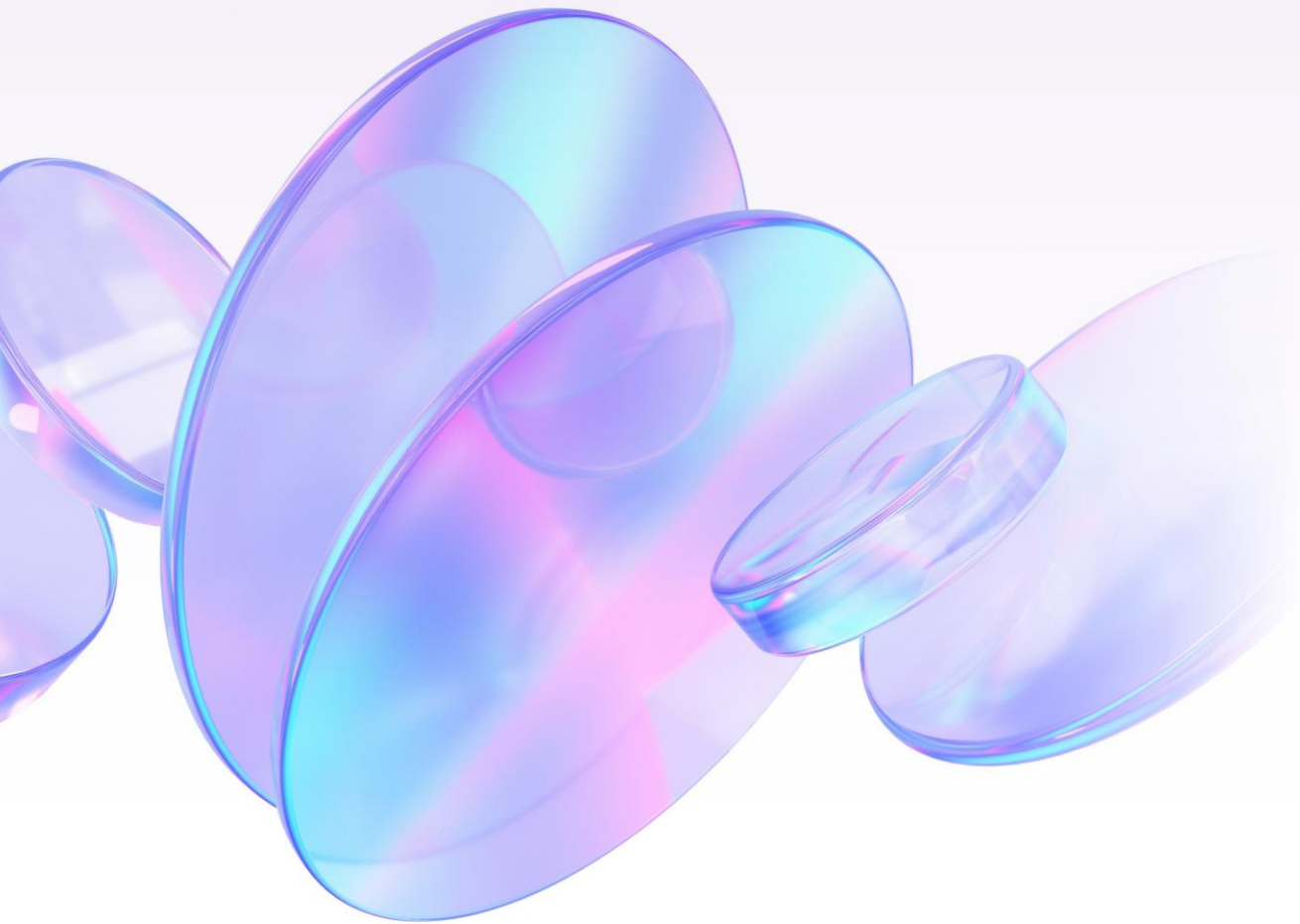




# CLOUD SOLUTION PROVIDER FULL HANDBOOK



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**[CSP Billing](#)**

## Onboarding with Dicker Data

---

Ensure onboarding has been completed.

### Become a Reseller

Register for a Dicker Data reseller account:

- [Australia](#)
- [New Zealand](#)

### Stay Updated (Recommended)

Subscribe to the Microsoft mailing list for news and events:

- [Australia](#)
- [New Zealand](#)

### Advise your PLA ID

### Provide your CSP Partner Location ID ([Where to find my Partner Location ID](#) )

This is required for all transactions.

### Enroll with Microsoft as an Indirect Reseller. (If not previously enrolled)

Register as a Microsoft Indirect Reseller [here](#).

### Authorise Dicker Data as your Indirect Provider.

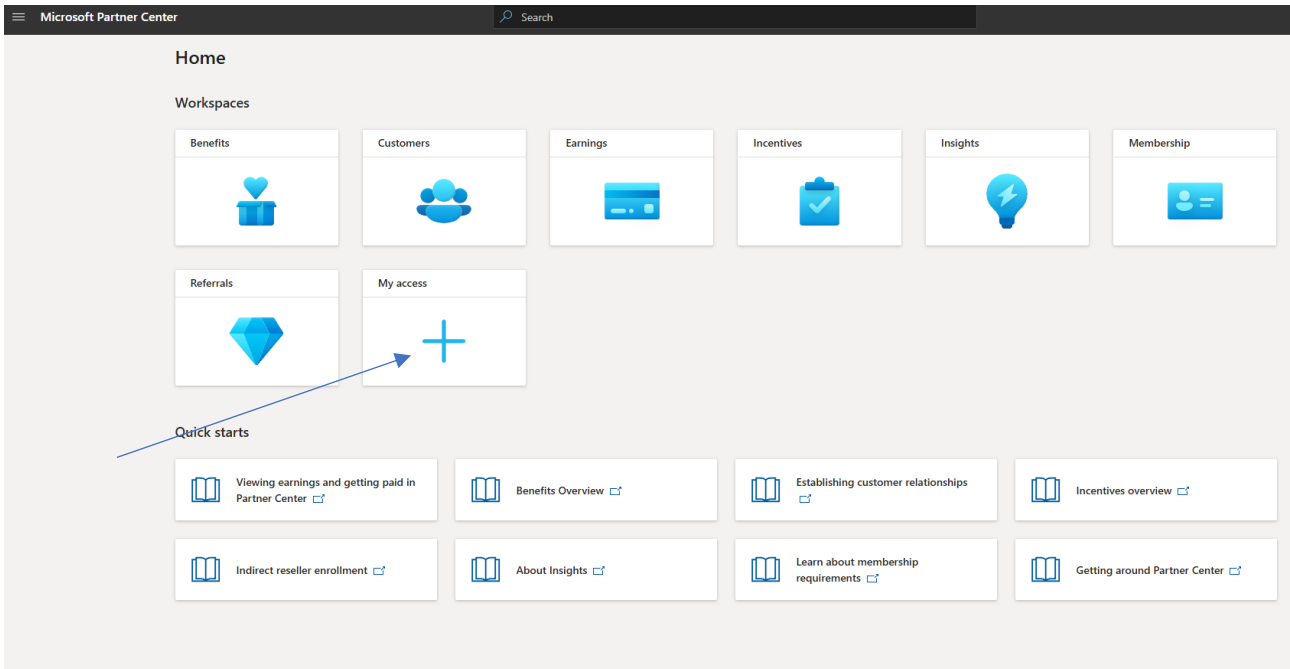
Accept the invitation for Dicker Data to be your Microsoft Indirect Provider:

- [Australia](#)
- [New Zealand](#)

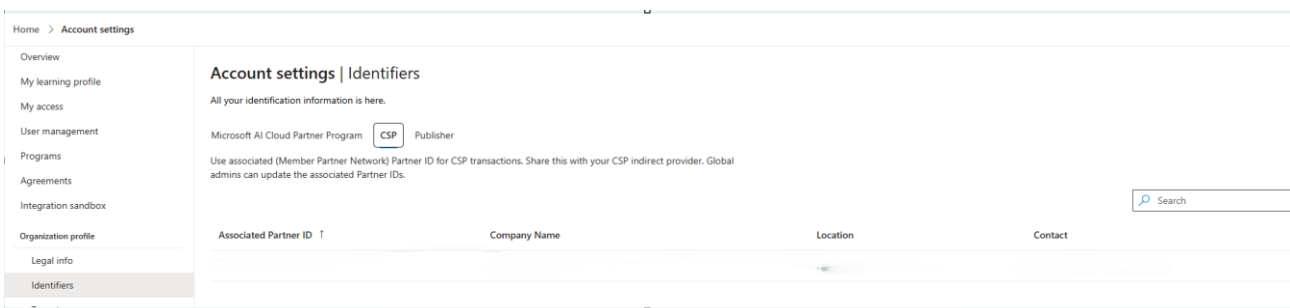
## Where to find my Partner Location ID

### Finding your correct PLA.

- Login to Partner center <https://partner.microsoft.com/>
- Click My Access Tile



- Navigate to Organisational Profile- Identifiers- CSP

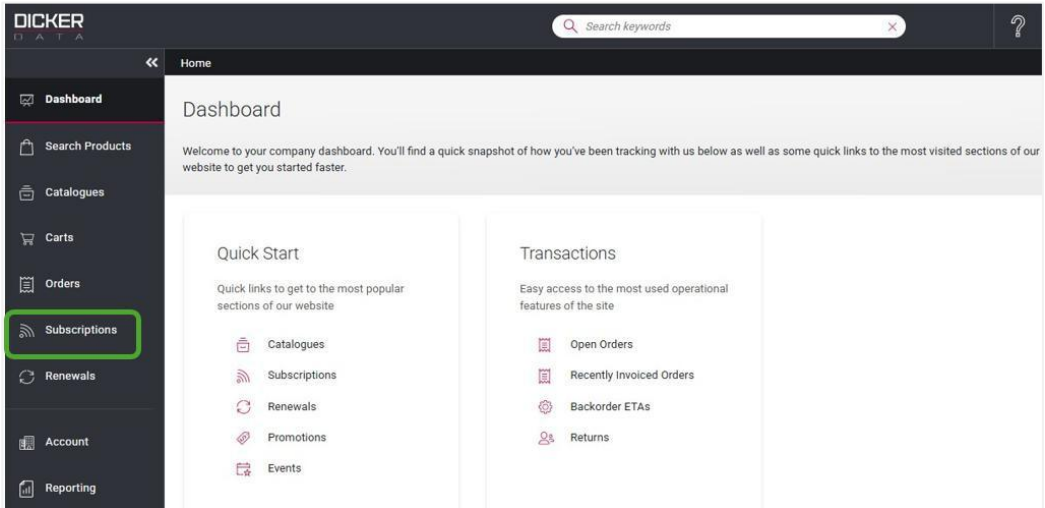


- Identifiers- here you will see a list of numbers – (min 2) one will state Global Partner Location – used for Tier 1 purchases.
- Take note of Location ID number.

## Getting Started

Log In to [www.dickerdata.com.au](http://www.dickerdata.com.au) or [www.dickerdata.co.nz](http://www.dickerdata.co.nz) with your username, reseller account number and password.

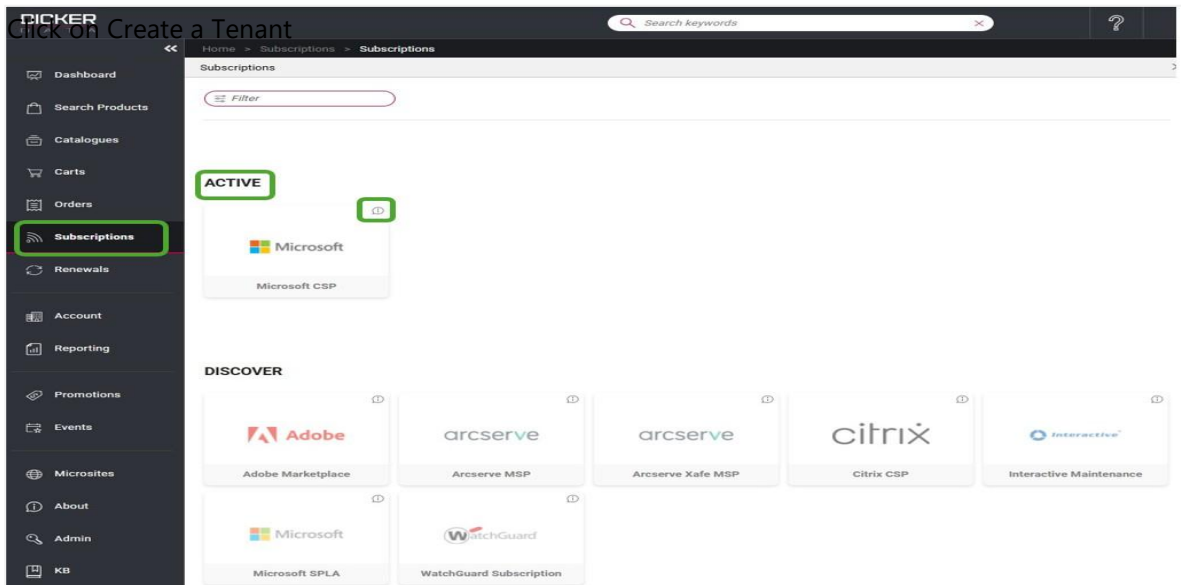
### Navigate to Subscriptions

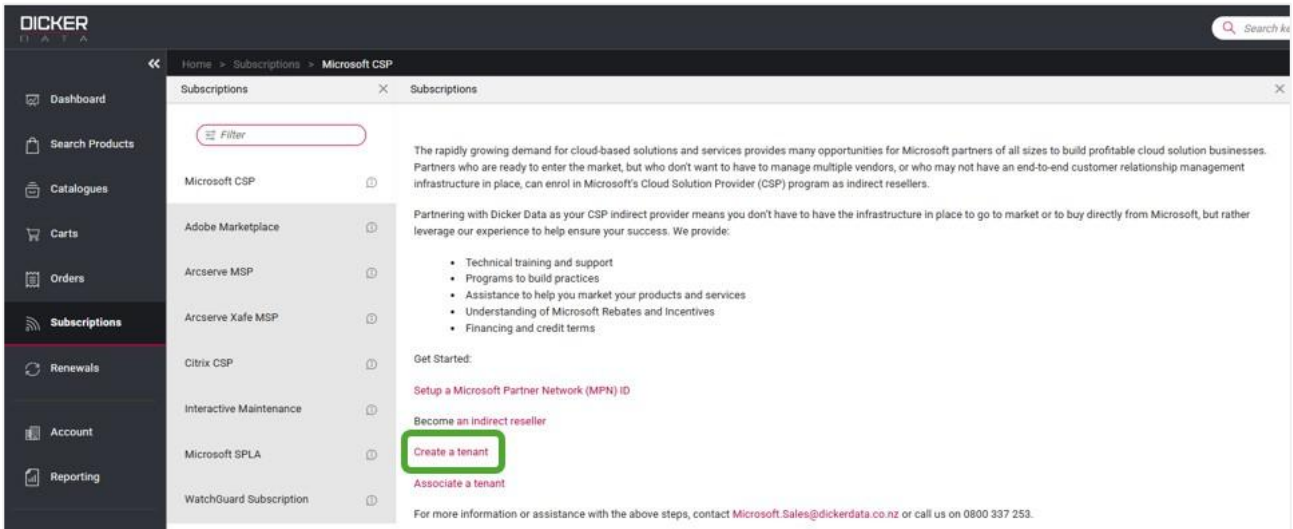


## Creating a New Tenant

Creating a New Tenant from the Microsoft CSP Information Section

Click on the  in the Active Microsoft CSP subscription from the Subscription

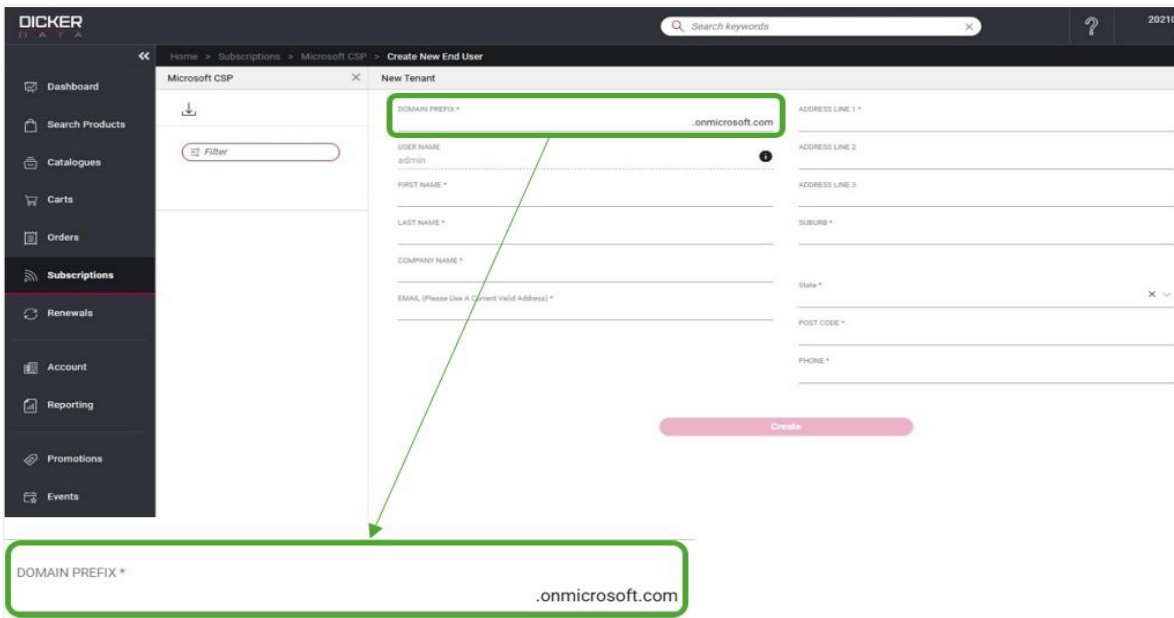




Ensure the Domain Prefix entered is the one used for the onmicrosoft.com email

PO BOX is not accepted

Example: csptenant.onmicrosoft.com (csptenant is the Domain Prefix)



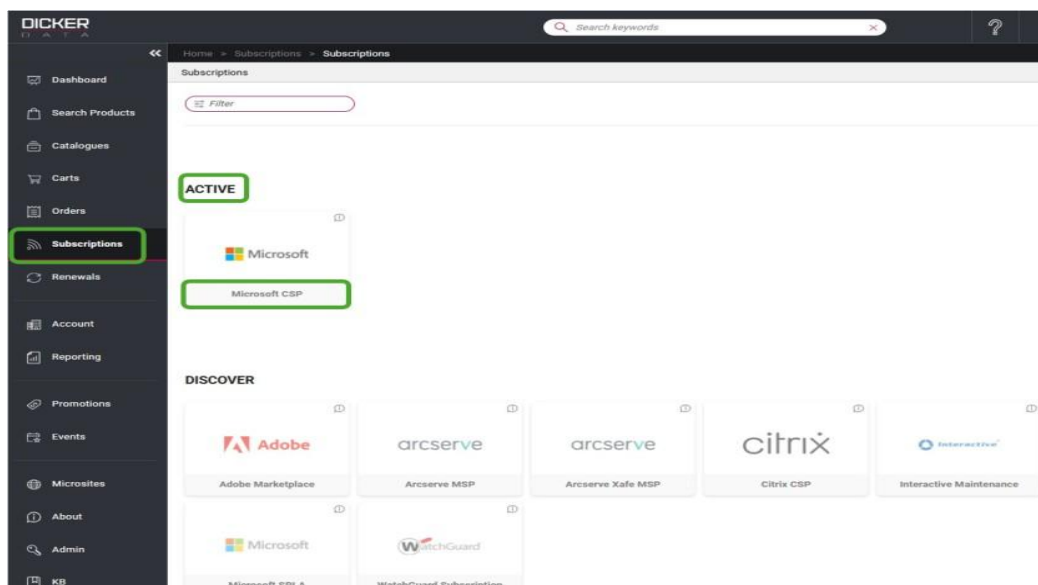
Please enter a **valid** email address here to make sure you receive the Tenant Creation email. (these emails cannot be generated again) Associating Tenants (Individually or by bulk)

### Option 1: End User Has Global Admin Access

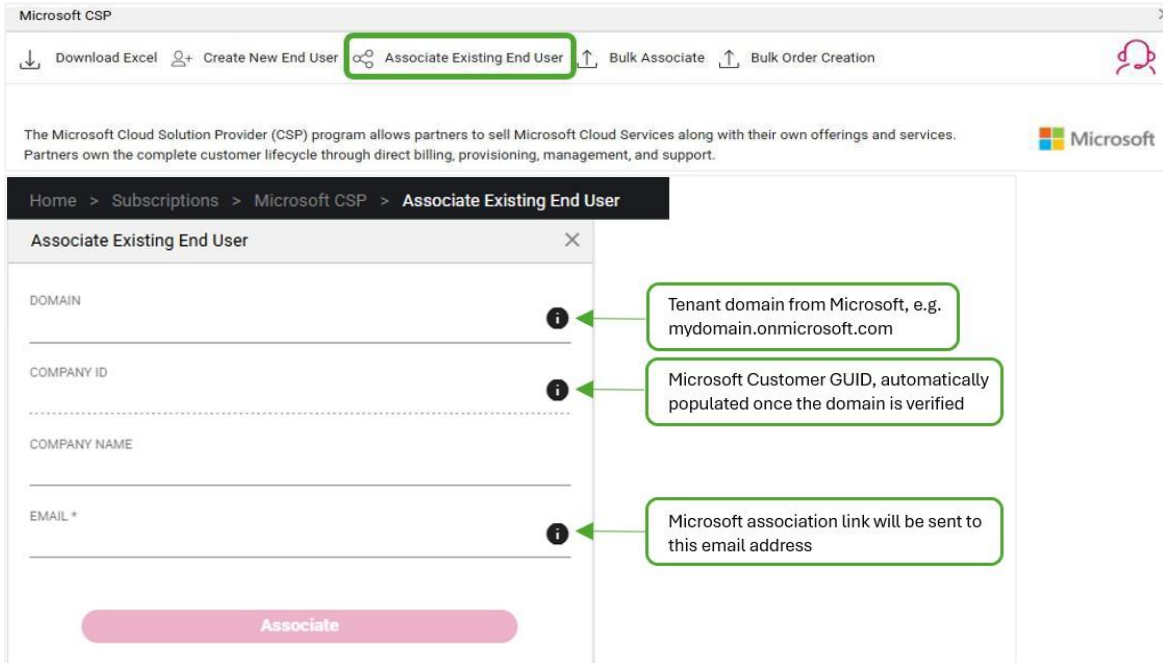
1. Ensure the association email is sent to the end user's Global Admin email address.
2. **Tip:** Notify your end users before starting the process so they know to expect the request.

### Option 2: Partner Has Global Admin Access

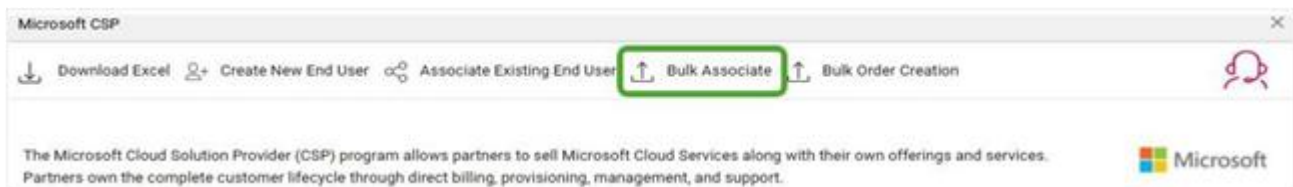
- If you (the partner) have Global Admin rights for the end user's tenancy, enter **your own email address**.
- Notifications will then be sent to you instead of the end user.
- Click **Microsoft CSP**



**Individual association:** For an existing Tenant that you have not transacted with before via Dicker Data Ltd. **Click Associate Existing End User.**

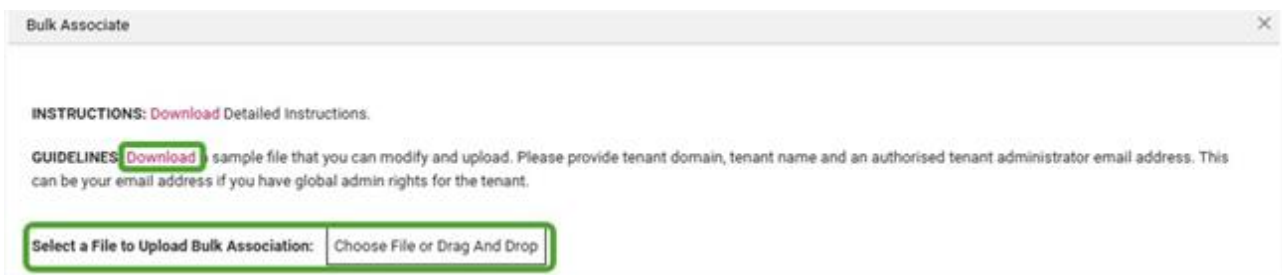


**Bulk Associate:** This feature lets you link multiple tenants in one action. Simply download the CSV file and fill in the required columns (marked in green). This eliminates the need to manually associate each tenant with its subscription individually.



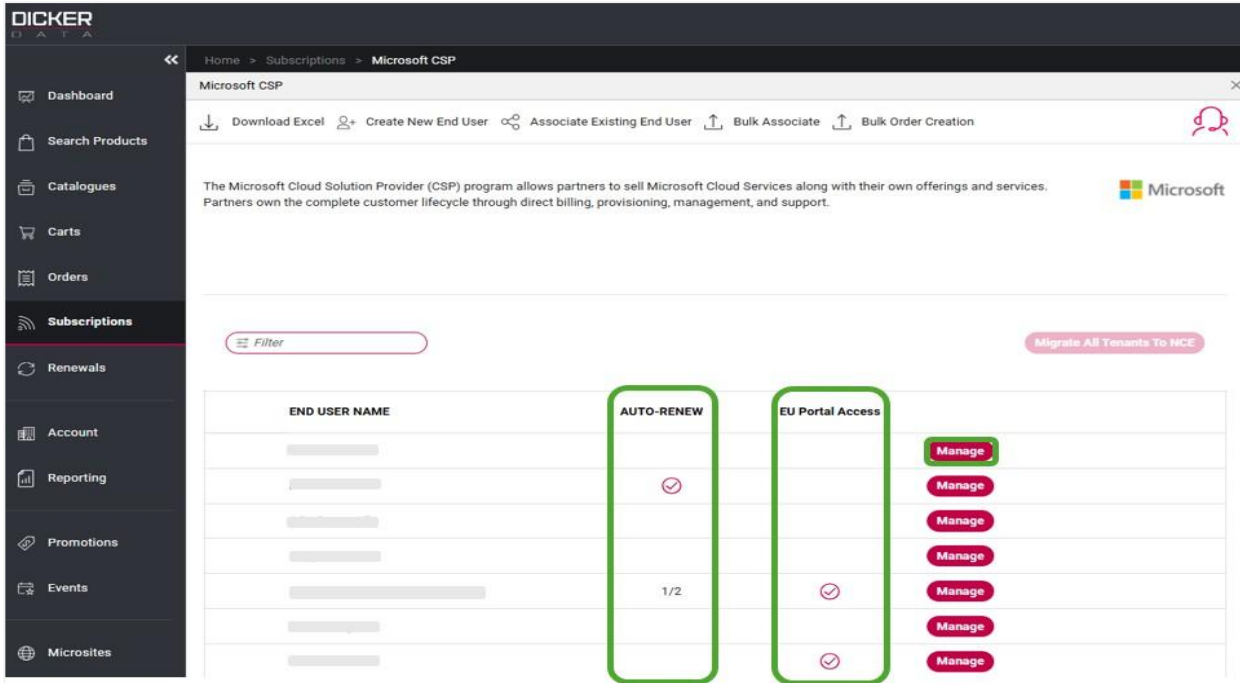
**Download CSV file and manually enter the mandatory columns (Green) in the table.**

Upload the completed CSV file and review the summary. You can edit or delete any lines before submitting them.



## Tenant List

Tenants will appear on the Tenant List when added via creation or association




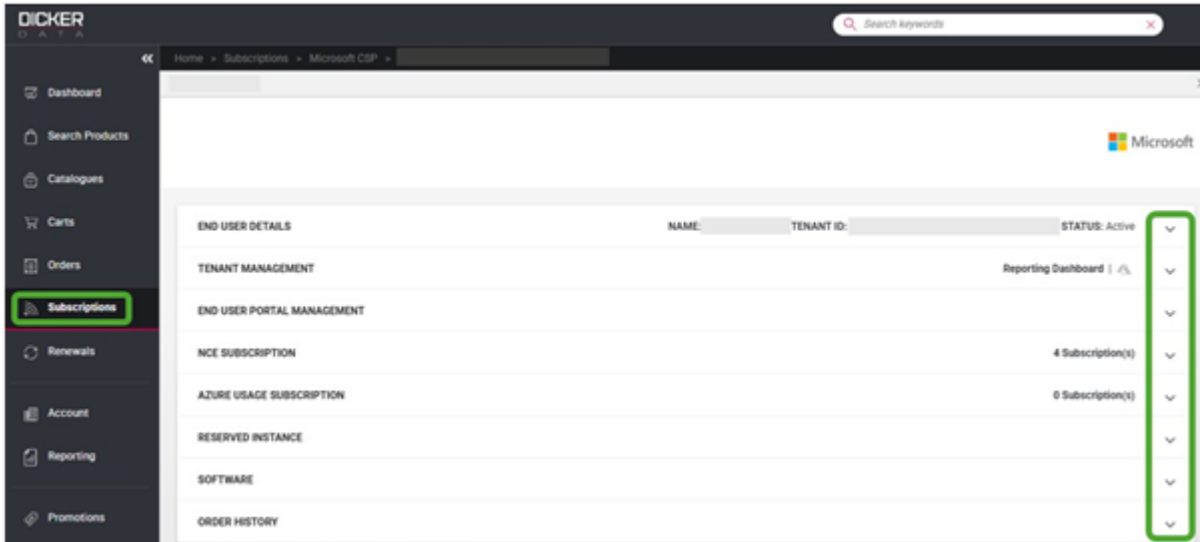
**Auto-Renew** column indicates subscriptions with auto-renew, cancel and Extended Services Term (Subscriptions with auto renew at the current quantity and Microsoft pricing at the time of renewal).

**EU Portal Access** Indicates whether an End User Portal has been created, allowing the end user of the tenancy to access their subscriptions.

Click on the **Manage** button to access the tenancy.

## Tenants Overview

Clicking on the  will expand the section and display the details for that section.



## End User Details section

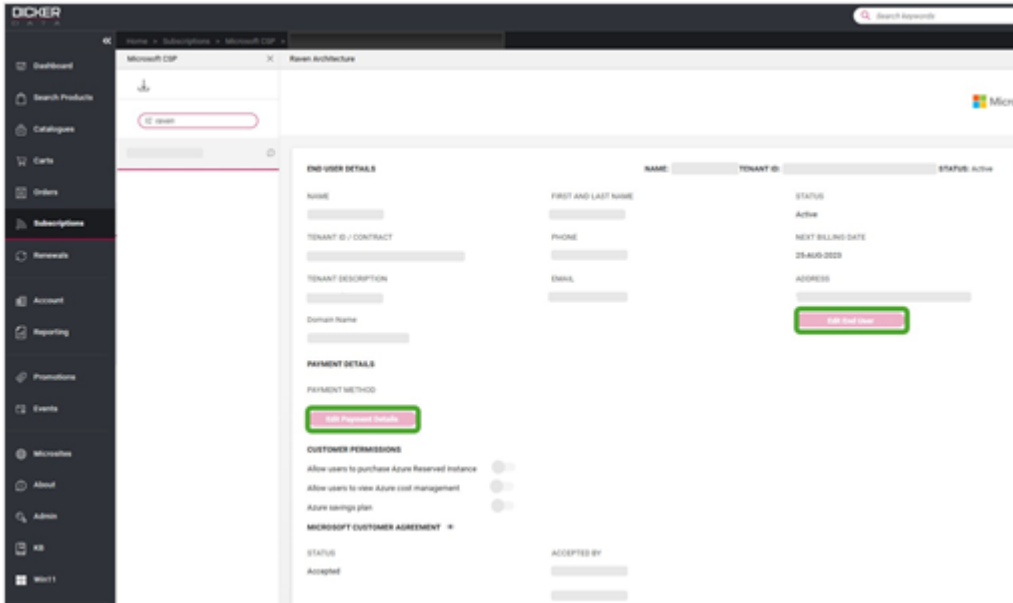
To edit **End User Details**, click the **Edit End User** button. This will open the **Edit Tenant Details** blade.

**Edit Payment Details:** Allows you to update payment alert limits and add a Digital Wallet as a payment method.

**Customer Permissions:** Enables you to toggle the following options:

- Allow users to purchase Azure Reserved Instances directly through portal.azure.
- Allow users to view Cost Management.
- Allow users to purchase a Savings Plan.

**The View Agreement Selection  will take you to the Microsoft Cloud Agreement site.**



## Tenant Management Section – GDAP

This section provides quick access to key portals, including the **Office 365** and **Microsoft Azure Management Portals**.

- **Reporting Dashboard:** Select this option to view and download available reports.
- **New Admin Relationship:** Enables partners to configure granular, time-bound access for their customers.

To set up a new admin relationship:

1. Navigate to the tenant.
2. Click the **Tenant Management** dropdown.
3. Select **New Admin Relationship** from the list.

The screenshot displays the DICKER Microsoft CSP interface. The left sidebar contains navigation options: Dashboard, Search Products, Catalogues, Carts, Orders, Subscriptions (highlighted), Renewals, Account, Reporting, Promotions, Events, Microsites, About, Admin, KB, and Win11. The main content area is titled 'Licensing Guru' and shows 'END USER DETAILS' with fields for NAME, TENANT ID, and STATUS (Active). Below this, the 'TENANT MANAGEMENT' section lists various Microsoft services such as Microsoft Entra ID, Dynamics 365 Business Central, Microsoft Intune, Exchange, Lifecycle Services, Microsoft 365, Microsoft 365 Compliance, Microsoft 365 Defender, Microsoft 365 Lighthouse, Microsoft Azure Management Portal, Power BI, Power Platform, Teams, SharePoint Online, Visual Studio Marketplace, Microsoft Security Copilot, Microsoft Dragon Copilot, and Azure Cost Management. The 'Admin Relationships' section features a table with columns for NAME, STATUS, VALID FROM, and VALID TO. A single entry is shown: 'Dicker Data - Support Analyst' with an 'Active' status, valid from 07/08/2024 to 09/08/2025. Below the table is a 'New Admin Relationship' form with a dropdown menu set to 'Support Analyst', a '7' day duration, and a 'Create' button. A note states: 'Support Analyst has access to read Azure Active Directory, raise and managed Microsoft Premium Support tickets on behalf of your tenancy.' Attached Microsoft GDAP Roles are listed as Directory Readers, Service Support Administrator, and HelpDesk Administrator.

Admin relationships available:

- Support Analyst
- Support Operator
- Support Admin
- Tenancy Technician
- Teams Reader

Each option includes detailed information about the corresponding GDAP roles and their permissions.

**New Admin Relationship**

Create an admin relationship as a   for   Days

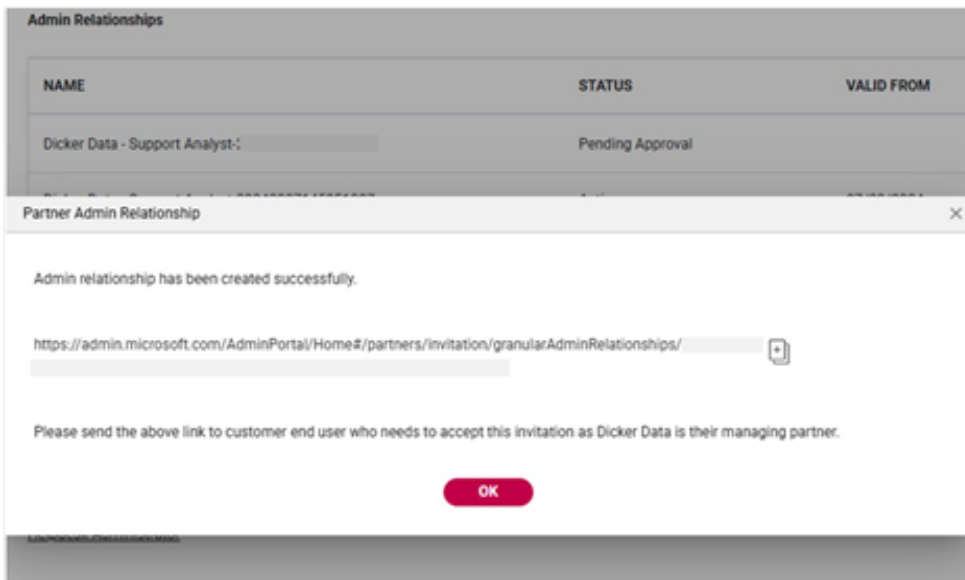
Support Analyst has access to read Azure Active Directory, raise and managed Microsoft Premium Support tickets on behalf of your tenancy.

Attached Microsoft GDAP Roles:

- [Directory Readers](#)
- [Service Support Administrator](#)
- [Helpdesk Administrator](#)
- [Security Reader](#)
- [Teams Reader](#)

Click **Create**, you will then receive a pop-up box containing the Admin Relationship link.

Copy this link and send to the tenant's Global Admin to accept the association with Dicker Data



Global Admin to accept and give partner access

### Approve partner roles

Your partner, Dicker Data Ltd, requests these admin roles. These roles give your partner permission to view data and complete tasks in the admin centers. [Learn more about admin roles](#)

**Partner information**  
 [Redacted]  
 AU

**Relationship type**  
 Granular admin access

**Relationship name**  
 Dicker Data - Support Analyst-20230427090905422

**Roles**  
 Service Support Administrator  
 Directory Readers

**Duration**  
 7 days

**Accept and give partner access?**

You're giving this partner administrator permissions. This allows them to make changes to your organization's account. Make sure you understand the impact of accepting this partner and review permissions for each role.

By selecting Dicker Data Ltd, you're electing to grant this Partner administrator permissions, which includes acting as your agent to communicate with Microsoft. These permissions will allow the Partner to be the primary administrator of the Online Services and have administrative privileges and access to Customer Data and Administrator Data. Customer consents to Microsoft and its Affiliates providing the Partner with Customer Data and Administrator Data for purposes of provisioning, administering and supporting (as applicable) the Online Services. Partner may process such data according to the terms of Partner's agreement with Customer, and its privacy commitments may differ from Microsoft's. Customer may terminate the Partner's administrative privileges at any time. You acknowledge and agree that you (a) have the authority to grant the Partner these permissions on behalf of Customer, (b) understand the impact of accepting this Partner, (c) have reviewed the permissions for each role, and (d) accept responsibility for the Partner's actions according to these permissions.

Partner Relationships will show GDAP privileges here.

### Partner relationships

These are the partners that you authorized to work with your organization. Each partner has different responsibilities for working with your organization, and some might have roles. [Learn more about working with a partner](#)

Dicker Data Ltd has these roles: Service Support Administrator, Directory Readers

**Review your partner agreements**  
 Make sure partners still need their approved roles.

2 items Filter Search

**Granular delegated administrative privileges (GDAP)**

Partner	Roles	Expiration date	Status
Dicker Data - Support Analyst-202304270909054...	Service Support Administrator, Directory Readers	4 May 2023	Active

**Other partner types**

Partner	Partner type	Role authorization	Roles
[Redacted]	Reseller	None	None assigned

Admin Relationship Status Active.

**Admin Relationships**

NAME	STATUS	VALID FROM	VALID TO
Dicker Data - Support Analyst-	Active	07/08/2024	09/08/2025

**New Admin Relationship**


Create an admin relationship as a  for  Days

Support Analyst has access to read Azure Active Directory, raise and managed Microsoft Premium Support tickets on behalf of your tenancy.

Attached Microsoft GDAP Roles:

- [Directory Readers](#)
- [Service Support Administrator](#)
- [Helpdesk Administrator](#)

The Global Admin will receive an email with the subject line "You have a Granular admin relationship with Dicker Data Ltd"



**✔ You have a Granular admin relationship with Dicker Data Ltd**

An administrator in your organisation approved a Granular admin relationship with Dicker Data Ltd for your account with Microsoft. This gives them access to the Microsoft 365 admin center and other sites to manage your account.

**Details**

**Approved by**

**Expires on** 03 May 2023

**Relationship name** Dicker Data - Support Analyst-20230427090905422

**Partner roles** [View assigned roles in Microsoft 365 admin centre](#)

**Partner name**

**Partner contact** [Partner contact information](#)

**Important**

If you don't want this partner to manage your account with Microsoft, remove the roles for the Dicker Data - Support Analyst-20230427090905422 Granular admin relationship in the Microsoft 365 admin center.

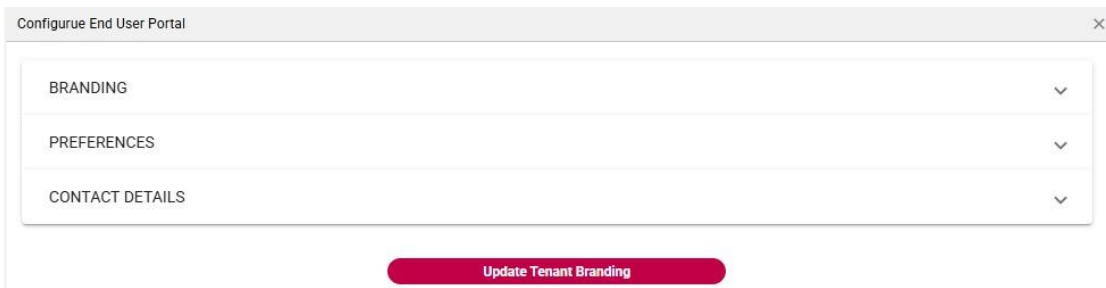
To learn more about granular delegated admin permissions (GDAP) click [here](#)

## End User Portal Management

The End User portal is a white-labelled solution you can brand as your own and allows customers to manage their Microsoft licences.

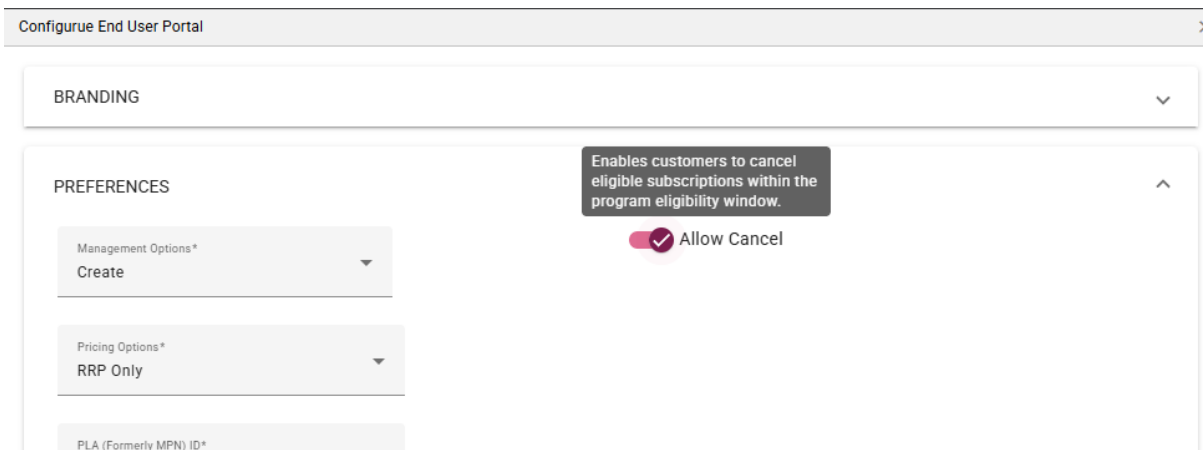
Click on the **Configure Portal** button to upload your company logo, manage user preferences and add a Contact Us page.

There are three sections that can be modified: Branding, Preferences and Contact Details.



**Branding:** Allows you to choose a site colour and upload your company logo.

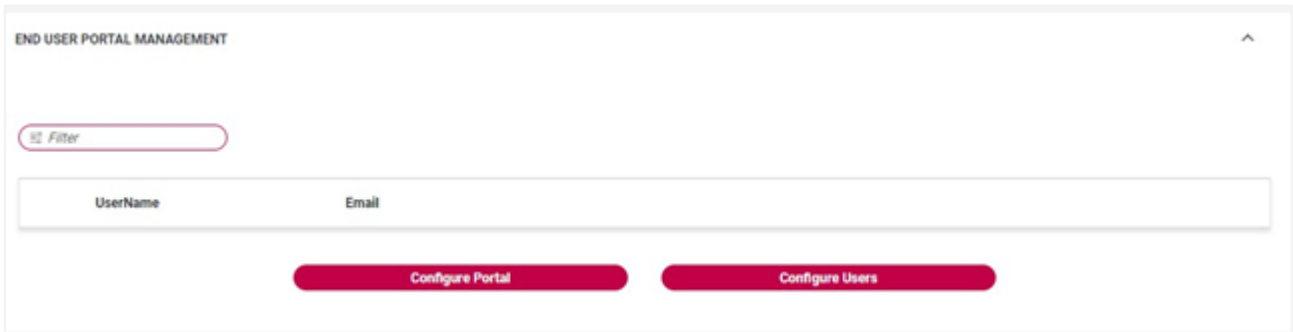
**Preferences:** Set user preferences, pricing views, notifications and allow cancel



**Contact Details:** Add support details for your end users

Click on **Configure Users** to provide users access to the EU portal.

(No emails are sent to the end users. Normal login details are required)








**NOTE:** The End User Portal permits only users from the customer's Entra directory (*Single Sign On*) to be added. External accounts and aliases are not supported, as access depends on the user's Entra login credentials.

If you encounter an error in the End User Portal, you may need to enable these specific settings. See below for more information:

[Configure how users consent to applications - Microsoft Entra ID | Microsoft Learn](#)

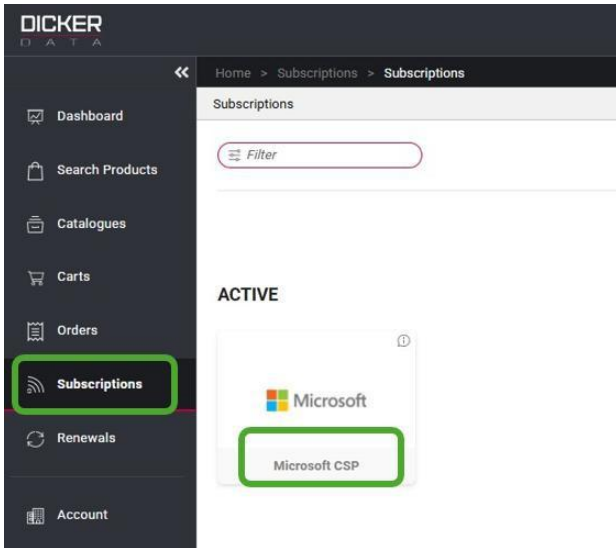
**Subscription Overview**

Clicking on the  will expand the section to display the licences under the tenant.

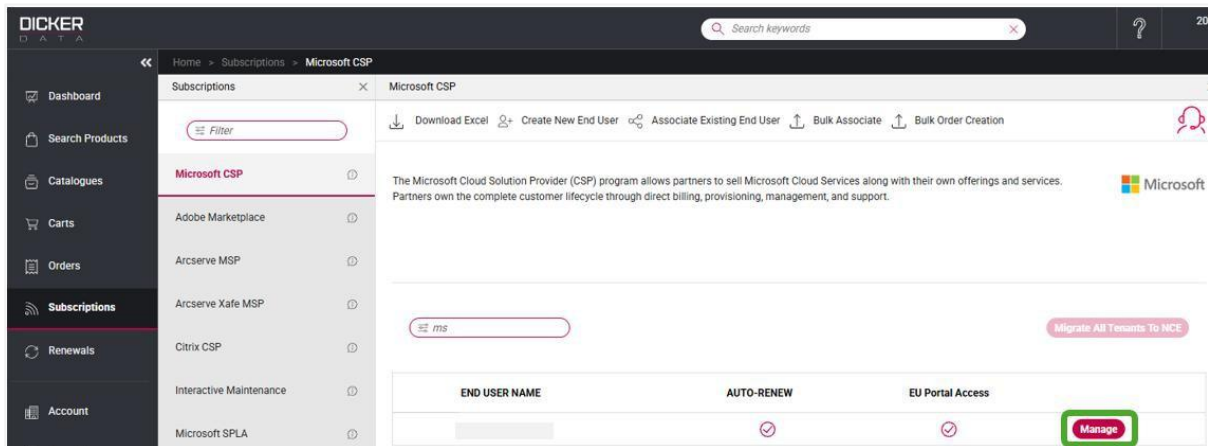
NCE SUBSCRIPTION	4 Subscription(s)	
AZURE USAGE SUBSCRIPTION	2 Subscription(s)	
RESERVED INSTANCE		
SOFTWARE		

## How to buy NCE Subscriptions

Navigate to Microsoft CSP



From the tenant list, click **Manage**



Click **Add New Product**

DESCRIPTION	QTY	PRICE	RRP	AUTO RENEWAL	STATUS	ACTION
Microsoft 365 Business Basic P1Y:CFQ7TTC0LH18:0001:Y: MS NCE M365 BUSINESS BASIC 1YR COMMIT	8			<input checked="" type="checkbox"/> 24-JUL-2025	Active	<a href="#">Manage</a> <a href="#">Add Add-On</a>

[Add New Product](#) [Confirm All](#)

Subscription Type is New Commerce Experience.

Select the product, commitment and quantities required and click **Add**

Subscription Type: New Commerce Experience - Commercial

Filter: business bas

DESCRIPTION	PRICE	RRP	QTY	ACTION
MS NCE M365 BUSINESS BASIC (NO TEAMS) MTH COMMIT STOCK CODE: P1M:CFQ7TTC0LH18:000P:1:	/mth	/mth	1	<a href="#">Add</a>
MS NCE M365 BUSINESS BASIC (NO TEAMS) YR COMMIT STOCK CODE: P1Y:CFQ7TTC0LH18:000P:1:	/yr	/yr	1	<a href="#">Add</a>
MS NCE M365 BUSINESS BASIC (NO TEAMS) 1YR COMMIT STOCK CODE: P1Y:CFQ7TTC0LH18:000P:Y:	/yr	/yr	1	<a href="#">Add</a>

On the right-hand side of the screen, please check to ensure you have the correct licences, then click **Confirm**

MS NCE M365 BUSINESS BASIC (NO TEAMS) 1MTH COMMIT  
Price: /mth | Quantity: 1

MS NCE M365 BUSINESS BASIC (NO TEAMS) 1YR COMMIT  
Price: /yr | Quantity: 1

[Confirm](#)

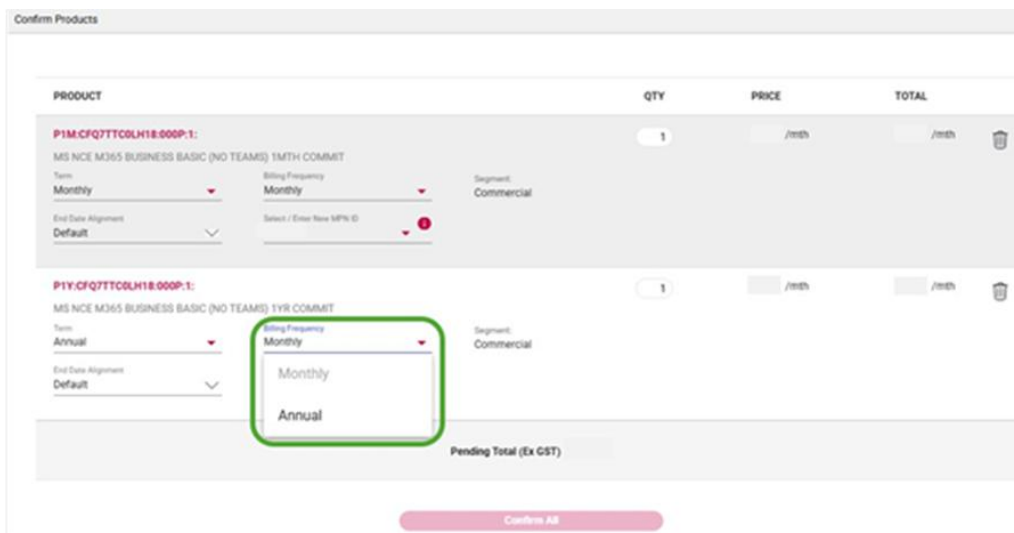
Enter your PLA from the drop-down menu (Do not select "No Indirect Reseller") - *No Indirect Reseller means your PLA is not linked, which can be deemed non-compliant under Microsoft's CSP Indirect Reseller agreement and may impact incentive earnings and purchasing eligibility.*

If you receive an error like this "The PLA ID (formerly MPN ID) is not linked to an active CSP indirect reseller tenant"



Click here for more information [Validation Codes](#)

If you've chosen an annual-commit subscription, you must select a billing frequency and then click '**Confirm All**'



## How do I adjust the auto renew settings?

To turn off auto-renew for some or all of your orders, you'll need to update the setting manually. Go to the tenant and subscription you want to modify, select Manage, Manage Renewal and locate the Cancel button. Switch it to cancel to disable auto-renew.

## How to use Bulk Order Creation

**Do not use this method when transferring from another “Provider” (P2P- Partner to Partner), as it may result in duplicate entries.**

- **Bulk Order Creation:** The bulk order creation feature allows you to create multiple subscriptions for multiple tenants at once. You need to add the mandatory columns (Green) in a CSV file. This saves you time and hassle when having to upload multiple subscriptions and tenants.

Bulk Order Creation

Import Bulk Orders In-Process Archive

INSTRUCTIONS: [Download](#) Detailed Instructions.

GUIDELINES: [Download](#) a sample file that you can populate CSP order details and upload.

WARNING: This bulk order creation system does not automatically identify duplicate subscriptions. There may be valid reasons for requesting multiple subscriptions for the same item. **The responsibility for any duplicate subscriptions created lies solely with the user. Please carefully review existing subscriptions before placing a bulk order.**

Select a File to Upload Bulk Order: [Choose File or Drag And Drop](#)

- Log in to your account on the Dicker Data website and go to the Bulk Order Creation under the Microsoft CSP page.
- Download a CSV file and manually enter the mandatory columns (Green) in the table.
- Upload the completed CSV file and review the summary of your orders. You can edit or delete any orders before submitting them.
- If there are any errors, review the list of failed orders and identify the cause of the error. Common errors include missing or invalid information.
- Copy and paste the selected rows or lines into a new file or spreadsheet. Save the new file or spreadsheet with a different name and only submit those lines.
- If there are no errors the template will go to Archive showing the date and time stamp.

The auto renew is automatically toggled on for all the orders that you create with the bulk order feature. This means that your subscriptions will renew automatically at the end of the term. You will receive a notification email before the renewal date (Annual and Triannual) and you can cancel the renewal at any time.

## How do I adjust the renewal options (Auto-renew, Cancel renewal, and Extended Service Term)

You can manage the end-of-term behaviour of a subscription by selecting **Manage** on the relevant subscription in the portal. The following options apply:

- **Auto-renew ON**

The subscription will renew automatically into the same term and billing frequency at renewal.

- **Extended Service Term**

The subscription moving into an **Extended Service Term (EST)**, where services continue on a month-to-month basis until the subscription is manually cancelled.


- **Cancel Renewal**

Subscriptions can only be cancelled within Microsoft's permitted cancellation window. If cancellation is available, it can be actioned from the **Manage** screen. Once cancelled, services are disabled in line with Microsoft policy.

## Extended Service Terms – EST

How to identify and manage EST subscriptions in the Dicker Data portal

Log in to the Dicker Data website

- Navigate to Subscriptions
- Select the Insights Tool- this is located the top right hand of the screen - 
- Click Renewals, then filter on EST
- From here, you can download the data for review

**OR** Manage subscriptions individually by selecting the cog icon against each subscription

## **ACTION FOR ALL PARTNERS**

We strongly recommend reviewing these subscriptions as soon as possible and confirming the appropriate action with your customers. If a subscription is not intended to renew into an Extended Service Term (EST), you must actively update it to **“Cancel at end of term”**, otherwise it will automatically transition into EST upon expiry.

### **What if I need to cancel an order?**

You can cancel an order that you created within the first 24 hours of placing it. You will receive a full refund for the cancelled order. To cancel an order, you need to go to the tenant / subscription that you want to cancel and clicking manage. There you can see the cancel subscription button and click it.

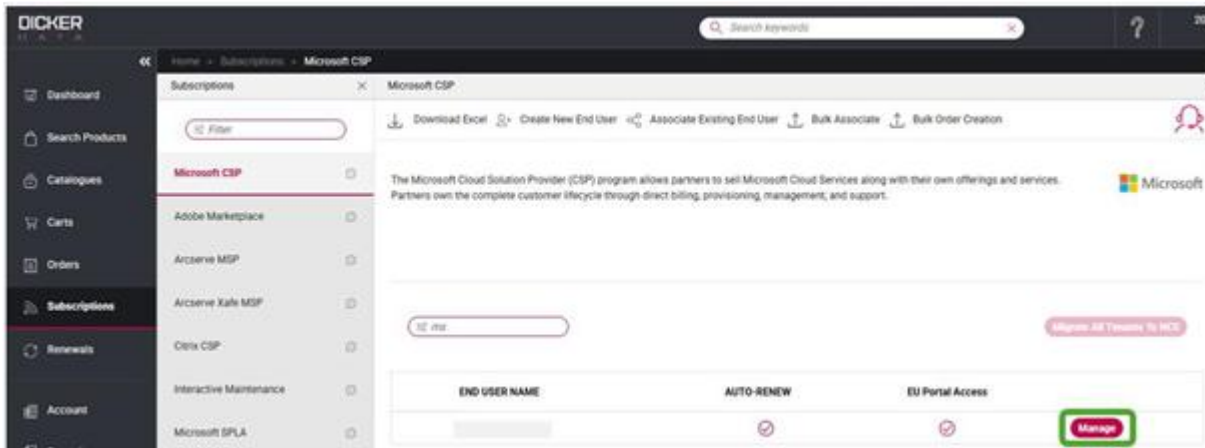
### **What if I make a mistake or there is a problem?**

You have 7 days from the date and time of purchase to check the orders that you created with the bulk order feature are correct. If you find a mistake or a problem with your order, we recommend that you cancel it and reorder it correctly before the 7 days are over. However, after the 7 days, there is no refund or exchange available for your order. For this reason, we highly recommend that you carefully review the data that has been loaded for each tenant.

**NOTE:** upload the files only one-time, if you encounter errors copy and paste errors into a new file and submit

## How to Manage Existing Subscriptions

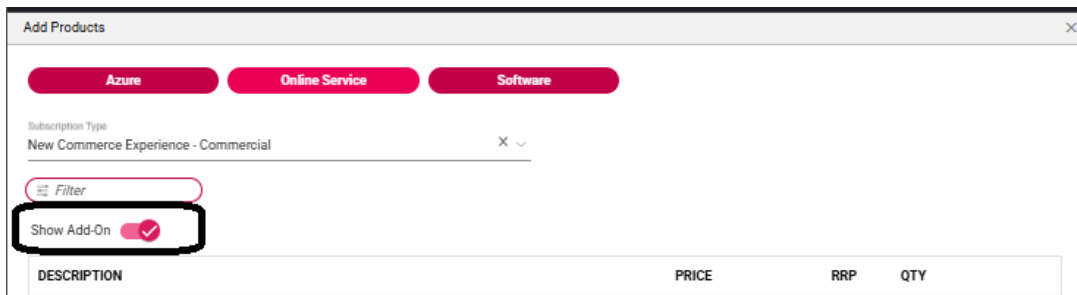
To manage or amend your existing subscriptions, select the Tenant you want to amend and click **Manage**.



## How to buy Add-On's (NCE)

Add-on subscriptions require a qualifying licence to function. For example, Teams Phone Standard depends on an existing product like Office 365 E3 in the tenant. This is a technical enforcement by Microsoft—purchases will be blocked if no qualifying licences is detected.

To purchase an Add-on licence click "Show Add-On"



## How to Change Quantities

Changes to the original licence quantity can be made within 7 days from the exact time of provisioning. After this period, quantities can be increased at any time. Monthly subscriptions can be decreased at any time and will only take effect from the following month, while annual subscriptions can only be reduced on their anniversary date.

If an existing scheduled change is in place and any mid-term modification is made—such as adjustments to quantity, term, or end date - the original scheduled change will be overwritten. If the change is still required, you must reschedule it. To avoid duplication or conflicts, please ensure that all modifications are included within a single scheduled change request.

Select the subscription that needs to be adjusted in the tenant’s list and click **Manage**.

NCE SUBSCRIPTION							4 Subscription(s)
<input type="text" value="Filter"/>	Status	Renewal Options					
DESCRIPTION	QTY	PRICE	RRP	AUTO RENEWAL	STATUS	ACTION	
Microsoft 365 Business Premium P1Y:CFQ7TTC0LCHC:0002:1 MS NCE M365 BUSINESS PREMIUM 1 YR COMMIT	3	/yr /yr	/yr /yr	<input checked="" type="checkbox"/> 22-OCT-2025	Active	<a href="#">Manage</a>	


Click **Subscription Details** for immediately change or click **Manage Renewal** for changes to take place at the renewal date.

The screenshot shows the 'Manage NCE Subscription' page. It is divided into two main sections:

- SUBSCRIPTION DETAILS:** This section allows for immediate changes. It includes fields for Stockcode, Product, Description, PLA (formerly MPN), and Quantity. A 'Service Status' indicator shows 'Active'. Buttons for 'Save Details' and 'Cancel Subscription' are present.
- MANAGE RENEWAL:** This section allows for changes that take effect at the next renewal date. It includes fields for Renewal Date, Auto-renew preference (with options for 'Auto-renew', 'Extended Service Term', and 'Cancel'), Quantity, Term, Billing Frequency, and End Date Alignment. A 'Schedule Renewal' button is at the bottom.




Annotations on the screenshot include a green box labeled 'IMMEDIATE CHANGE' pointing to the 'SUBSCRIPTION DETAILS' section and a blue box labeled 'CHANGE ON RENEWAL' pointing to the 'MANAGE RENEWAL' section.

**AUTO RENEWAL**

How to identify if you have an existing “Scheduled change” in place  (Clock Icon)

NCE SUBSCRIPTION 3 Subscription(s) ^

Status Renewal Options

DESCRIPTION	QTY	PRICE	RRP	AUTO RENEWAL	STATUS	ACTION
Microsoft 365 Business Basic D P1Y:CFQ7TTC0LH18:000L:1: MS NCE M365 BUSINESS BASIC DON ATION (NON-PROFIT PRICING) 1YR COMMIT	28	\$0.00/yr \$0.00/yr	\$0.00/yr \$0.00/yr	 	Active	<a href="#">Manage</a> <a href="#">Add Add-On</a>
Microsoft 365 Business Premium P1M:CFQ7TTC0LCHC:000J:1: MS NCE M365 BUSINESS PREMIUM N ONPROFIT STAFF PRICING 1MTH COMMIT	7					<a href="#">Manage</a> <a href="#">Add Add-On</a>
Microsoft Intune (Non-Profit P P1M:CFQ7TTC0LCHC:001K:1: MS NCE MICROSOFT INTUNE (NON-P ROFIT PRICING) 1MTH COMMIT	1			 13-APR-2026	Active	<a href="#">Manage</a> <a href="#">Add Add-On</a>

[Add New Product](#)

Confirm Qty Update

Current charges	\$6.07
Additional prorated charges	\$1.42
Total amount for next billing	\$7.49
Ongoing charges after next billing	\$12.14

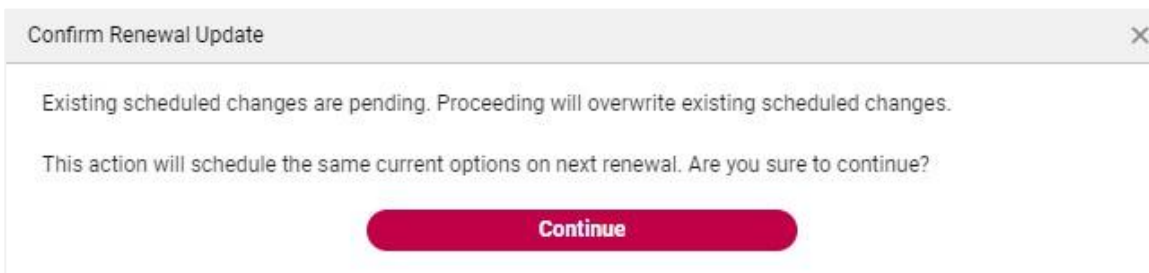
Are you sure to change the quantity immediately?

[Schedule On Renewal](#) [Immediately](#)

## Important Note:

If an existing scheduled change is in place and any mid-term modification is made—such as adjustments to quantity, term, or end date - the original scheduled change will be overwritten. If the change is still required, you must reschedule it. To avoid duplication or conflicts, please ensure that all modifications are included within a single scheduled change request.

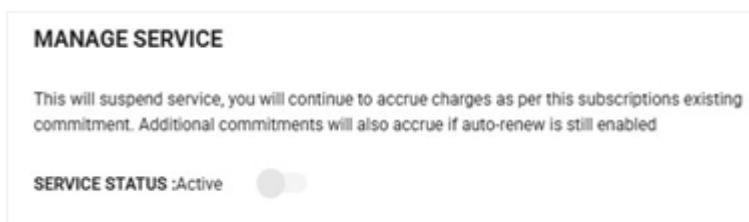
The Confirm Renewal Update message will appear.



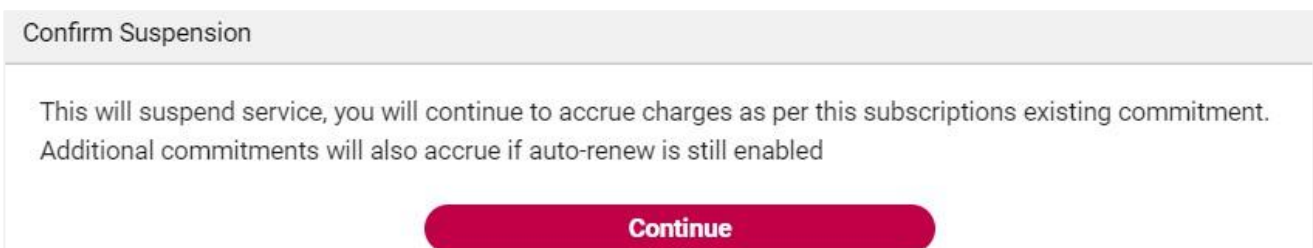
[More information on Scheduled Changes](#)

## How to Suspend Subscriptions

Suspending NCE subscriptions does not cancel licences as it does in the CSP Legacy program. Billing continues regardless of suspension, and Microsoft will still invoice for the subscription. The partner remains fully liable for payment even when a subscription is suspended. This function should only be used to restrict a tenant’s access to their licences (e.g., in cases of non-payment). Suspension can be applied in the portal by clicking ‘Manage’ on the relevant subscription and using the Suspend toggle.



The Confirm Suspension message will appear.



## How to manage renewal options (Auto-renew, Cancel renewal, and Extended Service Term)

Under the New Commerce Experience (NCE), subscriptions will automatically renew into their existing term and billing arrangement on the renewal date unless action is taken.

You can manage the end-of-term behaviour of a subscription by selecting **Manage** on the relevant subscription in the portal. The following options apply:

- **Auto-renew**

The subscription will renew automatically into the same term and billing frequency at renewal.

- **Extended Service Term**

The subscription moving into an **Extended Service Term (EST)**, where services continue on a month-to-month basis until the subscription is manually cancelled.

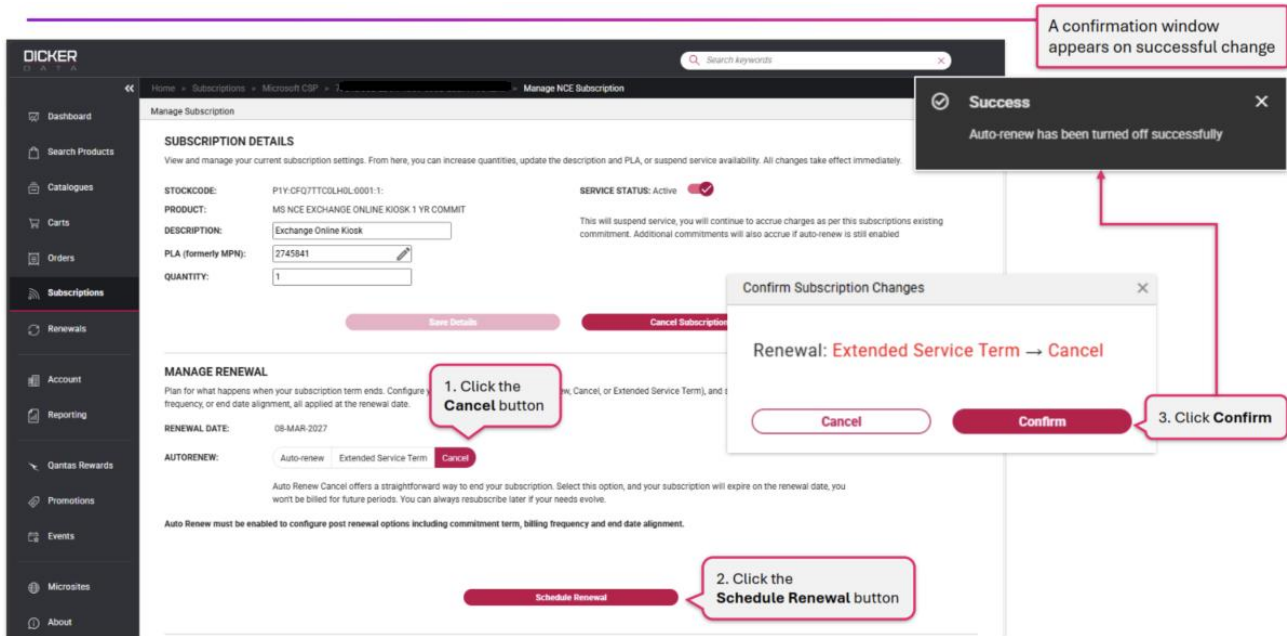
- **Cancel Renewal**

Subscriptions can only be cancelled within Microsoft's permitted cancellation window. If cancellation is available, it can be actioned from the **Manage** screen. Once cancelled, services are disabled in line with Microsoft policy.

### Activating Extended Service Term

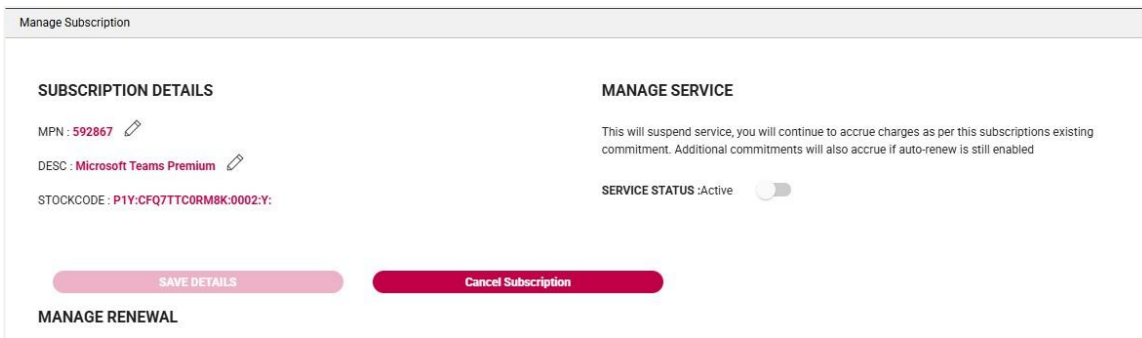
The screenshot shows the 'Manage NCE Subscription' interface. The 'SUBSCRIPTION DETAILS' section includes fields for Stockcode, Product, Description, PLA, and Quantity. The 'MANAGE RENEWAL' section shows the 'Auto-renew' option selected, with 'Extended Service Term' and 'Cancel' as alternative options. A 'Schedule Renewal' button is visible. A 'Confirm Subscription Changes' dialog box is open, showing the transition from 'Auto-renew' to 'Extended Service Term' with 'Cancel' and 'Confirm' buttons. A 'Success' notification window at the top right states 'Extended Service Term turned on successfully'. Annotations with red boxes and arrows point to the 'EST button', 'Schedule Renewal button', 'Confirm' button, and the success message.

### Cancelling Extended Service Term



## How to Cancel Subscriptions

Cancelling subscriptions can be done from the portal by clicking Manage on the relevant subscription. You will only be able to see the Cancel Subscription button if you are within the cancellation time frame (7 days).



Cancelling monthly licences will appear as a bill then credit on the customer's invoice.

## How to Upgrade Subscriptions

Subscription upgrades can be done from the portal by clicking **Manage** on the relevant subscription, click

**View Eligible Offers** to view upgrade options and Select the Subscription you want to upgrade to and click **Upgrade**.

### UPGRADE OPTIONS

[View Eligible Offers](#)

UPGRADE OPTIONS		
Stock Code	Title	
CFQ7TTCOLH1P:0001	Exchange Online (Plan 2)	<a href="#">Upgrade</a>
CFQ7TTCOLF85:0002	Office 365 E5	<a href="#">Upgrade</a>
CFQ7TTCOLH18:0001	Microsoft 365 Business Basic	<a href="#">Upgrade</a>
CFQ7TTCOLFLX:0001	Microsoft 365 E3	<a href="#">Upgrade</a>
CFQ7TTCOLFLX:0003	Microsoft 365 E3 - Unattended License	<a href="#">Upgrade</a>
CFQ7TTCOLFLZ:0002	Microsoft 365 E5	<a href="#">Upgrade</a>
CFQ7TTCOLF85:0001	Office 365 E5 without Audio Conferencing	<a href="#">Upgrade</a>

Click the drop-down menu under DESTINATION SUBSCRIPTION, select New Subscription or an existing subscription (if available).

**Confirm Upgrade** ✕

---

**FROM:**

**P1M.CFQ7TTCOLCHC:0002:1:** **MS NCE M365 BUSINESS PREMIUM 1 MTH COMMIT**

---

**TO:**

**P1M.CFQ7TTCOLFLZ:0002** **Microsoft 365 E5**

---

**DESTINATION SUBSCRIPTION**

New Subscription ▼

New Subscription

AU Users E5( ) Qty:2

**QUANTITY TO UPGRADE:**

Licenses

---

**TERM :** Current : Monthly

**CHANGE TO:**

No Change ▼

---

**BILLING FREQUENCY :** Current : Monthly

**CHANGE TO:**

No Change ▼

---

**END DATE ALIGNMENT :** Current : 19/07/2025

**CHANGE TO:**

No Change ▼

---

Please note by upgrading this plan you agree to the currently committed term. No cancellation period is provided for plan upgrades

Amend the quantity needed, term, billing frequency, end date alignment then click **Confirm**.

**NOTE:** Cancellation windows aren't applied to upgrades, so changes can't be made once submitted. Double-check all your upgrade details before continuing.

You can upgrade mid-term or schedule an upgrade to happen at the end of the existing term by setting the renewal instructions.

### Mid-term upgrade invoice example

In the below example, you can see the tenant had 2 Business Basic subscriptions that were billed for 1 month from 20 Feb to 19 Mar (Line 2), then on 24 Feb they upgraded those two licences to Business Standard (Line

1) and were subsequently credited for the unused time period on the Business Basic (Line 3).

Stock Code	Stock Desc	Order Qty
P1Y:CFQ7TTC0LDPB:000	Microsoft Corporation - Microsoft 365 Business Sta >Usage for 24-FEB-2022 to 19-MAR-2022 MS NCE M365 BUSINESS BASIC 1YR	2.0000
P1Y:CFQ7TTC0LH18:000	Microsoft Corporation - Microsoft 365 Business Bas >Usage for 20-FEB-2022 to 19-MAR-2022 MS NCE M365 BUSINESS BASIC 1YR	2.0000
P1Y:CFQ7TTC0LH18:000	Microsoft Corporation - Microsoft 365 Business Bas >Usage for 24-FEB-2022 to 19-MAR-2022 MS NCE M365 BUSINESS BASIC 1YR	-2.0000

## How to Align End Date

Coterminosity can be activated when a subscription is created or when it is renewed. A subscription can be made coterminous with an existing subscription according to the following table:

		New or renewing Subscription		
		1-month	1-year	3-years
Existing Subscription	1-month	Yes	No	No
	1-year	Yes	Yes	Yes
	3-years	Yes	Yes	Yes

A new or renewing 1–3 year subscription may not be co-termed with a 1-month subscription

**MANAGE RENEWAL**

Changes will take effect on renewal date: 04-MAY-2023  
Quantity increase and Upgrade will be effective instantly

**AUTORENEW:**  RENEWS ON 04-May-2023

**QUANTITY: CURRENT :** 2  
CHANGE TO:

**TERM :** Current : Monthly  
CHANGE TO:

**BILLING FREQUENCY :** Current : Monthly  
CHANGE TO:

**END DATE ALIGNMENT :** Current : 03/05/2023  
CHANGE TO:

Date alignment can be done in the portal by clicking **Manage** on the relevant subscription and then using the **End Date Alignment** drop down:

NOTE: Activating coterminosity for an existing subscription does not change the end-date of the existing term, rather it schedules the coterminosity to be activated when the subscription next renews.

To learn more about aligning end dates click [here](#)

## Bulk PLA Process

Login with Purchasing Rights within the Dicker Data Portal

Go to "Subscriptions" – "Microsoft CSP"

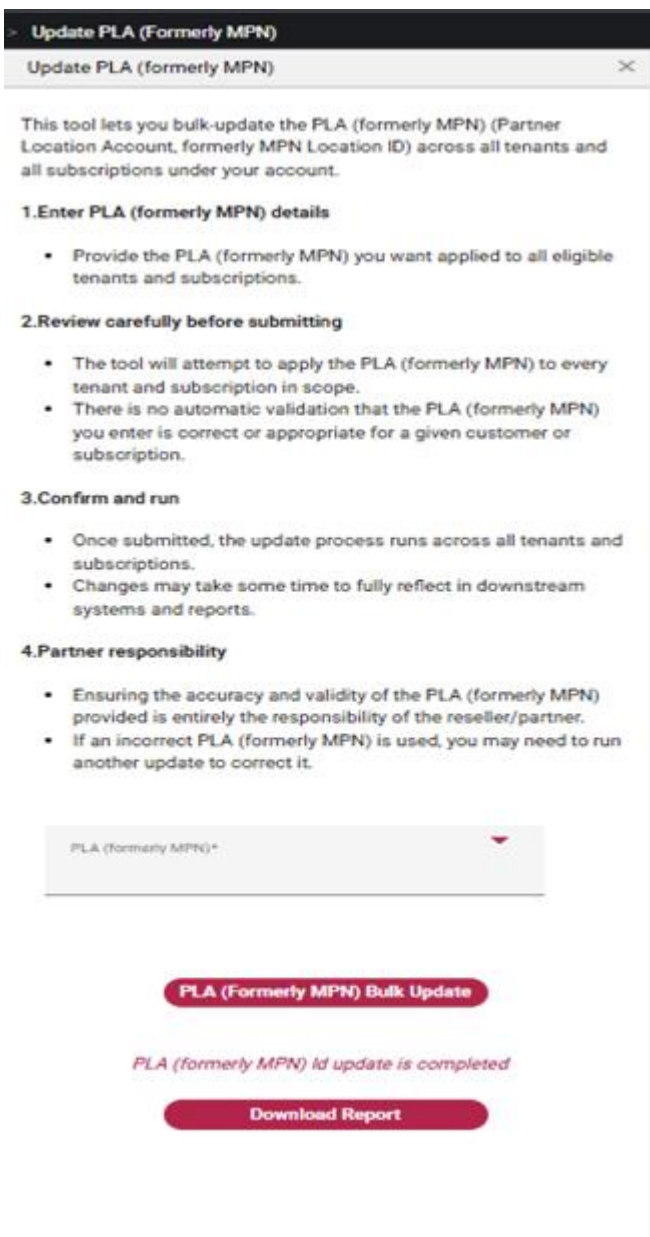
Click on "PLA" Bulk Update

The screenshot shows a web application interface for managing subscriptions. At the top, there is a breadcrumb trail: Home > Subscriptions > Microsoft CSP. Below this, there are two tabs: 'Subscriptions' and 'Microsoft CSP'. The 'Subscriptions' tab is active, showing a list of subscription categories: Adobe Marketplace, Arcserve MSP, Microsoft CSP (highlighted in red), Microsoft SPLA, Arcserve Xafe MSP, and ConnectWise Backup. Each category has a filter icon. The 'Microsoft CSP' tab is also visible, showing a description of the Microsoft Cloud Solution Provider (CSP) program and a 'PLA (Formerly MPN) Bulk Update' button. The interface includes various action buttons like 'Download Excel', 'Create New End User', 'Associate Existing End User', and 'Bulk Associate'. There are also icons for charts, a help desk, and the Microsoft logo.

This tool lets you bulk-update the PLA across all tenants and all subscriptions under your account.

- Step 1 – Enter your correct Transacting CSP PLA details as confirmed in Partner Centre (see [PLA](#))
- Step 2- Review carefully before submitting
- Step 3- Confirm and Run
- Step 4- Partner Responsibility – Ensure your PLA is entered correctly, if it is not shown please type in the correct one.

Then to finalise this action please click PLA Bulk Update



**Update PLA (Formerly MPN)**

Update PLA (formerly MPN)

This tool lets you bulk-update the PLA (formerly MPN) (Partner Location Account, formerly MPN Location ID) across all tenants and all subscriptions under your account.

**1. Enter PLA (formerly MPN) details**

- Provide the PLA (formerly MPN) you want applied to all eligible tenants and subscriptions.

**2. Review carefully before submitting**

- The tool will attempt to apply the PLA (formerly MPN) to every tenant and subscription in scope.
- There is no automatic validation that the PLA (formerly MPN) you enter is correct or appropriate for a given customer or subscription.

**3. Confirm and run**

- Once submitted, the update process runs across all tenants and subscriptions.
- Changes may take some time to fully reflect in downstream systems and reports.

**4. Partner responsibility**

- Ensuring the accuracy and validity of the PLA (formerly MPN) provided is entirely the responsibility of the reseller/partner.
- If an incorrect PLA (formerly MPN) is used, you may need to run another update to correct it.

PLA (formerly MPN)\*

**PLA (Formerly MPN) Bulk Update**

*PLA (formerly MPN) id update is completed*

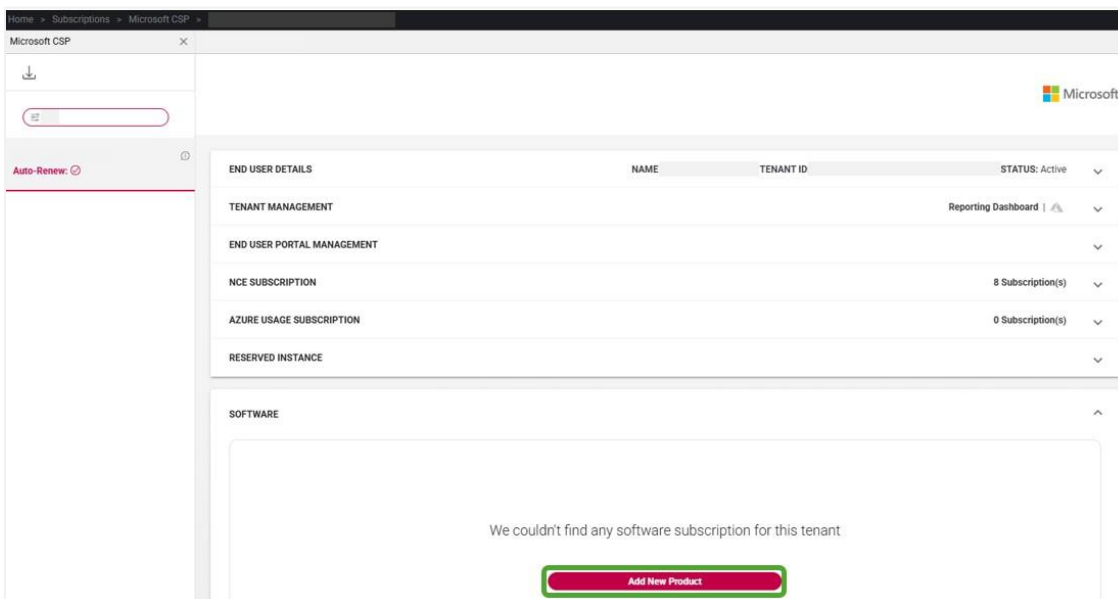
**Download Report**

Please note that if you have multiple PLA's we can remove them for you.

Please email [microsoft.sales@dickerdata.com.au](mailto:microsoft.sales@dickerdata.com.au) or [microsoft.sales@dickerdata.co.nz](mailto:microsoft.sales@dickerdata.co.nz)

## Software Subscriptions

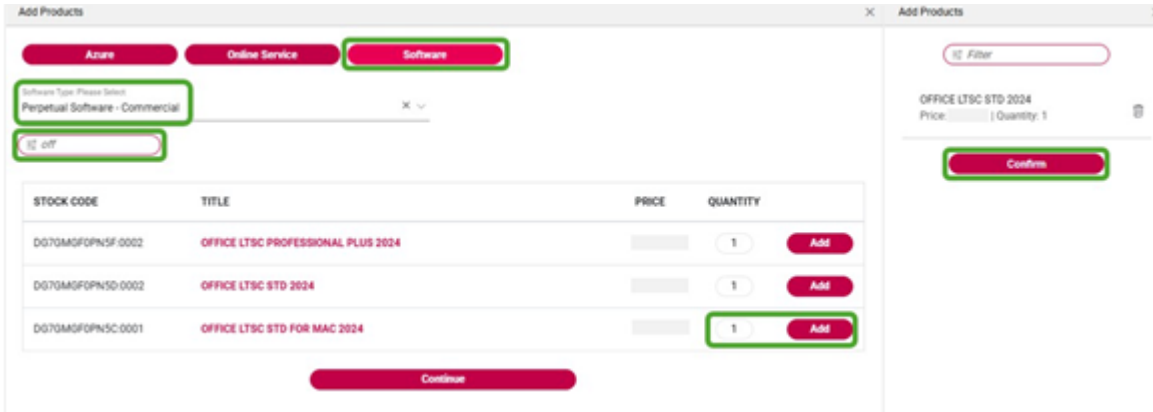
The Software section lists all Software Subscriptions and Perpetual Software for the Tenant. In the tenant page, drop down the **Subscription** section. Click **Add New Product** button.



Click on **Software** and then select the subscription type required to display the list of Software or Perpetual available.

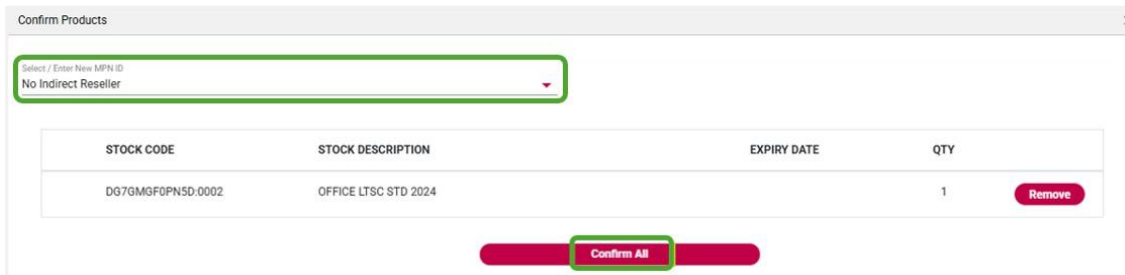
Type a search in the filter field to filter on the list of subscriptions.

Type the **Qty** and click **Add**. Review the added product, click on **Confirm**

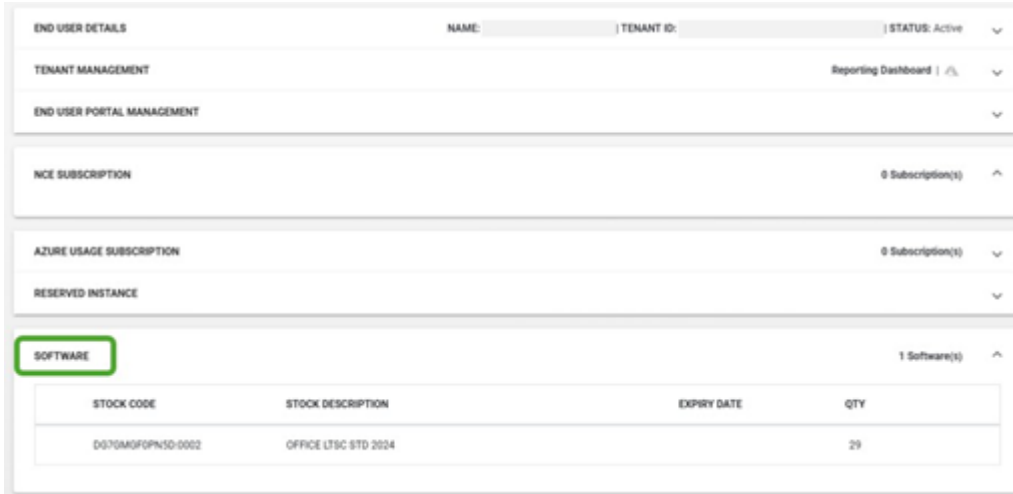


In the **Confirm Products** section enter your PLA from the drop-down menu (Do not select "No Indirect Reseller") - *No Indirect Reseller means your PLA is not linked, which can be deemed non-compliant under Microsoft's CSP Indirect Reseller agreement and may impact incentive earnings and purchasing eligibility.*

Click **Confirm all**.



The Perpetual and Software subscriptions will be listed in the Software section



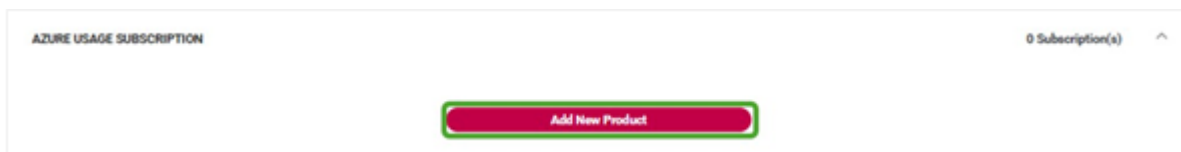
STOCK CODE	STOCK DESCRIPTION	EXPIRY DATE	QTY
D070M0F0PNS0-0002	OFFICE LTSC STD 2024		29

**NOTE:** Software Subscriptions are defaulted to AUTO RENEW and there is a 7 day window from the exact time of provisioning. For Perpetual Software, there is a 30-day window to cancel.

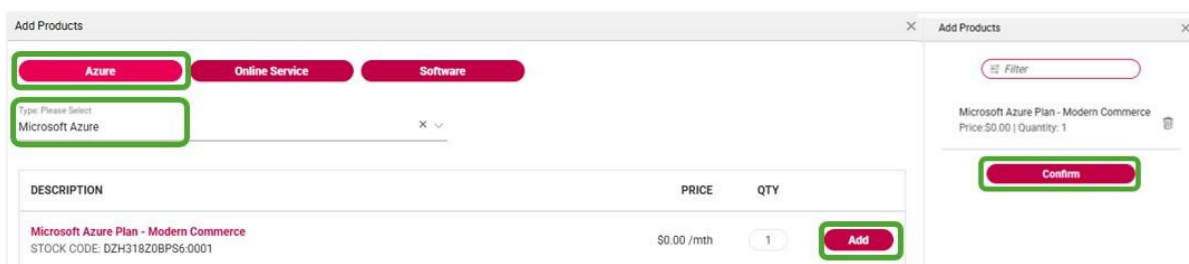
To learn more about cancellation policy click [here](#)

## How to buy Azure Plan

Under the Azure Usage Subscription section. Click Add New Product button.



Select Azure>Select Azure Plan>Add> Confirm.

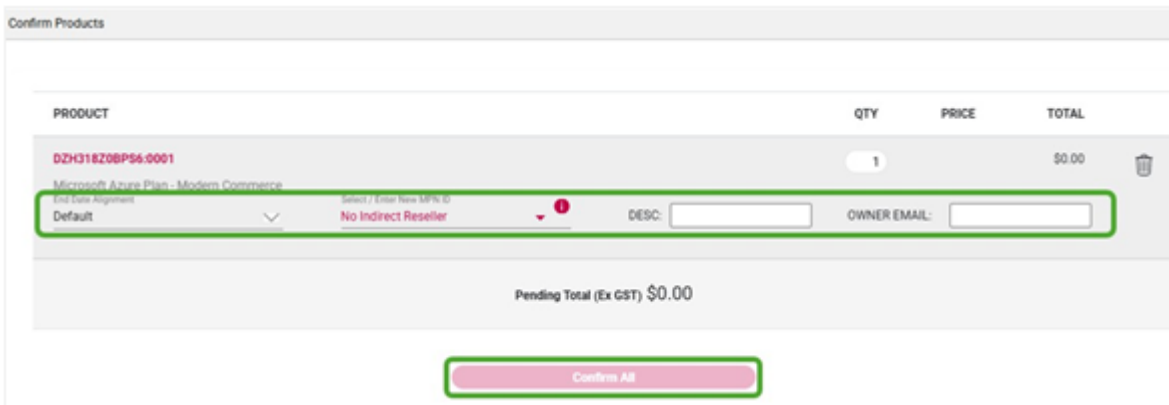


DESCRIPTION	PRICE	QTY
Microsoft Azure Plan - Modern Commerce STOCK CODE: DZH318Z0BP56.0001	\$0.00 /mth	1

Enter your PLA from the drop-down menu (Do not select "No Indirect Reseller") - *No Indirect Reseller means your PLA is not linked, which can be deemed non-compliant under Microsoft's CSP Indirect Reseller agreement and may impact incentive earnings and purchasing eligibility.*

Enter a description and the "Owner Email Address" identifies the primary contact for the Azure subscription. This is typically the customer's IT administrator or main Azure contact, not the reseller or CSP partner.

Click **Confirm all**. A popup will appear, tick the box and enter a reference.



**NOTE:** One Azure Plan per tenant (Suspended or Active)

## How to Manage Azure Subscriptions

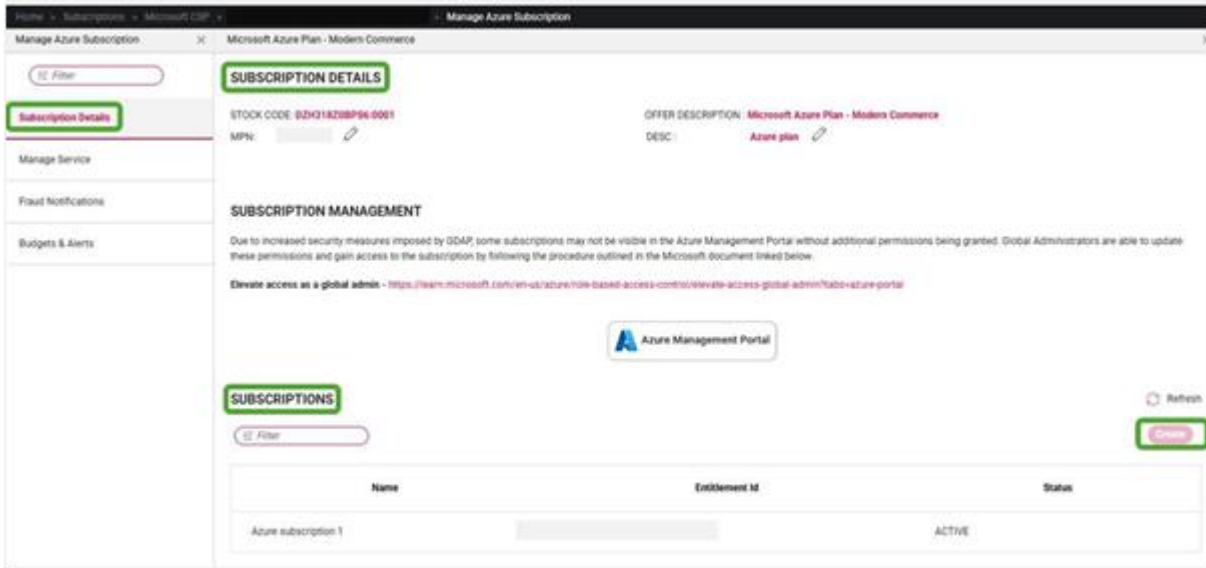
Click **Manage** on the Azure plan.



## Azure Subscription Details

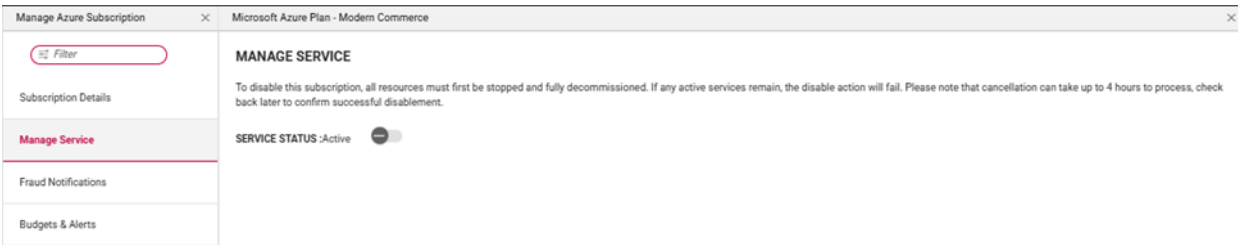
Details of the Azure Plan and Subscriptions can be found in this section.

The **Create** button allows you to create additional Azure **subscriptions** under your Azure Plan.



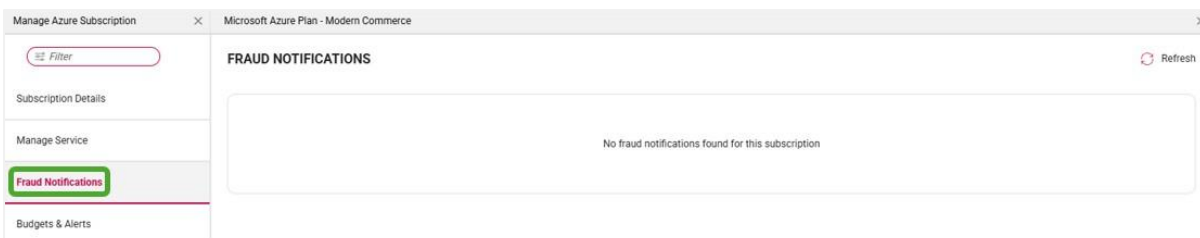
## Manage Services

To disable this subscription, all resources must first be stopped and fully decommissioned. If any active services remain, the disable action will fail. Please note that cancellation can take up to 4 hours to process, check back later to confirm successful disablement.



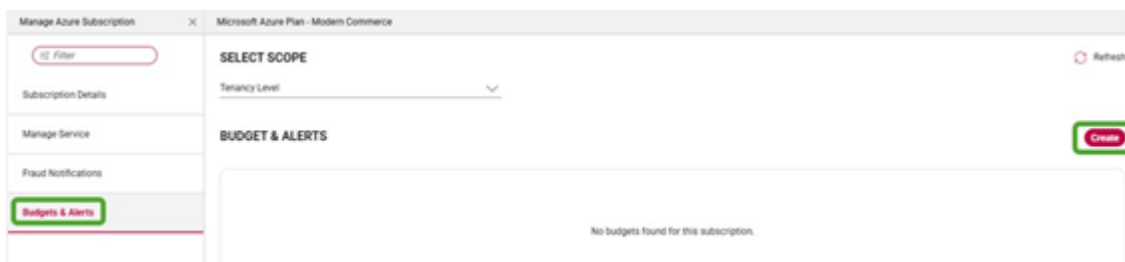
## Fraud Notifications

Partners who are impacted will only receive notifications from Microsoft here.



## Budget Details

Create Budgets & Alerts for your Azure Subscriptions.



These options may help you spot misconfigured services or unusual trends that might suggest fraud.

**Budget details**  
Give your budget a unique name. Select the time window it analyzes during each evaluation period, its expiration date and the amount.

Name\*

\* Budget name must only contain alphanumeric, underscore or hyphen.

Resets period\*

Creation date:

Expiration date:

**Budget amount**  
Give your budget amount threshold

Amount\*

**Alert conditions**

Type	% of budget	Amount
Critical	<input type="text"/>	\$0.00
Warning	<input type="text"/>	\$0.00

**Alert recipients (email)**

\* At least one email is mandatory

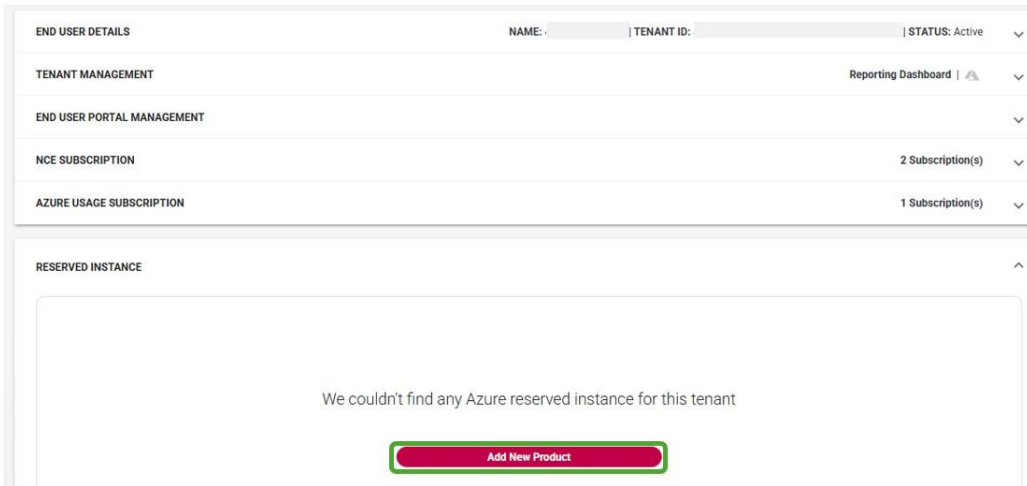
It is recommended to add azure-noreply@microsoft.com to your email white list to ensure alert mails do not go to your spam folder.

[Back](#) [Create](#)

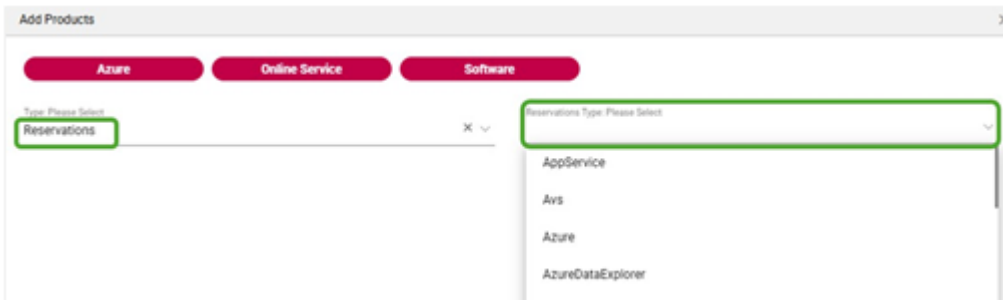
## How to buy Reserved Instances

Azure Reserved Instances allow a tenant to reserve Microsoft Virtual Machines for a fixed term, such as 1 year or 3 years. These reservations can be paid upfront or through monthly payments over the term. An active Azure subscription is required to add an Azure Reserved Instance.

Under the **Reserved Instance** section. Click **Add New Product** button.

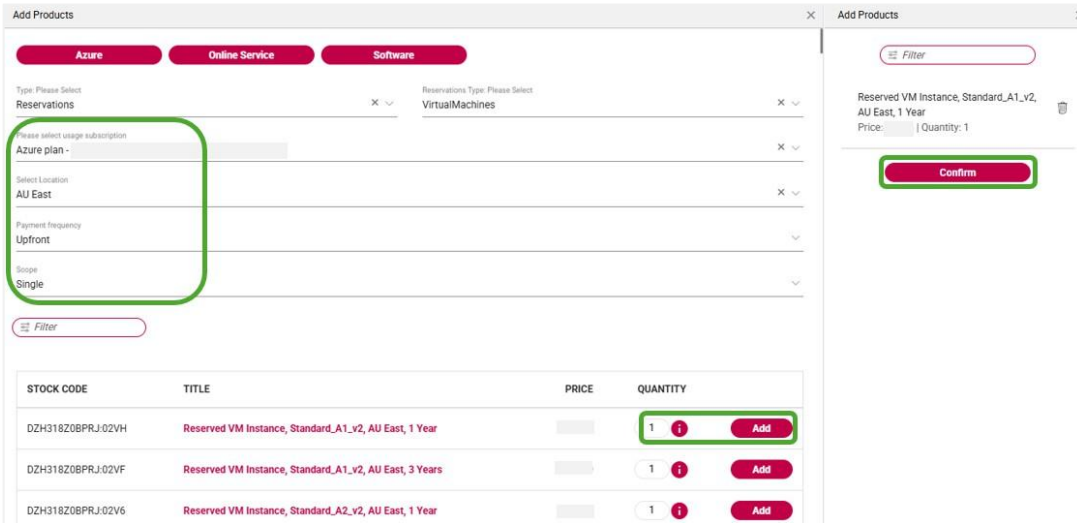


Reservations will be the default Type, select **the Reservations Type** from the drop-down menu.



Select the **Usage Subscription, Location, Payment frequency** and **Scope**.

Enter the quantity of the required subscription and click **Add**. Review the added reservations, click **Confirm**.



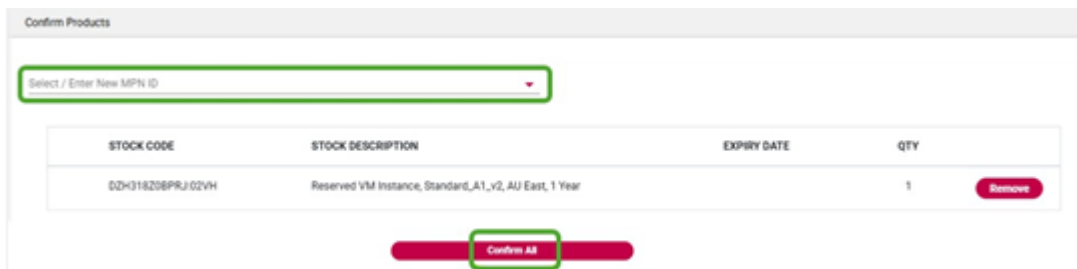
The screenshot shows the 'Add Products' window with the following details:

- Buttons: Azure, Online Service, Software
- Type: Please Select Reservations
- Reservations Type: Please Select VirtualMachines
- Fields (highlighted with a green box):
  - Please select usage subscription: Azure plan -
  - Select Location: AU East
  - Payment frequency: Upfront
  - Scope: Single
- Filter button
- Table:
 

STOCK CODE	TITLE	PRICE	QUANTITY	
DZH31820BPRJ.02VH	Reserved VM Instance, Standard_A1_v2, AU East, 1 Year		1	<b>Add</b>
DZH31820BPRJ.02VF	Reserved VM Instance, Standard_A1_v2, AU East, 3 Years		1	<b>Add</b>
DZH31820BPRJ.02V6	Reserved VM Instance, Standard_A2_v2, AU East, 1 Year		1	<b>Add</b>
- Summary panel (right):
  - Filter
  - Reserved VM Instance, Standard\_A1\_v2, AU East, 1 Year
  - Price: | Quantity: 1
  - Confirm**

Enter your PLA from the drop-down menu (**Do not select "No Indirect Reseller"**) - No Indirect Reseller means your PLA is not linked, which can be deemed non-compliant under Microsoft's CSP Indirect Reseller agreement and may impact incentive earnings and purchasing eligibility.

Click **Confirm All**. A popup will appear, tick the box and enter a reference.



The screenshot shows the 'Confirm Products' popup window with the following details:

- Field: Select / Enter New MPN ID (highlighted with a green box)
- Table:
 

STOCK CODE	STOCK DESCRIPTION	EXPIRY DATE	QTY	
DZH31820BPRJ.02VH	Reserved VM Instance, Standard_A1_v2, AU East, 1 Year		1	<b>Remove</b>
- Button: **Confirm All** (highlighted with a green box)

Added Azure Reserved Instances will be listed in **the Reserved Instances** section.

STOCK CODE	STOCK DESCRIPTION	EXPIRY DATE	QTY
DZH018Z0BQ35-00F9	Reserved VM Instance,Standard_B4ms,AU,1Y	18/08/2025	1
DZH018Z0BQ35-00F8	Reserved VM Instance,Standard_B4ms,AU,1Y	23/08/2025	2
DZH018Z0BQ4X-00P2	Reserved VM Instance,Standard_F4s_v2,AU,1Y	4/02/2026	1
DZH018Z0BQ50-0032	Reserved VM Instance,Standard_D4s_v3,AU,1Y	4/02/2026	1
DZH018Z0BQ35-00FF	Reserved VM Instance,Standard_B2ms,AU,1Y	24/05/2026	4
DZH018Z0BQ35-00F8	Reserved VM Instance,Standard_B4ms,AU,1Y	24/05/2026	2

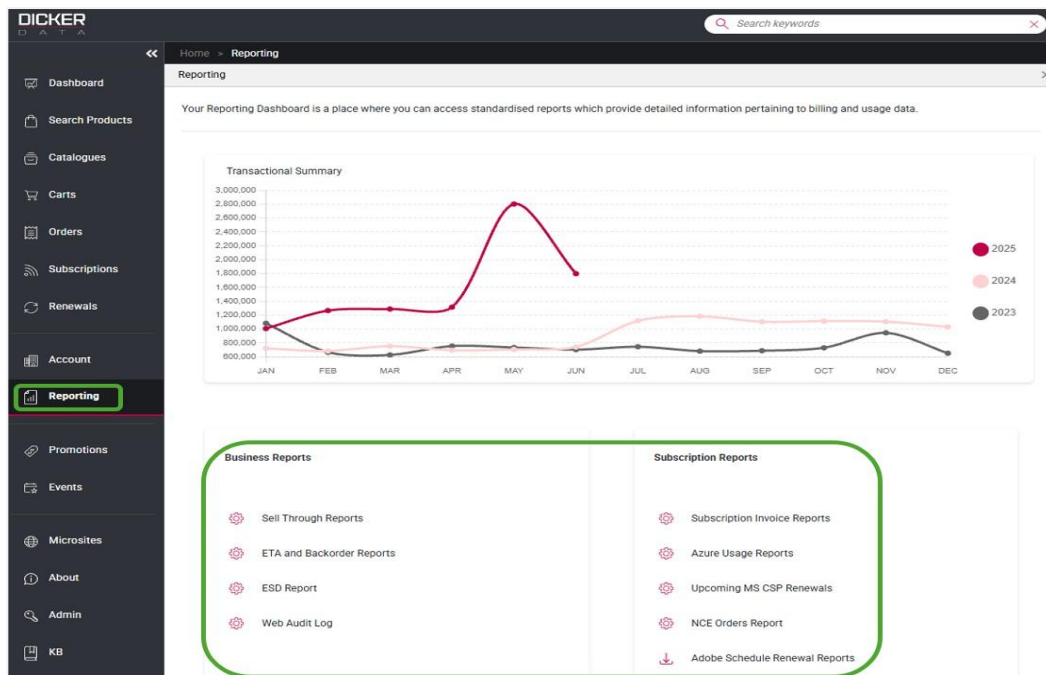
[Add New Product](#)

## Reporting

### Accessing Available Reports

The **Reporting Dashboard** can be found either at:

- the **Reporting** menu selection
- or at the Tenant Management section




END USER DETAILS	NAME:	TENANT ID:	STATUS: Active	▼
TENANT MANAGEMENT			Reporting Dashboard	▼
END USER PORTAL MANAGEMENT				▼
NCE SUBSCRIPTION			2 Subscription(s)	▼
AZURE USAGE SUBSCRIPTION			1 Subscription(s)	▼
RESERVED INSTANCE				▼
SOFTWARE				▼
ORDER HISTORY				▼

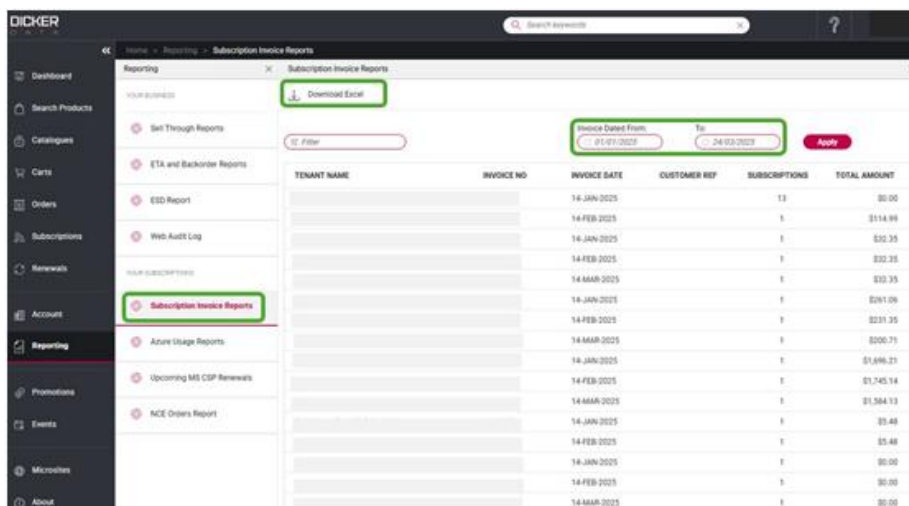
## Types of Available Reports

### Subscription Invoice Reports

Subscription Invoice Reports generates an Excel file with these tabs:

- Invoice Summary: Shows total Subscription Invoice Amount per Tenant.
- Invoice Details: Lists all Subscription Invoices by Tenant.
- Tenant Details: Individual tabs for each Tenant with their Subscription Invoice details.

Click **Subscription Invoice Reports**, choose the date range (maximum of 90 days) then click  Download Excel

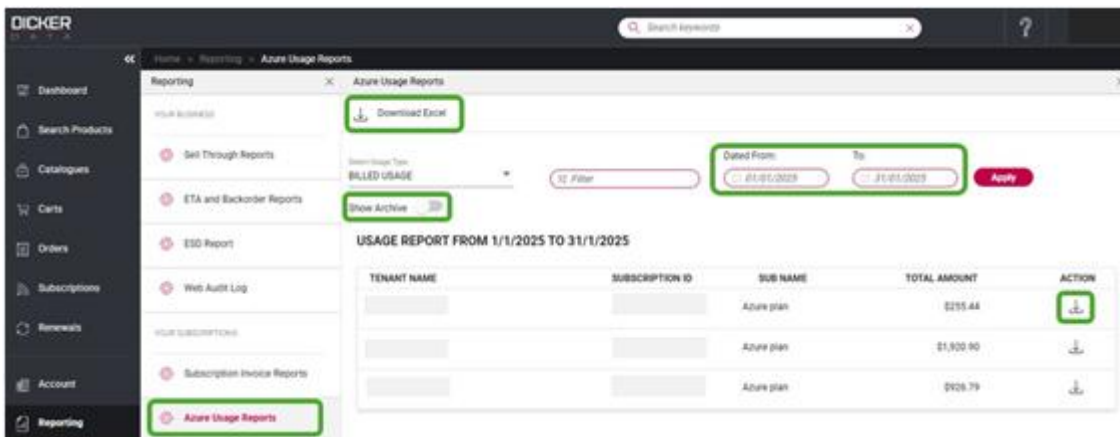


TENANT NAME	INVOICE NO	INVOICE DATE	CUSTOMER REF	SUBSCRIPTIONS	TOTAL AMOUNT
		14 JAN 2023		13	\$0.00
		14 FEB 2023		1	\$114.99
		16 JAN 2023		1	\$32.35
		14 FEB 2023		1	\$32.35
		14 MAR 2023		1	\$32.35
		18 JAN 2023		1	\$291.06
		14 FEB 2023		1	\$231.35
		14 MAR 2023		1	\$200.71
		14 JAN 2023		1	\$1,690.21
		14 FEB 2023		1	\$1,742.14
		14 MAR 2023		1	\$1,564.13
		14 JAN 2023		1	\$3.48
		14 FEB 2023		1	\$3.48
		16 JAN 2023		1	\$0.00
		14 FEB 2023		1	\$0.00
		14 MAR 2023		1	\$0.00


## Azure Usage Reports

The Azure Usage Reports section provides data on Billed Usage for a specified date range.

Click **Azure Usage Reports**, choose the date range (maximum of 31 days) then click on to download usage for all tenants or to download usage for individual tenants.



Show Archive toggle allows viewing and download of archived usage reports.

The  Download Excel option allows you to export all tenants' usage details to an Excel report, which includes the following tabs:

Tenant Summary: Displays all subscriptions and usage for each tenant.

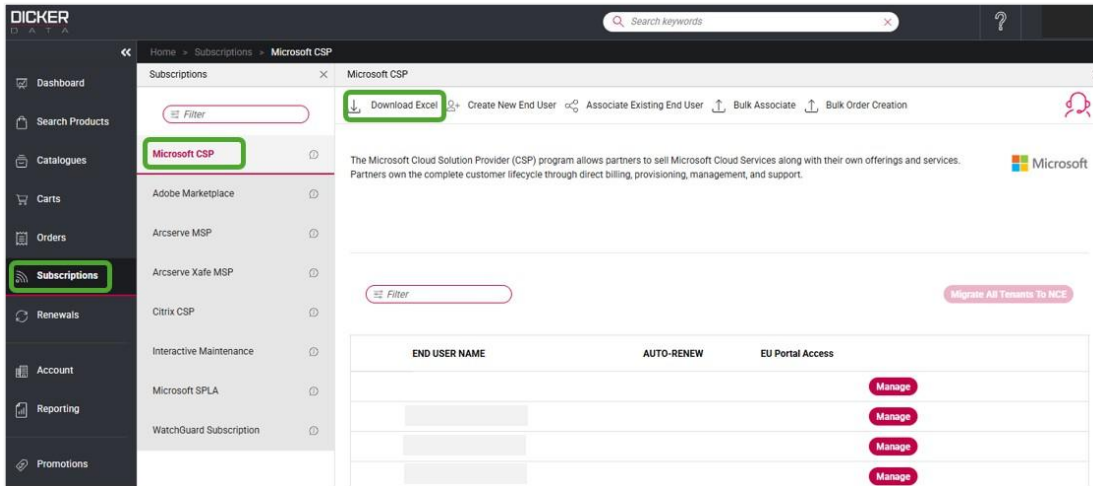
- Tenant Details: Provides a separate tab for each tenant with their subscription and usage

information. Individual Excel reports for each tenant can also be downloaded through the Action

column 

## Annuity Information Report

The **Annuity Information Report** section displays Microsoft CSP Subscription details for each Tenant. From the menu select **Subscriptions**, click **Microsoft CSP** then click **Download Excel**.



The Download option lets you export a list of Tenants and their CSP Subscription details. The report contains:


Summary tab: Shows Tenants and total amount by Domain.

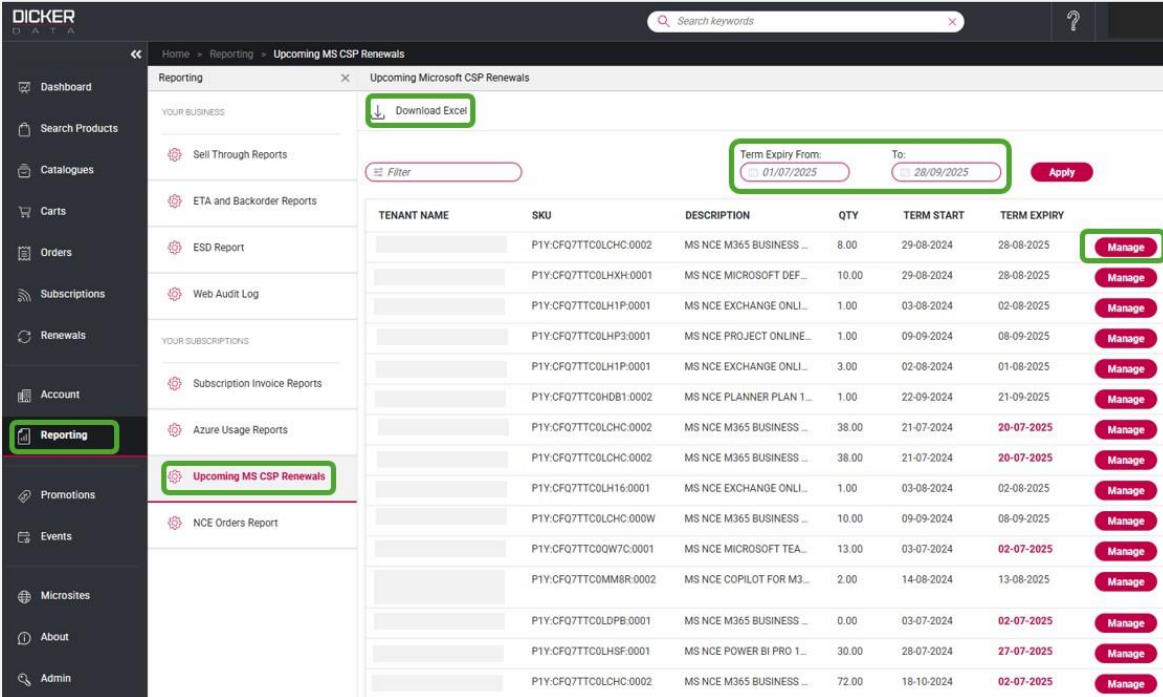
- Details tab: Lists Subscriptions and details for all Tenants.
- Tenant Details tab: A tab per Tenant showing subscription details, including Start and Expiry Dates.

## Upcoming CSP Renewals

The Upcoming Microsoft CSP Renewals report displays upcoming renewals for a maximum period of 90 days. This report is downloadable as an Excel file and will show NCE subscriptions and Azure Reserved Instances expiring in the specified date range. Those which have expired are highlighted for easy visibility.

Note: Software Subscriptions are not included in this report; you will need to maintain a manual record to track these separately.

Click **Upcoming CSP Renewals**, choose the date range (maximum of 90 days) then click  Download Excel



TENANT NAME	SKU	DESCRIPTION	QTY	TERM START	TERM EXPIRY	Manage
	P1Y:CF07TTC0LHC:0002	MS NCE M365 BUSINESS ...	8.00	29-08-2024	28-08-2025	Manage
	P1Y:CF07TTC0LHX:0001	MS NCE MICROSOFT DEF...	10.00	29-08-2024	28-08-2025	Manage
	P1Y:CF07TTC0LH1P:0001	MS NCE EXCHANGE ONLI...	1.00	03-08-2024	02-08-2025	Manage
	P1Y:CF07TTC0LHP3:0001	MS NCE PROJECT ONLINE...	1.00	09-09-2024	08-09-2025	Manage
	P1Y:CF07TTC0LH1P:0001	MS NCE EXCHANGE ONLI...	3.00	02-08-2024	01-08-2025	Manage
	P1Y:CF07TTC0HDB1:0002	MS NCE PLANNER PLAN 1...	1.00	22-09-2024	21-09-2025	Manage
	P1Y:CF07TTC0LHC:0002	MS NCE M365 BUSINESS ...	38.00	21-07-2024	20-07-2025	Manage
	P1Y:CF07TTC0LHC:0002	MS NCE M365 BUSINESS ...	38.00	21-07-2024	20-07-2025	Manage
	P1Y:CF07TTC0LH16:0001	MS NCE EXCHANGE ONLI...	1.00	03-08-2024	02-08-2025	Manage
	P1Y:CF07TTC0LHC:000W	MS NCE M365 BUSINESS ...	10.00	09-09-2024	08-09-2025	Manage
	P1Y:CF07TTC0QW7C:0001	MS NCE MICROSOFT TEA...	13.00	03-07-2024	02-07-2025	Manage
	P1Y:CF07TTC0MM8R:0002	MS NCE COPILOT FOR M3...	2.00	14-08-2024	13-08-2025	Manage
	P1Y:CF07TTC0LDPB:0001	MS NCE M365 BUSINESS ...	0.00	03-07-2024	02-07-2025	Manage
	P1Y:CF07TTC0LHSF:0001	MS NCE POWER BI PRO 1...	30.00	28-07-2024	27-07-2025	Manage
	P1Y:CF07TTC0LHC:0002	MS NCE M365 BUSINESS ...	72.00	18-10-2024	02-07-2025	Manage

The Upcoming MS CSP Renewals report will display information for the subscription. The report contains:


- Tenant ID and Name
- Subscription ID, SKU, Description, Qty
- Term Start and Expiry Date

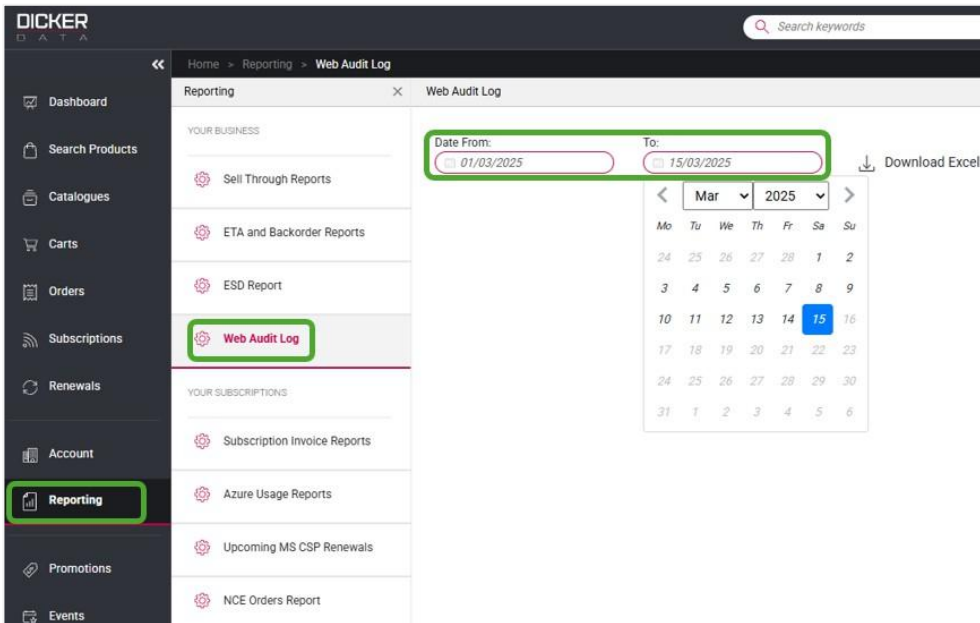
Click on **Manage** to access the subscription.

## Extended Service Terms

### Web Audit Log

The Web Audit Log provides a record of actions performed and allows access to data for up to two weeks at a time. To obtain information for several date ranges, separate reports must be generated for each period.

Click **Web Audit Log**, select date range then click  Download Excel



The Web Audit Log will display information for the subscription. The report contains:

- Login name, date and time
- Action performed
- Tenant ID and Subscription ID affected

### CSP Billing

You will receive two invoices: one for NCE subscriptions including cycle and variance charges, and another for Azure consumption, Reserved Instances, Market Place products as well as Perpetual licences, and Software subscriptions.

Please note that a separate invoice will be generated for each individual Payment Method that has been set up on your CSP Tenants. Types of Payment Methods may include Credit Account, Digital Wallet etc. If you have multiple Digital wallet IDs set up, then each individual digital wallet ID will be on a separate invoice.