Guest&printpage=false&wa=wsignin1.0) | | |
| SLT | [SOFTWARE LICENSE TERMS INFO](https://mbs.microsoft.com/partnersource/partneressentials/agreements/dynamics_slt.htm) | | |
| AX 2012 OPERATIONAL TRAINING | [AX 2012 OPERATIONAL TRAINING](https://mbs.microsoft.com/partnersource/deployment/documentation/howtoarticles/msdax2012opttraining.htm?printpage=false&sid=1i2bhotmqyxvmazdysyo2hgg&stext=AX%202012%20training) | | |
| MERGERS & ACQUISITIONS |  | [EMEA EMAIL](mailto:mbscon@microsoft.com) | [mbslques@microsoft.com](mailto:mbslques@microsoft.com) |
| UPDATED SPA PROFILE FORM | [HERE](https://mbs.microsoft.com/partnersource/partneressentials/spa/spa.htm?printpage=false&stext=spa) | | |
| LEAD REFERRAL PROGRAM | [LEAD REFERRAL PROGRAM](https://mbs.microsoft.com/partnersource/customerreferral/en/default) | | |
| ADD-ONS UPDATED PROFILES FOR SOLUTIONS DEVELOPED BY MBS PARTNERS | [PROFILES FOR SOLUTIONS DEVELOPED BY MBS PARTNERS](http://dynamics-erp.pinpoint.microsoft.com/) | | |
| ADD-ONS CERTIFIED FOR MS DYNAMICS | [HERE](https://mbs.microsoft.com/partnersource/marketing/campaigns/advertising/certified_for_microsoft_dynamics) | | |
| ADD-ON REGISTRATION PAGE | [ADD-ON REGISTRATION PAGE](https://mbs.microsoft.com/partnersource/deployment/documentation/howtoarticles/nav_addonregistration.htm) | | |
| CREDIT SERVICES-VIEW CURRENT STATEMENT | [PARTNERSOURCE](https://mbs.microsoft.com/PartnerSource) ⇨ VOICE ⇨ Specific Partner Information ⇨ Scorecard ⇨ Balance Info | | |
| CREDIT SERVICES | [mbscredi@microsoft.com](mailto:mbscredi@microsoft.com) | [ecoll@microsoft.com](mailto:ecoll@microsoft.com) | [mbscce@microsoft.com](mailto:mbscce@microsoft.com) |
| MPN | [MPN NETWORK ENROLMENT/COMPETENCIES/BENIFITS ETC](https://partner.microsoft.com/global/program) | | |
| ZERO VALUE LICENSE FOR INTERNAL USE SOFTWARE | [SEND EMAIL REQUEST HERE](mailto:mbsnfr@msdirectservices.com) | | |

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# INTRODUCTION

# OBJECTIVE

The **Operational Guidelines** are intended to provide **Microsoft Business Solutions (MBS) Partners** with fast and easy access to information about policies, procedures and guidelines related to the operational support and services provided by the Regional Operating Centers.

This guideline provides:

* An overview of Microsoft Dynamics including its license and business operations model, Partner contracts, Partner and Customer online portals.
* Details on pricing, placing an order and Credit & Collections.
* Information on Partner Support and Partner Programs.

Please refer to the section [9.0 APPENDIX](#_APPENDIX) of this guideline for a Glossary which contains terms and acronyms used throughout this document. This guideline serves as a reference guide for your day-to-day operations and it is recommended to use this guideline in conjunction with other information/training material provided by **Regional Operations Centers** as well as your local subsidiary.

# REVISION OF THE OPERATIONAL GUIDELINES AND DISCLAIMER

This version of the Operational Guidelines contains information updated as of August 2011. Please note that contents of this guideline may be subject to change without prior notice.

The Operational Guidelines are for exclusive use by **Microsoft Business Solutions (MBS)** Partners who support sales of **Microsoft Dynamics®** products. This guideline is not intended to be shared with and must not be distributed to customers.

All processes and policies comply with the terms and conditions of MBS Partner agreements at the time of printing. In case of discrepancies between this guideline and an agreement with MBS, regulations stated in **the agreement shall take precedence**.

# OPERATIONAL TRAINING

Two contacts in your organization are recommended to complete the following training which will enable you to effectively conduct business with the **Regional Operations Center (ROC).**

Please click on this link to access the **MBS Partner Operational Training page** which includes training material on **Order Central, Chat Now, PartnerSource, VOICE** and the Microsoft Incident Management Operations System **(MIMOS)/**On-line Call Logging Tool**:**

[PARTNER OPERATIONAL TRAINING LINK](https://mbs.microsoft.com/partnersource/ordering/orderingnews/partner_training.htm)

# REGIONAL OPERATIONS CENTERS (ROC)

There are three Regional Operations Centers that make up the Worldwide Operations of Microsoft:

* **Americas Operations Center (AOC)**, responsible for the United States, Canada and Latin America
* **EMEA Operations Center (EOC)**, responsible for the region Europe, Middle-East and Africa.
* **Asia Pacific Operations Center (APOC),** is responsible for the Asia Pacific Region including Australia and New Zealand.

The Regional Operations Centers own the legal relationship with Microsoft Dynamics Channel Partners. The Regional Operations Centers also owns the distribution rights, issues licenses and invoices to MBS Partners.

**Collective operational activities in the three Regional Operations Centers include:**

* Credit Services
* Finance
* Order management
* Pricing
* Product Release and Launch
* Product supply and distribution
* Query management
* SKU Configuration

# BUSINESS OPERATIONS MODEL

The **Regional Operations Centers** **(AOC, EOC & APOC)** and the local **Microsoft Sales and Marketing Subsidiaries** cooperate to provide operational, sales and marketing support to all Microsoft Business Solutions (MBS) Partners.

In the **Figure 1** below you can find an overview of some of the **central tasks** of the two organizations that support you. The distribution of tasks will be clear for each process throughout this document.

* Please consult your **Partner Account Manager (PAM)** in the **Local Microsoft Subsidiary** for all questions and issues related to **sales, developing your business and business opportunities in the market, marketing and sales support**.
* For the **execution** of these decisions, on matters that relate to **agreements, ordering products and software, receiving latest price lists, extending your credit, payment and distribution**, etc. you will then **work with the Regional Operating Center** covering your area.

Your **PAM** will work with the various internal Microsoft tools at his/her disposal, and the relevant **Regional Operations Center (ROC)** will work closely with your **PAM** on any issues outside of the normal (e.g. credit issues, improvement efforts).

# KEY CONTACTS AND ESCALATION PATHS

Chat Now and the MIMOS (Microsoft Incident Management Operations System) are the **primary** tools for communication with the Regional Operations Center (ROC) except for APOC\*. **Manual orders** and **operational queries** must be submitted to ROC via MIMOS except for APOC (via email). More information about MIMOS and how to access it can be found in section [5.1 CHAT NOW / SUBMIT AN INQUIRY / MBS TELEPHONE SERVICE / EMAIL (APOC ONLY)](#_CHAT_NOW_/)

Further **online ordering** options are listed in the section [4.0 PRICING / PLACING ORDER](#_PRICING_/_PLACING).

The MBS Operations Team is also available for Channel Support and Escalations. Channel support includes training on MBS Operations, exception and escalation management. If for any reason you have to escalate an operational issue, please include the reference to the original query/transaction, a description of the escalation steps taken so far and of why the issue is being escalated.

\* *Chat Now & email to* [*mbslques@microsoft.com*](mailto:mbslques@microsoft.com) *is the primary tools for communication with APOC.*

# PARTNER CONTRACTS

# SOLUTION PROVIDER AGREEMENT (SPA)

The Microsoft Business Solutions (MBS) **Solution Provider Agreement (SPA)** grants reselling Partners the right to place orders with the Operations Center of the region they are based for Microsoft Dynamics® licensed software and related services. Ordering is contingent on having met all SPA authorization requirements, which include meeting the minimum certification requirements outlined in the [SPA GUIDE](https://mbs.microsoft.com/partnersource/partneressentials/spa/SPA.htm) for the licensed software you wish to order from Microsoft.

**There are Three Regional Operation Centers (ROCs), each of which accepts orders from partners based in their respective area:**

|  |  |
| --- | --- |
| **AOC**  **Americas Operational Center** | **EOC**  **EMEA Operational Center** |
| **AOC is located in Fargo, North Dakota, USA.**  **AOC manages all SPA Agreements for Partners who want to place orders for customers located in NORTH, CENTRAL AND SOUTH AMERICA.** | **EOC is located in Dublin, Republic of Ireland, Europe.**  **EOC manages all SPA Agreements for Partners who want to place orders for customers located in EUROPE, MIDDLE EAST AND AFRICA.** |

|  |  |  |
| --- | --- | --- |
| **APOC**  **ASIA PACIFIC OPERATIONAL CENTER**  **APOC is divided into Three Geographical Regions** | | |
| **APOC except China & Japan(MRS)** | **CHINA (MCCL)** | **JAPAN (MSKK)** |
| **MRS manages all SPA Agreements for Partners who want to place orders for customers located in the territory Asia Pacific (APAC) with the exception of Japan and China).** | **MCCL manages all SPA Agreements for Partners who want to place orders for customers located in China.** | **MSKK manages all SPA Agreements for Partners who want to place orders for customers located in Japan.** |

For a successful SPA enrolment, an MBS Partner is required to at least be an active **member (at any level) of the Microsoft Partner Network (MPN)** which is designed for all Partners who develop and market solutions based on Microsoft platforms, provide consulting or technical services on Microsoft systems, or recommend Microsoft technology purchases. The registration can be done via the MPN website by clicking on this link: [MICROSOFT PARTNER NETWORK (MPN) WEBSITE](https://partners.microsoft.com/Partnerprogram/Welcome.aspx). More details about MPN can be found in the section [8.1 MICROSOFT PARTNER NETWORK](#_8.1_MICROSOFT_PARTNER).

Documents needed to be signed for the SPA application, the SPA Guide and other information can be found on the MPN web site by clicking [HERE](https://partner.microsoft.com/US/productssolutions/dynamics/40014584) and on PartnerSource under this link: [PartnerSource SPA and Discount Schedules](https://mbs.microsoft.com/partnersource/partneressentials/spa/spa.htm?printpage=false).

**SIGNED DOCUMENTS REQUIRED TO BE SENT TO THE REGIONAL OPERATION CENTER:**

* 1 signed copy of **SPA Agreement**
* 1 copy of **SPA Profile, Licensed Software and Online Services Selection Form (including the MPN ID)**
* 1 original copy of **Certificate of Incorporation** **(APOC Only)**
* 1 original copy of **3 years’ financial reports** **(APOC Only)**
* 1 signed copy of **Credit Application (EOC & APOC Only)**
* 1 signed copy of **Reseller Addendum** **(India Partners-Distribution Model only)**

**If submitting for an affiliate, the following additional documents are also required:**

* 1 signed copy of **Recorded Affiliate Agreement**
* 1 copy of **Recorded Affiliate Profile Form (including the MPN ID)**
* 1 original copy of **Certificate of Incorporation** **(APOC Only)**
* 1 original copy of **3 years’ financial reports** **(APOC Only)**
* 1 signed copy of **Credit Application (EOC & APOC Only)**
* 1 signed copy of **Reseller Addendum** **(India Partners-Distribution Model only)**

**Completed SPA documents should be sent to:**

|  |  |
| --- | --- |
| **AOC** | **EOC** |
| **Microsoft Business Solutions**  **Attn: SPA Processing**  **One Lone Tree Road**  **Fargo**  **ND 58104**  **USA** | **Microsoft Ireland Operations Ltd**  **Attn: MBS Contracts Team**  **Microsoft Building 3**  **Carmanhall Road**  **Sandyford Industrial Estate**  **Dublin 18, Ireland.** |

|  |  |  |
| --- | --- | --- |
| **APOC** | | |
| **APOC except China & Japan** | **CHINA** | **JAPAN** |
| **Microsoft Regional Sales (MRS) Corporation**  **Attn: MS Dynamics Contracts Team**  **438B Alexandra Road**  **#04-09/12 Block B**  **Alexandra Technopark**  **Singapore 119968** | **MCCL:**  **16F MBS**  **Microsoft (China) Company Ltd**  **Attn: Partner Development,**  **Microsoft Dynamics Team**  **1st Floor, Microsoft Tower**  **LSH Plaza, 8 Wangjing Street**  **Chaoyang District**  **Beijing 100102, PR China** | **MSKK:**  **Microsoft Japan Co., Ltd**  **Attn: Microsoft Dynamics Operation Team**  **(Gyomu Kanri bu)**  **Shinagawa Grand Central Tower 2-16-3**  **Konan Minato-ku,**  **Tokyo 108-0075**  **Japan** |

***It is recommended that these documents are sent by registered post or courier. Please note the courier tracking number of your documents.***

To deliver licensed software as an authorized MBS Partner under the SPA Agreement, Partners must have passed specific **solution proficiency exams** which vary by solution. Please refer to Appendix C **“SPA Exam Requirements by Solution” of the SPA Guide** for the exam requirements by solution. The SPA Guide is available by clicking [HERE](https://mbs.microsoft.com/partnersource/partneressentials/spa/spa.htm).

**Minimum Revenue Requirement.**

In order to remain an active SPA Partner, Company must have generated at least a certain pre-set amount of revenue (the “Threshold”) as of two certain set time periods (the “Checkpoints”).

**(1)** The first Checkpoint will be measured on the 12 month anniversary of the SPA Effective Date. The Threshold for the first Checkpoint is $20,000 net to Microsoft if the partner signed the FY11 SPA, or $35,000 USD (or equivalent amount in local currency) in total gross revenue for partners on subsequent versions of the SPA. For the purposes of this section, total gross revenue means the total value based on the Dynamics Price List for all licenses and Services sold under the SPA, plus Other Agreement Revenue. For the purposes of this section, “Other Agreement Revenue” means all revenue generated by Company Parties under any agreement for sales of Microsoft Dynamics products that Company is also authorized to distribute under the SPA (if such revenue is reported to Microsoft). Partners who have not reached the Threshold as of the first Checkpoint will not be able to place orders for new Licenses for a period of 12 months if they signed the FY11 version of the SPA. Non-compliant partners who have signed subsequent versions of the SPA will not be able to place any orders for a period of 12 months.

**(2)** The second Checkpoint will be measured at the date that Company renews its Solution Provider Agreement or signs a new Solution Provider Agreement. The Threshold for the second Checkpoint is $35,000 USD (or equivalent amount in local currency) in gross revenue. For the purposes of this section, gross revenue means the total value based on the Dynamics Price List for all licenses and Services sold, plus Other Agreement Revenue, from the first day after the first Checkpoint until the date of the second Checkpoint, before any discounts are applied. Partners who are non-compliant at the second Checkpoint will not be able to re-enroll in the SPA program for a period of 12 months.

**(3)** Partners who are enrolling in the SPA for the first time will be exempt from the second Checkpoint if the second compliance period is less than 12 months. (Existing partners will not be offered such an exemption, and will be required to meet the Threshold revenue requirement at the second Checkpoint.)

**SPA Entitlements**

SPA entitles you to the following:

* Access to PartnerSource/Voice
* Demo/Development & Testing License (aligned to the SPA expiry date) & software
* Price List for the Solution Addendum submitted

A new Partner who signs the SPA Agreement is entitled to a Demonstration,

Development and Testing License with 20 concurrent users for each SPA Solution

Addendum completed. This license is provided for customer demonstration,

development & testing purposes only and cannot be used for internal use purposes or transferred to end customers.

**New SPA Partner On-Boarding e-learning**

After signing the SPA, two contacts within your organization are suggested to complete

Microsoft Dynamics Partner Operations Training. This e-learning will enable

the partner to effectively conduct business with the Regional Operations Centre.

On-Boarding e-learning Partner Operations Training can be found [HERE](https://mbs.microsoft.com/partnersource/ordering/orderingnews/partner_training.htm)

**SPA Re-Enrolment**

The **SPA re-enrolment process** is described [HERE](https://mbs.microsoft.com/partnersource/partneressentials/spa/spa.htm) where Partners can download the new SPA documents, a document specifying how the new SPA has changed, and a re-enrolment checklist.

* Review the changes of the new SPA Agreement.
* Ensure you are **enrolled in MPN**.
* Fill out the required documents and submit them to the ROC (the same address as for new SPA applications, see above):
  + 1 signed copy of **SPA Agreement**
  + 1 copy of **SPA Profile and Licensed Software and Online Services Selection Form**
  + 1 signed copy of **Reseller Addendum** **(India, Ukraine & Russia Partners-Distribution Model only)**

**If submitting for an affiliate as well, the following documents are also required:**

* 1 signed copy of **Recorded** **Affiliate Agreement**
* 1 copy of **Recorded Affiliate Profile Form**
  + 1 signed copy of **Reseller Addendum (India, Ukraine & Russia Partners-Distribution Model only)**

**SERVICE LEVEL AGREEMENT**

* ***SLA IS 48 HOURS FOR ALL VALID AGREEMENTS.***

**PLEASE NOTE: IF ANY OF THE ABOVE DOCUMENTS ARE MISSING OR NOT FULLY COMPLETED, THE SPA AGREEMENT CANNOT BE FULLY PROCESSED.**

# PARTNER SPA DISCOUNT

The Partner SPA discount on orders for customers is based on **the customer’s location, the Partner’s “12 month revenue roll”** and the regional SPA discount schedule corresponding to the **customer’s** location.

**DISCOUNT SCHEDULE: AOC** [HERE](https://mbs.microsoft.com/downloads/partner/SPAdocs/AmericasSPADiscountSchedule_MAR_2010.pdf)

**DISCOUNT SCHEDULE: EMEA** [HERE](https://mbs.microsoft.com/downloads/partner/SPAdocs/SPADiscountSchedulesEMEA_MAR_2010.pdf)

**DISCOUNT SCHEDULE: APOC** [HERE](https://mbs.microsoft.com/downloads/partner/SPAdocs/SPA_Discount_Schedules_APAC_MAR_2010.pdf)

***NOTE: SCHEDULE IS INTENDED FOR ORDERS FOR CUSTOMERS LOCATED IN THE REGION. EFFECTIVE FOR SPA PARTNERS AFTER THEY HAVE ENTERED INTO A SPA AGREEMENT****.*

# PARTNER INCENTIVE PROGRAM (EFFECTIVE JANUARY 2012)

Over the last two years, Microsoft’s Partner strategy has centred on designing and delivering business enhancements to our Partners.  As part of this strategy and announced on October 27th, 2010 the Partner Incentive Program has been restructured to reward license growth, customer add growth, and BREP revenue recaptured. The updates to the program create a competitive “pay-for-performance” Partner discount model that paves the way for higher future incentive earnings.

In the new model, Partners will be rewarded on their License and BREP performance separately. Our goal is driving scale and growth by rewarding those partners that have demonstrated commitment and success in the past by investing in their Dynamics business. To ensure a focus on new revenue and market share gains, License revenue will be rewarded higher than BREP revenue.

The License discount is comprised of two components: a base discount and a growth incentive, both determined by a Partner’s tier threshold. Which is in turn determined by a Partner’s worldwide “Gross To Partner” license revenues metric. To ensure global consistency and fairness, there are different sets of thresholds for mature and emerging markets. The growth incentive discount is an additional discount partners can attain based on performance. The three types of growth incentive discounts are:

1. 1 Year License Growth - One year of year-over-year growth
2. 2 Years of License Growth - Two consecutive years of year-over-year growth
3. Customer Add Growth- Year-over-year growth in excess of the customer’s  “Growth Requirement”

The growth incentives are additive; you can earn one, two, or all three of them. They are each set at 5% which means Partners can earn a combination of these discounts up to an additional 15%. To earn a growth incentive discount, the Partner’s actual achievement must equal or exceed a “Growth Requirement”. Growth Requirements vary by tier, but the baseline against which we set the target is the average of Gartner and IDC’s published overall ERP market growth rates.

Ensuring that customers remain on BREP contracts is critical to ensuring they gain the full value of their purchase and remain satisfied, long-term customers. For this reason, we are motivating and rewarding partners for re-signing, or recapturing, a high percentage of the BREP contracts that come up for renewal. Partners’ actual worldwide Revenue Recapture Rate will be compared to Revenue Recapture Thresholds to determine the BREP Renewal Discount. BREP discounts are directly correlated with a Partner’s success recapturing revenue amounts.

* BREP or License Fee volume is no longer the driver of BREP Partner Discounts
* BREP Revenue Recapture focuses on the BREP amounts that SHOULD be able to be renewed compared to the amounts that were ACTUALLY renewed
* Microsoft is making this change to focus partners on recapturing customer revenue (Partners can control their financial success in this area)

To incentivise timely renewals there is a lower discount for re-enrolments of 10%

For more information on the Partner Incentives Program please visit [PartnerSource](https://mbs.microsoft.com/partnersource/partneressentials/partnerprogram/octannouncement)

# CHANGING PARTNER NAME/DETAILS

Changes in Partner details must be communicated to the Regional Operations Center (ROC) immediately. This includes significant changes in ownership (over 51%), changes in company name (both legal name and trading name), location changes and changes in the operational activities of the organization.

|  |  |
| --- | --- |
| **DESCRIPTION** | **ACTION REQUIRED** |
| Change of company name (both legal & trading name) | * Send an email to your ROC **see table below** * Provide an official letter on company letterhead stating the reason for change (for authentication purpose) * Attach a copy of Certification of company registration ( or equivalent) for verification purpose |
| Change of ownership (i.e. Merger or acquisition) resulting in a change of company name | * Send an email to your ROC **see table below** * ROC will liaise with your Partner Account Manager & Legal Department to draw up a novation agreement and advise necessary documents |
| Change in address & operational activities of the organization | * Send an email to your ROC **see table below** |

|  |  |
| --- | --- |
| **AOC** | [mbsagree@microsoft.com](mailto:mbsagree@microsoft.com) |
| **EOC** | [mbscon@microsoft.com](mailto:mbscon@microsoft.com). |
| **APOC** | [mbslques@microsoft.com](mailto:mbslques@microsoft.com) |

***NOTE: IF THE PARTNER DOESN’T NOTIFY THE ROC OF THEIR NAME/ADDRESS CHANGE AT THE TIME OF THE CHANGE TAKING PLACE AND INVOICES ARE ISSUED BY THE ROC WITH THE WRONG NAME/ADDRESS, THE PARTNER IS OBLIGED TO PAY ALL INVOICES ISSUED WITH THE OLD NAME/ADDRESS EVEN THOUGH THEIR NAME AT THE TIME OF MAKING THE PAYMENT HAS CHANGED.***

# PAYMENT TERMS

In general payment terms have been set at ‘**End of month + 65 days**’. However, Microsoft reserves the right to change payment terms with Partners but with prior notice.

The payment due date will be specified on your **invoices**. It is a Partner’s responsibility to ensure the full value of invoices are paid on time and are in the Microsoft bank account as per due date. It is also imperative that Partners provide Microsoft with instructions on how their payments should be applied i.e. which invoices are being paid and/or which credit notes are being used (see Remittance Advices section under [CREDIT SERVICES](#_CREDIT_SERVICES)).

# CREDIT LIMITS

All new Partners who have signed the SPA Agreement are initially subject to a **Credit Application Process.**

Credit limits are determined based upon the following three factors:

* **A review of your financial statements.**

The timeliness of the information we receive can affect your credit limit. Without up to date financial information we have a **responsibility** to appropriately manage our credit risk.

* **Your payment history.**

As the goal is to remain 100% current we view deviation from this as being a potential credit risk to Microsoft. As such we reserve the right to adjust your credit limit when we perceive it to be appropriate.

* **Trade References.**

We may also request **trade references** from other vendors (we will ask you to list your trade referees) in our credit information form, which you will be asked to complete periodically.

You may request an increase in your credit limit by providing Microsoft with more details of your credit worthiness via section [5.1 CHAT NOW / SUBMIT AN INQUIRY / MBS TELEPHONE SERVICE / EMAIL (APOC ONLY)](#_CHAT_NOW_/)

In exceptional cases, ROC may request some form of security to be provided to partly/fully secure the credit limit we offer you. This security may take the form of but is not limited to the following:

A bank security, parental guarantee or shareholder security.

For further information if required please contact the ROC MBS Credit & Risk Department via

|  |  |
| --- | --- |
| **AOC** | [mbscredi@microsoft.com](mailto:mbscredi@microsoft.com) |
| **EOC** | [mbsecoll@microsoft.com](mailto:mbsecoll@microsoft.com) |
| **APOC** | [mbscce@microsoft.com](mailto:mbscce@microsoft.com) |

**Reviewing Credit Limits over time**

* You will be asked to provide copies of your **audited financial statements within 90 days of year-end close**.
* Also Microsoft may request **additional interim management accounts** when your credit limit is being assessed.
* Your **Partner Account Manager (PAM)** will also be asked for input.

**Exceeding Credit Limit**

* Should you exceed your credit limit, orders placed will automatically go on **hold** and ordinarily can only be released when payment is received to reduce the overdue amount.
* However a Partner has four other options to get the order released:

1. **prepay** the order on hold,
2. bring the **balance to a level below the credit limit** through a payment to Microsoft,
3. provide Microsoft with copies of their **financial statements for the last two years** which will allow an updated credit check and possible increase in their credit limit if they are sufficiently financially secure, or
4. provide **confirmation from a parent company** who will agree to guarantee the debts (in which case we will do a credit check on the parent company).

* In the case where you can forecast in advance, a need for additional credit for a specific month, you should contact Credit & Collections.

Microsoft Credit & Collections reserves the right to reduce the credit limit (or require pre-payment and/or 3rd party guarantees) based on the partner’s financial status and payment performance.

# ZERO VALUE LICENSES –DEMONSTRATION AND EVALUATION LICENSES

**2.7.1 DEMONSTRATION, DEVELOPMENT AND TESTING**

A new Partner who signs the SPA Agreement will receive a NFR (Not for resale) or Zero Value **demonstration, development and testing license** with **20 concurrent** users corresponding to the licensed software indicated on the SPA profile form. This license is provided for customer demonstration, development and testing purposes only and cannot be used for internal use purposes, in any form of live environments or be transferred to customers.

A Partner can configure a Zero Value Demo/Dev License himself using the License Key Configurator (LKC) tool on VOICE, under the Development Tools section of their account.

Partners can refer to their SPA welcome letter for detailed information on how to generate their Demo/Dev via the LKC tool.

[LICENSE KEY CONFIGURATION (LKC) TOOL / VOICE](https://mbs2.microsoft.com/Members/Registration/LicenseKeyConfigurations.aspx?x=OQZSRROYTXYYRRQWUYYMMSRPTWXZRLOKZQZQVROYOQLVLMNLRUVVXYQRVMPOQZNNOMQTUSRWXZSOLZUQ&MNPVisible=false&wa=wsignin1.0)

The Zero Value license expiry date will coincide with the expiry date of the SPA Agreement. The license is issued proactively by the ROC MBS Customer Operations Team right after processing the SPA Agreement and/or Solution Addendum. Please contact the ROC MBS Customer Operations Team see Section [5.1 CHAT NOW / SUBMIT AN INQUIRY / MBS TELEPHONE SERVICE / EMAIL (APOC ONLY)](#_CHAT_NOW_/) for Zero Value License queries.

**DEMO / DEV LICENSES – MICROSOFT DYNAMICS® AX 2012**

* Microsoft Dynamics AX partners are entitled to 25 named users on their Microsoft Dynamics AX 2012 Demo / Dev license. This license is provided for customer demonstration, development and testing purposes only and cannot be used for internal use purposes or transferred to customers. Partners can have both a Microsoft Dynamics AX 2009 and Microsoft Dynamics AX 2012 Demo / Dev license.
* Demo / Dev licenses are available for download on VOICE under Developer Tools -> License Key Configuration -> Create New Configuration. To download a Microsoft Dynamics AX 2012 Demo / Dev license, select Product Line = ‘Microsoft Dynamics AX Business Value’.

**2.7.2 PARTNER INTERNAL USE LICENSES**

In addition to the 20 concurrent users for one ERP solution of the Partners choice, the Partner will receive an additional number of users for Internal Use. Further details can be found under [SECTION 8.2 (ZERO VALUE LICENSES – PARTNER INTERNAL USE SOFTWARE)](#_8.2_ZERO_VALUE) of this document.

The number of users that the partner receives for Internal Use is dependent on what competency they pass and what partner level they are at. More info is available on the [MPN site](https://partner.microsoft.com/global/program/competencies/40120298#t8)

**INTERNAL USE LICENSES (MPN)– MICROSOFT DYNAMICS® AX 2012**

* All partners who have an existing Microsoft Dynamics AX 2009 Microsoft Partner Network (MPN)Internal Use License will be automatically upgraded to Microsoft Dynamics AX 2012 by end of September, 2011 (In countries where Microsoft Dynamics® AX2012 is generally available).
* Partners whose licenses have not yet been upgraded, may request an upgrade by contacting their [Microsoft Regional Operations Centre](https://mbs2.microsoft.com/PartnerSourceApp/chatnow.aspx)
* Details of current Microsoft Dynamics AX 2012 license entitlements for MPN are available [HERE](http://download.microsoft.com/download/F/6/7/F674AE63-14AD-4ED3-BA05-85AFBDAFA563/User_Type_Matrix.xps).

**2.7.3 CUSTOMER EVALUATION LICENSES**

Evaluation Licenses are available for the ERP products Dynamics® NAV & Dynamics® AX.

Click [HERE](https://mbs.microsoft.com/Cms/Templates/document/General.aspx?NRMODE=Published&NRNODEGUID=%7b300A6472-8E2E-4EA7-BE0F-0BA8B0540630%7d&NRORIGINALURL=/partnersource/partneressentials/agreements/MSDYN_AX2009EvalLicense.htm&NRCACHEHINT=Guest&wa=wsignin1.0) for Evaluation Software License Terms (SLT) & Order form for AX

Click [HERE](https://mbs.microsoft.com/partnersource/documentation/howtoarticles/NAVBusinessConcepts.htm) for Evaluation Software License Terms (SLT) & Order form for NAV

**An Evaluation license is defined** as a license which is to be used to assist a customer in evaluating their product requirements and to assist in making a decision whether to purchase a full license or not. A time limit of 120days will exist for each evaluation license provided.

**How can I order an Evaluation License?**

Partners can place a manual order for the Evaluation license on behalf of their customer from PartnerSource where a copy of the SLT and Order Form is available. [HERE](https://mbs.microsoft.com/Cms/Templates/document/General.aspx?NRMODE=Published&NRNODEGUID=%7b300A6472-8E2E-4EA7-BE0F-0BA8B0540630%7d&NRORIGINALURL=/partnersource/partneressentials/agreements/MSDYN_AX2009EvalLicense.htm&NRCACHEHINT=Guest&wa=wsignin1.0).

**Pre-Requisites:** Before placing the order on the Regional Operations Center (ROC), the partner **must confirm** on the order form that they have provided the customer with a physical copy of the SLT and that the customer accepts the terms and conditions of the SLT.

The Partner will receive an email back from the Regional Operations Center (ROC) with details on how and where to download the evaluation license.[HERE](https://mbs.microsoft.com/partnersource/partneressentials/agreements/dynamics_slt.htm?printpage=false&sid=xvab2egkrgvax2m3ujvclm3h&stext=SLT)

**EVALUATION LICENSES – MICROSOFT DYNAMICS® AX 2012**

* For Microsoft Dynamics AX 2012, evaluation licenses can be manually requested by the partner on behalf of the customer. An evaluation license is a license to assist a customer in evaluating their product requirements and in making a decision whether to purchase a full license or not.
* Click [HERE](https://mbs.microsoft.com/Cms/Templates/document/General.aspx?NRMODE=Published&NRNODEGUID=%7b300A6472-8E2E-4EA7-BE0F-0BA8B0540630%7d&NRORIGINALURL=/partnersource/partneressentials/agreements/MSDYN_AX2009EvalLicense.htm&NRCACHEHINT=Guest&wa=wsignin1.0) for Evaluation Software License Terms (SLT) & Order form.

# PARTNERSOURCE / CUSTOMER SOURCE

**PartnerSource** is a Web portal available to Microsoft Business Solutions (MBS) Partners who focus on Microsoft Dynamics® products. It provides up-to-date tools that help our Partners increase sales, improve skills, and deliver superior service and products to customers.

[LINK TO PARTNERSOURCE](https://mbs.microsoft.com/partnersource)

# INFORMATION AVAILABLE ON PARTNERSOURCE

On **PartnerSource**, Microsoft Business Solutions (MBS) Partners may

* access product updates, downloads, and training materials

[WORLDWIDE ONLINE OPERATIONS TRAINING](https://mbs.microsoft.com/partnersource/communities/training/trainingmaterials/student/MSD_ERPPLCTestSitesLanguage.htm)

* attend online sessions
* register for special events
* exchange information with other Partners
* and much more.

For each country, there is a country/region specific site on PartnerSource. To access information for your country/region go to

[PARTNERSOURCE](https://mbs.microsoft.com/PartnerSource) ⇨ Worldwide ⇨ [select your country/region].

The content under **“Pricing and Ordering”** on PartnerSource is maintained by the Regional Operations Centers (ROC) to inform all certified MBS Partners of policies, procedures, tools, price lists and guidelines related to the operational support provided by ROC. This is the main source for MBS Partners describing how they can interact with ROC.

**PartnerSource** also contains the link to

* [CHAT NOW](https://mbs.microsoft.com/partnersourceapp/chatnow.aspx?wa=wsignin1.0)
* Submit an inquiry through the On-Line Call Logging Tool/[MIMOS (Microsoft Incident Management Operations System) and MBS Telephone Service](#_CHAT_NOW_/)\*
* [ORDER CENTRAL (Please refer to Ordering)](#_ORDERING)
* [MY MESSAGES/AUTOBILL(please refer to Renewing Enhancement Plans - My Messages/Autobill)](#_RENEWING_BUSINESS_READY)
* VOICE (Virtual Organization Information Center)which allows information to be shared between MBS and its Partners and features a wealth of information about your organization and your customers. Click here for details on [HOW TO USE VOICE](https://mbs.microsoft.com/partnersource/how_to_use_voice)

*\* For APOC submit inquiry to* [*mbslques@microsoft.com*](mailto:mbslques@microsoft.com)

# ACCESS / LOCAL ADMINISTRATOR

To access PartnerSource, Microsoft Business Solutions (MBS) Partners must have **signed the SPA Agreement**. CRM Partners who have not signed the SPA Agreement must have a signed **CSA Agreement** instead of the SPA Agreement.

Non-selling partners can sign a Partner RegistrationAagreement to obtain PartnerSource access (see <https://partner.microsoft.com/global/40089025>)

After a Partner has signed the SPA Agreement, a VOICE account for the local VOICE Administrator inside the Partner’s company will be proactively created. The local VOICE Administrator is responsible to manage the rights of employees and can grant other employees access to MBS systems and tools, such as PartnerSource. There is an instruction describing setting up Employee Access to PartnerSource at [HOW TO USE VOICE](https://mbs.microsoft.com/partnersource/how_to_use_voice).

PartnerSource is a **Microsoft** **Windows Live ID** enabled site. If employees already have a Microsoft Windows Live ID account, they can link this account to the email address within their PartnerSource profile set up by the local VOICE Administrator in their organization. If an employee does not have a Microsoft Windows Live ID account, visit [WINDOWS LIVE ID](https://accountservices.passport.net/reg.srf)

**IF AN EMPLOYEE HAS LOST ACCESS TO PARTNERSOURCE HE/SHE SHOULD CONTACT THE LOCAL VOICE ADMINISTRATOR IN HIS/HER ORGANIZATION.**

**FOR TECHNICAL PROBLEMS PLEASE** [EMAIL VOICE](mailto:voice@microsoft.com)**.**

# CUSTOMER SOURCE

## CustomerSource is a Windows Live ID enabled website which is available for all Microsoft Dynamics customers enrolled in the Enhancement Plan. The site contains personalized product and service information, a searchable knowledge base, downloads, documentation, discussion boards, online training, news and other features.

Customers can log into CustomerSource [HERE](https://mbs.microsoft.com/customersource)

It is recommended to read the CustomerSource article by clicking on this [LINK](http://www.microsoft.com/dynamics/customersource_article.mspx#EVB)

# PRICING / PLACING ORDER

# PRICE LIST INFORMATION

Notifications regarding new pricelists and changes are posted on the global Pricing page on PartnerSource [HERE](https://mbs.microsoft.com/Cms/Templates/document/General.aspx?NRMODE=Published&NRNODEGUID=%7b3E6E5CFA-C347-4720-A2FC-229B88259E19%7d&NRORIGINALURL=/partnersource/newsevents/news/newsgeneral/newpricelistpub.htm&NRCACHEHINT=Guest&wa=wsignin1.0)

Current price lists are available to download from [PARTNERSOURCE](https://mbs.microsoft.com/partnersource) ⇨ [Pricing](https://mbs.microsoft.com/partnersource/worldwide/asiapacific/pricing/) ⇨ Price Sheets

* Updated price lists are published quarterly.
* Price increases will be posted on PartnerSource 90 days in advance of any price changes.
* Price lists are available in English, Spanish, German and Danish.
* Partners will not receive notice in advance when prices decrease
* Notification on removal/discontinuation of modules/granules will be provided in PartnerSource 120 days in advance as per SPA.

**Cross-Border Pricing**

Pricing for all countries and regions is visible to partners by choosing the required country or region from the dropdown list on the dynamics pricelist

THE LOCATION OF ***THE CUSTOMER*** DETERMINES THE PRICE

# ORDERING

There are different ways to submit an order for customer:

* ORDER CENTRAL
* MIMOS (On-Line Call Logging Tool), ROC ORDER FORM AND PRICE LIST
* EMAIL (APOC Only)
* MY MESSAGES for Service Plan Renewals
  + 1. **ORDER CENTRAL**

**Order Central** is the worldwide online order entry tool for Microsoft Dynamics Partners and can be can be accessed via [PartnerSource](https://mbs.microsoft.com/Cms/Templates/document/General.aspx?NRMODE=Published&NRNODEGUID=%7bE1A22953-85FF-406A-91D5-E93FD3FB0F15%7d&NRORIGINALURL=/partnersource/ordering/orderingnews/MSGlobalpolicychange&NRCACHEHINT=Guest&wa=wsignin1.0) [HERE](https://mbs.microsoft.com/orderprocessing).

Most type of transactions for most Dynamics Products can be ordered via Order Central.

Training materials can be found on [PartnerSource](https://mbs.microsoft.com/partnersource/ordering/orderingnews/partner_training.htm?printpage=false).  Please take advantage of our new comprehensive online training [HERE](https://mbs.microsoft.com/partnersource/ordering/orderingnews/partner_training?r=292&l=4). Pricing and Policy Changes and our [FAQ’s](https://mbs.microsoft.com/partnersource/ordering/orderingnews/MSDOrdercentralFAQs) document can be found on [PartnerSource](https://mbs.microsoft.com/Cms/Templates/document/General.aspx?NRMODE=Published&NRNODEGUID=%7bE1A22953-85FF-406A-91D5-E93FD3FB0F15%7d&NRORIGINALURL=/partnersource/ordering/orderingnews/MSGlobalpolicychange&NRCACHEHINT=Guest&wa=wsignin1.0). Key policy changes can be reviewed [here](https://mbs.microsoft.com/Cms/Templates/document/General.aspx?NRMODE=Published&NRNODEGUID=%7bE1A22953-85FF-406A-91D5-E93FD3FB0F15%7d&NRORIGINALURL=/partnersource/ordering/orderingnews/MSGlobalpolicychange&NRCACHEHINT=Guest&wa=wsignin1.0).

Please feel free to contact ROC via Chat Now [HERE](https://mbs2.microsoft.com/PartnerSourceApp/chatnow.aspx?r=292&l=2) if you have any further questions.

* + 1. **MICROSOFT INCIDENT MANAGEMENT OPERATIONS SYSTEM (MIMOS) / On-Line Call Logging Tool (AOC & EOC Only)**

Partners may access MIMOS/On-Line Call Logging Tool directly through PartnerSource [HERE](https://mbs2.microsoft.com/Support/OperationsIncidents.aspx?Mode=Create).

Or via the Contact Dynamics Operations homepage [HERE](https://mbs2.microsoft.com/PartnerSourceApp/chatnow.aspx?r=292&l=2)

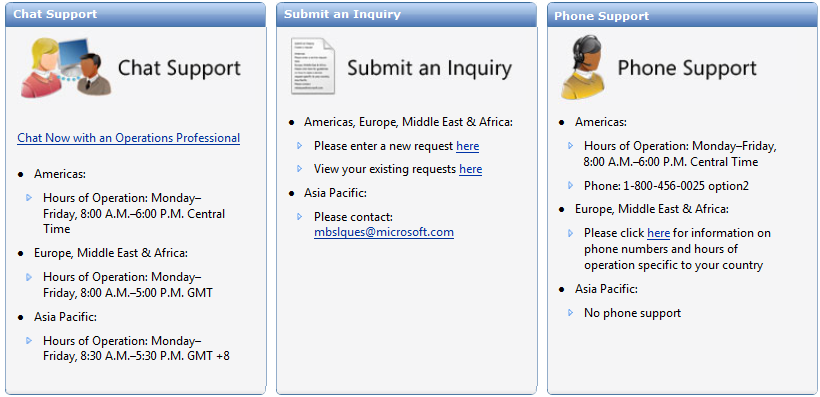


Figure 6: Contact Dynamics Operations options

Please follow the below steps in order to submit your order to the Regional Operations Center

The **ROC** **Order Form is embedded into the** price list can be downloaded from [PARTNERSOURCE](https://mbs.microsoft.com/PartnerSource) ⇨ Worldwide Sites ⇨ [select your country/region] ⇨ Pricing & Ordering. On the ROC Order Form,

* make sure to include your internal Purchase Order number
* make sure all mandatory fields are populated
* if applicable, provide a discount ID in the **PromoWeb ID** field if a special deal has been agreed with your Partner Account Manager (PAM) (please refer to section [4.6 SPECIAL DEALS](#_SPECIAL_DEALS))
* if applicable, provide the **Global Volume Agreement (GVA)** or **Multisite Agreement (MA)** number and MA/GVA Tier.
* use the **Comments field** for any message you want to give us regarding the order.

**ROC Actions**

* Once you submit your query it is automatically sent to ROC for processing and shortly after you will receive an **email** with a unique reference number, the so-called Case number.
* If the ROC MBS Customer Operations Team requires more information, you will be contacted via the email address entered as part of the MIMOS Case submission.

The **link to download the license file** will be sent to you by **email** and the **invoice** will be sent by email and/or is available on your VOICE account.

In AOC & EOC Partners can check the status of an order by ringing a free phone line (see the Appendix for the phone number for your country) and quoting the Case number to the agent for an update on the progress of a request.

***PLEASE NOTE: CONTINUE SUBMITTING ORDERS VIA ORDER CENTRAL IF THESE TOOLS ARE AVAILABLE FOR YOUR PRODUCT.***

***THE MBS TELEPHONE LINE SHOULD ONLY BE CALLED ONCE YOU HAVE RECEIVED A CASE NUMBER FOR YOUR REQUEST LOGGED THROUGH MIMOS (EOC Only).***

* + 1. **EMAIL (APOC Only)**

Partners may contact the Operations team in APOC for orders/inquiry to [mbslques@microsoft.com](mailto:mbslques@microsoft.com)**.** Partners will receive a CASE number in return.

* + 1. **MY MESSAGES for Service Plan Renewals**

**FOR SERVICE PLAN RENEWALS SEE SECTION** [HERE](#_RENEWING_BUSINESS_READY)

**Recommendations to ensure a valid order**

* Orders **must** come from **you** and not from an alternative source, e.g. your Partner Account Manager (PAM).
* You should engage your PAM in the ordering process if help is required with:
* Specific product questions,
* Pricing **discount** and exception negotiation.
* **Order Form – make sure** all mandatory fields **are** populated.
* **Price-list –** current price-list must be submitted. Please check the date on the price-list you are using to ensure it is of the current month.
* **Discounts and exceptions** are formally processed via the **PAM or MS Representative**. Your PAM or MS Representative will provide you with the **discount ID** which must be entered on the order **prior** to submission, to ensure the approved discount amount is applied.
* **On special deals** – theRegional Operations Center (ROC) will **validate** the discount ID and apply the discount to the invoice. If there is a discrepancy with the order and the agreed discount amount your PAM will be notified who will subsequently contact you to resolve the issue.
* **Denied party screening** will be carried out by the ROC MBS Customer Operations Team on ALL orders received by ROC.
* ROC checks your **credit status** with Credit Services. If you fail this check your order will go **on hold**, please refer to section [7.0 CREDIT SERVICES](#_CREDIT_SERVICES) for more information.

**PLEASE NOTE: ORDERS BY TELEPHONE ARE NOT SUPPORTED FOR LEGAL REASONS. ALL ORDERS MUST BE PLACED BY THE PARTNER (AND E.G. NOT BY THE PAM).**

**Service level agreements (SLAs) for processing license orders**

* The standard SLA for order processing is **3 days**.
* Order processing will **not** be subject to the standard SLA if:
* There is in-complete and/or inaccurate information,
* The order is delayed due to credit checking.

# MICROSOFT DYNAMICS® AX 2012

Microsoft Dynamics AX 2012 is an ERP solution designed for enterprises and helps employees be more productive and increases the value of data by providing all people in the organization with access to critical business information and processes.

The single, global solution promotes rapid adoption because it’s simple to learn and use and provides the agility you need to expand business opportunities, modify processes, and differentiate your business.

Core industry functionality is built directly into the solution to support end-to-end capabilities for: manufacturing, distribution, retail, professional services, and public sector. Packaged solutions can be built and implemented on top of the industry platform with support from Microsoft Partners for an end-to-end solution that meets even the most specific needs. Microsoft Dynamics AX supports global organizations by offering multi-site, country-specific functionality, and multi-language capabilities on a central installation.

For further details on Microsoft Dynamics AX 2012 visit the launch portal on PartnerSource.

Microsoft Dynamics AX 2012 is localised and translated for the following countries.

|  |  |  |
| --- | --- | --- |
| * Australia * Austria * Belgium * Canada * Denmark * France * Germany * Ireland * Italy * Malaysia | * Mexico * Netherlands * New Zealand * Singapore * South Africa * Spain * Switzerland * UK * USA | * Finland\* * Iceland\* * Norway\* * Sweden\* * Saudi Arabia\* * Thailand\* |

*\*****Please note:*** *For these countries, localizations to address specific tax, accounting and financial reporting requirements will be available at General Availability in August. However, translations (user interface and limited user assistance) are currently planned to be available in November, 2011. All features and dates are preliminary based on current expectations and are subject to change without notice.*

For details regarding availability of Microsoft Dynamics AX 2012, please click [HERE](http://www.microsoft.com/en-us/dynamics/erp-buy-ax-software.aspx).

**Pricing and Licensing:**

* We are introducing a new Server and CAL licensing model for Microsoft Dynamics AX 2012 known as Business Value Licensing (BVL). It is a revolutionary and much simplified way to purchase ERP. This new model is effective from August 1st, 2011 and is the **only** licensing model used to purchase Microsoft Dynamics AX2012. Training materials and information about the new Microsoft Dynamics AX 2012 licensing model are available at the following link, click [HERE](https://mbs.microsoft.com/partnersource/partneressentials/licensingpolicies/businessvaluelicensing)
* For details regarding availability of Microsoft Dynamics AX 2012 by country and industry, please click [HERE](https://mbs.microsoft.com/customersource/newsevents/news/generalnews/MSDYAX_AvailabilityLocalizationTranslation).

**Existing Customers:**

* Please note that existing customers will not be automatically upgraded to Microsoft Dynamics AX 2012
* It is necessary for existing customers to [upgrade/transition](https://mbs.microsoft.com/downloads/partner/partneressentials/MicrosoftDynamicsAX2012UpgradePolicy.pdf) to the new [Microsoft Dynamics AX 2012 Business Value Licensing model](https://mbs.microsoft.com/partnersource/partneressentials/licensingpolicies/businessvaluelicensing) in order to get the new version
* More information can be found [HERE](https://mbs.microsoft.com/partnersource/deployment/documentation/howtoarticles/msdax2012opttraining.htm).

**Partner Readiness**

* Worldwide Microsoft Dynamics AX 2012 Operations Training sessions took place in September. This training will provide information about placing orders for Microsoft Dynamics AX 2012 and upgrading existing customers to Microsoft Dynamics AX 2012. Operations Training materials are available [HERE](https://mbs.microsoft.com/partnersource/deployment/documentation/howtoarticles/msdax2012opttraining.htm) in multiple languages.
* We recommend that channel partners visit the [Microsoft Dynamics AX 2012 Launch Portal](https://mbs.microsoft.com/partnersource/solutions/AX/MSD_AX2012LaunchPageHome.htm) on PartnerSource to obtain the latest sales and marketing information on Microsoft Dynamics AX 2012.
* The [Microsoft Dynamics AX 2012](https://mbs.microsoft.com/partnersource/deployment/resources/productreleases/MicrosoftDynamicsAX2012)  page on PartnerSource contains the download for the final release of Microsoft Dynamics AX 2012.

**Demo / Dev Licenses**

* Microsoft Dynamics AX partners are entitled to 25 named users on their Microsoft Dynamics AX 2012 Demo / Dev license. This license is provided for customer demonstration, development and testing purposes only and cannot be used for internal use purposes or transferred to customers. Partners can have both a Microsoft Dynamics AX 2009 and Microsoft Dynamics AX 2012 Demo / Dev license.
* Demo / Dev licenses are available for download on VOICE under Developer Tools -> License Key Configuration -> Create New Configuration. To download a Microsoft Dynamics AX 2012 Demo / Dev license, select Product Line = ‘Microsoft Dynamics AX Business Value’.

**Evaluation Licenses**

* For Microsoft Dynamics AX 2012, evaluation licenses can be manually requested by the partner on behalf of the customer. An evaluation license is a license to assist a customer in evaluating their product requirements and in making a decision whether to purchase a full license or not.
* Click [HERE](https://mbs.microsoft.com/Cms/Templates/document/General.aspx?NRMODE=Published&NRNODEGUID=%7b300A6472-8E2E-4EA7-BE0F-0BA8B0540630%7d&NRORIGINALURL=/partnersource/partneressentials/agreements/MSDYN_AX2009EvalLicense.htm&NRCACHEHINT=Guest&wa=wsignin1.0) for Evaluation Software License Terms (SLT) & Order form.

**Microsoft Partner Network (MPN) Internal Use Licenses**

* All partners who have an existing Microsoft Dynamics AX 2009 Microsoft Partner Network (MPN)Internal Use License will be automatically upgraded to Microsoft Dynamics AX 2012 by end of September, 2011 (In countries where Microsoft Dynamics® AX 2012 is generally available).
* Partners whose licenses have not yet been upgraded, may request an upgrade by contacting their [Microsoft Regional Operations Centre](https://mbs2.microsoft.com/PartnerSourceApp/chatnow.aspx)
* Details of current Microsoft Dynamics AX 2012 license entitlements for MPN are available [HERE](http://download.microsoft.com/download/F/6/7/F674AE63-14AD-4ED3-BA05-85AFBDAFA563/User_Type_Matrix.xps)

# 4.4 BUSINESS READY LICENSING (BRL) AND BUSINESS READY ENHANCEMENT PLAN (BREP)

**Business Ready Licensing (BRL) and Business Ready Enhancement Plan information is available** [HERE](https://mbs.microsoft.com/partnersource/partneressentials/guides/MSDYERP_LicencingGuide?r=13&l=2) under Microsoft Dynamics® ERP Licensing Guide – Partner Edition on PartnerSource.

Editions under the **Business Ready Licensing** plan include:

**A BRIEF OVERVIEW OF THE DIFFERENCES BETWEEN BUSINESS ESSENTIALS AND ADVANCED MANAGEMENT IS PROVIDED IN THE FOLLOWING TABLE:**

|  |  |  |
| --- | --- | --- |
|  | **Business Essentials Edition** | **Advanced Management Edition** |
| **Foundation Pack** | * Pre-selected, packaged set of basic functionality * Includes 1 Full Access user | * Includes all Business Essentials functionality, plus more * Includes 1 Full Access user |
| **Additional Users** | * License up to 10 additional Full Access (concurrent) users at the Foundation Pack price * Price breaks from 11th user * Unlimited users | * License up to 10 additional Full Access (concurrent) users at the Foundation Pack price * Price breaks from 11th user * Unlimited users |
| **Additional Components** | * Limited additional components are available for Business Essentials customers * Primarily based on a flat fee | * More additional components of extended functionality are available for Advanced Management customers * Primarily based on a flat fee |

Table 1: Overview BRL Business Essentials vs Advanced Management Edition

**PLEASE NOTE: IN BUSINESS READY LICENSING, WE WILL REFER TO BOTH MODULES AND GRANULES AS COMPONENTS.**

**BUSINESS ESSENTIALS AND ADVANCED MANAGEMENT USERS CANNOT BE MIXED.**

**ADVANCED MANAGEMENT ENTERPRISE PROVIDES ADDITIONAL COMPONENTS FOR ADVANCED MANAGEMENT ENTERPRISE CUSTOMERS ONLY, INCLUDING EXTENSIONS TO COMPONENTS IN THE ADVANCED MANAGEMENT EDITION, AS WELL AS OEM MODULES, AND THE MORE COMPLICATED SOFTWARE COMPONENTS.**

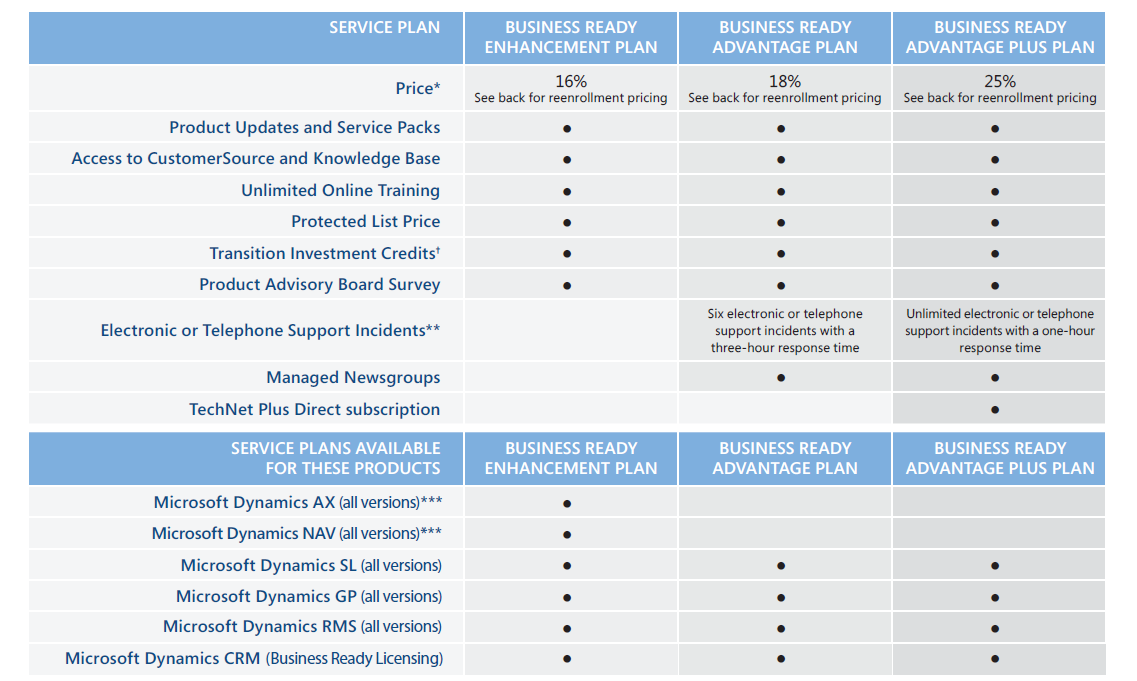
BRL **price lists** are available to download here from [PARTNERSOURCE](https://mbs.microsoft.com/partnersource) ⇨ Worldwide sites ⇨ [select your country/region] ⇨ [Pricing & Ordering](https://mbs.microsoft.com/partnersource/worldwide/asiapacific/pricing/) ⇨ Price Sheets.

**BUSINESS READY ADVANTAGE PLAN (BRAP)**

In the AOC, all **new customers** purchasing GP, CRM and SL must purchase a one year Business Ready Advantage Plan, which is 18% of the System List Price (SLP). The AOC also offers the Business Ready Advantage Plus Plan (25% of SLP).

In AOC the pricing on three year plans differs from EOC and APOC. Countries in LATAM receive a discounted price when purchasing a three year plan (14% of SLP for BREP, 16% for BRAP and 23% for BRAPP) but we do not offer the discount to customers located in the US and Canada, meaning that they pay standard pricing on three year plans (16% for BREP, 18% for BRAP, and 25% for BRAPP).

**BREP VERSUS BRAP VERSUS BRAP PLUS**



**BUSINESS READY ENHANCEMENT PLAN (BREP)**

The Business Ready Enhancement Plan for Microsoft Dynamics® is the maintenance plan for Microsoft Dynamics® customers around the globe. The plan includes:

* Upgrades, Updates, Service Packs, Fixes and Regulatory/Tax Updates
* Sustained Engineering
* Support Lifecycle Policy
  + 5-Year Support Lifecycle Policy for all products released 2005 or later
  + 10 year support policy for all major releases  of NAV, GP, SL, AX, RMS, CRM beginning  with releases starting in December 2007
* Investment Protection when moving to the future converged Microsoft Dynamics solution
  + Transition Investment Credit
* CustomerSource access including:
  + Unlimited Online Training
  + Knowledge Base
  + Downloads & Updates
  + Newsgroups
* Protected List Price

## What is Protected List Price?

Protected List Price is established by Microsoft by recording the recommended system list price at the time of your Microsoft Dynamics license purchase. This list price is protected and becomes the basis upon which your future Enhancement Plan renewals are calculated.

For more details on Protected List Price click [HERE](https://mbs.microsoft.com/customersource/worldwide/us/serviceplans/customerserviceplans/plppolicies.htm?printpage=false&sid=0z1yvovj4sv0tlnwjoskb4vd&stext=protected%20list%20price%20policy)

**Enhancement Plan fees:**

* **New and existing customers** pay **16%** of the License Enhancement Value for their Enhancement Plan (plan length is 365 days), regardless of the region. The Enhancement Plan is mandatory for the first year after the configuration of a new license. There is no grace period discount.

**Example:**

License Enhancement Value = 10,000 USD

Enhancement Plan rate = 16%

Duration = 365 days (= 1 year)

Enhancement Plan fee = 10,000 USD x 16% = 1,600 USD

* **Lapsed customers** will lose Protected List Price (PLP) and revert to System List Price (SLP)/ Current List Price (CLP) and lose their entitlement to Protected List Price (PLP). Lapsed Customers will need to re-enrol in the Enhancement Plan first and then renew the plan for 365 days or a three years Enhancement Plan going forward. The re-enrolment invoice will show the following rates:
* Current % for Enhancement Plan of the System List Price
* 3% re-enrolment fee
* Current % for future year of Enhancement Plan fee

**Example for a customer on a 16% Enhancement Plan (e.g. Microsoft Dynamics® AX)**

License Enhancement Value = 10,000 USD

Lapsed period = 420 days

Re-enrolment rate = 16% + 3%

Re-enrolment fee = 10,000 USD x (16% + 3%) x 420/365 = 2,186.30 USD

Duration going forward = 365 days (= 1 year)

Enhancement Plan rate = 16 %

Enhancement Plan fee = 10,000 USD x 16% = 1,600 USD

Total Enhancement Plan fee = 2,186.30 USD + 1,600 USD = 3,786.30 USD

Microsoft dynamics® solutions have a minimum requirement of one year of enrolment in the enhancement plan in the first year of purchase.

The BRL ordering process is described in section [4.2 ORDERING](#_ORDERING). The Enhancement plan should be ordered via My Messages or via the Regional Operations Center see section [5.1 CHAT NOW / SUBMIT AN INQUIRY / MBS TELEPHONE SERVICE / EMAIL (APOC ONLY)](#_CHAT_NOW_/) for new customers or if my messages is not available see section [4.4 RENEWING BUSINESS READY ENHANCEMENT PLANS (MY MESSAGES/AUTOBILL)](#_RENEWING_BUSINESS_READY) to see more details about ordering BREP.

**Three Year BREP Plans:**

Since March 1, 2010, all Microsoft Dynamics**®** NAVand Microsoft Dynamics® GP customers who renew will be charged 16% for a 1 year plan and 14% for a 3 year plan. Upgrading to a 3 year plan gives customers the ability to lock into a price for the 3 year term of the agreement.

* A three Year Enhancement Plan can be ordered via **My Messages.**
* For new customers the order should be placed in Order Central using the special **three years Plan Option** and choose the billing frequency: billed annually or the three years upfront (The AOC does not allow customers to prepay all three years up front). Annual payment options are available to all customers on Microsoft Dynamics® NAV, Microsoft Dynamics® AX, XAL, C5, Microsoft Dynamics® GP and Microsoft Dynamics® SL.
* Partners must deliver a hardcopy of the Microsoft Electronic Services Agreement (MESA) and Customer Services Guide (CSG) with each new sale of the enhancement at or before the time the additional ERP (Enterprise Resource Planning) system-related agreements are presented to the customer. More details in section [5.10 MICROSOFT ELECTRONIC SERVICES AGREEMENT (MESA) AND CUSTOMER SERVICES GUIDE (CSG)](#_MICROSOFT_ELECTRONIC_SERVICES). The **Microsoft Electronic Services Agreement and Customer Service Guide** are available for downloading on PartnerSource [HERE](https://mbs.microsoft.com/partnersource/partneressentials/serviceplans/customerserviceplans/Services_Guidebook)

**PLEASE NOTE:** **WHEN A CUSTOMER HAS PURCHASED A THREE YEAR SERVICE PLAN AND DECIDES TO CHANGE THEIR PARTNER OF RECORD IN VOICE PRIOR TO EXPIRATION OF THE PLAN, MICROSOFT WILL INVOICE THE NEW PARTNER OF RECORD FOR ANY REMAINING INSTALMENT PAYMENTS**

***IF A PARTNER ORDERS A MULTI-YEAR CONTRACT FOR A CUSTOMER WITH THE OPTION TO PAY IN ANNUAL INSTALLMENTS, THE PARTNER IS RESPONSIBLE FOR PAYMENT EACH YEAR. WITH ANNUAL INSTALLMENTS, THE PARTNER WILL BE BILLED 10 DAYS PRIOR TO THE EXPIRY OF THE 2ND/3RD INSTALLMENT AND IS RESPONSIBLE FOR THAT PAYMENT REGARDLESS IF THEY’VE COLLECTED IT FROM THEIR CUSTOMER.***

For more information please visit the Business Ready Enhancement Plan information site on PartnerSource [HERE](https://mbs.microsoft.com/partnersource/partneressentials/guides/MSDYERP_LicencingGuide?r=13&l=2)

For additional training materials on Business Ready Licensing and Business Ready Enhancement Plan please click [HERE](https://mbs.microsoft.com/partnersource/partneressentials/guides/MSDYERP_LicencingGuide?r=13&l=2)

# RENEWING BUSINESS READY ENHANCEMENT PLANS (BREP)-MY MESSAGES/AUTOBILL

**MY MESSAGES**

The main tool for renewing Enhancement Plans is called **My Messages** which can be accessed by Microsoft Business Solutions (MBS) Partners via [PARTNERSOURCE](https://mbs.microsoft.com/partnersource). My Messages is a tool that allows tracking, preparing and delivering customers‟ Enhancement Plan renewals. It provides the following benefits to MBS Partners:

* The tool includes reminders of when service plans are due for renewal for your customers.
* Customers with upcoming renewal anniversary dates will appear in the appropriate category and as the anniversary date of their service plan renewal approaches, customers will move from category to category. Partners can select a category and they will see a list of all customers due in that timeframe.
* In addition to tracking upcoming renewals, My Messages enables Partners to place orders for their customers’ Enhancement Plans electronically rather than contacting ROC.
* Partners can also create new quotes to accommodate changes to the customer’s implementation/system and e-mail quotes to themselves or to their customers.
* With My Messages renewals for multiple customers can be ordered at the same time
* All individuals at the Partner’s organization who have PartnerSource access will see messages designed for their company.

If you need further information about My Messages, please refer to the “My Messages” PowerPoint presentation on PartnerSource [HERE](https://mbs.microsoft.com/partnersource/MyMessages) or submit a query via *the* Regional Operations Center see section[*5.1 CHAT NOW / SUBMIT AN INQUIRY / MBS TELEPHONE SERVICE / EMAIL (APOC ONLY)*](#_CHAT_NOW_/).

More details about Enhancement Plans and three years Enhancement Plans can be found in section [4.3 BUSINESS READY LICENSING (BRL) AND BUSINESS READY ENHANCEMENT PLAN (BREP)](#_BUSINESS_READY_LICENSING) .

**AUTOBILL**

**Microsoft Dynamics Partner Strategy Autobill Program**

As a Microsoft Dynamics partner, you understand just how strategic the Business Ready Enhancement Plan is at every stage of your customer’s lifecycle.  Not only are these benefits the foundation of a customer’s relationship with Microsoft and their partner, they are critical to a customer’s overall success with their solution.

The Business Ready Enhancement Plan (BREP) benefits are grounded around the 3 primary pillars:

* Maximize solution value
* Protect your investment
* Increase your organization’s productivity

For successful partners like you, the enhancement revenue provides and essential annuity stream to help you reach your business goals, along with an opportunity to complement the plan with your own services, adding even greater value for your customers.

On October 27th, 2010, Microsoft announced plans to launch the Autobill Program which is a “through-partner” initiative to streamline these enhancement plan renewals. Once launched, Microsoft will automatically renew a customer’s service plan and invoice the assigned partner 20 days prior to the end of the current service plan term.

Today most partners renew their customers at a 95% recapture rate.  Ultimately, the Autobill program will allow us to more closely collaborate with partners to identify the small percentage of customers who are at risk of not renewing and automate the renewal for customers we know will renew anyway. Autobill launched in March 2011 for AOC/APOC and in August 2011 for EOC.

As announced during the October 27th MPN Announcement, Microsoft will no longer have a Grace Period for renewals once Autobill launches. In APOC / AOC, Effective March 1st renewals, if a customer lapses, they will incur re-enrolment and lapsed fees. Please ensure you are following the suggested process changes announced and reviewed over the past several months to ensure that your customer renews on-time. Autobill is designed to help you to automate the renewal process and ensure a seamless transition to the next plan year for your customer, providing uninterrupted access to their benefits.

**How does Autobill work?**

You may adjust your Autobill Status up until T-20 and Microsoft will bill you at T-10 for any customers who are not opted-out from the Autobill program.

As a partner, what value does Autobill bring to our organization?

* As stated earlier, most partners renew their customers at a 95% recapture rate.  Autobill will allow us to more closely collaborate with you to identify the customers who are at risk of not renewing.
* Leaving customers in Autobill can take much of the administrative burden off of the partner because you won’t have to place manual orders for all of your customers.
* Where Microsoft has dedicated resources to drive renewals, customers opted out of autobill will be the highest priority for renewal call-downs. These freed up resources will be utilized to work strategically with you to help them drive additional license revenue and additional value with you installed base.
* The Autobill tools, when utilized correctly, will also give us an opportunity to collaborate with partners in a transparent way to improve our communication to customers and reduce duplication of efforts with our mutual customer base.

**What makes a customer eligible for Autobill?**

There are specific business rules that apply for Autobill eligibility.  All business rules are validated real-time; the system looks at the Autobill settings in My Messages 10 days prior to the renewal (T-10), which is the day the invoice will be created.  If your customer is not eligible for Autobill, the Autobill status flag will be greyed out; however, you will still have the ability to renew the customer manually.

In order to participate in Autobill, the following must be true:

* You must have terms with Microsoft in order for your customer to be Autobilled.
* Your customer must be active on the Enhancement Plan. Once your customer has a manual order placed, they will be automatically defaulted into the Autobill program for the following year.
* The customer must have only 1 Partner of Record.
* You must have obtained all of the necessary product authorizations for the order.  This is no change from today’s process.
* A renewal quote must be present for your customer.
* Autobill will not run for your customer if a manual renewal order has already been placed prior to T-10.
* Service plans from Volume Licensing will not be a part of the Microsoft Dynamics Autobill program.
* If your customer has an account with CRM VL and a Microsoft Dynamics ERP solution on the same account, the account will not be autobilled.

To manage the Autobill launch process for your customers, we recommend the following steps:

1. Attend the Autobill Advanced Training [HERE](https://mbs.microsoft.com/partnersource/partneressentials/partnerprogram/OctAnnouncement.htm)
2. Evaluate your renewal process to ensure early commitment from customers.
   * + Adjust the timing of your invoice due dates to ensure earlier payment from customers.
     + You’ll want to begin receiving payment from customers at least 11 days in advance of the renewal date. To do this, you will likely want to make the due date earlier than what it is today to ensure payment from customers prior to T-10.
     + Partners should have contracts with their customers clearly outlining their payment and renewal terms.
     + Partners often include terms which require customers to give advance notice if they don’t plan on renewing with them the following year.

Partners must deliver a hardcopy of the Microsoft Electronic Services Agreement (MESA) (Formerly CSA) and Customer Services Guide (CSG) with each new sale of BREP at or before the time the additional ERP (Enterprise Resource Planning) system-related agreements are presented to the customer. More details can be found in section [5.10 MICROSOFT ELECTRONIC SERVICES AGREEMENT (MESA) AND CUSTOMER SERVICES GUIDE (CSG)](#_MICROSOFT_ELECTRONIC_SERVICES).

# ORDERING PARTNER SERVICE PLANS

Microsoft Business Solutions (MBS) Partner Service Plans give you the opportunity to purchase the support, training, and consulting services you need to boost your Microsoft Dynamics® product and solution knowledge, increase customer satisfaction, and grow your business.

An overview of Partner Service Plans and pricing is available [HERE](https://mbs.microsoft.com/Cms/Templates/site/UtilityPlus.aspx?NRMODE=Published&NRNODEGUID=%7bC59872AC-DADE-4CF2-BDBD-5DB4EA74FD9E%7d&NRORIGINALURL=/partnersource/partneressentials/serviceplans/partnerserviceplans/&NRCACHEHINT=Guest&wa=wsignin1.0) this information is to help determine what plan will best fit your business needs.

**PURCHASING ADVANTAGE PLAN AND ADVANTAGE PLUS PLAN:**

* Contact your Partner Account Manager, Service Account Manager or [LOCAL MICROSOFT OFFICE](http://www.microsoft.com/dynamics/worldwide.mspx) to obtain required contracts when ordering Advantage Plan or Advantage Plus Plan.
* Submit all contracts in signed duplicate. A countersigned copy will be returned for your records.
* Microsoft recommends using a courier. Include the tracking details on your order form in the space provided. We will then track the documents on your behalf.
* Where possible include a scanned copy of any contracts including courier tracking number or registered post shipping number together with your order form and cc: email below This will expedite the contract validation process

|  |  |
| --- | --- |
| **AOC** | [mbsagree@microsoft.com](mailto:mbsagree@microsoft.com) |
| **EOC** | [mbscon@microsoft.com](mailto:mbscon@microsoft.com) |
| **APOC** | [mbslques@microsoft.com](mailto:mbslques@microsoft.com) |

* Payment terms are accepted for payment on all Advantage Plan and Advantage Plus Plan orders.

Order forms, Advantage Plan and Advantage Plus Plan contracts and more information on how to order a Partner Service Plan is available on PartnerSource via the [PARTNER SERVICE PLANS](https://mbs.microsoft.com/partnersource/resources/partneressentials/serviceprograms/PAplanordering.htm) page.

**PLEASE NOTE: THE ADVANTAGE PLAN or ADVANTAGE PLUS PLAN ORDER CAN BE PROCESSED AS SOON AS THE CONTRACT HAS BEEN SIGNED AND PROCESSED BY THE MBS CONTRACTS TEAM.**

* ***ONLINE ORDERS***

Once the contract has been processed you can order the partner service plan online via [ORDER CENTRAL](https://mbs.microsoft.com/orderprocessing).Additional benefits and support incidents can also be purchased via [ORDER CENTRAL](https://mbs.microsoft.com/orderprocessing).

On Account and Wire Transfer are the only accepted methods of payment.

* ***MANUAL ORDERS***

Manual orders for the Advantage Plan, Advantage Plus Plan and additional benefits can be requested but it is recommended to use the online ordering functionality via Order Central. First obtain the Order Form from PartnerSource, complete the Order Form and send it to the relevant Regional Operations Center.

PURCHASING FLEX SUPPORT INCIDENTS:

* Additional support incidents can are available for partners on an existing service plan or for partners not on an existing service plan.
* Order forms and more information on how to order support incidents is available on PartnerSource via the [PARTNER SERVICE PLANS](https://mbs.microsoft.com/partnersource/resources/partneressentials/serviceprograms/PAplanordering.htm) page. Orders can be submitted online or via the relevant Regional Operations Center.
* ***ONLINE ORDERS***

Additional support incidents can also be purchased via [ORDER CENTRAL](https://mbs.microsoft.com/orderprocessing).

On Account and Wire Transfer are the only accepted methods of payment.

* ***MANUAL ORDERS***

Manual orders for additional support incidents can be requested but it is recommended to use the online ordering functionality via Order Central. First obtain the Order Form from PartnerSource, complete the Order Form and send it to the relevant Regional Operations Center.

# SPECIAL DEALS

A special deal (also known as special bid or PromoWeb discount) is where a Partner **negotiates an order discount** with the Partner Account Manager (PAM) or MS Representative.

* To obtain a special deal on an order, you must contact your PAM or MS Representative to negotiate the deal. Once the deal is agreed the PAM will provide you with a discount ID (PromoWeb ID).
* A license order can only be placed **once** the discount has been formally approved by Microsoft Business Solutions (MBS) and an ID number has been made available by the PAM. The Promoweb ID should be entered in the **Promo Web / Discount ID** field in Order Central or in the **Promoweb ID** field on the **Cover Sheet**.
* If the discount ID number is **not** provided the discount will not be applied to the invoice.
* **Global Volume Agreement (GVA)** and **MultiSite Agreements** (MA) cannot be combined with special deal requests.
* Orders including the discount ID which cannot be validated will be delayed until the correct information is submitted. The Regional Operations Center (ROC) will inform you and your PAM of this via email.

**PLEASE NOTE: SPECIAL DEAL ID, SPECIAL BID ID, DISCOUNT ID AND PROMO WEB ID HAVE THE SAME MEANING.**

Special deal discounts are applicable for Microsoft Dynamics® core ERP (Enterprise Resource Planning) products only. Any other software products developed by Microsoft or any software programs which are developed and owned by third parties are not subject for applying special deal discounts. For example, SQL runtime granules or third party Add-Ons cannot be discounted. Special deal discounts are also not applicable to enhancement plans or to Microsoft Dynamics® CRM when sold under the Dynamics® price lists.

# ORDERS ON HOLD

There are several reasons as to why an order can go on hold and subsequently delay:

* The order is based on an **out-dated price list**,
* The **license is assigned to another Partner**,
* The **discount ID** on the order does not match the discount requested,
* An **invalid discount ID** appears on the order,
* A Partner **exceeded the credit limit** or has an overdue amount,
* The order has an **invalid configuration**,
* The **Partner authorization check fails**,
* The order is for a **Denied Party**.

If an order is placed on hold, the Regional Operations Center (ROC) will contact you directly to agree on any necessary actions in order to get the order processed.

# INCORRECT INVOICES / CREDIT REQUESTS

If an incorrect invoice was received, a Partner needs to submit a credit request for this invoice to the Regional Operations Center (ROC) **within 21 days** *(see Section 9(d)(4) of your SPA contract)* and specify the invoice number, provide details and a business justification.

A credit request for an incorrect invoice can be submitted for **AOC and EOC** using the **MIMOS** or the On-line Call Logging Tool which can be accessed on PartnerSource [HERE](https://mbs2.microsoft.com/Support/OperationsIncidents.aspx?Mode=Create). For **APOC** submit a credit request for an incorrect invoice by email at [mbslques@microsoft.com](mailto:mbslques@microsoft.com)

# TRANSITION POLICY

Existing customers enrolled in an **Enhancement Plan**

**can transition** from one Microsoft Dynamics® **License Model**, **Product Line** or

**Edition** to another Microsoft Dynamics® License Model, Product Line or Edition.

|  |  |
| --- | --- |
| Definitions | |
| Product Line Transition | Any move from one product line code base to a different product line code base. |
| Edition Transition | Any edition change within the same product line and licensing model. |
| License Model Transition | Any move from the Module Based Licensing (MBL) model to the Business Ready Licensing (BRL) model, remaining within the same product line. |
| Microsoft Dynamics AX 2012 Upgrade/Transition | A move from an earlier version of Microsoft Dynamics AX (Module Based Licensing or Business Ready Licensing) to Microsoft Dynamics AX 2012 (Business Value Licensing Model) |

Table 2: Definitions - Transitions

Please review the **Business Ready Licensing Transition Policy**, **Partner Supplement for the Transitions Policy** and also read the **Customer** and **Partner FAQs** which are available under the following link [HERE](https://mbs.microsoft.com/partnersource/partneressentials/licensingpolicies/md_transitions.htm) The Microsoft Dynamics AX 2012 Upgrade Policy is available [HERE.](https://mbs.microsoft.com/downloads/partner/partneressentials/MicrosoftDynamicsAX2012UpgradePolicy.pdf)

**Ordering a Product Line, Edition or License Model Transition**

* Transition orders may be placed on Order Central in the same way as a regular order. The partner should select the correct customer account and choose the Transition Selection option.
* A new enhancement plan must be purchased when transitioning a customer.
  + Order Central will configure the new license and lock the old one.
  + Any Transition Investment Credit due will be calculated and applied by Order Central as a discount on the new license. A Transition fee will be applied for License Model Transitions.
  + The enhancement plan fee will be calculated by Order Central and any credit for unused enhancement on the old license will be applied against the enhancement plan on the new license.

**LICENSE MODEL TRANSITIONS – TOP 10 TIPS**

1. **Customers must be current on enhancement to transition**
2. **License Model Transitions for Microsoft Dynamics® provide customers with value and choice.** This is not something customers are being forced to do. If customers prefer, they can continue to purchase under Module Based Licensing.
3. **Customers will always receive the most recent version of their product when transitioning license models to Business Ready Licensing.** 
   1. Customers can downgrade to a previous product version as long as that product version is supported on Business Ready Licensing.
   2. It is not possible for customers on Business Ready Licensing to purchase modules from earlier versions that are not supported on Business Ready Licensing.
4. **Customer can continue to run the old license for 180 days during implementation. They cannot order any new users or modules on the old license.**
5. **The customer keeps any and all Microsoft functionality they owned before the transition (as long as it is available on Business Ready Licensing).**
6. **If a customer owns one module only available in either Business Ready Licensing for Microsoft Dynamics® Advanced Management or Advanced Management Enterprise, they will map directly to Advanced Management – regardless of whether they were a Standard Edition or Professional Edition customer under Module Based Licensing for Microsoft Dynamics®.**
7. **No module deactivations in the last six months**

Must wait six months or Reactivate the modules

1. **Must pay the difference between BRL and MBL price for any users purchased in the last 12 months**
2. **The Protected List Price for Microsoft Dynamics® on Module Based Licensing goes with the customer over to Business Ready Licensing.**
3. **All services credits must be used in full at the time of License Model Transition.**

**Ordering a Transition/Upgrade to Microsoft Dynamics AX 2012**

* Partners should read about the Microsoft Dynamics AX 2012 Business Value Licensing model [HERE](https://mbs.microsoft.com/partnersource/partneressentials/licensingpolicies/businessvaluelicensing.htm) and the Microsoft Dynamics AX 2012 Upgrade Policy at this [LINK](https://mbs.microsoft.com/downloads/partner/partneressentials/MicrosoftDynamicsAX2012UpgradePolicy.pdf) in detail to understand the options available, the eligibility criteria and customer impacts.
* CREDIT BASED PRODUCT VERSION UPGRADE/TRANSITION
  + Credit based product version upgrade/transition orders may be placed on Order Central in the same way as a regular order. The partner should select the correct customer account and choose the ‘Transition Selection’ option.
  + A new enhancement plan must be purchased when transitioning a customer.
  + Order Central will configure the new license and lock the old one.
  + Any Transition Investment Credit due will be calculated and applied by Order Central as a discount on the new license. A Transition fee will be applied for License Model Transitions.
  + The enhancement plan fee will be calculated by Order Central and any credit for unused enhancement on the old license will be applied against the enhancement plan on the new license.
  + FORMULA BASED PRODUCT VERSION UPGRADE/TRANSITION
  + A Microsoft Dynamics AX 2012 upgrade transition can be requested by submitting a request to the Microsoft Regional Operations Centre using the Global Order Form which can be found attached to the [PRICELIST](https://mbs.microsoft.com/partnersource/pricing/pricesheets/dynAXpricesheet.htm).

# ORDERING MEDIA & MARKETING COLLATERALS

* **ORDERING PHYSICAL MEDIA**
* **ORDERING MICROSOFT SHAREPOINT SERVER AND SQL MEDIA**
* **ORDERING MARKETING LITERATURE FOR ALL MICROSOFT DYNAMICS PRODUCTS WITH MEDIA**
* **ORDERING MBS COURSEWARE & TRAINING MATERIAL**
  + 1. **ORDERING PHYSICAL MEDIA**

To place an order for media for Microsoft Dynamics® AX or Microsoft Dynamics® NAV, you must choose the Media and Marketing Material Order option instead of the License Order option to submit an order online via Order Central

**ROC ACTIONS**

* + ROC will ensure that all physical items will be accompanied by all required shipping papers.
  + Delivery transit time may vary from one to 11 days depending to which country the item(s) is (are) to be delivered to.
  + Should you require specific information on the **latest shipment status** and airway bill number please log a query via *the* Regional Operations Center see section [*5.1 CHAT NOW / SUBMIT AN INQUIRY / MBS TELEPHONE SERVICE / EMAIL (APOC ONLY)*](#_CHAT_NOW_/) and you will receive the latest shipment status along with carrier details and airway bill number to allow you further **track and trace** capabilities if required.
  + Please refer to the offline Media pricelist list for pricing of media
  + Charge to cover: Product costs, Shipment costs, any Duties and Taxes.
  + For **destinations outside the European Union (EU) all** shipments will be accompanied by a detailed packing list and a customs invoice which will include “Bill to” details, “Ship to” details, Product part number, description and quantity, country of origin and the GATT valuation for customs purposes.

***PLEASE NOTE: DELIVERY TRANSIT TIME MAY VARY BETWEEN ONE TO 11 DAYS DEPENDING ON WHICH COUNTRY THE ITEM(S) IS (ARE) TO BE DELIVERED TO AND ANY POTENTIAL CUSTOMS DELAYS THAT MAY APPLY TO THE CONSIGNMENT.***

* + 1. **ORDERING MICROSOFT SHAREPOINT SERVER AND SQL MEDIA**

If you are ordering **Microsoft SharePoint Server (MSS) or SQL** it is important to note that the SQL and MSS software code will not be added to the Microsoft Dynamics**®** ERP license files. When MSS or SQL is ordered from the Dynamics pricelist, the Dynamics modules are used for billing purposes only. They do not add any permissions to the customers ERP license file/registration keys.

***PLEASE NOTE:*** ***WHEN ORDERING MICROSOFT SHAREPOINT SERVER (MSS) AND SQL IT WILL NO LONGER BE POSSIBLE TO PURCHASE FROM DPL FOR AX AND WILL NEED TO BE PURCHASED THROUGH VL.***

**SQL**

SQL software is pre-pidded which means that there is no license file or unlocking key. The physical media set will be distributed to you once the SQL license is ordered. There is no longer a need to order media separately to the license order unless replacement media is required.

**MSS**

With MSS 2010 (launched January 2011), there is no media and it is available through download only. The product key is located on the VOICE account on the registration page (if the customer is current on enhancement plan). Should a partner wish to stay on MOSS 2007 and require replacement media, it can be ordered online through Order Central.

* + 1. **ORDERING MARKETING LITERATURE FOR ALL MICROSOFT DYNAMICS®PRODUCTS WITH MEDIA**

Partners can place orders for their marketing needs in PartnerSource ( You need to use current logins and passwords for access).

Shortly after you submit your order you will receive a **ship** **reference ID**.

* + 1. **ORDERING MBS COURSEWARE AND TRAINING MATERIAL**

**Registered Partners And Certified Software Advisors:**

Microsoft Registered Partners and customers **cannot** order Courseware and Training Manuals directly, but may order training materials through a Microsoft Certified Partner for Learning Solutions (CPLS). To search for a local CPLS, please use the Microsoft Resource Directory Link <https://solutionfinder.microsoft.com>. Training Extensions are available at no charge from Microsoft Business Solutions (MBS). Visit the Training Extensions page on PartnerSource to find all available training extensions for download.

**Microsoft Silver and Gold ERP Competent Partners:**

Courseware and Training Manuals are available for direct order through independent third-party distributors. For your convenience, please see the instructions below:

* Open the Courseware and Training Manual list at Partner Source [HERE](https://mbs.microsoft.com/partnersource/communities/training/trainingmaterials/) to find the Course ID number.
* Search by product and language.
* Place an order via [MICROSOFT LEARNING](http://www.microsoftlearningproducts.com/).

***FOR MORE INFORMATION ON MBS TRAINING MATERIALS PLEASE EMAIL*** [MBSUNIV@MICROSOFT.COM](mailto:mbsuniv@microsoft.com).

# DYNAMICS AX FOR RETAIL 2009

Dynamics® AX for Retail 2009 is available in all countries where Dynamics® AX 2009 is sold. Dynamics® AX for Retail 2012 is now also available.

Partners are encouraged to become familiar with the details in order to encourage customers to take advantage of new capabilities.

The Microsoft Dynamics® AX for Retail 2009 solution provides a highly flexible global retail solution allowing you to deploy a complete end-to-end ERP solution or to integrate a multi-store management solution with an existing ERP or existing POS system. Dynamics® AX for Retail 2009 is available to buy from the Dynamics ® AX pricelist.

Dynamics® AX for Retail 2009 is exclusively offered through the Business Ready License Program (BRL) within the Advance Management (AM) Edition of AX 2009.

Dynamics® AX 2009 MBL customers will need to undergo transition to BRL if they want to take advantage of these new capabilities.

Pre-Requisite information to purchase Dynamics® AX for Retail 2009 is available on Partner Source[HERE](https://mbs.microsoft.com/partnersource/marketing/marketingcollateral/messagingframeworks/msdyaxretail_prk.htm?printpage=false&stext=dynamics%20ax%20for%20retail). You are encouraged to become familiar with the details if you intend to purchase Dynamics AX for Retail 2009.

For additional information or questions, please submit your query through via *the* [Regional Operations Center](mailto:https://mbs.microsoft.com/partnersourceapp/chatnow.aspx?wa=wsignin1.0)

To place a Dynamics® AX for Retail 2009 Migration request, place a manual order for Dynamics AX for Retail Migration. Include the Order Form and Pricelist via [Regional Operations Center](mailto:https://mbs.microsoft.com/partnersourceapp/chatnow.aspx?wa=wsignin1.0). The local ROC will validate and full the migration order request. Fulfilment of the license file will be made available in VOICE.

To order Dynamics® AX for Retail 2009, the partner must have signed the SPA agreement, Dynamics AX for SPA Profile & Product Software.

Certification to purchase Dynamics AX for Retail 2009 is no longer required.

Once the Dynamics SPA and AX Software Product & Profile Forms are complete, the Dynamics Partner can place an order for Microsoft Dynamics® AX for Retail 2009 module(s) on behalf of a Customer.

The Dynamics AX Advanced Management Module must be purchased before the Dynamics AX for Retail module can be purchased.

All Dynamics AX partners can purchase Dynamics® AX for Retail 2009 modules

The RMS partner purchase the Dynamics® AX for 2009 POS modules only, once they have signed a SPA agreement and selected Dynamics AX as the product.

A customer may have two partners, the partner of record being the primary Dynamics AX partner and the Dynamics® AX for Retail Partner.

# PARTNER SUPPORT / AGREEMENTS / PROCESSES

# CHAT NOW / SUBMIT AN INQUIRY / MBS TELEPHONE SERVICE / EMAIL (APOC ONLY)

**Chat Now** is an instant chat option available for immediate response from our Customer Care Team (during normal Local Regional Operating Center business hours). All operational queries regarding product orders, ordering policy, licensing, registration keys, etc. can be submitted to the Regional Operations Center (ROC) via the [CHAT NOW](https://mbs2.microsoft.com/PartnerSourceApp/chatnow.aspx?r=98&l=7&wa=wsignin1.0) functionality on PartnerSource.

**Submit an inquiry** (queries and some type of orders) directly to the ROC MBS Customer Operations Team through **The Microsoft Incident Management Operations System (MIMOS) or On-Line Call Logging Tool** whichis a Web based tool used by Microsoft Business Solutions (MBS) Partners in the **AOC and EOC only** available on PartnerSource [HERE](https://mbs2.microsoft.com/Support/OperationsIncidents.aspx?Mode=Create)

***Please check if you have access to PartnerSource.***

***If not then contact the local VOICE Administrator in your organization and ensure that you have an active account in VOICE.***

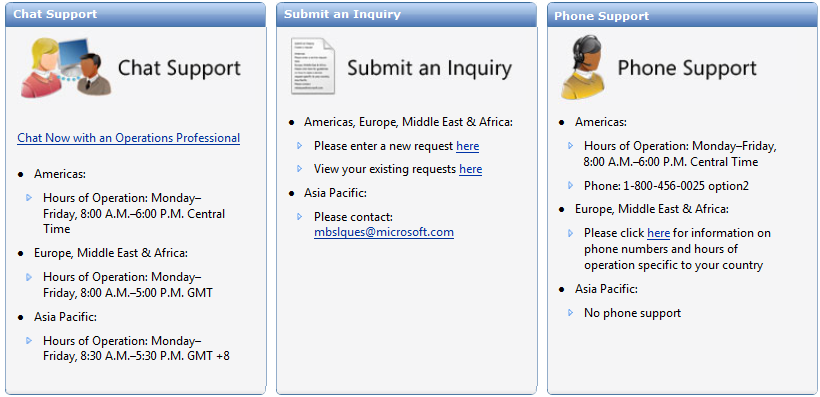
***When you have a VOICE account you need to link your Microsoft Windows Live ID to this account. This will then ensure that you have access to MIMOS (AOC & EOC Only)***

**Submit an inquiry to APOC by email at** [mbslques@microsoft.com](mailto:mbslques@microsoft.com)

Log on to PartnerSource, then go to the global **Contact Dynamics Operations** homepage [HERE](https://mbs2.microsoft.com/PartnerSourceApp/chatnow.aspx?r=292&l=2)

The Operations page then displays three ways to contact the Operations Center:

* Chat Now (Chat Support)
* Submit an Inquiry – MIMOS/On-line Call Logging Tool **(AOC & EOC only)**
* Submit an Inquiry- APOC By email at [mbslques@microsoft.com](mailto:mbslques@microsoft.com)
* Phone Support **(with MIMOS Case number for AOC & EOC only)**

  
 Figure 1: Contact Dynamics Operations options

The **Submit an Inquiry** option has two choices **(AOC & EOC only)**:

* + View existing requests – this displays a list of individually submitted cases and a list of cases submitted by all company contacts
  + Enter a new request – this links to the case submission page account information automatically populated.

Follow the next steps to fill in the MIMOS Case Information page:

Figure 2: Process for Submitting a Case to AOC & EOC via MIMOS/On-Line Call Logging Tool

Once you **submit** your query or order it is **automatically** sent to the ROC MBS Customer Operations Team for processing. Shortly after submitting your query, you will receive an email, which contains a unique reference number, the **Case number**.

After submitting a Case, you can check the **status** of your Case by ringing a free phone line (see the Appendix for the phone number for your country) and quoting the Case number to the agent in the AOC & EOC MBS Customer Operations Team.

**MBS Telephone Service (AOC & EOC only)**

As part of MIMOS/On-Line Call Logging Tool a free phone line is available for Partners to use for follow up calls.

The MBS telephone line **cannot** be called unless MIMOS has been used to submit a request (EOC only)

The hours of operation for the telephone service are 8:00am to 5:00pm GMT.

Calls requiring an escalation can be escalated to a Supervisor or Manager if it is required

The MBS telephone service can be used for:

* Urgent orders which need to be processed quickly after submitting a Case.
* Obtaining a status update on the progress of a Case being processed.
* Cases that are approaching the end of the Service Level Agreement (SLA) for resolution completion.
* Escalating a query where a Partner believes that they have not received a quality response from the ROC MBS Customer Operations Team.

If you need **training on MIMOS**, please review the training presentation for self-training which is available on PartnerSource on the Operations homepage for your country/region.

If you are experiencing CLT problems you can send an email to [MBS CUSTOMER CARE OPERATIONS](mailto:mbsquery@microsoft.com) with the text**“MIMOS access issue”**in the subject line.

***Reminder: Submit an inquiry to APOC by email at*** [*mbslques@microsoft.com*](mailto:mbslques@microsoft.com)

# SERVICES PROVIDER LICENSE AGREEMENT

The **Service Provider Licensing Agreement (SPLA)** enables an organisation to license Microsoft software products to provide software services to its customers. The SPLA expressly allows for delivering software services if a Partner’s customer does not want to acquire their own licenses. Microsoft Dynamics® AX, Microsoft Dynamics® NAV, Microsoft Dynamics® GP, Microsoft Dynamics® SL and Microsoft Dynamics® C5 are now available on the SPLA platform.

Click on the link [HERE](http://www.microsoft.com/dynamics/partners/hosting.mspx) to get an overview about the SPLA.

**HOW TO BECOME A SPLA PARTNER**

Partners wishing to enrol in the SPLA Agreement need to meet the following two eligibility requirements:

* **Enroll in the Microsoft Partner Network.** You must be a member of the Partner Network at any level. If you are not a member, get more information about the [Microsoft Partner Network](https://partner.microsoft.com/global/partner?countrycode=worldwide). You must also join and maintain status in the [Microsoft Hosting Community](https://partner.microsoft.com/global/licensing/licensingprograms/ltvolumelicensing/40057328).
* **Sign a Microsoft Business and Services Agreement (MBSA) - not applicable to SPLA Essentials.** Service providers that have an existing MBSA via another Volume Licensing agreement should work with their Microsoft account manager and/or reseller to provide their MBSA number and link the MBSA to their SPLA.

Microsoft recommends that you work with a designated SPLA reseller, available in most regions. You can sign the SPLA and obtain the Service Provider Product Use Rights (SPUR) document, price list, and customer license terms from your SPLA reseller. For contact information, see [HERE](http://www.microsoft.com/serviceproviders/licensing/howto.mspx).

Resellers are authorised to sell in multiple countries. The Partner should ask the Microsoft subsidiary about the authorised resellers available in the relevant country and then make a choice. In the rare instance where we do not have a reseller in a country they may be allowed to sign a direct SPLA Agreement – the local Microsoft subsidiary should assist them in this.

**HOW TO REGISTER FOR MICROSOFT DYNAMICS**® **ON SPLA**

SPLA Partners also need to achieve the same certification requirements as for SPA Partners which are listed in the SPA Guide or can use the certifications of a 3rd party Partner. More details about the SPA and link to SPA documentation are provided in the section [2.1 SOLUTION PROVIDER AGREEMENT (SPA)](#_SOLUTION_PROVIDER_AGREEMENT) in this guideline.

Partners need to obtain the registration form “Microsoft Dynamics™ registration form for SPLA” from the SPLA Reseller, complete it and send it back to the SPLA Reseller. This form is also available from [EXPLORE.MS](http://www.explore.ms/). After the form has been received in the ROC the information is validated, the Partner will be mastered in VOICE just as SPA Partners are handled.

**HOW TO ORDER LICENSE KEYS FOR MICROSOFT DYNAMICS**® **ON SPLA**

To order Production License Keys for a customer, complete the **License Key Request Form** [HERE](https://www.explore.ms/Navigation.aspx?Start=Programs.SPLA.Forms) and follow the instructions to submit to the Regional Operations Center (ROC).

**BILLING AND INVOICING**

There is no cost to the SPLA Partner for a Microsoft Dynamics® license key; billing is based on the Partner’s reporting of their customers’ usage during the prior month.

The Partner is responsible for consolidating and reporting the use of the Microsoft Dynamics® software product (in the form of software services) by customers and reporting such information to the SPLA Reseller. License usage reports must be submitted either through a **Monthly Use Report or a Zero Use Report via MOET (Microsoft Order Entry Tool)** available [HERE](http://www.explore.ms/).

More details for Microsoft Service Providers can also be found in [HERE](http://www.explore.ms/) under the various folders in the “Services Provider Licensing Agreement (SPLA)” Section <https://www.explore.ms/Navigation.aspx?Start=Programs.SPLA>

# PARTNER LOCALISATON & TRANSLATION LICENSE PROGRAM (PLLP)

PLLP is a licensing program designed to provide partners with the necessary rights to create localizations and/or translations of Microsoft Dynamics software: Microsoft Dynamics® AX, Microsoft Dynamics® GP, Microsoft Dynamics® NAV and Microsoft Dynamics® SL

PLLP delivers benefits to you as our channel partners, including license to Microsoft IP, access to technical documents, resource center, naming guidelines and more. Prior to this licensing program, our channel partner agreements such as the Solution Provider Agreement (SPA) have prohibited localization and translation of Microsoft Dynamics software.

By utilizing the extensible nature of the development architecture of Microsoft Dynamics software, under the PLLP, you as a channel partner may now:

* Supplement the base Microsoft Dynamics software by developing functionality to meet specific laws or regulations that are not covered in such software ”out-of-the-box” (e.g., regulations that are unique to states, provinces, cities or municipalities in a particular country); or
* Create localizations and/or translations in countries where Microsoft does not offer a localized or translated version of Microsoft Dynamics software. Learn more about the program requirements, benefits, and how to sign up on the PLLP homepage [HERE](https://mbs.microsoft.com/partnersource/partneressentials/pllp)

# MICROSOFT DYNAMICS® ACADEMIC ALLIANCE (DynAA)

**The Microsoft Dynamics**® **Academic Alliance (DynAA) program** donates an educational and/or academic research only license (education license) to qualifying educational institutions who integrated Microsoft Dynamics® product(s) in their curriculum or academic research in disciplines that include, but are not limited to, accounting information systems, managerial accounting, management information systems, professional selling, marketing, supply chain and operations management. The terms of the license state that the software cannot be used for evaluation purposes, for personal, family, or business use. The institutions cannot use the license(s) for Microsoft Dynamics®-specific training on a for-profit basis or to manage their own operations.

In addition to the software license, the DynAA program provides the institution with a complimentary customer support plan, which gives access to Microsoft Business Solutions (MBS) CustomerSource customer portal, and a DynAA Curriculum Repository.

A Partner who identifies an educational institution interested in using **Microsoft Dynamics**® **Products for educational or academic research** should direct questions and application to the DynAA Team at this [EMAIL](mailto:dynaa@microsoft.com) in English.

Please ensure to provide the following information:

* Contact information for the educational institution
* Partner contact information (if involved managing and/or supporting the institution)
* Product(s) the institution would like to use
* Details about how the product(s) will be used within their curriculum

The DynAA Team will review the educational institutions’ eligibility to join the program. If all criteria are met, the customer will be provided with the Microsoft Dynamics® Academic Alliance Agreement, which is to be signed by the institution and submitted in two copies back to the MBS Contracts Team in your ROC. As soon as the application is approved and the signed agreements are received by the Contracts Team the order can be submitted to ROC MBS Customer Operations Team by the DynAA Team.

Partners who have previously provided the Microsoft Dynamics® NAV or Microsoft Dynamics® AX educational license addendums should now direct their educational customers to the DynAA program and the program website listed below. For Microsoft Dynamics® NAV and Microsoft Dynamics® AX educational license renewals, these renewal requests should be sent to the DynAA Team at this [EMAIL](mailto:dynaa@microsoft.com) in English. All institutions using the educational license must sign the Microsoft Dynamics® Academic Alliance Agreement and return two signed copies to the MBS Contracts Team in Dublin.

Partners who are interested in connecting with educational institutions can contact the DynAA Team at this [EMAIL](mailto:dynaa@microsoft.com).

Program information and application process is described on the program [WEBSITE](http://www.microsoft.com/education/academic_alliance.mspx).

# MULTISITE AGREEMENT (MA) & GLOBAL VOLUME AGREEMENT (GVA)

**Multisite Agreement (MA):**

Customers who plan to deploy Microsoft Dynamics® solutions on **multiple sites** can realize **accelerated** user volume discounts by **aggregating** their purchases across all of their license sites. This can be done within a Multisite Agreement (MA), which is available worldwide.

To be eligible to sign an MA Contract, a customer must meet a minimum purchase threshold of 51 points for the first order. Those 51 points should be spread across a minimum of two sites. Each foundation pack is equivalent to one point and each additional user per site is equivalent to one point.

|  |  |
| --- | --- |
| **MA User Tiers** | **Qualifying Points** |
| D | From 51 to 75 |
| E | From 76 to 160 |
| F | From 161 to 500 |
| G | From 501 to 1000 |
| H | From 1001 to 1500 |
| I | From 1501+ |

Table 3: Overview of Multisite Agreement Tier Levels

Enhancement will be calculated over the lower MA user tier based on aggregate user purchases. Enhancement rates are unaffected by the MA agreement. In order to benefit from the agreement the customer licenses must remain on active enhancement for the duration of the MA agreement.

The term of the MA is two years. The MA will automatically renew for an additional year if the customer purchase an additional 25 points during the initial two year term.

**STEPS TO COMPLETE THE MULTISITE AGREEMENT**

* Download the most recent version of the MA Form [HERE](https://mbs.microsoft.com/partnersource/partneressentials/agreements/multisiteagreements.htm)

Two signed original copies of the MA must be sent to your local operations center via courier:

|  |  |  |
| --- | --- | --- |
| **EMEA Region** | **North America and  Latin America Region** | **Asia Pacific Region** |
| MBS Multisite Agreement Administrator  Microsoft EOC Atrium Building B Carmanhall Road Sandyford Industrial Estate Dublin 18, Ireland | MBS Multisite Agreement Administrator  Microsoft  4141 38th St. SW Fargo,  ND 58104 USA | MBS Multisite Agreement Administrator  Microsoft Regional Sales Corporation 438B Alexandra Road #04-09/12 Block B Alexandra Technopark Singapore 119968 |

Table 4: Addresses for Submitting Multisite Agreements

* You will receive a confirmation e-mail along with a unique MA Agreement Number for the customer in question.
* Once processing has been completed both copies of the MA will be signed by Microsoft. One hard copy will be returned to the customer and the other copy will be kept on file by Microsoft.

**STEPS TO SUBMIT A MULTISITE AGREEMENT ORDER**

* The customer must have a valid MA Agreement with a unique MA Agreement number for an order to be processed. The first order can be submitted together with the agreement.
* Download the **MA Order Form** [HERE](https://mbs.microsoft.com/partnersource/partneressentials/agreements/multisiteagreements.htm) and the up-to-date price list for the deployment country from the local site of PartnerSource at this [LINK](https://mbs.microsoft.com/partnersource) ⇨ Worldwide sites ⇨ [Pricing](https://mbs.microsoft.com/partnersource/worldwide/asiapacific/pricing/) ⇨ Price Sheets
* Complete the MA Order Form and the price list (order coversheet and a price list is required for each site license). Please reference guidelines for completing a price list and an order form below:
  + If more than one order is being placed for an MA agreement these orders should be submitted together to ensure aggregation of users across the sites
  + Submit the completed MA order forms and price lists for each site to your Regional Operations Center.
  + Note that until further notice MA Orders cannot be submitted online.
  + MA orders must be submitted on the MA Order Coversheet only in order to get the benefits of the MA program.
  + Please confirm the MA Tier level with the primary customer.
  + All mandatory fields on the MA Order Coversheet must be completed to ensure the order can be processed by the Regional Operations Center.
  + The MA Agreement must be current. If the term has expired the customer will not get the benefit of aggregation unless there is a renewal.
  + Orders with additional functionality and users will be processed separately; please note that in those instances two invoices will be issued.
  + Please reference ‘Multisite order’ on the subject line when submitting an MA order.
* Submit the order to your Regional Operational Center (ROC):

|  |  |  |
| --- | --- | --- |
| **EMEA Region** | **North America and  Latin America Region** | **Asia Pacific Region** |
| via the Microsoft Incident Management Operations System (MIMOS) or Manually (please see section [4.2 ORDERING](#_ORDERING)) | via the On-Line Call Logging Tool / Microsoft Incident Management Operations System (MIMOS) | [EMAIL ORDER](mailto:mbslques@microsoft.com) |

Table 5: Submitting Multisite Agreement Orders

**MA ORDERS CANNOT BE SUBMITTED VIA ORDER CENTRAL.**

**ROC Actions**

* + If the Regional Operations Center (ROC) requires more information you will be contacted via the email address entered as part of the ITR submission.
  + The **license file(s)** will be sent to you by **email**, the **invoice** will be sent by **email** and/or **post**.

Agreements, MA Order Coversheet form and Guidelines for MA are available [HERE](https://mbs.microsoft.com/partnersource/partneressentials/agreements/multisiteagreements.htm)

**PLEASE NOTE: MA DISCOUNTS ARE APPLICABLE FOR MICROSOFT DYNAMICS® CORE PRODUCTS ONLY. ANY OTHER SOFTWARE PRODUCTS DEVELOPED BY MICROSOFT OR ANY SOFTWARE PROGRAMS WHICH ARE DEVELOPED AND OWNED BY THIRD PARTIES ARE NOT SUBJECT FOR APPLYING MA DISCOUNTS. FOR EXAMPLE, CRM, SQL RUNTIME GRANULES OR THIRD PARTY ADD-ONS CANNOT BE DISCOUNTED.**

**Global Volume Agreement (GVA):**

The Global Volume Agreement is available worldwide, and provides a framework for custom Terms and Conditions offered by Microsoft, to address the following scenarios:

* Customer willing to purchase a minimum of 161 BRL users over a 3-year period
* Customers with large Microsoft IT spend that are looking for a similar volume licensing-oriented agreement for their ERP purchases
* Customers who have phased deployment schedules that want to negotiate based on all their forecasted deployments
* Customers who are looking for a strategic relationship directly with Microsoft, and the ability to choose the right partner at the right time

**Global Volume Agreement (GVA)** offers value to large customers who plan to purchase and deploy Microsoft Dynamics™ GP, Microsoft Dynamics™ SL, Microsoft Dynamics™ NAV, or Microsoft Dynamics™ AX solutions on a multisite, multinational basis spread over a number of years. These customers can get a lower per user list price based on volume by forecasting their purchase volume over a 3 year period. **They must forecast a minimum of 161 BRL users to be eligible** (a minimum upfront purchase of 25% of forecast is required on the initial order) and must meet annual purchase commitments in order to continue to enjoy the pricing benefits of GVA.   
We estimate that GVA will only be applicable for the top 10% of all BRL opportunities. As a result, we are not offering GVA broadly and **Partners cannot offer GVA pricing without a Microsoft Partner Account Manager (PAM) or Solution Sales Professional (SSP) engaged in the opportunity.** Your PAM or SSP will provide the GVA to you. You can view a sample GVA at the link below.  
  
Please work with your PAM or SSP to determine if your customer is eligible for GVA. We recommend the BRL Multi-Site Agreement as a starting point for any discussion with a large multisite customer. To learn more about Multi-Site Agreements, please refer to PartnerSource > Partner Essentials >> Agreements.  
  
**Engaging in and selling a Global Volume Agreement (GVA) to a customer may have an impact to your Partner Discount as defined in the Solution Provider Agreement (SPA), the associated SPA Guide and Discount Schedule.** Except for opportunities already agreed to during the pilot phase, any GVA deals that are closed after June 1, 2008 will be subject to a variable SPA partner discount. Partners will receive their standard SPA discount on the first 100 user licenses and any AME modules a customer purchases on the initial order. For all users in excess of the first 100 on the initial order, and all subsequent license purchases by the customer during the term of the customer’s GVA, the selling partner will receive their standard SPA discount or 40%, whichever is lower. GVA revenue applies toward the partner’s 12-month roll. Business Ready Enhancement sold with GVA will receive the standard SPA partner discount.   
  
If you are already engaged in an approved GVA opportunity, and you need to place license orders through your Regional Operation Center, please utilize the documents below.

* The Microsoft Master Business Agreement (MBA) or Microsoft Master Service Business Agreement (MBSA) is required for the GVA program. View the Step-by-Step Guide for Executing a MBSA for GVA Customers. [Click here for the Guide](https://mbs.microsoft.com/downloads/partner/partneressentials/agreements/StepbyStepGuideforExecutingaMasterBusinessServiceAgreement(MBSA).doc)
* [GVA—Partner Handbook](https://mbs.microsoft.com/downloads/partner/partneressentials/Agreements/GVA_Partner_Handbook_May2008.doc)
* [GVA— Order Cover Sheet](https://mbs.microsoft.com/downloads/partner/PartnerEssentials/Agreements/OrderFormFinal.zip)
* [GVA—Frequently Asked Questions (FAQ)](https://mbs.microsoft.com/downloads/partner/partneressentials/agreements/GVA_FAQ_For_Partners_FEB2008.pdf)
* If you read the [FAQ](https://mbs.microsoft.com/downloads/partner/partneressentials/agreements/GVA_FAQ_For_Partners_FEB2008.pdf), and you still have questions, please contact your PAM or SSP for assistance. If you would like to provide feedback on the program, please send an email to [GVAInfo@microsoft.com](mailto:GVAInfo@microsoft.com) .

# CHANGE OF PARTNER/CUSTOMER TRANSFER REQUEST

If you need to assist a customer with changing their Partner, you can do so by submitting the Change of Partner form.

For more information on Changing Partners: [CHANGE OF PARTNER FORM](https://mbs.microsoft.com/partnersource/partneressentials/agreements/changepartnerform.htm?printpage=false&stext=Partner%20Change)

You can also navigate on PartnerSource: PartnerSource|Partner Essentials|Agreements

Return this form completed to the Regional Operations Center (ROC). See the section

[5.1 CHAT NOW / SUBMIT AN INQUIRY / MBS TELEPHONE SERVICE / EMAIL (APOC ONLY)](#_CHAT_NOW_/)**.**

***FOR THE PARTNER CHANGE PROCESS WE OFFER A SLA OF THREE DAYS.***

# CUSTOMER DISASSOCIATION – BREP REVENUE RECAPTURE RATE (BRRR) IMPACT

**Scenario’s in which a Partner requests to disassociate Customers:**

1. **Partner no longer has a relationship with the customer.** 
   * Partner is accountable for BREP renewals for 12 months- unless customer selects a new partner
2. **Customer is no longer using the license.**
   * Partner is accountable for BREP renewals for 12 months
3. **Customer is bankrupt or no longer trading - Partner needs to submit proof.**
   * Bankrupt customers are excluded from BRRR.

**Proof of Bankruptcy / Out of Business:**  any of the following are acceptable:

* + A letter from the customer on company letterhead, confirming they are bankrupt/out of business signed by an officer of the company
  + Reputable websites that provide the status of a business and whether they are still trading.
  + Confirmation from the PAM
  + Press articles
  + Other legal documentation – to be validated by LCA

1. **Customer transitioned from Dynamics Pricelist(DPL) to SPLA - Partner needs to submit proof.**
   * Customers transitioned from DPL to SPLA are excluded from BRRR.

**Proof of Customer transition from DPL to SPLA**

* A company headed letter/ e-mail from the SPLA partner confirming the customer is on SPLA
* Customer needs to show proof and concession needs to be obtained before removal from BRRR.

# LICENSE TRANSFERS

The License Transfer Policy provides the conditions under which the following can be processed:

* License transfers between companies under shared ownership
* Transfer of users or functionality between licenses
* Deactivation of users or functionality within a license
* Name changes on a license

Please be aware that in almost every case these changes are only possible if the parties concerned are affiliates, as defined in the Software License Terms (SLT). In many cases there will be a cost involved and there are a number of limitations with regard to what can be transferred. More information on the License Transfer Policy and required application forms can be found by clicking [HERE](https://mbs.microsoft.com/Cms/Templates/document/General.aspx?NRMODE=Published&NRNODEGUID=%7b8F52EEA6-35CE-4ED4-8965-2CBC52E4CE8B%7d&NRORIGINALURL=/partnersource/partneressentials/licensingpolicies/msdy_policytransferlicenses.htm?printpage=false&NRCACHEHINT=Guest&printpage=false&wa=wsignin1.0)

***PLEASE NOTE: WE HAVE A SLA OF TWO DAYS TO PROCESS SUCH TRANSFERS.***

# SOFTWARE LICENSE TERMS (SLT)

As part of the sales process and as required under the Solution Provider Agreement (SPA), partners must present a copy of the current Software License Terms (SLT) below for Microsoft Dynamics AX, Microsoft Dynamics NAV, Microsoft Dynamics GP, Microsoft Dynamics SL to prospective customers so that they can be aware of the terms

The SLT are localized and available on PartnerSource [HERE](https://mbs.microsoft.com/partnersource/partneressentials/agreements/dynamics_slt.htm)

**PLEASE NOTE: OTHER CHANGES FOR MICROSOFT DYNAMICS® GP/ MICROSOFT DYNAMICS® SL – EACH SYSTEM DATABASE WILL REQUIRE ITS OWN SERVER SOFTWARE. IF ONE DATABASE RUNS MULTIPLE SITES, ONLY ONE SERVER LICENSE IS NEEDED.**

# MICROSOFT ELECTRONIC SERVICES AGREEMENT (MESA) AND CUSTOMER SERVICE GUIDE (CSG)

The Microsoft Electronic Services Agreement (MESA), formerly known as **Customer Services Agreement (CSA)** is a standalone global agreement containing general terms and conditions governing customer use of Microsoft broad services, which includes the Business Ready Enhancement Plan (BREP). The MESA is an agreement between Microsoft and the customer.

Partners must deliver a hardcopy of the MESA with each new sale of BREP at or before the time the additional ERP (Enterprise Resource Planning) system-related agreements are presented to the customer. MESA governs the customer’s use of Enhancement. The BREP **Customer Services Guide (CSG)** is incorporated by reference and can be attached as an exhibit to the MESA which will help customers understand the benefits and policies surrounding Enhancement. The MESA does not need to be signed.

MESA and CSG are localized and available for downloading at PartnerSource. You can also access a quick link to these guides by clicking [HERE](https://mbs.microsoft.com/partnersource/partneressentials/serviceplans/customerserviceplans/Services_Guidebook).

# UPGRADING LICENSES

**UPGRADING LICENSES**

* A license upgrade occurs when a new product version is released.
* Where possible\*, when a new version of a product is released, all license holders that have **an up-to-date Enhancement Plan with Microsoft Business Solutions (MBS)** will automatically be upgraded to the **most recent** license version.
* A customer with an **expired Enhancement plan** will need to re-enrol into an active Enhancement Plan in order to be eligible to upgrade to the latest available version.

\*Please note that in the case of the release of Microsoft Dynamics AX 2012, existing customers were not automatically upgraded to the new version. More information available on the Microsoft Dynamics AX 2012 Operational Training page [HERE](https://mbs.microsoft.com/partnersource/deployment/documentation/howtoarticles/msdax2012opttraining.htm?printpage=false&sid=1i2bhotmqyxvmazdysyo2hgg&stext=AX%202012%20training)

# MERGERS AND ACQUISITIONS

Any request for Partner Mergers & Acquisitions should be communicated to the Regional Operations Center (ROC). Before we can process your request, email the following to our Contracts team: Click your relevant ROC

|  |  |
| --- | --- |
| **AOC** | [mbsagree@microsoft.com](mailto:mbsagree@microsoft.com) |
| **EOC** | [mbscon@microsoft.com](mailto:mbscon@microsoft.com). |
| **APOC** | [mbslques@microsoft.com](mailto:mbslques@microsoft.com) |

* A signed headed letter from each company with the request to merge the accounts. The letter needs to clearly state which account to close and which to keep open. If you are legally obliged to notify all customers, or obtain their consent, to transfer their data from the merging account to the remaining account, the letter must confirm you have complied with these legal requirements.
* If the merging account has developed any Add-On Applications, the Add-On Reassignment form must be completed, signed by both partners and submitted to the Regional Operations Center. This will ensure that the add-on object ranges and add-on modules that are assigned to the merging partner will be reassigned to the remaining account. Add-On Applications are Independent Software Vendor (ISV) software applications, independently developed by a Microsoft Partner, that are enabled when used in conjunction with Microsoft Dynamics® NAV.
* A zero balance on the merging account – please liaise with Microsoft Credit Services regarding any balance on the merging account.
* An updated SPA Profile Form If the merging partner has additional ERP authorizations to the remaining partner. You can find this form [HERE](https://mbs.microsoft.com/partnersource/partneressentials/spa/spa.htm?printpage=false&stext=spa)
* In **APOC,** the process is a little different where it requires:

1) Sign novation agreement

2) Official letter re merger/acquisition

3) Legal proof re merger/acquisition.

# MICROSOFT DYNAMICS LEAD REFERRAL PROGRAM

The Microsoft Dynamics® Lead Referral Program has launched on August 16th, 2010. The program allows for all partners (MBS or Non MBS) to submit potential customer leads to Microsoft. If the Referral Lead results in a license sale the Partner will be paid a referral fee of 5% of the overall billed revenue, up to a maximum of $20,000. The fee will be paid on the initial License and Enhancement sale only and not on any subsequent sales or Enhancement. A Partner however cannot refer a lead and also be the transacting partner for the same opportunity.

**PARTNER REQUIREMENTS AND OPPORTUNITY**

The Referral Partner must be a member of MPN (at any level) and must agree to terms of Lead Referral Agreement in which they need to sign in order to be part of the program. Once a Partner signs up and their agreement is in place they can proceed in submitting leads to Microsoft. Some points to note with the Referral leads submitted:

* One-time signature required (12-month term with auto-renewal)
* Only new opportunities accepted
* Referrals must be submitted prior to transaction taking place
* Transaction must be completed prior to payment
* First referral received & accepted gets priority

In Scope:

* Products - AX, NAV, GP, SL, C5, CRM on-premises, CRM Online, POS/RMS
* Programs: BRL, VL (except for SPLA)
* Regions: Worldwide

For more information on the Microsoft Dynamics Lead Referral Program please visit here at [PARTNERSOURCE](https://mbs.microsoft.com/partnersource/customerreferral/en/default) or alternatively at [MPN](https://partner.microsoft.com/global/40142129)

# 5.15 ORDERING ADD-ONS FOR MICROSOFT DYNAMICS® NAV

* Add-On Applications are Independent Software Vendor (ISV) software applications, independently developed by a Microsoft Partner, that are enabled when used in conjunction with Microsoft Dynamics NAV. Add-On Applications are software solutions that complement and supplement the functionality found in Microsoft Dynamics NAV, and can be delivered and implemented for multiple customers. Add-On Applications may address an industry-specific need (vertical solutions) or general business processes (horizontal solutions).
* Add-Ons are not developed by Microsoft. Microsoft can in no way guarantee the quality of any add-on application. Microsoft will not offer product support on these products. Support must be obtained directly from the developing partner.
* Updated profiles for solutions developed by MBS Partners can be found [HERE](http://dynamics-erp.pinpoint.microsoft.com/)
* Some add-on applications are certified for Microsoft Dynamics. More information about Certified for Microsoft Dynamics software solutions can be found on PartnerSource – [HERE](https://mbs.microsoft.com/partnersource/marketing/campaigns/advertising/certified_for_microsoft_dynamics).
* There are two aspects related to an Add-On application:

1. First, there is the **Add-On base** which is the Microsoft objects which make it possible for the Add-On solution to work with the Microsoft Dynamics NAV core product. This part of the solution is ordered from Microsoft (the Add-On module).
2. Second, there is the solution developed by the ISV (referred to as **Add-On application**). The developing partner is responsible for distribution of the Add-On application to customers and reselling partners.

* To order an add-on for Microsoft Dynamics NAV, reselling partners must first contact the developing partner for the NAV add-on module to get their permission to order the add-on module from Microsoft.
* The developing partner manages the authorized resellers for their add-on module.
* Once a reselling partner has been added as an authorized reseller, they will be able to place the order for the add-on module in Order Central. Add-on modules are listed in the ‘Industry Solutions’ section of the online ordering catalogue.
* If a reselling partner does not know the name of the add-on module, they should contact the developing partner to obtain this.
* If a reselling partner is unable to order an add-module in Order Central, they should contact the developing partner requesting to be added as an authorized reseller for the add-on module.
* For add-on pricing please refer to the developing partner of the add-on application.
* Once a reselling partner has been added as an authorized reseller for an add-on module, they will be able to place orders for it and execute access for the associated add-on range will be added to their demo/dev license next time it is downloaded from the License Key Configuration tool on VOICE.

***PLEASE NOTE: THE ADD-ON MODULE DOES NOT PROVIDE ACCESS TO THE FULL SOLUTION. IT ONLY PROVIDES ACCESS TO THE MICROSOFT OBJECTS THAT ARE REQUIRED ON THE MICROSOFT DYNAMICS NAV LICENSE IN ORDER FOR THE SOLUTION TO WORK WITH MICROSOFT DYNAMICS NAV. THE RESELLING PARTNER SHOULD CONTACT THE DEVELOPING PARTNER DIRECTLY TO LICENSE THE ADD-ON APPLICATION.***

* If you have developed a solution based on Microsoft Dynamics NAV and you are interested in including it in the Add-on Program, please contact your PAM for further advice and instruction. You can also find information on the [ADD-ON REGISTRATION PAGE](https://mbs.microsoft.com/partnersource/deployment/documentation/howtoarticles/nav_addonregistration.htm) on PartnerSource.

# CRM

# INTRODUCTION

Microsoft Dynamics CRM 2011 is a familiar, intelligent, and connected CRM solution that combines Microsoft® Office applications with powerful CRM software to improve marketing effectiveness, boost sales, and enrich customer service interactions.

Microsoft Dynamics CRM 2011 introduces new server editions, 3-tier CAL licensing, user licensing simplifications, and increased licensing flexibility with User / Device CAL functionality and the CRM Online Step-up SKU license. These licensing changes provide the ability to address additional user scenarios, call center and shift worker scenarios, On-premises to Online migration, and present more affordable options for customer and partner self-service.

Microsoft Dynamics CRM 2011 is available across most Microsoft Channels, including Volume Licensing, Business Ready Licensing, ISV Royalty, Hosting (SPLA), and Microsoft Dynamics CRM Online -providing solutions for a wide range of use scenarios, from small workgroups to large enterprises, and the ability to offer the right solutions to meet Customers changing business needs.

Pricing for the Microsoft Dynamics CRM 2011 Servers has *not changed* from the Microsoft Dynamics CRM 4.0 version, yet many new product features have been added.

This Guide provides an overview of the licensing structure and options for Microsoft Dynamics CRM 2011. Topics covered include Server editions, Client access licenses and external connector licenses, program availability, sales channels, pricing, and Microsoft Dynamics CRM 2011 upgrade paths, Microsoft Dynamics CRM Online subscription licenses and programs, Software Assurance, Subscriber access licenses, and other important information that will help address Customer queries related to Microsoft Dynamics CRM 2011 licensing.

# HOW TO BECOME A MICROSOFT DYNAMICS® CRM PARTNER

**How to become a Microsoft Dynamics® CRM Partner?**

If you would like to become a Software Advisor and be eligible to receive fees on Microsoft Dynamics® CRM on premise and CRM Online customer orders, your organization must:

* Enrol in MPN [HERE](https://partner.microsoft.com/global/40014052)
* Sign the Software Advisor Fee Agreement at this [LINK](https://mbs.microsoft.com/public/crmsignup/relationshiptype.aspx)
* Pass the required exams to become certified on Microsoft Dynamics® CRM. For most up to date information on exam requirements, please review the Software Advisor Program Guide and Certification Information located on the Software Advisor page of the MPN portal [HERE](https://partner.microsoft.com/global/productssolutions/dynamics/microsoftdynamicscrm/40012663)
* If you want to be able to claim fees for selling Microsoft Dynamics® CRM please see section 6.3 below

# CLAIMING MICROSOFT DYNAMICS CRM FEES

Once a customer’s order for Microsoft Dynamics CRM has been placed, you will need to take further steps to claim your Software Advisor fees (not valid for CRM orders via the Dynamics price lists). A prerequisite you must have is an active CSA agreement in place. As a Software Advisor, you will be able to claim Software Advisor fees [HERE](https://mbs.microsoft.com/mbsregistration/ChooseRelationship.aspx) and complete the four steps as follows:

You can view the status of claims by clicking on this [LINK](https://mbs.microsoft.com/Members/MBSRegistration/CSAClaimList.aspx).

Microsoft Dynamics CRM is available from the Dynamics price lists for SPA Partners. To find out more information on pricing, please download the pricelist from PartnerSource.

# ORDERING MICROSOFT DYNAMICS® CRM VIA THE DYNAMICS PRICE LIST (DPL)

Microsoft Dynamics® CRM has been available to order from the Dynamics® price lists for SPA Partners as part of a customer ERP (Enterprise Resource Planning) solution since December 2006.

To sell Microsoft Dynamics® CRM from the Dynamics® price lists, Microsoft Business Solutions (MBS) Partners must have a valid **Solution Provider Agreement (SPA)** as well as having signed the Microsoft Dynamics® **CRM Addendum** and submitted into the Regional Operations Center (ROC) for processing. In addition, Partners must meet the Microsoft Dynamics® CRM **certification requirements** which are listed in the **SPA Guide** together with certification requirements for the other Microsoft Dynamics® products. The Microsoft Dynamics® CRM addendum is available for downloading from the SPA site together with standard SPA documentation. Link to SPA site, address details and requirements for submitting the SPA Agreement are specified in the Section 2.1 [SOLUTION PROVIDER AGREEMENT](#_SOLUTION_PROVIDER_AGREEMENT) of this guideline.

**ORDERING REQUIREMENTS**

**Microsoft Dynamics**® **CRM Professional** is available to order for **current** Microsoft Dynamics® AX, Microsoft Dynamics® GP, Microsoft Dynamics® NAV or Microsoft Dynamics® SL **customers** with a **valid Enhancement Plan** from Business Ready Licensing (Advanced Management Edition only) or Modular Based Licensing (Professional Edition only). It is also available to order for customers purchasing a **new license** for Microsoft Dynamics® NAV, Microsoft Dynamics® AX, Microsoft Dynamics® GP, or Microsoft Dynamics® SL from Business Ready Licensing (Advanced Management Edition). The Standard SPA discount will be applied for Microsoft Dynamics® CRM orders, the same as for other Microsoft Dynamics® products.

**PLEASE NOTE: THE CSA FEE CANNOT BE CLAIMED FOR MICROSOFT DYNAMICS® CRM LICENSES PURCHASED VIA THE DYNAMICS® PRICE LIST. THE CSA FEE ONLY APPLIES TO LICENSES ORDERED THROUGH THE VOLUME LICENSING CHANNEL. MORE INFORMATION IS AVAILABLE AT** [**CLAIMING MICROSOFT DYNAMICS® CRM FEES**](#OrderingCRM) **.**

**ORDERING MICROSOFT DYNAMICS**® **CRM VIA THE DYNAMICS**® **PRICE LIST (DPL)**

* A specific Microsoft Dynamics® CRM pricing sheet has been added to all of the ERP Dynamics® price lists located on [PARTNERSOURCE](https://mbs.microsoft.com/partnersource) ⇨ Pricing ⇨ Price Sheets.
* More information is included in the Section 4.1 [PRICE LIST INFORMATION](#_PRICE_LIST_INFORMATION)**.**

**ORDERING STEPS FOR ERP MICROSOFT DYNAMICS**® **CUSTOMERS**

* Place your order online by choosing the CRM modules from the Order Catalogue in [ORDER CENTRAL](https://mbs.microsoft.com/orderprocessing) or
* Submit the order to the Regional Operations Center (ROC) via [MIMOS/ON-LINE CALL LOGGING TOOL](https://mbs2.microsoft.com/Support/OperationsIncidents.aspx?Mode=Create) or by email at [mbslques@microsoft.com](mailto:mbslques@microsoft.com) for **APOC**

***MICROSOFT DYNAMICS® CRM ENHANCEMENT PLAN IS MANDATORY AND THE END DATE WILL BE ALIGNED TO THE DATE OF THE ERP ENHANCEMENT PLAN RENEWAL DATE.***

Orders are fulfilled with Microsoft Dynamics®CRM Media packs which include two CDs, the End User License Agreement (EULA) and a Welcome Letter.

For pricing information for **Microsoft Dynamics**® **CRM on Dynamics**® **price lists** please visit: [HERE](https://mbs.microsoft.com/downloads/partner/CRM/Pricelists/MD_CRM2011_Pricing_Licensing_Guide_May20111.pdf)

# MICROSOFT DYNAMICS® CRM ON-LINE

**MICROSOFT DYNAMICS CRM ONLINE**

Microsoft Dynamics CRM online delivers a rich sales, service management and marketing automation functionality through your browser and within everyday applications.

Microsoft Dynamics CRM online can be used with Microsoft Office Outlook, a Web browser, a custom portal, a Microsoft Office SharePoint portal, or a mobile device.

Microsoft Dynamics CRM online is a direct Customer offering

* Flexible purchasing through **self-service, or volume licensing** (EA/CASA)
* Payment via credit card and invoicing

**HOW TO ORDER CRM ONLINE?**

* Customer signs up and Activates Trial [HERE](http://crm.dynamics.com/)
* Customer converts Trial to Subscription and makes payment

# MORE INFORMATION ON [**ON THIS LINK**](http://crm.dynamics.com/en-gb/how-to-buy)

**HOW TO SIGN UP FOR THE INTERNAL USER OFFER FOR CRMOL?**

**SIGN UP PAGE**: [HERE](http://crm.dynamics.com/en-us/offers/crm-online-for-partners)

**STEP BY STEP PROCESS:** [ON THIS LINK](https://partner.microsoft.com/global/40163621)

**BENEFITS OVERVIEW:** [INFO HERE](https://partner.microsoft.com/global/productssolutions/dynamics/40149008)

# MICROSOFT DYNAMICS® CRM ON-LINE FREE PHONE NUMBERS

|  |  |  |  |
| --- | --- | --- | --- |
| **CRM Country EMEA** | **Single Entry Number Published As Dialed from in-Country** | **APAC** | **Single Entry Number Published As Dialed from in-Country** |
| Austria | 0800677708 | Australia | 0800677708 |
| Belgium | 080049643 | Hong Kong SAR | 800905797 |
| Cyprus | 800 91190 | India | 000800 650 1710 |
| Czech Republic | 800142591 | Japan | 00531650532 |
| Denmark | 8070 3202 | Malaysia | 1800801139 |
| Finland | 0800411301 | New Zealand | 0800888074 |
| France | 0805 109234 | Singapore | 18003962642 |
| Germany | 0800 2472637 | **LATAM** | **Single Entry Number Published As Dialed from in-Country** |
| Greece | 00800126842 | Brazil | 0800 047 4792 |
| Hungary | 06 800 18510 | Canada | 1866-792-3244 |
| Ireland | 1800936390 | Chile | 1230 020 5655 |
| Israel | 1809231703 | Colombia | 1 800 944 0724 |
| Italy | 800 987322 | Costa Rica | 800 5555 4423 |
| Luxembourg | 800 26126 | Mexico | 800 563 0610 |
| Netherlands, The | 0800 0200494 | Peru | 0800 5 4417 |
| Norway | 800 57500 | Puerto Rico | 1866-792-3332 |
| Poland | 00800 1212439 | Trinidad & Tobago | 8553032732 |
| Portugal | 800 860584 |  |  |
| Romania | 0800 894578 |  |  |
| Spain | 900 938311 |  |  |
| Sweden | 020 1701950 |  |  |
| Switzerland | 0800 088880 |  |  |
| United Kingdom | 0800 3762862 |  |  |

# MICROSOFT DYNAMICS® CRM USEFUL LINKS

**CRM PRICING AND LICENSING RESOURCES**

**MICROSOFT VOLUME LICENSING** [HOME PAGE](http://www.microsoft.com/licensing/)

**CRM PRICING & LICENSING**

**CRM 2011 Pricing & Licensing Guide** [HERE](https://mbs.microsoft.com/downloads/partner/CRM/Pricelists/MD_CRM2011_Pricing_Licensing_Guide_May20111.pdf)

**Microsoft Dynamics CRM Dynamics Price Sheets** [ON THIS LINK](https://mbs.microsoft.com/partnersource/pricing/pricesheets/dynCRMpricesheet.htm)

- Links to many CRM Pricing and Licensing resources at this above PartnerSource site

**CRM ONLINE**

[HOME PAGE AND FREE TRIAL](http://crm.dynamics.com/)

[CRM 2011 PRICING AND LICENSING CHANGES](https://mbs.microsoft.com/partnersource/pricing/announcements/MSD_CRM2011PricingLicensingChanges.htm)

[VL PRICING & LICENSING FAQ FOR CRM ONLINE](https://mbs.microsoft.com/partnersource/sales/promotions/MSDYCRMonline_VolumeLicenceFAQ2011.htm)

[CRM ON LINE PRICING AND LICENSING FAQ](https://mbs.microsoft.com/partnersource/pricing/announcements/msdcrmonlinepricelicenfaq.htm)

[IN DEPTH PARTNER TRAINING](https://training.partner.microsoft.com/learning/app/management/registrationex/LMS_Registration.aspx?UserMode=0&Mode=0&ActivityID=724005)

[SPLA](http://www.microsoft.com/hosting/en/us/licensing/splabenefits.aspx)

# CREDIT SERVICES

# COLLECTIONS CYCLE

The Collections cycle process begins once an invoice is issued to a Partner through to the time invoice payment is received by Microsoft.

**MICROSOFT ACTIONS**

* Each month the Collectors in the Regional Operations Center (ROC) send out a **current** **statement of account** to each Partner by e-mail.
* All MBS Partners are able to view a current statement of account online. This functionality can be accessed through [PARTNERSOURCE](https://mbs.microsoft.com/PartnerSource) ⇨ VOICE ⇨ Specific Partner Information ⇨ Scorecard ⇨ Balance Info). Invoices will also be available to view online from VOICE under Specific Partner Information ⇨ Sales & Services Operations ⇨ Order Status).
* Few days later the Collectors will contact each Partner to confirm the receipt of the statement and to find out whether Partners have **queries** on any of their invoices or whether they require **copy invoices**.
* Later in the month the Collectors will contact Partners again to secure **promise of payment** of the approved invoices. MBS Partners are able to enter their Promise of Payment dates online. This functionality can be accessed through [PARTNERSOURCE](https://mbs.microsoft.com/PartnerSource) ⇨ VOICE ⇨ Specific Partner Information ⇨ Scorecard ⇨ Balance Info).
* Where payment is not received and no valid reason has been given for non-payment such Partners will be contacted by the Collector to request an **explanation** for non-payment.
* Non-payment of invoices will **only** be accepted where there is an open, **valid Incident Tracker Request number** **(ITR#)** to prove that there is a **query** on the invoice.
* The account will be placed on **credit hold** due to non-payment where no valid reason has been provided and a collections process will commence.
* The collection process will lead to a **final warning** **letter** been issued if there is continuous non-payment which then may result in termination and/or legal actions.

**PARTNER ACTIONS**

* All Partners are requested to look at the statement as soon as possible after it has been received and to identify whether there are any **incorrect invoices** or **missing invoices**.
* If any incorrect invoices are found in the statement Partners are required to write to the ROC MBS Customer Operations Team via the MIMOSsee section [5.1 CHAT NOW / SUBMIT AN INQUIRY / MBS TELEPHONE SERVICE](#_CHAT_NOW_/) or for APOC by email at [mbslques@microsoft.com](mailto:mbslques@microsoft.com).
* If Partners require copy invoices they need to contact their Credit Services directly.
* All Partners are requested to notify Credit Services of a **payment date** for the invoices falling due in that month.
* Partners are required to make payment in such a way to ensure that **it could reach the correct bank account by the invoice due date,** i.e. payment should be made two or three days before the invoice due date. If Partners cannot pay invoices before their due date, they can pay on the due date provided they make a **“same day” transfer**.
* If payment is not received by **due date** and there is **no valid reason** for non-payment the Partner’s account will be placed **on hold**. This means that no orders will be released to that Partner until the situation is resolved.
* Partners are required to submit **remittance advice** details with the payment or send it to Collections as soon as payment is transferred to ensure the correct and timelyprocessing of payments and orders. The remittance advice should indicate what invoice is being covered by this payment. For more details please refer to section [7.5 REMITTANCE ADVICES](#_REMITTANCE_ADVICES).
* Partners are responsible for any local **bank fees** incurred, and must add these fees to the amount to be paid. Citibank London will not add any charges for these transactions therefore any bank costs will be from Partners’ local bank.

# CREDIT LIMITS

Microsoft Business Solutions are committed to ensuring that partners receive the credit limit that they require to successfully grow and expand their business. In order to ensure that this is the case, credit limits will be reviewed from time to time to ensure that they are consistent not only with partners current purchasing needs, but also with their future plans.

**THE REGIONAL OPERATIONS CENTER (ROC)** bases its decision on Credit Limits on the following 4 factors among others:

* **A REVIEW OF YOUR FINANCIAL STATEMENTS.**

The timeliness of the information we receive can affect your credit limit. Without up to date financial information we have a **responsibility** to appropriately manage our credit risk.

* **YOUR PAYMENT HISTORY.**

As the goal is to remain 100% current we view deviation from this as being a potential credit risk to Microsoft. As such we reserve the right to adjust your credit limit when we perceive it to be appropriate.

* **YOUR SALES FORECAST.**

In keeping with our commitment to support partners purchasing needs for the next fiscal year and beyond, we will always take into account future orders currently in the pipeline and will endeavour to accommodate these requests.

* **EXTERNAL CREDIT AGENCIES.**

As we have a responsibility to manage our credit risk, we may consult with 3rd party credit agencies in order to obtain additional independent advice with regard to credit limits as appropriate.

**REVIEWING CREDIT LIMITS OVER TIME**

You may be asked to provide copies of your **audited financial statements within 90 days of year-end close**.

Also Microsoft may request **additional interim management accounts** when your credit limit is being assessed.

Your **Partner Account Manager (PAM)** will also be asked for input.

**EXCEEDING CREDIT LIMIT**

Should you exceed your credit limit, orders placed will automatically go on **hold** and ordinarily can only be released when payment is received to reduce the overdue amount.

However a Partner has other options to get the order released:

1. Bring the **balance to a level below the credit limit** through a payment to Microsoft,
2. Provide Microsoft with copies of their **financial statements for the last two years** which will allow an updated credit check and possible increase in their credit limit if they are sufficiently financially secure, or
3. Provide **confirmation from a parent company** who will agree to guarantee the debts (in which case we will do a credit check on the parent company)or
4. Provide any additional security as requested by Microsoft.

You may request an increase in your credit limit directly with Credit & Collections. Please include the amount of credit limit that you are seeking and copies of your audited financial statements in English (balance sheet and Profit & Loss Account) for the last two years

***PLEASE NOTE: THE ROC RESERVES THE RIGHT TO REDUCE THE CREDIT LIMIT (OR REQUIRE PRE-PAYMENT AND/OR 3RD PARTY GUARANTEES) BASED ON THE PARTNER’S FINANCIAL STATUS AND PAYMENT PERFORMANCE.***

# BANK INFORMATION AND CURRENCIES

* + 1. **AOC (AMERICAS OPERATIONS CENTER)**

There are various different options that a Partner can choose when paying for an order. *Note: It is important to mention which form of payment you are using when placing an order.*

* **PAYMENT TERMS**
  + If choosing the payment terms option, you will have to have this option setup beforehand per the previous section in this book. *See Payment Terms section*
* **CHECK**
  + Checks are acceptable for orders, however, your order will remain on hold until the payment has been received and applied to the order. Please include the order number the payment is for along with your check. *See mailing address below*

|  |  |
| --- | --- |
| **US PARTNERS** | **CANADA PARTNERS** |
| **Microsoft Corporation**  **P.O. Box 848025**  **Dallas, TX 75284-8025** | **Royal Bank of Canada**  **Microsoft**  **PO Box 7808**  **Postal Station A**  **Toronto, Ontario M5W 4E1** |

|  |  |
| --- | --- |
| **OVERNIGHT DELIVERY** | **OVERNIGHT DELIVERY** |
| **Microsoft Corporation**  **C/O Bank of America**  **Lockbox 848025**  **1950 N. Stemmons Fwy, Ste 5010**  **Dallas, TX 75207** | **Toronto Wholesale Remittance Department**  **4 Prince Andrew Place**  **Toronto, Ontaro M3C 2H4 Canada**  **Attn: RBC Wholesale Remittance Dept.**  **Microsoft Business Solutions**  **Lockbox #T09731** |

* **WIRE TRANSFER**
  + - * + If you are wiring payments please include the order number the payment is for and remit to:

|  |  |
| --- | --- |
| **US PARTNERS** | **CANADA PARTNERS** |
| **Wire Transfers**  **Microsoft Corporation**  **C/O Bank of America**  **Deposit Account Number: 3751821263**  **Routing Transit Number:**  **0260-0959-3**  **1950 N. Stemmons Fwy. Ste. 5010**  **Dallas, TX 75207** | **ACH Payments**  **Beneficiary Bank: Royal Bank of Canada**  **Name of the Account: Microsoft**  **Account Number: 102-740-8**  **Routing (Branch): 003**  **Bank Address:**  **260 East Beaver**  **Creek Road**  **Richmond Hill**  **Ontario L4B 3M3** |

|  |  |
| --- | --- |
| **INTERNATIONAL WIRES** | **FOR ALL INCOMING WIRES** |
| **Beneficiary Bank: Bank of America**  **International wires should include**  **SWIFT Number BOFAUS3N** | **Beneficiary Account Name:**  **Great Plains**  **Account Number: 102-740-8**  **Branch Transit Number: 06032**  **Branch Address:**  **260 East Beaver Creek Road**  **Richmond Hill, Ontario L4B 3M3**  **Bank Number: 003**  **All wires coming from the United States: ABA # is 021000021**  **Wires coming from England or Europe must quote our SWIFT code: ROYCCAT2** |

**7.3.2 EOC (EMEA OPERATIONS CENTER)**

Partners are responsible for ensuring that the payment is made to the **correct** bank account, as detailed below:

Account Name: **Microsoft Ireland Operations Ltd**

|  |  |  |
| --- | --- | --- |
| **SWISS FRANC (CHF)** | **DANISH KRONER (DKK)** | **EURO (EUR)** |
| **Citibank N.A. London**  **Citibank House**  **Floor 1**  **336 Strand**  **London WC2R 1HB**  **United Kingdom**  **Sort Code: 185008**  **SWIFT: CITIGB2L**  **Account no. 10814695**  **IBAN No:**  **GB62CITI18500810814695** | **Citibank N.A. London**  **Citibank House**  **Floor 1**  **336 Strand**  **London WC2R 1HB**  **United Kingdom**  **Sort Code: 185008**  **SWIFT: CITIGB2L**  **Account no. 10814679**  **IBAN No:**  **GB09CITI18500810814679** | **Citibank N.A. London**  **Citibank House**  **Floor 1**  **336 Strand**  **London WC2R 1HB**  **United Kingdom**  **Sort Code: 185008**  **SWIFT: CITIGB2L**  **Account no. 10814652**  **IBAN No:**  **GB59CITI18500810814652** |

|  |  |  |
| --- | --- | --- |
| **BRITISH POUND (STERLING) (GBP)** | **NORWEGIAN KRONER (NOK)** | **SWEDISH KRONER (SEK)** |
| **Citibank N.A. London**  **Citibank House**  **Floor 1**  **336 Strand**  **London WC2R 1HB**  **United Kingdom**  **Sort Code: 185008**  **SWIFT: CITIGB2L**  **Account no. 10814660**  **IBAN No**  **GB37CITI18500810814660** | **Citibank N.A. London**  **Citibank House**  **Floor 1**  **336 Strand**  **London WC2R 1HB**  **United Kingdom**  **Sort Code: 185008**  **SWIFT: CITIGB2L**  **Account no.  10814687**  **IBAN No:**  **GB84CITI18500810814687** | **Citibank N.A. London**  **Citibank House**  **Floor 1**  **336 Strand**  **London WC2R 1HB**  **United Kingdom**  **Sort Code: 185008**  **SWIFT:  CITIGB2L**  **Account no.  10814644**  **IBAN No:**  **GB81CITI18500810814644** |

|  |  |
| --- | --- |
| **US DOLLAR** | **RUSSIAN RUBLE** |
| **Citibank N.A. London**  **Citibank House**  **Floor 1**  **336 Strand**  **London WC2R 1HB**  **United Kingdom**  **Sort Code 185008**  **SWIFT: CITIGB2L**  **Account no. 10814636**  **IBAN No:**  **GB06CITI18500810814636** | **Citibank N.A. London,**  **PO Box 200,**  **Cottons Centre,**  **Hays Lane,**  **London SE1 2QT,**  **United Kingdom**  **Sort code: 185005**  **SWIFT: CITIGB2L**  **Account no. 12522675**  **IBAN No : GB51CITI18500812522675** |

Table 6: Overview of Microsoft Bank Accounts per Currency

**PLEASE NOTE: EOC ACCEPTS PAYMENTS IN FOLLOWING CURRENCIES ONLY:**

**EUR, USD, GBP, DKK, NOK, SEK, CHF AND RUB.**

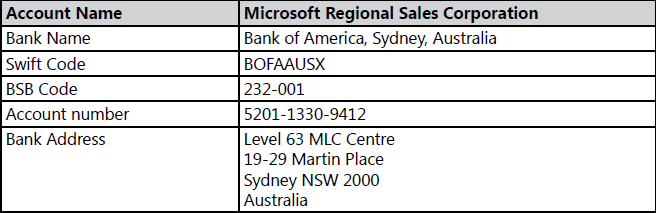
**7.3.3 APOC (ASIA PACIFIC OPERATIONS CENTER)**

Partners are responsible for ensuring that the payments are made to the **correct** bank

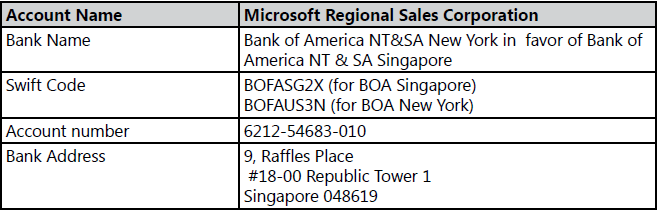
account, as detailed below:

**Account Name: Microsoft Regional Sales Corporation**

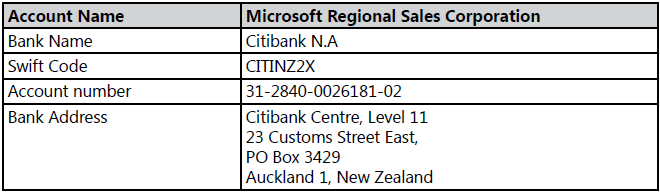
**FOR AUSTRALIAN DOLLAR (AUD) PAYMENT**



**FOR US DOLLAR (USD) AND INDIAN RUPEE (INR) PAYMENT**



**FOR NEW ZEALAND (NZD) PAYMENTS**

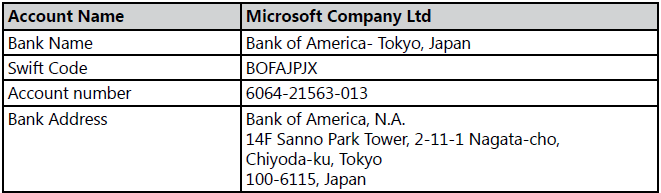


**Account Name: Microsoft (China) Co Ltd**

**FOR RENMINBI (RMB) PAYMENT**



**Account Name: Microsoft Company Ltd  
FOR JAPANESE YEN (JPY) PAYMENT**



**REQUESTING COPIES OF INVOICES**

* Should the Partner require copies of invoices to be sent, please contact the APOC
* Operations team [HERE](mailto:mbslques@microsoft.com).
* For Microsoft GP/SL, Partners can use **VOICE** to get additional copies of invoices.

# PRE-PAYMENT OF ORDERS

When a Partner is on Pre-payment terms, the bank accounts (refer to **Section 7.3 Bank Information & Currencies**) are applicable for payment transfer depending on the type of currency mode.

Upon request, the Partner will receive a pro-forma invoice from the ROC operations team for payment. Partners’ orders will be released upon confirmation on receipt of payment into Microsoft designated bank account.

For queries on payment status, please contact [HERE](mailto:mbscce@microsoft.com)

# REMITTANCE ADVICES

When Partners transfer a payment to bank accounts (refer to **Section 7.3 Bank Information & Currencies**), it is critical that Credit & Collections in the Regional Operations Center (ROC) is informed of the invoices being paid. This information can either be added in the bank transfer via the advice field or a mail can be sent to the Partner's assigned Collector. It is critical that the Credit & Collections Team receives this information before or at the same time as the bank transfer is issued to ensure:

* The payment will be applied according to the list of invoices provided by the Partner.
* The payment will be applied in a timely manner to ensure future orders are not unnecessarily delayed.
* Timely and accurate allocations of Partner payments to avoid lengthy reconciliations in the future for both the Partner and ROC.

# WITHHOLDING TAX INFORMATION (EOC)

Under the terms of ROC’s agreements with distributors, resellers and end users, it is the Partner’s responsibility to pay the correct amount of withholding tax under its local tax laws. Partners should consult with their own advisors as the withholding tax obligations vary by country.

Partners are allowed to reduce their payments to the ROC by the amount of the withholding tax paid to local tax authorities, provided they furnish MIOL with the **Withholding Tax Certificate**. This document can be obtained from the local tax office and it must be sent to the Collector via email as soon as possible after it has been issued.

# SERVICE BILLING MANAGEMENT

For services billing i.e. calls out support, single incidents or any services charge not

documented above, the process for receiving and being billed for these services will

remain the same, i.e. ROC rather than the local Microsoft subsidiary will bill for the services.

**Partner Actions**

* Service contracts must be signed with the Regional Operations Center (ROC).
* Service reports must be emailed to the Regional Operations Center (ROC) at stipulated intervals click below at your relevant ROC

|  |  |
| --- | --- |
| **AOC** | [mbscredi@microsoft.com](mailto:mbscredi@microsoft.com) |
| **EOC** | [mbsecoll@microsoft.com](mailto:mbsecoll@microsoft.com) |
| **APOC** | [mbslques@microsoft.com](mailto:mbslques@microsoft.com) |

* For all service billing queries - please send your query by email. Click above at your relevant ROC.

# EMEA OPERATIONS CENTER (EOC) – SPECIFIC CREDIT SERVICES PROCESSES

* + 1. **VAT RULES**

Microsoft Ireland Operations Ltd. (MIOL) will determine the VAT status of the taxable sale transactions dependent on Partner location and the Partners VAT registration status, as applicable.

Partners should ensure that their customer information is accurate and up to date at all times to ensure that the correct VAT is calculated and a valid invoice issued.

* + 1. **INTRASTAT REPORTING**

**IntraStat** is the system for collecting statistics on the physical trade in goods (i.e. the actual movement of goods) between the Member States of the European Union (EU). It has been in operation since the beginning of the Single Market on 1 January 1993.

Wherever any sales result in the shipment of Physical Goods, these shipments will be made by Microsoft Ireland Operations Ltd. (MIOL). As a result all shipments of physical product out of Ireland to other EU Member States will be considered Intra-EU transactions and must be considered as to whether they meet the requirements for inclusion on the IntraStat statistical reports.

* MIOL will determine its own IntraStat reporting obligations and is unable to provide this information to Partners.
* Partners should consult with their local advisors for further information to ensure compliance with their local country legislation.

# MICROSOFT PARTNER NETWORK

# 8.1 MICROSOFT PARTNER NETWORK

The **Microsoft Partner Network (MPN)** is designed for all Partners who develop and market solutions based on Microsoft platforms, provide consulting or technical services on Microsoft systems, or recommend Microsoft technology purchases.

Microsoft Partners include: Consulting Services Providers, Independent Software Vendors (ISVs), Independent Hardware Vendors, Large Account Resellers (LARs), Original Equipment Manufacturers (OEMs), Support Providers, System Integrators, System Builders, Training Providers, Value-Added Resellers (VARs), and Value-Added Providers.

There are three levels of membership in the MPN:

The level at which you join is determined by your organization’s level of expertise and the desired level of engagement you would like to have with Microsoft. Organizations can show their achievements by obtaining the Silver or Gold level of one or several competencies. Microsoft offers the CRM and ERP competencies. Please visit the MPN site [HERE](https://partner.microsoft.com/global/program) where you will find more information about enrolment, competencies, benefits and etc.

***PLEASE NOTE: MPN IS OUTSIDE THE RESPONSIBILITIES OF THE REGIONAL OPERATIONS CENTER (ROC) AND THE ROC MBS CUSTOMER OPERATIONS TEAM CANNOT PROVIDE SUPPORT FOR MPN QUERIES. PARTNERS WHO REQUIRE INFORMATION ON HOW TO BECOME AN MPN PARTNER OR AN MPN PARTNER WITH THE ERP OR CRM COMPETENCY SHOULD CONTACT HERE BY*** [EMAIL](https://partner.microsoft.com/global/supportsecurity/40032423) TO THE REGIONAL SERVICE CENTER (RSC) ***.***

# ZERO VALUE LICENSES - PARTNER INTERNAL USE SOFTWARE

**SPA 5 Partner Internal use licenses**

Under section 8 of the [SPA GUIDE](https://mbs.microsoft.com/partnersource/partneressentials/spa/SPA.htm#8), partners who meet product-specific assessment requirements for a licensed Software product are entitled to a set of 5-user internal use license of one ERP solution of their choice. This internal use license is valid for as long as the partner is enrolled in the SPA and compliant with the certification requirements.

Partners can request for their SPA 5 user internal use license by downloading the SPA 5 NFR request form from the download section of the SPA program page [HERE](https://mbs.microsoft.com/partnersource/partneressentials/spa/SPA.htm), complete and direct to the respective regional operations centre (details in the form). Partners with internal use licenses under MPN can request for the additional users to be added to their existing MPN license.

**MPN Competency (Gold/Silver) Partner Internal use licenses**

MPN Partners who have achieved either the CRM, ERP or ISV competencies are eligible to 1 set of Partner internal use software, 1 ERP (Enterprise Resource Planning) solution of the Partner’s choice. Details in the entitlement matrix below

|  |  |
| --- | --- |
| **Competency type** | **license entitlement count** |
|
| SPA Minimum Certification Compliancy | SPA 5 user license of an ERP product of the Partner’s choice |
| MPN - ISV Competency (silver) | MPN 5 user license of an ERP product of the Partner’s choice |
| MPN - ISV Competency (gold) | MPN 5 user license of an ERP product of the Partner’s choice |
| MPN - ERP Competency (silver) | MPN 15 user license of an ERP product of the Partner’s choice |
| MPN - CRM Competency (silver) | MPN 15 user license of an ERP product of the Partner’s choice |
| MPN - ERP Competency (Gold) | MPN 30 user license of an ERP product of the Partner’s choice |
| MPN - CRM Competency (Gold) | MPN 30 user license of an ERP product of the Partner’s choice |

This MPN Partner internal license is active as long as the Partner stays active in the MPN program and maintains their Competency.. In order to receive such a license, the partner needs to complete a form and send a request [HERE](mailto:mbsnfr@msdirectservices.com). The link to this form and the process to obtain the NFR license is provided for competent Partners within the Competency Welcome Kit which is provided by the MPN Program.

**Terms of use**

Both the SPA and MPN Partner internal use licenses are for the Partner’s business and internal employee training only. The type of license must not be resold, used for personal use, or used for customer training. This license is provided for the latest released versions of Microsoft software only.

**Purchasing Additional users**

If more than the entitled users are needed, the **Partner can order additional users** for which a charge will incur based on the current unit price for users as per the **Business Ready Licensing Advanced Management price list**. If the requesting Partner is a SPA Partner for the chosen product line, the Partner discount as per the SPA Agreement (please refer to section “Partner Discount” for further information) will be applied to these additional users. There is **no Enhancement Plan fee** for these additional users on these licenses.

AX2012 is now available for Partner internal use under the MPN program benefit as described above.

***PLEASE NOTE: INDUSTRY BUILDER FUNCTIONALITY (AX) IS NOT AVAILABLE ON THE MPN INTERNAL USE LICENSE.***

# APPENDIX

**9.1 GLOSSARY**

| **TERM** | **EXPLANATION** |
| --- | --- |
| **AOC** | Americas Operations Center which is based in Fargo, North Dakota, USA. |
| **APAC** | Asia Pacific |
| **APOC** | Asia Pacific Operations Center – divided into 3 regions: Japan, China and APAC without Japan and China. Based in Singapore |
| **APERTUM** | Microsoft Business Solutions ERP system sold in Germany, Switzerland, US, Ireland etc. |
| **MICROSOFT DYNAMICS® AX** | Formerly known as Axapta, a Microsoft Dynamics ERP product  sold worldwide. |
| **BRL** | Business Ready Licensing |
| **BREP** | Business Ready Enhancement Plan |
| **BRRR** | BREP Revenue Recapture Rate |
| **C5 LIGHT** | Boxed Enterprise Resource Planning product sold from Microsoft Business Solutions only in Denmark. |
| **CHF** | Swiss Franc |
| **COMMERCE FOR AX/XAL/C5** | Web based license configuration tool for Microsoft Dynamics® AX/XAL/C5 licenses. |
| **COMMERCE FOR NAV** | Web based license configuration tool for Microsoft Dynamics® NAV licenses. |
| **COMPONENT** | Web based license configuration tool for Microsoft Dynamics® AX/XAL/C5 licenses. |
| **CRM** | Customer Relationship Management. CRM is renamed to Microsoft Dynamics® CRM |
| **CSA** | Customer Services Agreement |
| **CSG** | Customer Services Guide |
| **DENIED PARTY** | List of customers and countries that MBS is not allowed doing business with under various legislations. All incoming orders will be screened against these lists, and orders to ‘Denied Parties’ will be rejected. |
| **DKK** | Danish Kroner |
| **DynAA** | Microsoft Dynamics® Academic Alliance |
| **EMEA** | Europe, Middle East, Africa - This is the region supported by EOC. |
| **EOC** | Microsoft “EMEA Operations Center” which is based in Dublin, Ireland. The legal name is Microsoft Ireland Operations Ltd. (MIOL) |
| **TERM** | **EXPLANATION** |
| **ERP** | Enterprise Resource Planning – The integration of the core business functions of all departments within an organization which is the purpose of products like Microsoft Dynamics® GP, Microsoft Dynamics® AX and Microsoft Dynamics® NAV. |
| **EU** | European Union |
| **EULA** | End User License Agreement – replaced by the Software License Terms (see SLT) |
| **EUR** | EURO |
| **FY** | “Fiscal Year “ i.e. FY12 Fiscal Year 2012 |
| **GBP** | British Pound (Sterling) |
| **GRANULE** | The smallest piece of functionality in the Microsoft Dynamics™ NAV product that can be purchased. |
| **GREAT PLAINS** | Great Plains is renamed to Microsoft Dynamics® GP. |
| **IBAN** | International Bank Account Number |
| **ID** |  |
| **IntraStat** | Reporting requirements for exporting/importing companies (European Union only). |
| **IPLA** | International Product License Agreement – replaced by the Software License Terms (see SLT) |
| **ISV** | Independent Software Vendor |
| **ITR** | Incident Tracker Request |
| **ITR#** | Incident Tracker Request Number |
| **LATAM** | “Latin America” region |
| **LMT** | License Model Transition |
| **LMTE** | License Model Transitions Estimator |
| **MA** | Multi-site Agreement - Customers who plan to deploy our solutions on multiple sites can realize accelerated user volume discounts by aggregating their purchases across all of their license sites |
| **MBL** | Modular Based Licensing |
| **MCCL** | Microsoft (China) Co. Ltd. |
| **MBS** | Microsoft Business Solutions |
| **Microsoft Dynamics®** | The new brand that replaced Microsoft Business Solutions.  A new naming convention is applied: Microsoft Dynamics® AX (Axapta), Microsoft Dynamics® CRM (CRM), Microsoft Dynamics® GP (Dynamics GP), Microsoft Dynamics® NAV (Navision), and Microsoft Dynamics® SL (Solomon). |
| **Microsoft Dynamics® AX** | A Microsoft Business Solutions ERP product sold worldwide. |

| **TERM** | **EXPLANATION** | |
| --- | --- | --- |
| **Microsoft Dynamics® CRM** | | A Microsoft suite of integrated applications and services that provide functionality for leads and opportunity management, customer history tracking and analysis, automated incident management, and business activity and employee performance forecasting and measurement. |
| **Microsoft Dynamics® GP** | | A Microsoft Business Solutions ERP product sold worldwide. |
| **Microsoft Dynamics® NAV** | | A Microsoft Business Solutions ERP product sold worldwide. |
| **Microsoft Dynamics® SL** | | Microsoft Business Solutions ERP product. |
| **MIMOS** | | Microsoft Incident Management Operations System is a Global Web based tool used by Microsoft Partners to submit orders and queries directly to the MBS Customer Operations Team. |
| **MIOL** | | Microsoft Ireland Operations Limited – this is the legal name of the Microsoft operations headquarter in Dublin (Republic of Ireland). MIOL is also called EOC. |
| **MIOL Currencies** | | USD, EUR, GBP, DKK, SEK, NOK, CHF – in which all price lists will be published and all invoices issued. |
| **MO** | | Microsoft Operations |
| **Module** | | The smallest piece of functionality in the Microsoft Dynamics® product that can be purchased. |
| **MOSS** | | Microsoft Dynamics® Client for Microsoft Office and SharePoint Server |
| **MPN** | | Microsoft Partner Network |
| **MRS** | | “Microsoft Regional Sales“– the legal name of APOC in Singapore. |
| **MRS Currencies** | | USD, AUD, NZD, INR Dollar – in which all Price Lists will be published  and all invoices issued. |
| **MS** | | Microsoft |
| **My Messages** | | An online tool available on PartnerSource which enables MBS partners to track, prepare and deliver their customers’ Enhancement Program renewals more efficiently and proactively online. |
| **Navision** | | Navision is renamed to Microsoft Dynamics® NAV. |

|  |  |
| --- | --- |
| **TERM** | **EXPLANATION** |
| **NFR (Not For Resale) or Zero Value License – for MBS Partners** | license type for demonstration, development, and test purposes for the solution the Solution Addendum has been signed for |
| **NFR (Not For Resale) or Zero Value License – for Partners with ERP/CRM Silver/Gold competency** | license type for Internal Use of a Microsoft Dynamics® solution of the partner’s choice |
| **NOK** | Norwegian Kroner |
| **OAM** | Operations Account Manager |
|  |  |
| **Order Central** | Global Online Ordering Tool for most Microsoft Dynamics Products for all MBS Partners |
| **Order On Hold** | An order that has been received by EOC but which is not being fully processed because of issues with the accompanying information, the Partner or other. |
| **PAM** | Partner Account Manager – who is the relationship account manager in the subsidiary. |
| **PartnerSource** | A Web portal which provides up-to-dates tools, information, forms to all Microsoft Business Solutions Partners |
| **PO Number** | Purchase Order Number – Partner’s reference number on an order. |
| **Physical Media** | Any product that requires shipping and therefore not sold in license form. |
| **Product Supply & Distribution** | Organization responsible for the day to day management of material and processes required for the fulfillment of orders. |
| **PSMM** | Product Solutions Marketing Manager |
| **Promoweb** | Internal tool used to record special discounts provided to partners. |
| **Rebates** | Microsoft offers their Partners the opportunity to improve their profitability by earning rebates against their sales of Microsoft product. A rebate is the return of a pre-determined portion of the purchase price to MBS Partners for fulfilling certain conditions as laid down by Microsoft. |
| **ROC** | Regional Operations Center |
| **RUB** | Russian Ruble |
| **TERM** | **EXPLANATION** |
| **RSC** | Regional Service Center for MPN related matters |
| **SEK** | Swedish Kroner |
| **SKU** | Stock Keeping Unit – identification for a type of product. Every unit of MS product is assigned a SKU. |
| **SLA** | Service Level Agreement – MS commits to try to adhere to certain SLAs defining the length of time it should take to process queries, orders, credit requests, contracts, etc. |
| **SLT** | Software License Terms (SLT) – replacement for IPLA and EULA. Partners must provide the customer with a hardcopy of the SLT at or before the time your additional ERP system-related agreements are presented to or signed by the customer for new Microsoft Dynamics® product: GP, AX, SL, NAV. |
| **Solomon** | Solomon is renamed to Microsoft Dynamics® SL. |
| **SPA** | Solutions Provider Agreement |
| **4Special Bid / Special Discount / Special Deal / PromoWeb Discount/Deal Tracker ID** | A request from a Partner for a reduction in price on a particular, individual order. |
| **SPLA** | Services Provider License Agreement |
| **Subsidiary** | Your local Microsoft Business Solutions office where your PAM is based. For all questions and issues related to sales, developingyour business and business opportunities in the market please contact your PAM. |
| **USD** | US Dollar |
| **VAT** | Valued Added Tax – Partners in the European Union, Norway and Switzerland need to have an international VAT number and send it to Microsoft. |
| **VOICE** | Virtual Organization Information Center – Microsoft Business Solutions Partner and customer information and product authorizations. Accessed via Partner Source. |
| **Windows Live ID** | Formerly known as Passport Network Account |
| **WSS** | Microsoft Dynamics® Client for Microsoft Office and Windows SharePoint Services |
| **XAL** | Microsoft Business Solutions ERP product. XAL is renamed to Microsoft Dynamics® XAL. |

* 1. **CONTACTING AOC**

[LINK TO CONTACT AOC DYNAMICS OPERATIONS](https://mbs.microsoft.com/partnersourceapp/chatnow.aspx?wa=wsignin1.0)

* 1. **CONTACTING APOC**

**SUBMIT AN INQUIRY TO APOC BY EMAIL AT** [mbslques@microsoft.com](mailto:mbslques@microsoft.com)

* 1. **EOC MIMOS/On Line Call Logging Tool – LINKS AND PHONE NUMBERS**

| **REGION** | **LINK** | **ERP**  **FREE PHONE** | **CRM ON LINE FREE PHONE** |
| --- | --- | --- | --- |
| **UK, IRE**   * **Ireland** * **United Kingdom** | <https://mbs2.microsoft.com/Support/OperationsIncidents.aspx?Mode=Create> | **n/a**  **0808 2342456** | **1800 936390**  **0800 3762862** |
| **GSA**   * **Austria** * **Germany** * **Switzerland** | <https://mbs2.microsoft.com/Support/OperationsIncidents.aspx?Mode=Create> | **0800 295395**  **0800 6645687**  **0800 836930** | **0800 677708**  **0800 2472637**  **0800 088880** |
| **FRANCE &**  **BENELUX**   * **France** * **Belgium** * **Netherlands** * **Luxembourg** | <https://mbs2.microsoft.com/Support/OperationsIncidents.aspx?Mode=Create> | **0800 912693**  **0800 76267**  **0800 0220694**  **n/a** | **0805 109234**  **0800 49643**  **0800 0200494**  **800 26126** |
| **MEA**   * **East Mediterranean** * **Egypt** * **Israel** * **Gulf** * **North Africa** * **Saudi Arabia** * **South Africa** * **Turkey** * **West, East and Central Africa** | <https://mbs2.microsoft.com/Support/OperationsIncidents.aspx?Mode=Create> | **n/a**  **n/a**  **n/a**  **n/a**  **n/a**  **n/a**  **0800 995711**  **n/a**  **n/a** |  |
| **CEE**   * **Cyprus** * **Malta** * **Greece** * **Bosnia & Herzegovina** * **Bulgaria** * **CIS** * **Croatia** * **Czech Rep** * **Estonia** * **Hungary** * **Latvia** * **Lithuania** * **Macedonia** * **Poland** * **Romania** * **Russia** * **Serbia & Montenegro** * **Slovakia** * **Slovenia** | <https://mbs2.microsoft.com/Support/OperationsIncidents.aspx?Mode=Create> | **n/a**  **n/a**  **n/a**  **n/a**  **n/a**  **n/a**  **n/a**  **800 142 993**  **n/a**  **068 0019551**  **n/a**  **n/a**  **n/a**  **008001214318**  **n/a**  **81080029203011**  **n/a**  **0800 002184**  **n/a** | **800 91190**  **00800 126842**  **800 142591**  **06 800 18510**  **00800 1212439**  **0800 894578** |

| **REGION** | **LINK** | **ERP**  **FREE PHONE** | **CRM ON LINE**  **FREE PHONE** |
| --- | --- | --- | --- |
| **SOUTHERN**  **EUROPE**   * **Italy** * **Portugal** * **Spain** | <https://mbs2.microsoft.com/Support/OperationsIncidents.aspx?Mode=Create> | **800 789086**  **800 849203**  **900 948304** | **800 987322**  **800 860584**  **900 938311** |
| **DENMARK / NORDICS**   * **Denmark** * **Greenland** * **Faroe Islands** * **Iceland** * **Finland** * **Norway** * **Sweden** | <https://mbs2.microsoft.com/Support/OperationsIncidents.aspx?Mode=Create> | **808 89698**  **808 89698**  **808 89698**  **800 9375**  **0800 919576**  **800 11885**  **020 791510** | **8070 3202**  **0800 411301**  **800 57500**  **020 1701950** |