

# IngramMicroCloud

## Advisor to Referral Process Procedure



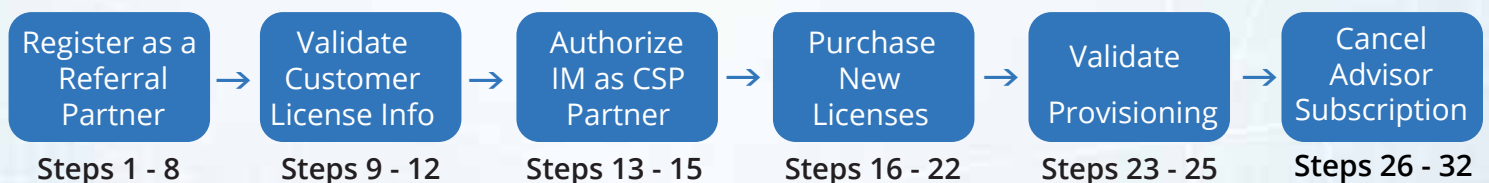
The purpose of this procedure document is to provide detailed step-by-step instructions that you as a partner must execute to convert any existing end-user tenant subscriptions from the Microsoft Advisor program to the Ingram Micro Referral program.

### Part 1: Prerequisites to converting an Advisor tenant to CSP under the Referral Program

Prior to starting the process, make sure that you have the following information:

- ✓ Know Customer (end user) Payment Info (Credit or Debit Card payments only)
- ✓ Microsoft Tenant Administrator Login Username and Password

The high level process flow is shown in the diagram below. Each box has step-by-step instructions on the remaining pages of the document.



1. If not already part of the Ingram Micro Referral Program, you must apply online at <http://www.ingrammicrocloud.com/referral/>. Fill out the application on the right side of the screen, accept the terms and conditions, and click Signup!

2. Click Submit payment forms to be directed to a page where you can download the W-9 and Non-Trade Partner Form.

**\*\*\*Please note: These forms are required to be submitted and approved in order to receive commission payments from Ingram Micro. However, you can begin the process of purchasing solutions on the Ingram Micro Cloud Referral site prior to completing and submitting these forms**

3. Download and complete the forms.
4. Submit the forms as attachments via email to [referralsAP@ingrammicro.com/](mailto:referralsAP@ingrammicro.com/).

## Cloud Referral Partner Forms

Thank you for becoming a referral partner of Ingram Micro Cloud! To properly set up payment processing, we require two documents that can be found below. Please note, you will not be able to receive payments until these forms are submitted and reviewed.

1

Download and complete forms

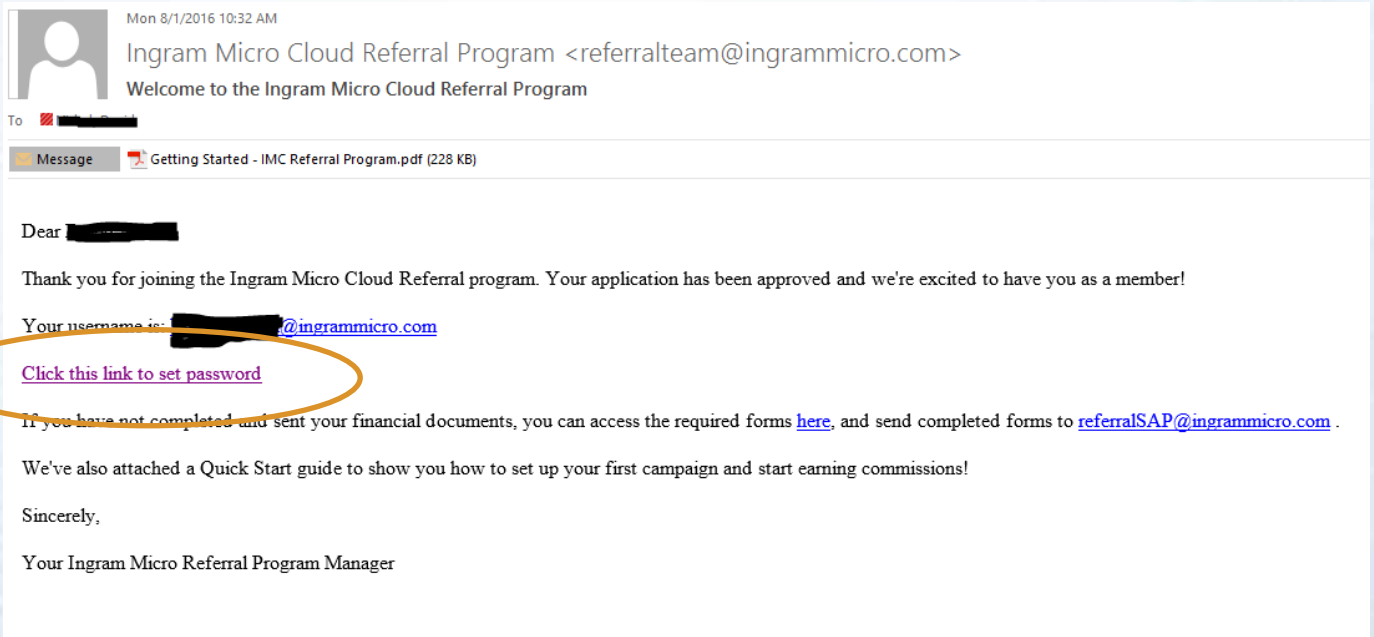
W-9

Non-Trade Partner Form

2

Email the completed forms to [referralSAP@ingrammicro.com](mailto:referralSAP@ingrammicro.com)

5. In the email box submitted as the username in step 1, open the message from [referralteam@ingrammicro.com](mailto:referralteam@ingrammicro.com). You will receive this notification within 24 hours of submission.
6. Select "Click this link to set password" to establish your password for your Post Affiliate Pro (PAP) account. PAP is the commission management software that provides you with:
  - A unique URL with your affiliate ID appended to the end of the address string (this identifies all sales completed through this link with your referral account).
  - HTML code for Digital Ad Banners that can be embedded into an existing website, or shared on LinkedIn and Twitter.
  - Real-time sales and commission tracking and reporting




7. Set a new password and login!

### Set Password

Username

Password

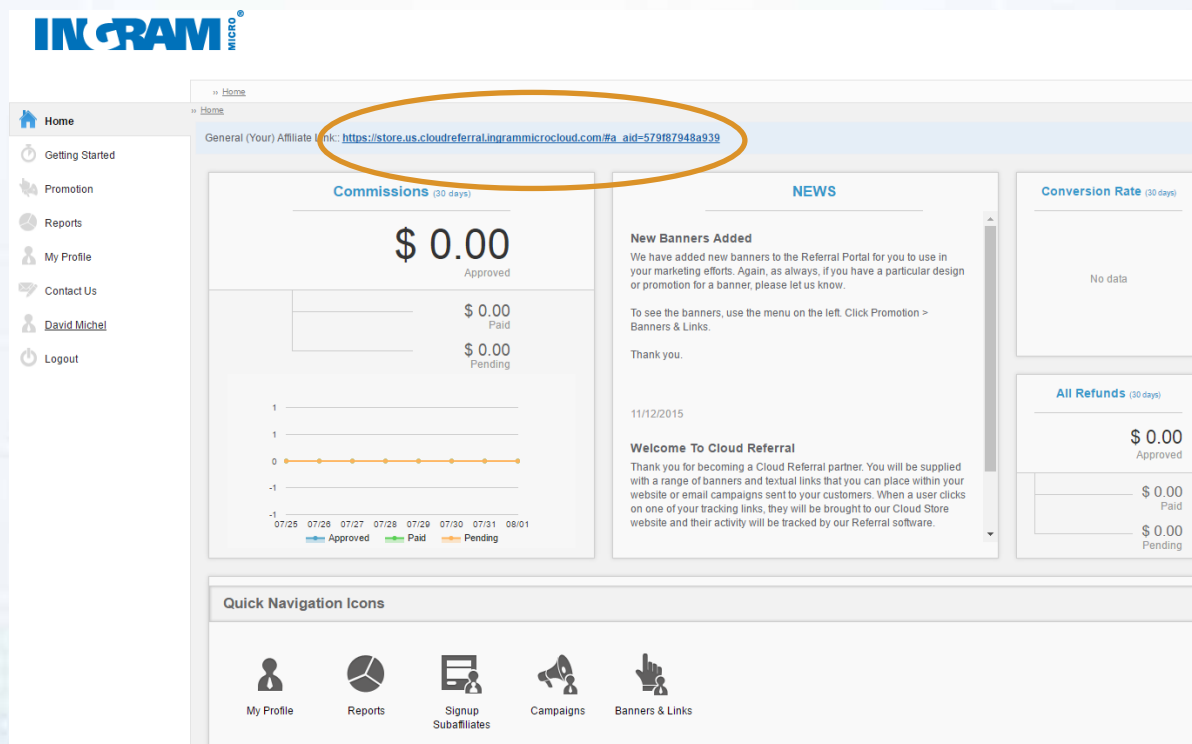
Retype password again

Enter code from picture  


**Set password and Login**

[Back to Login](#)

8. Select the link at the top of the initial PAP screen to access the Ingram Micro Referral Marketplace. This is where you will purchase the new Microsoft O365 licenses.



**INGRAM MICRO**

Home

General (Your) Affiliate Link: [https://store.us.cloudreferral.ingrammicrocloud.com/#a\\_aid=579f87948a939](https://store.us.cloudreferral.ingrammicrocloud.com/#a_aid=579f87948a939)

**Commissions (30 days)**

**\$ 0.00**  
Approved

**\$ 0.00**  
Paid

**\$ 0.00**  
Pending

**NEWS**

**New Banners Added**

We have added new banners to the Referral Portal for you to use in your marketing efforts. Again, as always, if you have a particular design or promotion for a banner, please let us know.

To see the banners, use the menu on the left. Click Promotion > Banners & Links.

Thank you.

11/12/2015

**Welcome To Cloud Referral**

Thank you for becoming a Cloud Referral partner. You will be supplied with a range of banners and textual links that you can place within your website or email campaigns sent to your customers. When a user clicks on one of your tracking links, they will be brought to our Cloud Store website and their activity will be tracked by our Referral software.

**Conversion Rate (30 days)**

No data


**All Refunds (30 days)**


**\$ 0.00**  
Approved


**\$ 0.00**  
Paid


**\$ 0.00**  
Pending


**Quick Navigation Icons**

 My Profile

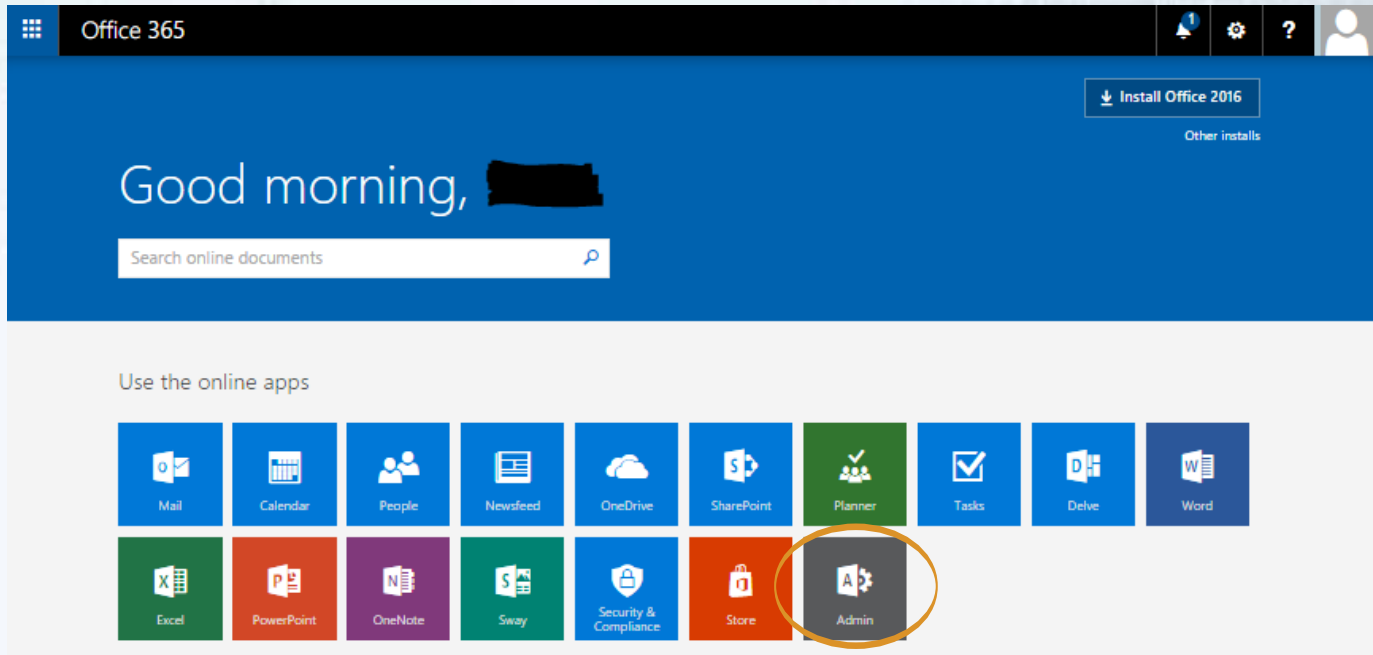
 Reports

 Signup Subaffiliates

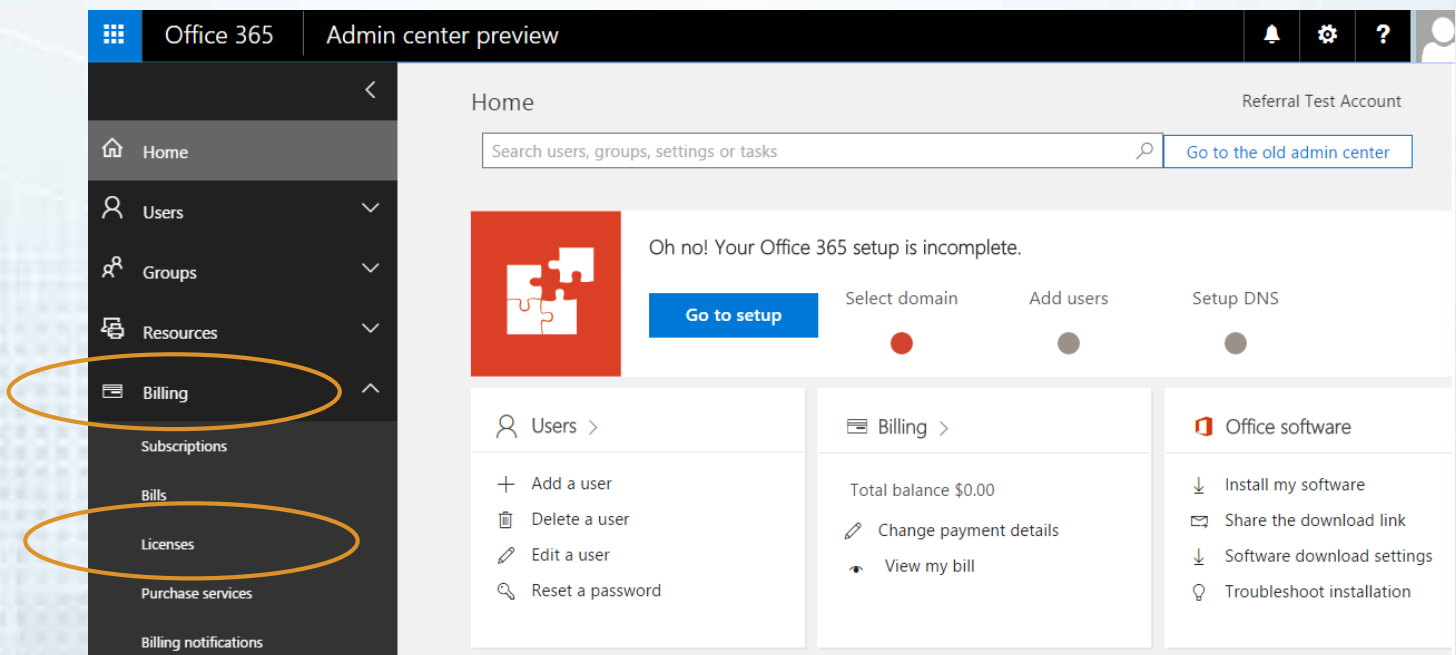
 Campaigns

 Banners & Links

9. Login to the existing Microsoft End User Tenant at <https://login.microsoftonline.com/> using the Administrator Username and Password.
10. Under the apps button on the top left, click "Admin"



11. Select the "Billing" tab on the left of your screen and choose "Licenses."



- Record the type and quantity of the licenses that currently exist on the End User Tenant. You must purchase the same type and quantity of licenses to minimize the effort of conversion. If the purchase is not made as an “exact” match, you will need to reassign each license to an end user manually.

Home > Licenses Referral Test Account

Name	Valid	Expired	Assigned
Office 365 Business Premium	1	0	1

- Click the link below to authorize Ingram Micro as the CSP Partner on the End User Tenant: <https://portal.office.com/partner/partnersignup.aspx?type=ResellerRelationship&id=a27ac673-9a4c-446c-bd28-280c0bf7cf71&msppid=607947&csp=1>

**Note: If you do not perform steps 13-15 at this time, you will have an opportunity to Authorize Ingram Micro as the CSP Partner during the purchase process (step 18)**

- Click the “Sign In” button and login to the existing Microsoft End User Tenant using the Administrator Username and Password.

## Office 365

Accept Microsoft Cloud Solution Provider invitation  
Sign in to accept this invitation from a Microsoft Cloud Solution Provider.

[sign in](#)

Partner information  
[Ingram Micro](#)

By continuing, you agree that Microsoft can share your ongoing contact and subscription information with this partner. For more information, please review the [privacy notice](#).

- Accept the terms and conditions and click the “Authorize CSP” button. Ingram Micro Inc will now appear under “Partner Relationships” on the settings tab.



Accept Microsoft Cloud Solution Provider invitation

Accepting Ingram Micro as your Microsoft Cloud Solution Provider and Administrator enables you to purchase offers and get administrative support from them. Establishing a relationship with a Microsoft Cloud Solution Provider does not change or modify your existing subscriptions, nor does it change the terms of those subscriptions.

Grant Delegated Admin Permission.

The granted permission can be removed, once the relationship has been established.

Company

Microsoft Cloud Solution Provider:

Location

1759 Wehrle Drive  
Williamsville NY 14221  
United States


☐ Yes, I have read and understand the [terms of delegated administration](#) and I am authorized to agree to these terms on behalf of my organization.

WARNING: If you choose to authorize a partner to be your delegated administrator, the partner will have full access to all your services, subscriptions, and data. Microsoft is not responsible for the delegated administrator. See the [terms of delegated administration](#) for more information, including risks and disabling partner access to your services.

Authorize CSP

Cancel


16. Use your unique URL from Post Affiliate Pro (from Step 8) to take you to the Ingram Micro Referral Marketplace:




Control PanelEmailChat1-855-660-6231Customer Login

Microsoft SMB Office 365Microsoft Enterprise Office 365More Microsoft Solutions

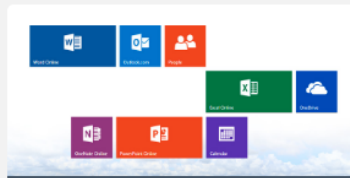
Ingram Micro Referral Marketplace



Microsoft SMB Office 365



Microsoft Enterprise Office 365



More Microsoft Solutions

17. Click the “Buy” button on the tile(s) that describes the exact same subscription(s) that the customer (end user) previously had. You discovered the customer’s pertinent information in Part 1.

**Note: If you do not choose the “exact” same subscriptions, you will still be able to complete the conversion, however, you will need to manually reassign all subscriptions to individual users within the Microsoft tenant.**

The screenshot displays the Ingram Micro website's Office 365 subscription selection interface. At the top, the Ingram Micro logo is on the left, and navigation links for 'Control Panel', 'Email', 'Chat', and the phone number '1-855-660-6231' are on the right. A 'Customer Login' button is also present. Below the navigation bar, there are three main subscription tiles:

- Office 365 Enterprise E1 (Monthly Pre-Paid)**: Described as 'For businesses that need communication and collaboration tools and the ability to read and do lightweight editing of documents with Office Online.' The subscription period is '1 Year(s)' with a price of '\$ 8.00/ mo \*'. A 'Buy' button is visible.
- Office 365 Enterprise E3 (Monthly Pre-Paid)**: Described as 'The best plan for businesses that need full productivity, communication and collaboration tools with the familiar Office suite, including Office Online.' The subscription period is '1 Year(s)' with a price of '\$ 20.00/ mo \*'. A 'Buy' button is visible.
- Office 365 Enterprise E5 without PSTN Conferencing (Monthly)**: Described as 'The best plan for businesses that need advanced security and analytics in addition to full productivity, communication and collaboration tools.' The subscription period is '1 Year(s)' with a price of '\$ 33.00/ mo \*'. A 'Buy' button is visible.

18. Notice that only 1 license is automatically added to the shopping cart. Add additional licenses to the shopping cart as required by increasing the number in the “Additional Office 365 – Remotely Accessed Software” section of the screen.

**Note: If you have not already authorized Ingram Micro as the CSP Partner for the existing tenant in steps 13-15, you can use the link titled “Click here to Authorise” that is displayed on the screen to perform those steps now.**

Description	Period/Qty	Setup	Subscription	Price	Discount	Total
Office 365 Enterprise E1 (Monthly Pre-Paid)	1 Year(s)	\$0.00	\$8.00	\$8.00	\$0.00	\$8.00
Total: \$8.00						



- ☐ Setup a New Office 365 Account
- ☒ Use an existing Office 365 Account

In order to use this feature, you must authorise Ingram Micro to provision new subscriptions to your account. [Click here to Authorise](#)

.onmicrosoft.com

Please enter your existing Tenant Domain, we will verify it has been authorised for use with us

#### Additional Office 365 - Remotely Accessed Software Seats

##### Office 365 - Remotely Accessed Software

	Setup	Subscription	Additional	Total
Office 365 Enterprise E1 ⓘ	\$0.00 per User	\$8.00 per User	<input type="text" value="0"/>	\$0.00
Office 365 Advanced eDiscovery ⓘ	\$0.00 per User	\$8.00 per User	<input type="text" value="0"/>	\$0.00
Delve Analytics ⓘ	\$0.00 per User	\$4.00 per User	<input type="text" value="0"/>	\$0.00
Skype for Business Cloud PBX ⓘ	\$0.00 per User	\$8.00 per User	<input type="text" value="0"/>	\$0.00
Skype for Business Plus CAL ⓘ	\$0.00 per User	\$2.00 per User	<input type="text" value="0"/>	\$0.00
Customer Lockbox ⓘ	\$0.00 per User	\$2.00 per User	<input type="text" value="0"/>	\$0.00

19. Select the “Use an existing Office 365 Account” radio button, enter your customer’s tenant domain and press Validate. If both the tenant name is accurate AND Ingram Micro is an approved CSP Partner (step 15), the message “The current domain is ready to be used” will be displayed.

- ☐ Setup a New Office 365 Account
- ☒ Use an existing Office 365 Account

In order to use this feature, you must authorise Ingram Micro to provision new subscriptions to your account. [Click here to Authorise](#)

.onmicrosoft.com

The current domain is ready to be used.

20. Press the “continue” button at the bottom of the page to move to the terms and conditions screen.
21. Scroll to the bottom of the page and click “Accept and Continue.”

### ADDITIONAL TERMS AND CONDITIONS FOR MURAL CLOUD SUBSCRIPTIONS

The following additional terms apply to your purchase of (“Vendor”) services:

#### 1. Term and Termination

Services start once provisioned on the marketplace. You may cancel the Services through the marketplace so long as no Service commitments are active hereunder (i.e. You or one or more of Your Users are employing any active Services). You may only terminate the Service if there are no existing term commitments for Services. If You or a User terminates its use of a Service prior to the expiration of the term commitment for the selected service, You will remain responsible to Ingram Micro for all remaining and accrued charges for such Service pursuant to the selected term commitment.

MaaScloud Professional Services are purchased as a one-time service.

#### 2. Fees

You agree to pay the fees and charges for the Services as outlined in the registration process and that appear on the Site, as may be amended from time to time. For any extension of a subscription term or the provisioning of a Service upgrade, the then-current price will apply, unless otherwise mutually agreed in writing by the Parties. Ingram Micro, may, from time to time, in its sole discretion, change the fees it charges for the Service. Any increase in the fees will take effect at the beginning of User’s next subscription term. Ingram Micro will notify You of any such changes by updating the Site or sending notice by e-mail or regular mail

Print

Accept and Continue

22. Complete all required fields in the checkout screen, including customer payment information, select the checkbox to accept the Ingram Micro Terms of Service, and click the “Place Order” button.

Payment Method\*

American Express

Card Number\*

(e.g.: 4111111111111111)

Expiration Date\*

08 2016

CardHolder Name\*

(e.g.: JOHN SMITH)

Card Verification Code

(e.g.: 1234)

Billing address

☐ Use contact address

Billing Address\*

Billing Address Line 2

City\*

Country\*

Afghanistan

State/Province

Not Applicable

Zip Code\*

Email Address\*

(e.g.: tech\_user@plates.com)

Phone\*

Country: Area: Number: Ext:

+ 93

(e.g.: +1 503 7155370)

Fax

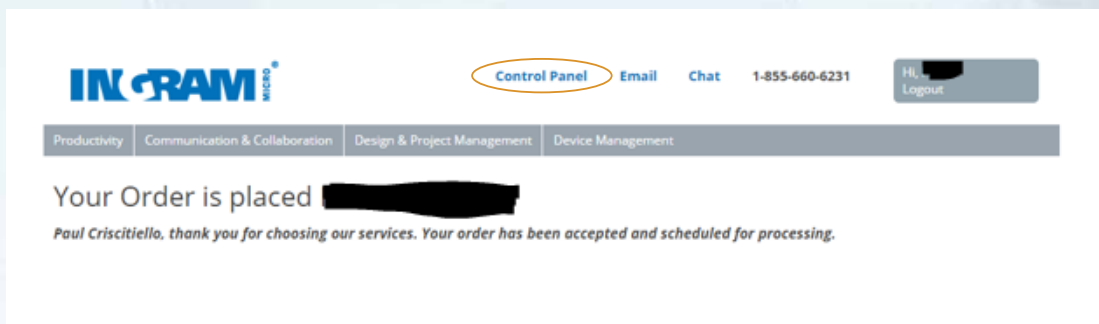
Country: Area: Number: Ext:

+ 93

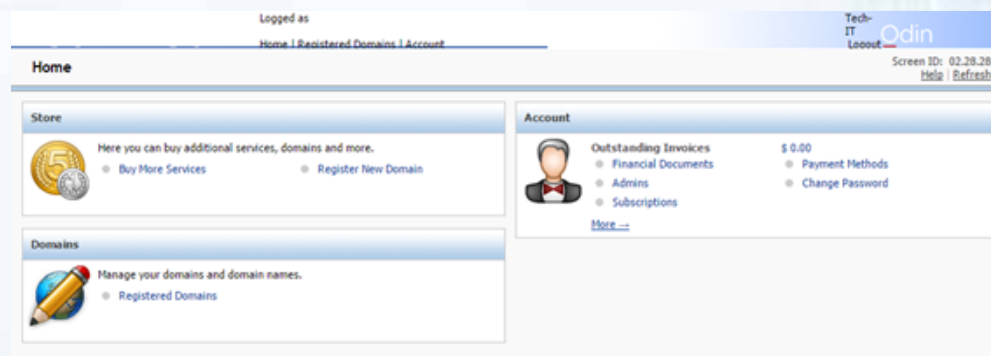
☐ I have read and I accept the Ingram Micro Inc. Terms of Service ([Click here to view](#)). I also understand that Domain Name registration orders cannot assure availability and are subject to these same Terms and Conditions.

Place Order

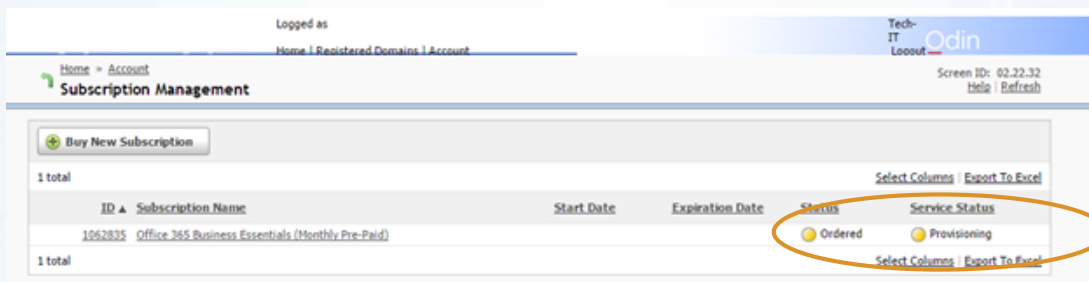
23. The order confirmation page is displayed. To validate provisioning of the licenses to the tenant, click on the link to the Control Panel.



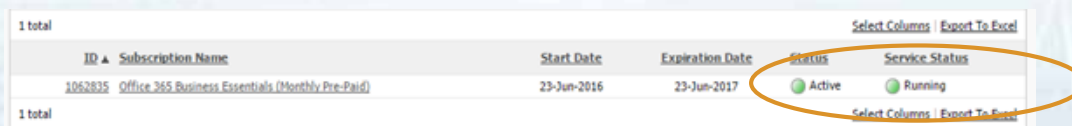
24. Click "Subscriptions."



25. Check the status of the provisioning. At first it will show "Provisioning."

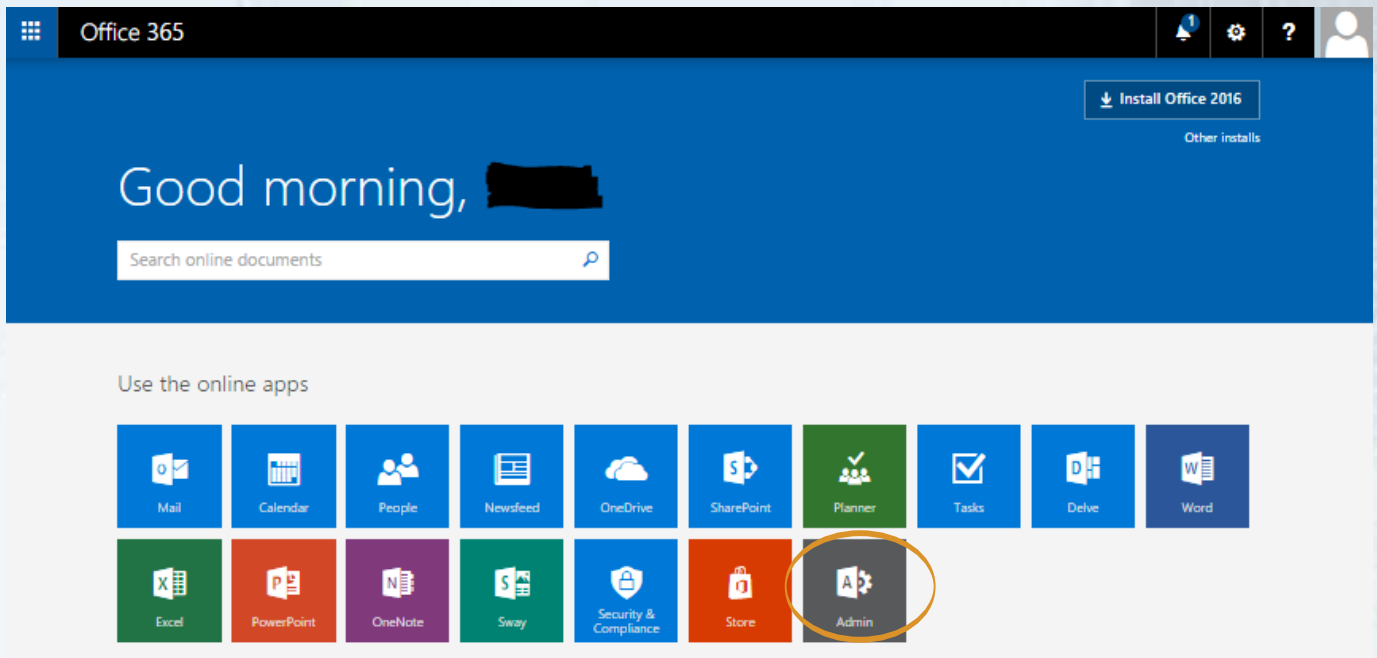


Wait to proceed until it reads "Running." (This process can take up to 3 hours, depending on Microsoft network traffic.)

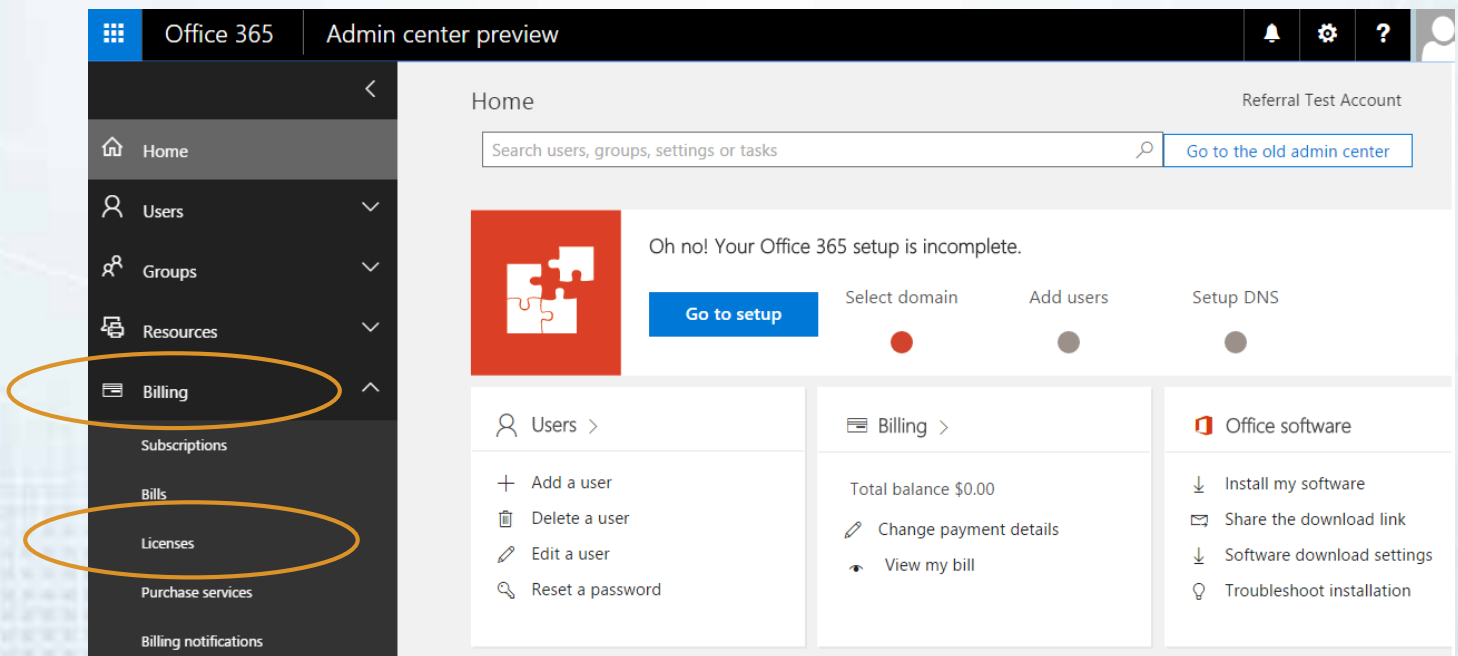


26. When provisioning is complete and the service is running, login to the Microsoft End User Tenant at <https://login.microsoftonline.com/>, using the administrator Username and Password.

27. Under the apps button on the top left, click "Admin"



28. Select the "Billing" tab on the left of your screen and choose "Licenses."



29. Verify that there are twice as many “Valid” licenses as there were before the purchase was made (recorded in step 12). This confirms that the new licenses have been added to the tenant.

Home > Licenses Referral Test Account

Name	Valid	Expired	Assigned
Office 365 Business Premium	2	0	1

30. Navigate to Billing > Subscriptions > More Actions. Choose the “Moving to different Office 365 offering” radio button, and click the “Cancel subscription” button to cancel the current Advisor subscriptions.

#### Cancel subscription

##### 1. Important dates

### Important dates

#### Cancellation date

Your subscription will be disabled and billing will be turned off immediately. If you qualify for a credit, it will be processed within 60 days.

#### Data deletion date

After cancellation, your subscription will be in a disabled state for 90 days. After that time, your subscription will be deprovisioned and all customer data will be deleted. [Learn more](#)

Subscription being cancelled	Cancellation date	Data deletion date	Early termination fee
Office 365 Business Premium	August 2, 2016	October 31, 2016	No

#### \* Please tell us why you are cancelling.

We value your feedback

- ☐ Business needs have changed
- ☒ Moving to different Office 365 offering
- ☐ Product didn't meet our needs
- ☐ Too difficult to set up and manage
- ☐ Dissatisfied with customer support
- ☐ Dissatisfied with reliability
- ☐ Moving to another service provider
- ☐ Dissatisfied with price

Additional feedback?

[Back](#) [Cancel subscription](#)

31. Navigate to Billing > Licenses one last time to validate that the number of Licenses purchased is equal to the original amount of Advisor subscriptions.

Home > Licenses

Name	Valid	Expired	Assigned
Office 365 Business Essentials	1	1	1

32. **CONGRATULATIONS! YOU MADE IT!**