KEY NOTES FOR MICROSOFT TRAINING

MODULE: PROFILE

1.fisrt check final price or preliminary by the conformation of request in cover page and dates, DCoE signature

Profiles must also be added to the Future Pricing table, with the header as it’s named in Section 1 and 2

2. final price sheet has PO Boxes, preliminary does not have

Approval Requirements

P-LSS:

3.Profile name is added under the Enterprise Section and falls under this pre-approved list:

§ Banking – Bank tellers

Manufacturing – Manufacturing floor workers and devices

Retail – Point-of-sale workers and devices

Healthcare – Clinical workstations (in direct support of patient healthcare)

Call Centres

Worker Kiosk Device

General Contractors

Developers (MSDN or MPN Program)

Government Contractor

Construction Worker

Field Worker

Factory Worker

Industry Device

4. check Blue:

Profile name is added under the Enterprise Section and is not in the pre-approved list.

BD: Adding a profile under the Additional Product Section only, unless unless Apply Framework Concessions

5.check the section according to that add PO boxes to the cover page.

6.check formulas and pricing levels, page breaks after setting page breaks put normal view and check format of page or use templates for page format.

7.add the comments like empowerment flag section in cover page and add comments at TOCR

8.write the mail to the Microsoft owner.

MODULE: TENANTS

1.Tenants should not be listed on the Future Pricing Table, instead the products within that Tenant should be listed under the Enterprise, Additional Products, or overlying Profile.

2. no need to add PO boxes for tenants.

3.Move the quantity from enterprise or additional products

4.check dates, DCoE signature and final or preliminary.

5.add the tenants and check format and calculation formulas page format.

6.Check page breaks and put normal view

7. Write flag empowerment, TOCR -comments, write the mail to the person.

MODULE: DISCOUNTS

1. Corporate level concession-947-see the
2. More than 25% custom BD
3. Government level we can see concession-575-here need to check all price levels and discount.
4. Check the TTF
5. Write the flags for all percentages individually, also disc count mount.
6. Check pages brakes put normal mode send the excel sheet or Pdf one.
7. Desktop count should be taken highest user count
8. Order means apply to the all product in sections.

Formulas for discounts; Disc%

|  |  |  |  |
| --- | --- | --- | --- |
| Disc% | Disc NUP | Disc Ext | List Ext |
| 6% | =round (net unit price\*(1-percentage),2)  =round(F21\*(1-P21),2) | =(net price unit-Disc NUP)\*License quantity, unit quantity |  |

MODULE: UPLIFTS

1. Uplift flag aways blue
2. Uplift formula for calculation- **Formula for 5**% uplift =**ROUND (Net Unit Price\*(1+0.05),2)**

MODULE: Custom Payments

1. Two types one Upfront, Annual, decide which one and change payment schedule column to annual or prepay and change date, add DCoE signature.
2. Prepay- · **Prepay (Upfront)** – A single payment due which covers the whole term of the agreement. The payment due is 100% of the price.   Make 3 years into 1 year change the upfront 1 year at bottom of total year 1-3
3. If discount is there calculated at before product summery page add at product summery page add calculate unit price at unit price section.
4. Calculate Net unit price \* 3 if discount given apply discounts formulas and multiply by 3.
5. Change the year unit quantity 12 to 36 and check page brakes and add flag numbers at bottom in page layout section and click normal view.
6. Add the flags depends upon the percentages and discount mount as per concession 947 or if government 575.

Annual- · **Annual Payment** – 3 equal payments, one for each year of the agreement. Each annual payment is 100% of the annual price. If the requestor does not specify the payment option, this is the default.

1. Change payment schedule section and dates , DCoE signature.

2. Divide the 1 year to 3years change the upfront to total year1 and 2nd year add at 1st anniversary if 3rd year put 2nd anniversary below of upfront payment.

3. Add the flags depends upon the percentages and discount mount as per concession 947 or if government 575.

4. Write TOCR comments -Legacy support group, payment terms, edit product.

Module: Supplemental

1. Compare to original sheet to CPS sheet if original sheet mention months or years add that years or months at term of agreement.
2. Add enrolment number from customer request, if it is enterprice enrolment (EA) or ESA -go the price sheet find which month.
3. Add PO Boxes as per original sheet or depends on the sections at product summary. If it indirect add PO And Lar boxes. If it is preliminary no need to add PO, Lar boxes.
4. Check product ordered or locked at original sheet by using Part number. Check future pricing tables also if ordered or locked.

|  |  |  |  |
| --- | --- | --- | --- |
| Product | EA/SCE | EAS | SA Products |
| If locked SKU& Ordered SKU | Trup UP Quote at cover page heading | Supplemental | Supplemental |
| Net New -means product not there in the original price sheet | Supplemental  Quote | Supplemental | Supplemental |
| NET new & locked SKU both | Supplemental True up quote | Supplemental |  |

5.Check products format payments invoice date, anniversary, pages brakes,

6.write Flags – according preapprove list check at one note document supplemental documents and also find the TOCR.

Module: RAMPED PRICE.

1. Add PO boxes multiple sections likes years sections different year different section boxes.
2. Check which ramped percentage got that concession level and add flags.
3. We change the FTP
4. Add flags according to the Discount amount, Discount Percentages.
5. Concession 947 more than 30% that will be BD
6. Corporate level concession 947, Government Level 535,
7. We need to maintain or change – Dates, DCoE, Enrolment number,Payment schedule -upfront or annual, Format of the pages, page breaks, Empowerment levels like BD1,Blue2,Plss1.
8. If request is finalized change final price or else keep as preliminary and no need to add PO boxes and if indirect Enrolment add PO boxes and Lar boxes depends upon the section in the product summary form template samples.
9. Before find the price sheet prices need to check weather Direct or indirect enrolment that belogs to EA Price sheet or ESA.
10. Total deal value and customer earned value should be same.
11. Chanel price sheet means for indirect-customer price sheet means -Direct final price.
12. Deal Desk -Business Desk same, P-ES -PLSS both same.
13. What ever changes done according that add TOCRS.
14. PO-Purchage order
15. LAR-Large Account Reseller
16. FPT -Future pricing Table

MODULE-INTERNAL CPS-STANDARED -BLENDED.

Formulas:

Disc%

Disc NUP--- =round(nup\*(1-%),2)

1.Pre-Discount Extended Amount per product.

=List Price\*License Quantity

2.Discounted Extended Amount per product.

=Net Unit Price\*License Quantity

3.Total Discount Extended Amount.

=Pre-Discount Extended Amount-Discounted Extended Amount

MODULE-