

CLOUD SOLUTION PROVIDER FULL HANDBOOK

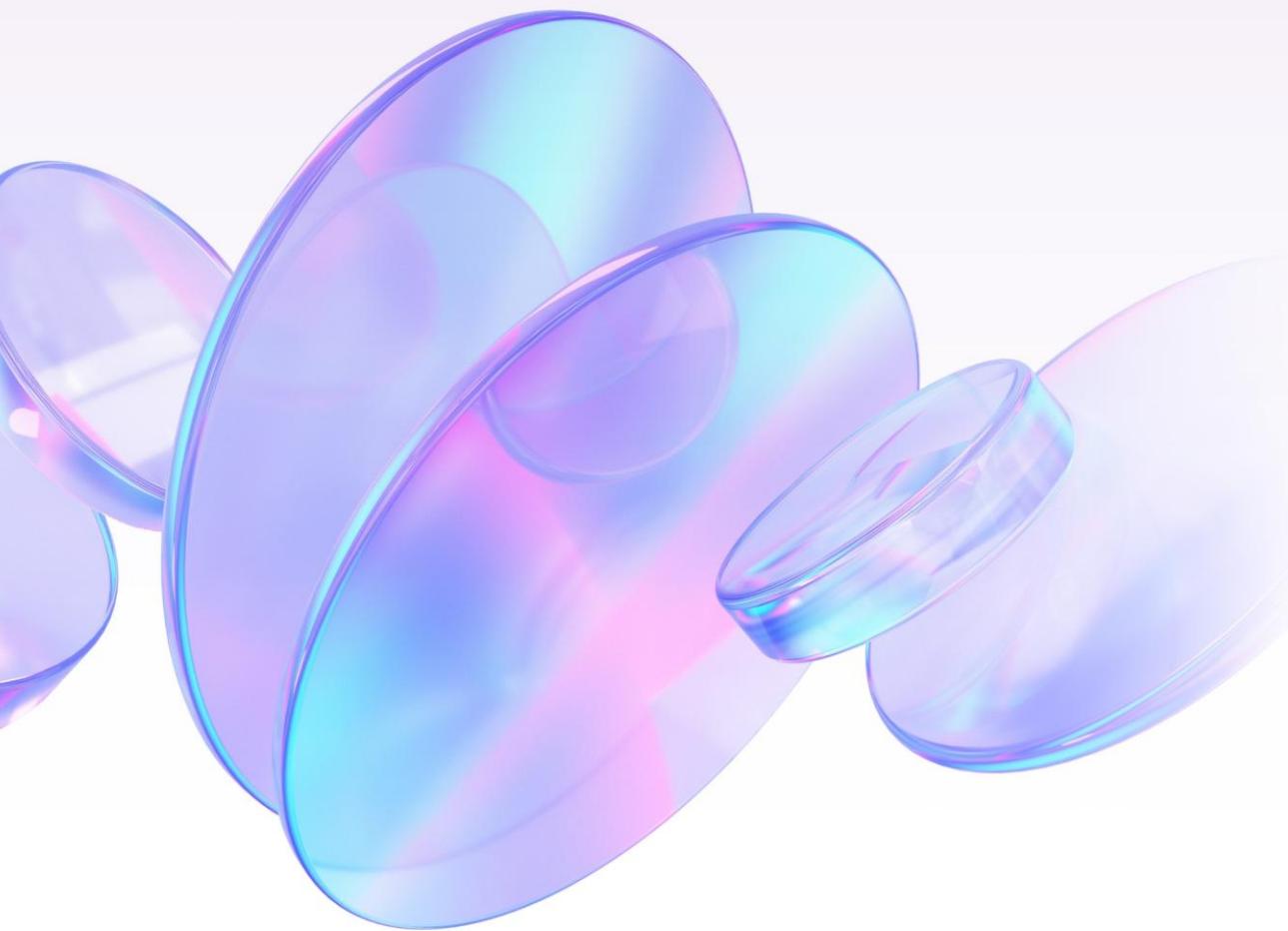


Table of Contents

On Boarding with Dicker Data

Getting Started

Creating a new Tenant

Associating Tenants (Individually or by bulk)

Individual association

Bulk Associate

Tenant List

Auto-Renew

EU Portal Access

Tenants Overview

End User Details section

Tenant Management Section GDAP

End User Portal Management

Subscription Overview

How to buy NCE Subscriptions

How to use Bulk Order Creation

How do I adjust the auto renew settings?

What if I need to cancel an order?

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

How to Manage Existing Subscriptions

How to buy Add-On's (NCE)

How to Change Quantities

How to Suspend Subscriptions

How to Cancel Subscriptions

How to Upgrade Subscriptions

Mid-term upgrade invoice information

How to Align End Date

Software Subscriptions

How to buy Azure Plan

How to Manage Azure Subscriptions

Azure Subscription Details

Manage Services

Fraud Notifications

Budget Details

How to buy Reserved Instances

Reporting

Subscription Invoice Reports

Azure Usage Reports

Annuity Information Report

Upcoming CSP Renewals

Web Audit Log

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 ([PLA](#)) here. 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.

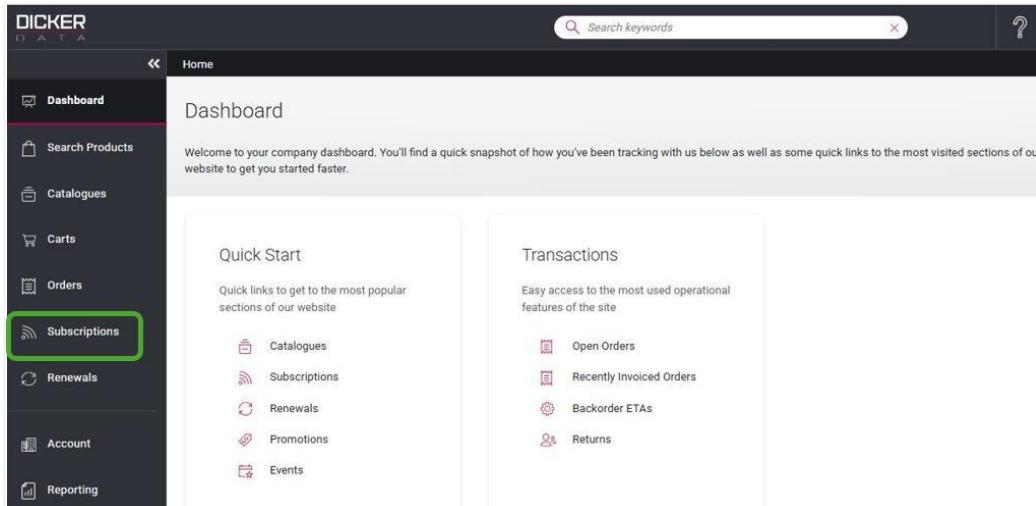
Accept the invitation for Dicker Data to be your Microsoft Indirect Provider:

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

Getting Started

Log In to www.dickerdata.com.au or www.dickerdata.co.nz with your username, reseller account number and password.

Navigate to Subscriptions

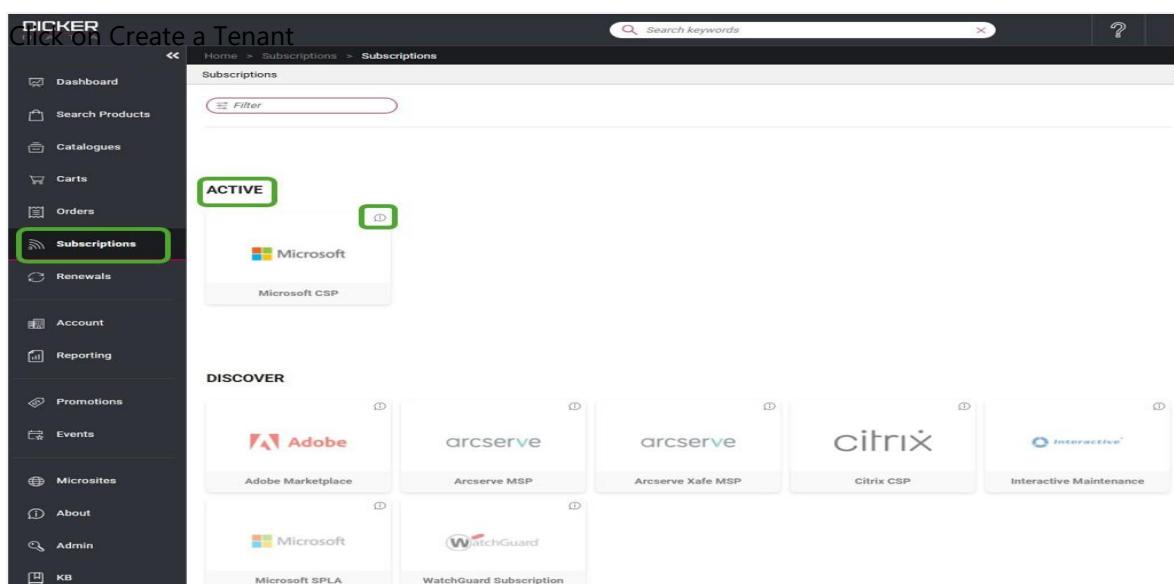


The screenshot shows the Dicker Data dashboard. The left sidebar has a 'Subscriptions' menu item highlighted with a green box. The main content area is titled 'Dashboard' and includes sections for 'Quick Start' and 'Transactions'. The 'Quick Start' section lists 'Catalogues', 'Subscriptions', 'Renewals', 'Promotions', and 'Events'. The 'Transactions' section lists 'Open Orders', 'Recently Invoiced Orders', 'Backorder ETAs', and 'Returns'.

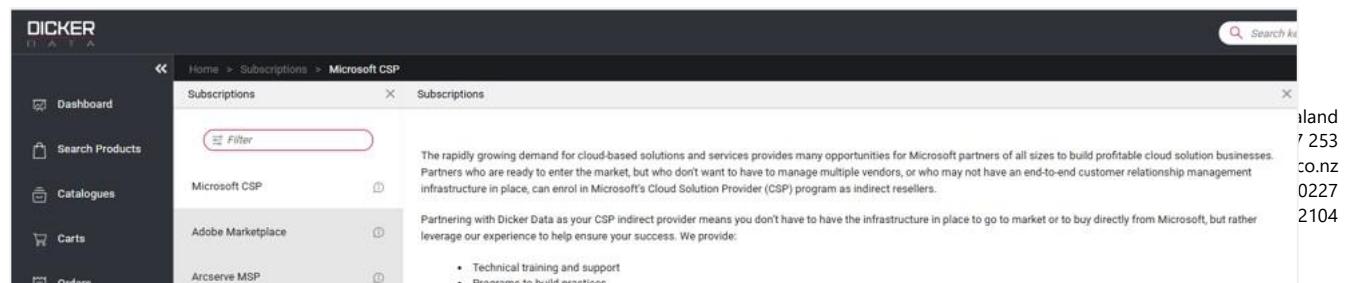
Creating a New Tenant

Creating a New Tenant from the Microsoft CSP Information Section

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



The screenshot shows the 'Subscriptions' page. The left sidebar has a 'Subscriptions' menu item highlighted with a green box. The main content area shows a grid of 'ACTIVE' and 'DISCOVER' subscriptions. The 'ACTIVE' section contains a single entry for 'Microsoft CSP'. The 'DISCOVER' section contains entries for 'Adobe Marketplace', 'Arcserve MSP', 'Arcserve Xafe MSP', 'Citrix CSP', 'Interactive Maintenance', 'Microsoft SPLA', and 'WatchGuard Subscription'.

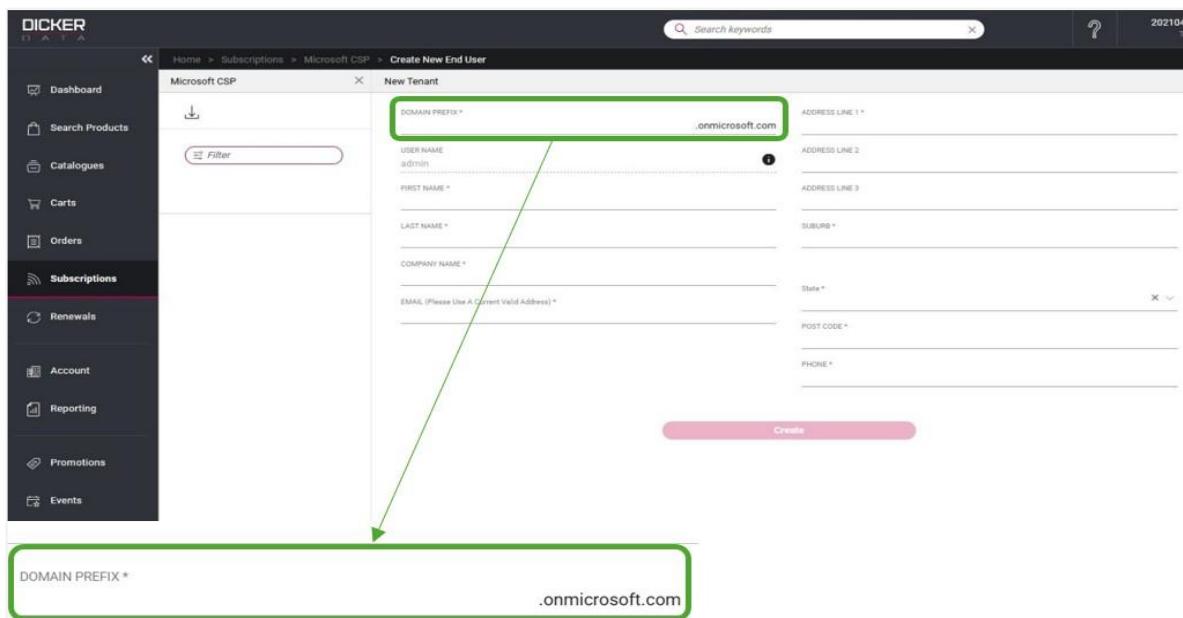


The screenshot shows the 'Microsoft CSP' subscription details page. The left sidebar has a 'Subscriptions' menu item highlighted with a green box. The main content area shows the 'Microsoft CSP' entry in the 'Subscriptions' grid. A detailed description of the Microsoft CSP program is provided, mentioning opportunities for partners of all sizes to build profitable cloud solution businesses. It also highlights that Dicker Data acts as an indirect provider, leveraging the company's experience to help ensure success. The description includes a bulleted list: 'Technical training and support', 'Programmatic training and execution', and 'Partnership opportunities'.

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)



Microsoft CSP > New Tenant

DOMAIN PREFIX: .onmicrosoft.com

USER NAME: admin

FIRST NAME:

LAST NAME:

COMPANY NAME:

EMAIL (Please Use A Current Valid Address):

ADDRESS LINE 1:

ADDRESS LINE 2:

ADDRESS LINE 3:

SUBURB:

STATE:

POST CODE:

PHONE:

Create

DOMAIN PREFIX: .onmicrosoft.com

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)

Home > Subscriptions > Microsoft CSP > Create New End User

New Tenant

DOMAIN PREFIX: .onmicrosoft.com

USER NAME: admin

FIRST NAME:

ADDRESS LINE 1:

ADDRESS LINE 2:

ADDRESS LINE 3:

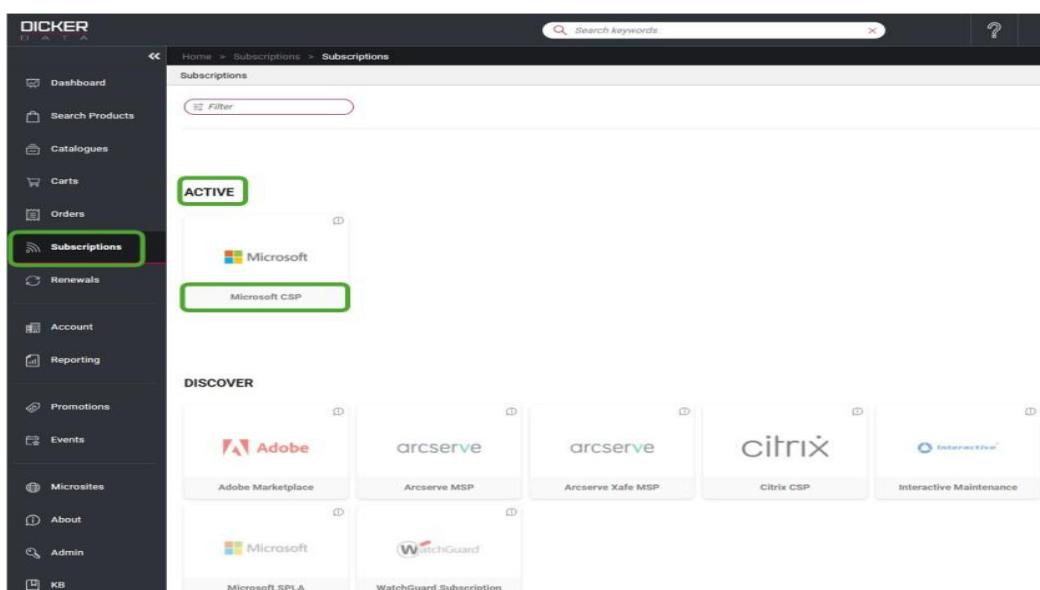
New Zealand
Reecall 0800 337 253
www.dickerdata.co.nz
CBN 9429038460227
enue, Auckland 2104

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.

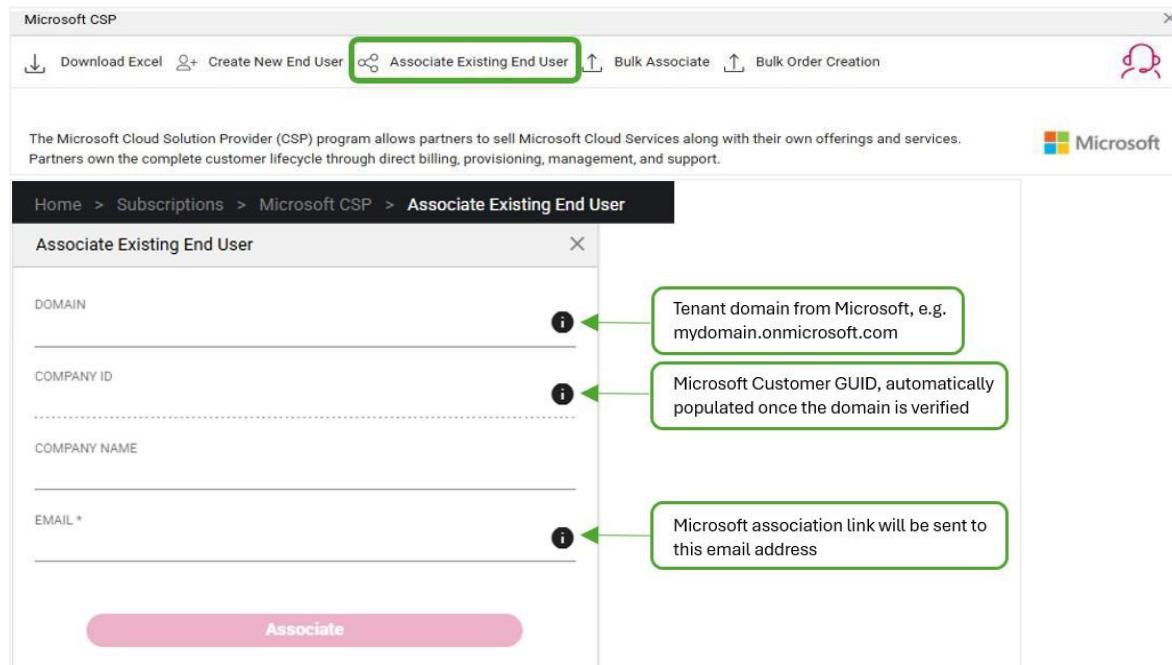
Option 2: Partner Has Global Admin Access

- 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.**



Microsoft CSP

Download Excel Create New End User Associate Existing End User Bulk Associate

The Microsoft Cloud Solution Provider (CSP) program allows partners to sell Microsoft Cloud Services along with their own offerings and services. Partners own the complete customer lifecycle through direct billing, provisioning, management, and support.

Microsoft

Home > Subscriptions > Microsoft CSP > Associate Existing End User

Associate Existing End User

DOMAIN Tenant domain from Microsoft, e.g. mydomain.onmicrosoft.com

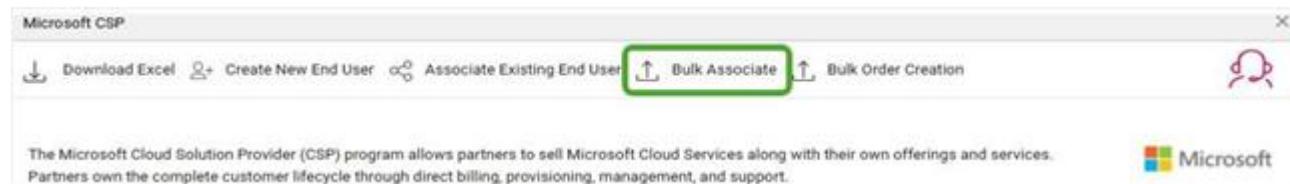
COMPANY ID Microsoft Customer GUID, automatically populated once the domain is verified

COMPANY NAME

EMAIL * Microsoft association link will be sent to this email address

Associate

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.



Microsoft CSP

Download Excel Create New End User Associate Existing End User Bulk Associate

The Microsoft Cloud Solution Provider (CSP) program allows partners to sell Microsoft Cloud Services along with their own offerings and services. Partners own the complete customer lifecycle through direct billing, provisioning, management, and support.

Microsoft

Home > Subscriptions > Microsoft CSP > Bulk Associate

Bulk Associate

INSTRUCTIONS: [Download](#) Detailed Instructions.

GUIDELINES: [Download](#) sample file that you can modify and upload. Please provide tenant domain, tenant name and an authorised tenant administrator email address. This can be your email address if you have global admin rights for the tenant.

Select a File to Upload Bulk Association:

Tenant List

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

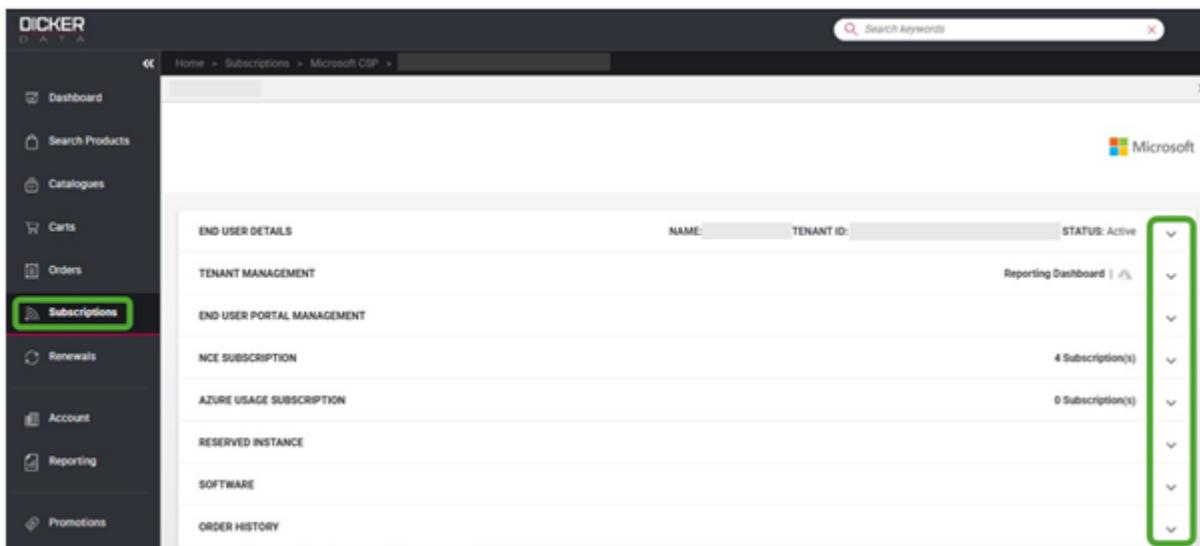
Auto-Renew column indicates subscriptions with auto-renew turned on or off. (Subscriptions with auto renew at the current quantity and Microsoft pricing at the time of renewal).

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

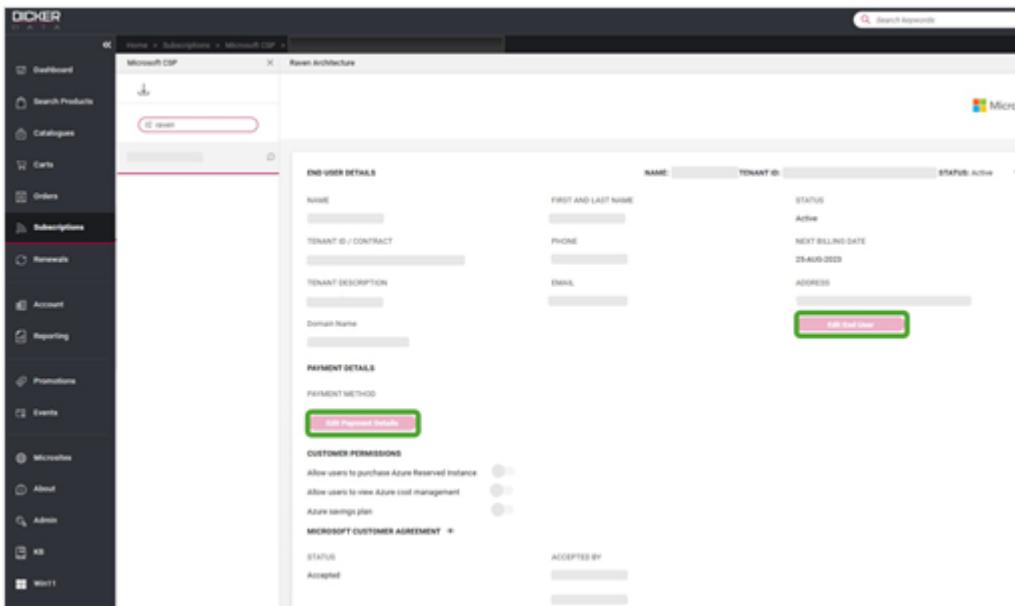
To edit **End User Details**, click the **Edit End User** button. This will open the **Edit Tenant Details** blade.

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.



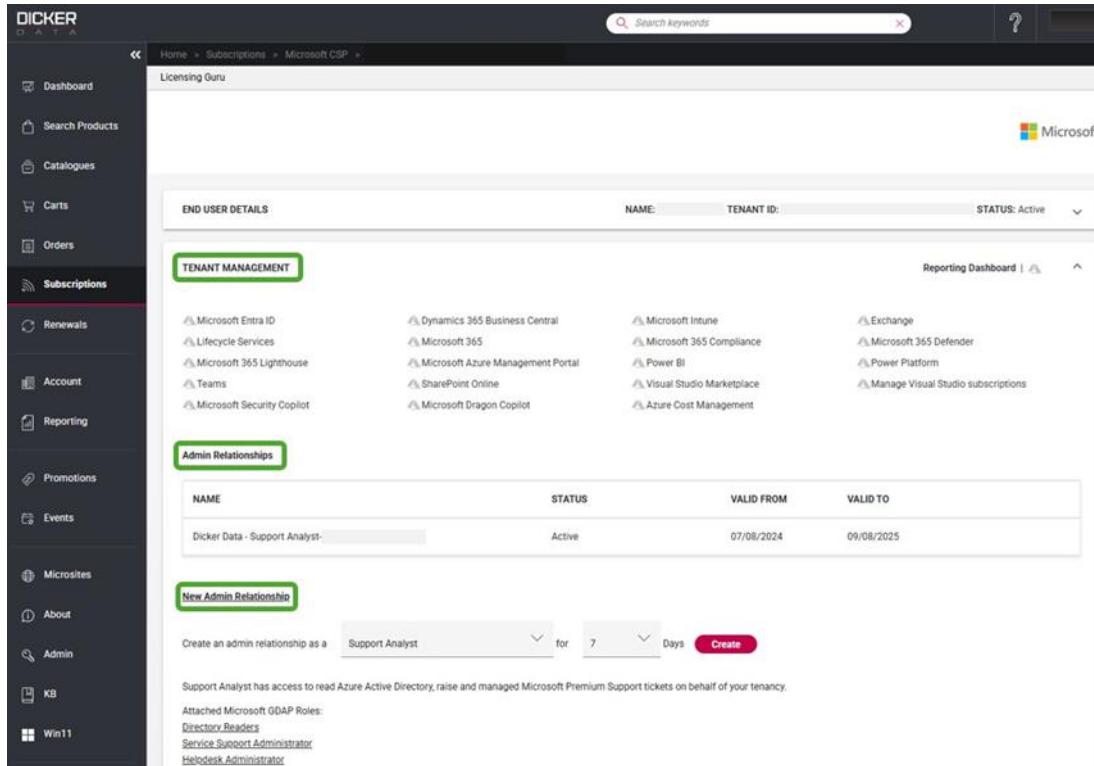
Tenant Management Section – GDAP

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 shows the Dicker Data Microsoft Licensing Guru interface. The left sidebar includes links for Dashboard, Search Products, Catalogues, Carts, Orders, Subscriptions, Renewals, Account, Reporting, Promotions, Events, Microsites, About, Admin, KB, and Win11. The main content area shows 'Licensing Guru' and 'END USER DETAILS' with fields for NAME, TENANT ID, and STATUS (Active). A 'TENANT MANAGEMENT' section lists various Microsoft services. A 'Admin Relationships' section shows a table for creating admin relationships, with a row for 'Dicker Data - Support Analyst-' set to 'Active' from '07/08/2024' to '09/08/2025'. A 'New Admin Relationship' button is visible. Below this, a note states: 'Support Analyst has access to read Azure Active Directory, raise and manage Microsoft Premium Support tickets on behalf of your tenancy.' Attached Microsoft GDAP Roles listed are: Directory Readers, Service Support Administrator, 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 **Support Analyst** for **7 Days** **Create**

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

Admin Relationships

NAME	STATUS	VALID FROM
Dicker Data - Support Analyst-	Pending Approval	

Partner Admin Relationship

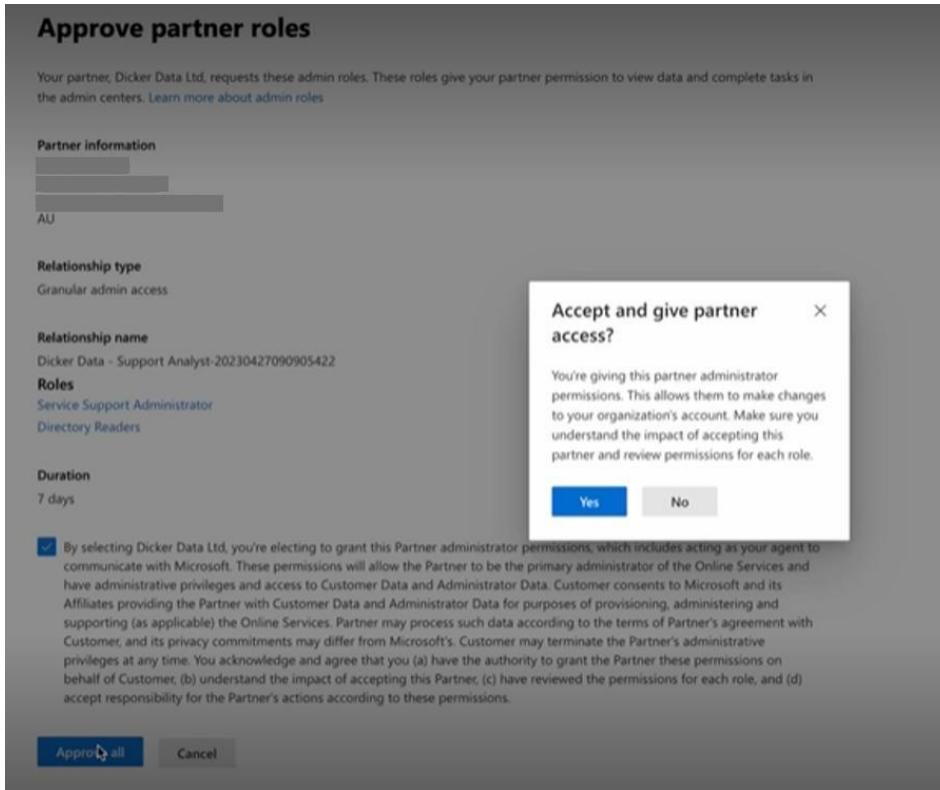
Admin relationship has been created successfully.

<https://admin.microsoft.com/AdminPortal/Home#/partners/invitation/granularAdminRelationships/>

Please send the above link to customer end user who needs to accept this invitation as Dicker Data is their managing partner.

OK

Global Admin to accept and give partner access



Partner Relationships will show GDAP privileges here.

Partner	Roles	Expiration date	Status
Dicker Data - Support Analyst-20230427090905422	Service Support Administrator, Directory Readers	4 May 2023	Active

Partner	Role type	Role authorization	Roles
██████████	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 manage 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"

 Microsoft

✓ 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	<input type="text"/>
Expires on	03 May 2023
Relationship name	Dicker Data - Support Analyst-20230427090905422
Partner roles	View assigned roles in Microsoft 365 admin centre
Partner name	<input type="text"/>
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.

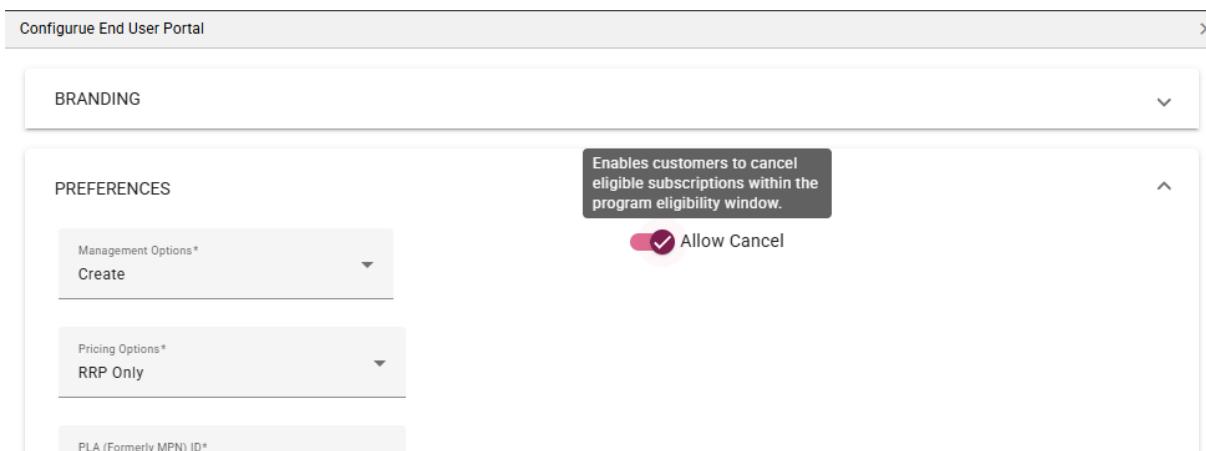
Click on the **Configure Portal** button to upload your company logo, manage user preferences and add a Contact Us page.

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.

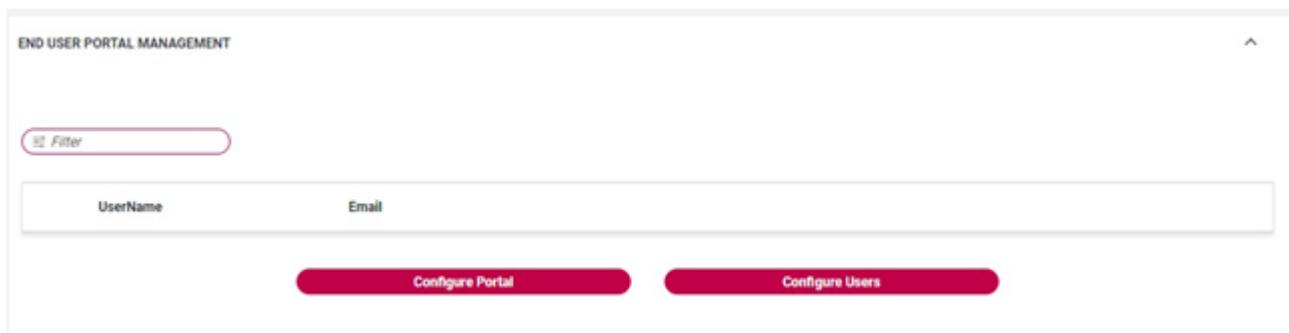
Preferences: Set user preferences, pricing views, notifications and allow cancel



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](#)

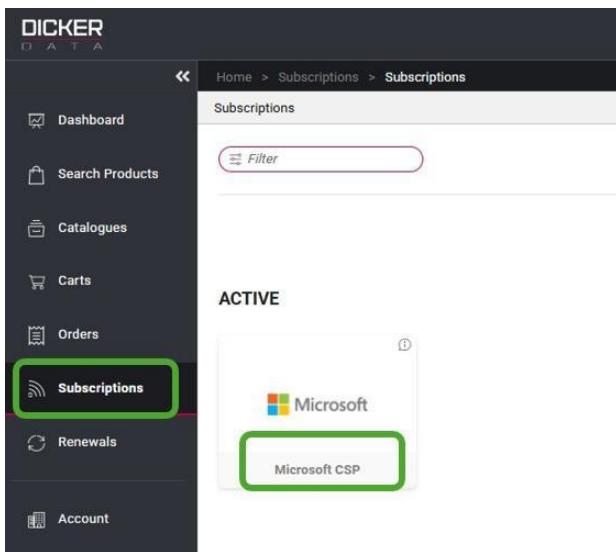
Subscription Overview

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

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

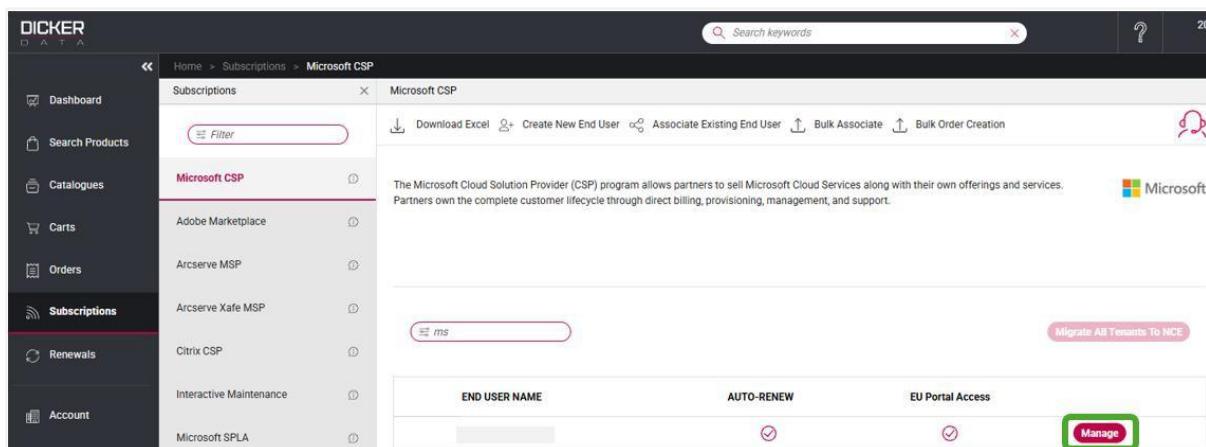
How to buy NCE Subscriptions

Navigate to Microsoft CSP

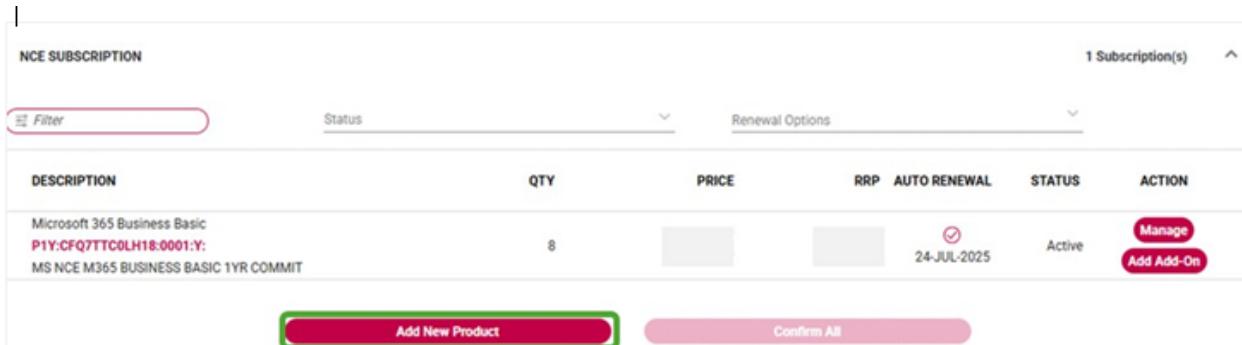


The screenshot shows the Dicker Data platform interface. The left sidebar has a 'Subscriptions' menu item highlighted with a green box. The main content area shows a list of tenants under the 'ACTIVE' section. The 'Microsoft CSP' tenant is selected and highlighted with a green box. The Microsoft logo is visible above the tenant name.

From the tenant list, click **Manage**



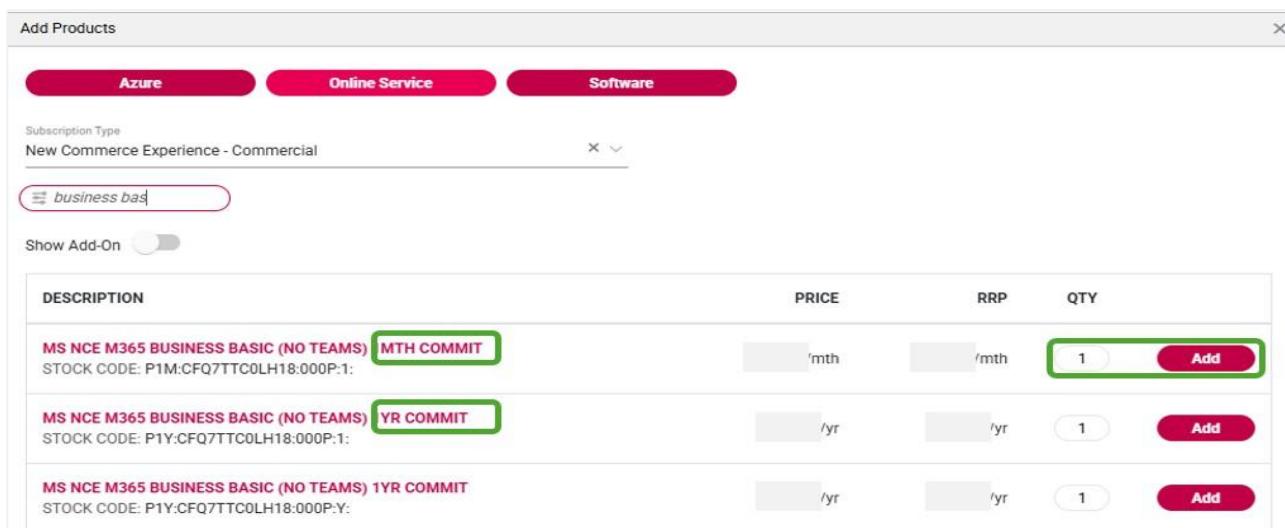
The screenshot shows the Microsoft CSP tenant management page. The left sidebar has a 'Subscriptions' menu item highlighted with a green box. The main content area shows the Microsoft CSP tenant selected. A 'Manage' button is highlighted with a green box in the bottom right corner of the tenant details section.

Click Add New Product

NCE SUBSCRIPTION						
Filter		Status	Renewal Options			
DESCRIPTION	QTY	PRICE	RRP	AUTO RENEWAL	STATUS	ACTION
Microsoft 365 Business Basic P1Y:CFQ7TTC0LH18:0001:Y: MS NCE M365 BUSINESS BASIC 1YR COMMIT	8	\$0.00	\$0.00	24-JUL-2025	Active	Manage Add Add-On

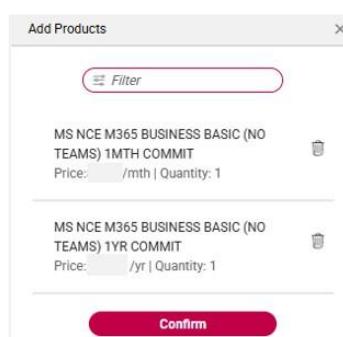
Subscription Type is New Commerce Experience.

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



DESCRIPTION	PRICE	RRP	QTY	
MS NCE M365 BUSINESS BASIC (NO TEAMS) 1MTH COMMIT STOCK CODE: P1M:CFQ7TTC0LH18:000P:1	/mth	/mth	1	Add
MS NCE M365 BUSINESS BASIC (NO TEAMS) 1YR COMMIT STOCK CODE: P1Y:CFQ7TTC0LH18:000P:1	/yr	/yr	1	Add
MS NCE M365 BUSINESS BASIC (NO TEAMS) 1YR COMMIT STOCK CODE: P1Y:CFQ7TTC0LH18:000P:Y	/yr	/yr	1	Add

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



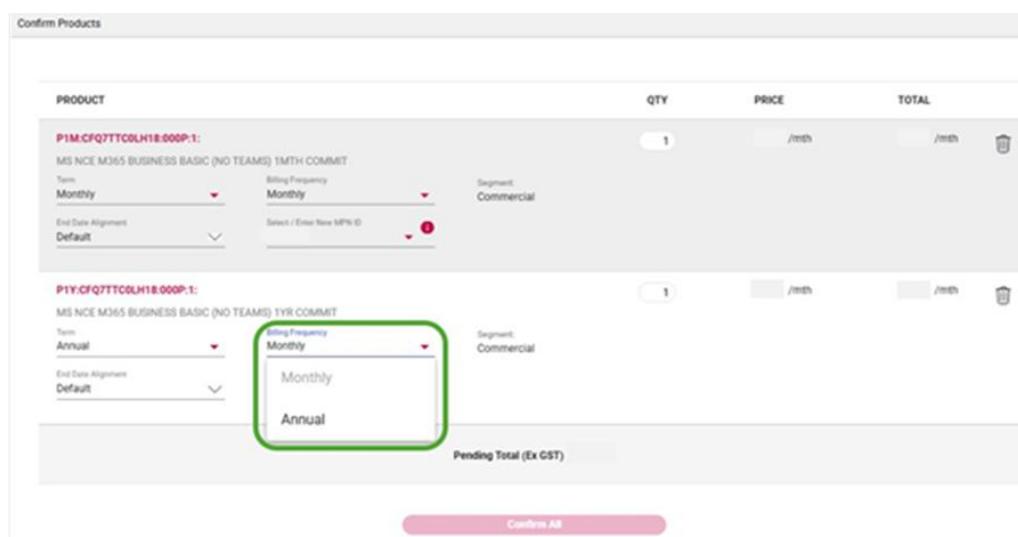
Enter your PLA from the drop-down menu (Do not select "No Indirect Reseller") - *No Indirect Reseller means your PLA is not linked, which can be deemed non-compliant under Microsoft's CSP Indirect Reseller agreement and may impact incentive earnings and purchasing eligibility.*

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**'



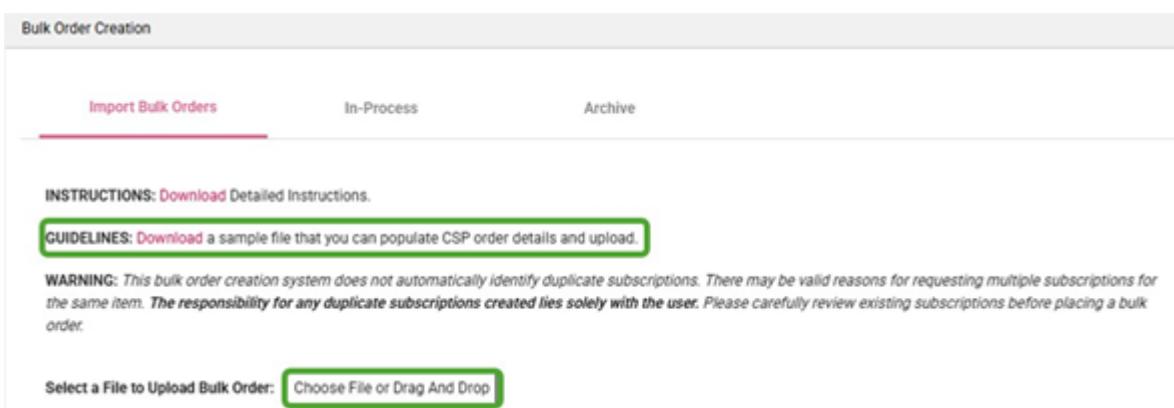
How do I adjust the auto renew settings?

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, and locate the auto-renew toggle. Switch it off 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.



- 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 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**, and locate the auto-renew toggle. Switch it off to disable auto-renew.

You can also adjust other options, such as term length or quantity, but note that these changes will only take effect at the next renewal.

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.

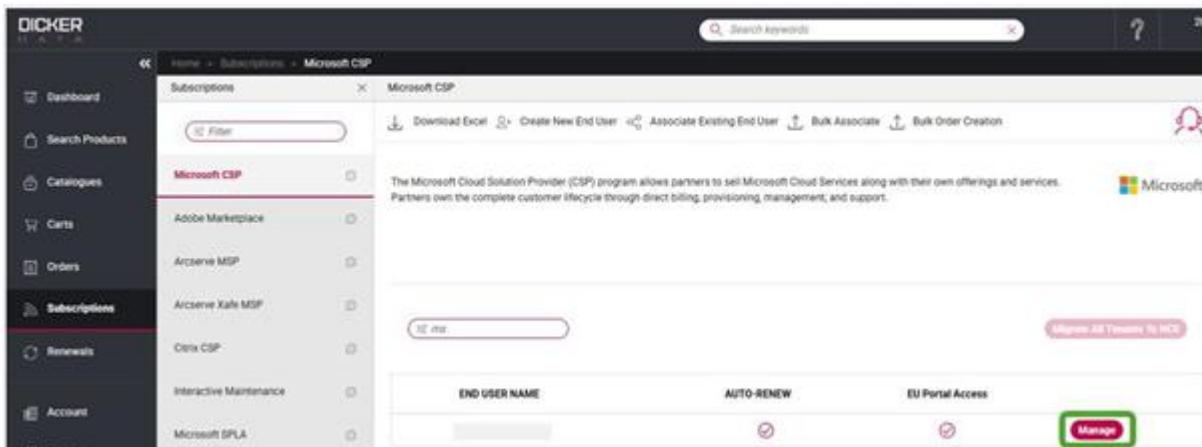
What if I make a mistake or there is a problem?

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**.

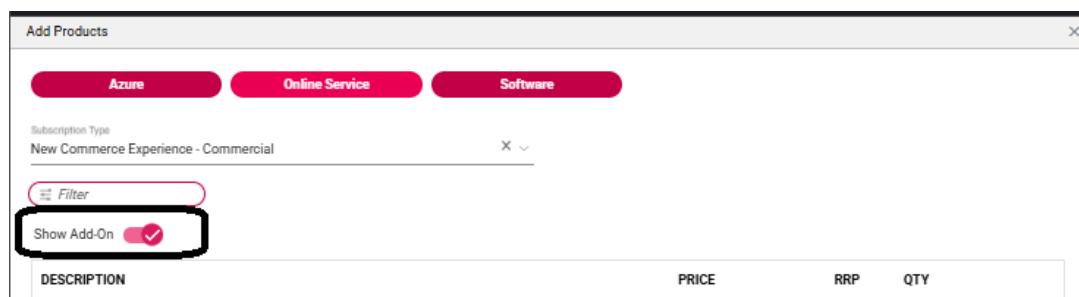


The screenshot shows the Dicker Data Microsoft CSP Subscriptions management interface. The left sidebar includes links for Dashboard, Search Products, Catalogues, Carts, Orders, Subscriptions (which is selected and highlighted in blue), Renewals, and Account. The main content area shows a list of tenants: Microsoft CSP, Adobe Marketplace, Arcserve MSP, Arcserve Xafe MSP, Dicker CSP, Interactive Maintenance, and Microsoft SPLA. For the Microsoft CSP tenant, there is a table with columns: END USER NAME, AUTO-RENEW, EU Portal Access, and a Manage button. The Manage button for the first user in the list is highlighted with a green box.

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 are detected.

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



The screenshot shows the Dicker Data Add Products interface. At the top, there are three tabs: Azure, Online Service, and Software. Below the tabs, a 'Subscription Type' dropdown is set to 'New Commerce Experience - Commercial'. A 'Filter' button is highlighted with a black box. Below the filter is a 'Show Add-On' checkbox, which is also highlighted with a black box and has a checked status. The main area shows a table with columns: DESCRIPTION, PRICE, RRP, and QTY. The 'DESCRIPTION' column is currently empty.

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 affect 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)
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	Manage

Change the quantity to the amount required.

Manage Subscription

SUBSCRIPTION DETAILS

MPN :

DESC : **Testing Desc**

STOCKCODE : **P1M:CFQ7TTC0LCHC:0002:1:**

SAVE DETAILS

MANAGE RENEWAL

Changes will take effect on renewal date: 15-JUL-2025
Quantity increase and Upgrade will be effective instantly

AUTORENEW: RENEWS ON 15-Jul-2025

QUANTITY: CURRENT : 3

CHANGE TO:

TERM : Current : Monthly

CHANGE TO:

BILLING FREQUENCY : Current : Monthly

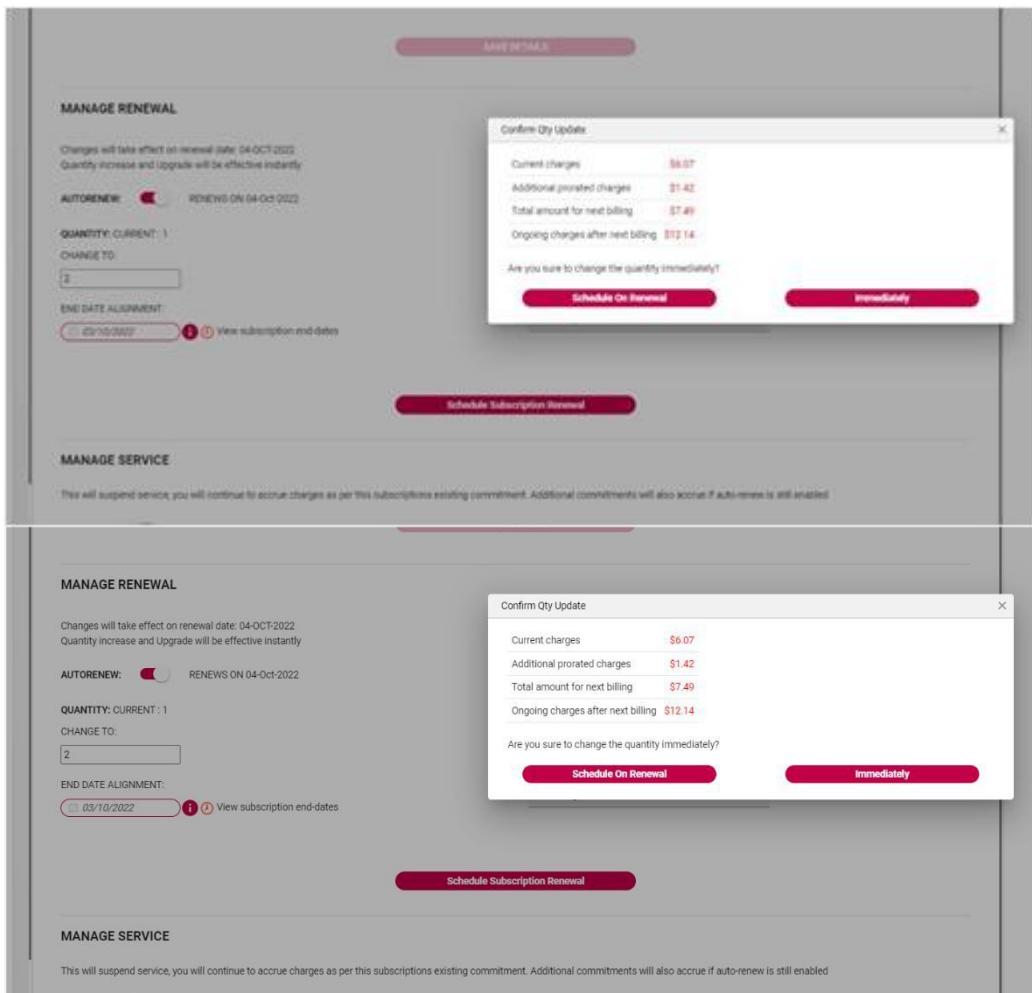
CHANGE TO:

END DATE ALIGNMENT : Current : 14/07/2025

CHANGE TO:

Schedule Subscription Renewal

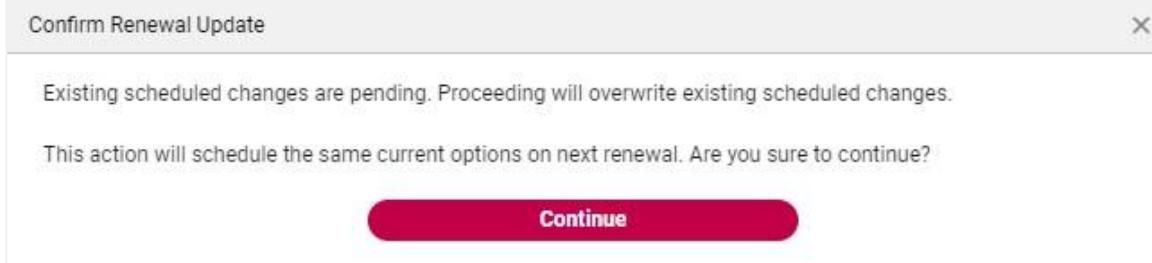
Click **Schedule Subscription Renewal** then select whether you would like the increase to take place immediately or wait until the licence renewal date



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.

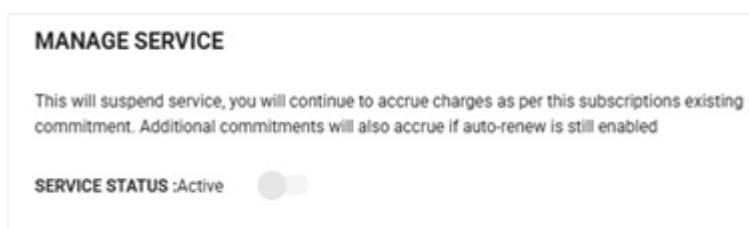
The Confirm Renewal Update message will appear.



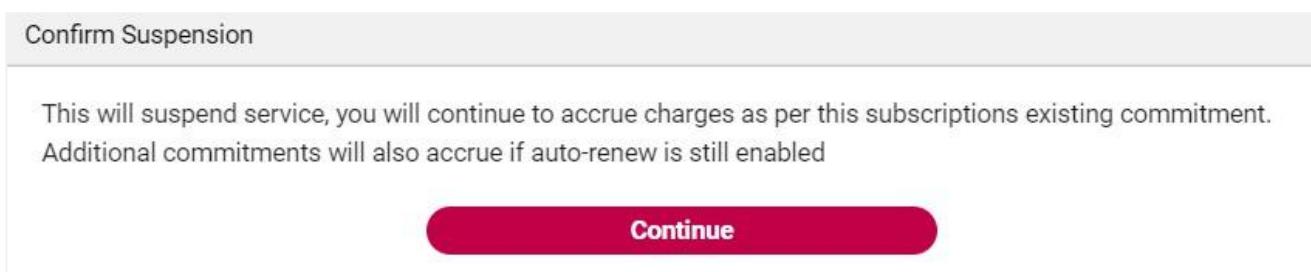
[More information on Scheduled Changes](#)

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 Auto Renew

Subscriptions in NCE will auto renew into their existing arrangement on their renewal date unless auto renew is turned off. This can be done in the portal by clicking Manage on the relevant subscription and then using the AUTORENEW toggle.

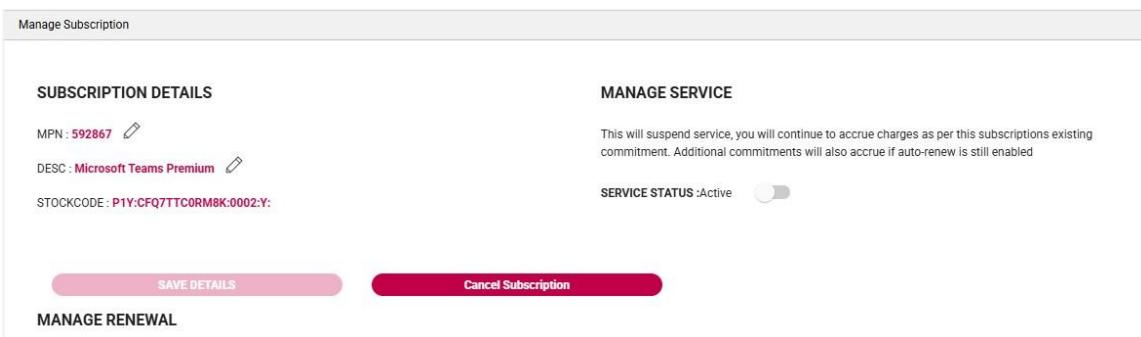
MANAGE RENEWAL

Changes will take effect on renewal date: 04-SEP-2022
Quantity increase and Upgrade will be effective instantly

AUTORENEW:  RENEWS ON 04-Sep-2022

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).



Manage Subscription

SUBSCRIPTION DETAILS

MPN : 592867 

DESC : Microsoft Teams Premium 

STOCKCODE : P1Y:CFQ7TTC0RM8K:0002:Y

MANAGE SERVICE

This will suspend service, you will continue to accrue charges as per this subscriptions existing commitment. Additional commitments will also accrue if auto-renew is still enabled

SERVICE STATUS : Active 

MANAGE RENEWAL

Cancel Subscription

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	
CFQ7TTC0LH1P:0001	Exchange Online (Plan 2)	<button>Upgrade</button>
CFQ7TTC0LF85:0002	Office 365 E5	<button>Upgrade</button>
CFQ7TTC0LH1B:0001	Microsoft 365 Business Basic	<button>Upgrade</button>
CFQ7TTC0LFLX:0001	Microsoft 365 E3	<button>Upgrade</button>
CFQ7TTC0LFLX:0003	Microsoft 365 E3 - Unattended License	<button>Upgrade</button>
CFQ7TTC0LFLZ:0002	Microsoft 365 E5	<button>Upgrade</button>
CFQ7TTC0LF85:0001	Office 365 E5 without Audio Conferencing	<button>Upgrade</button>

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

Confirm Upgrade

FROM:

P1M:CFQ7TTC0LCHC:0002:1 MS NCE M365 BUSINESS PREMIUM 1 MTH
COMMIT

TO:

P1M:CFQ7TTC0LFLZ:0002 Microsoft 365 E5

DESTINATION SUBSCRIPTION

New Subscription

New Subscription
AU Users E5() Qty:2

QUANTITY TO UPGRADE:

1 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 StaOMMIT >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 BasCOMMIT >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 BasCOMMIT >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

TERM : Current : Monthly
CHANGE TO:

QUANTITY: CURRENT : 2
CHANGE TO:

BILLING FREQUENCY : Current : Monthly
CHANGE TO:

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

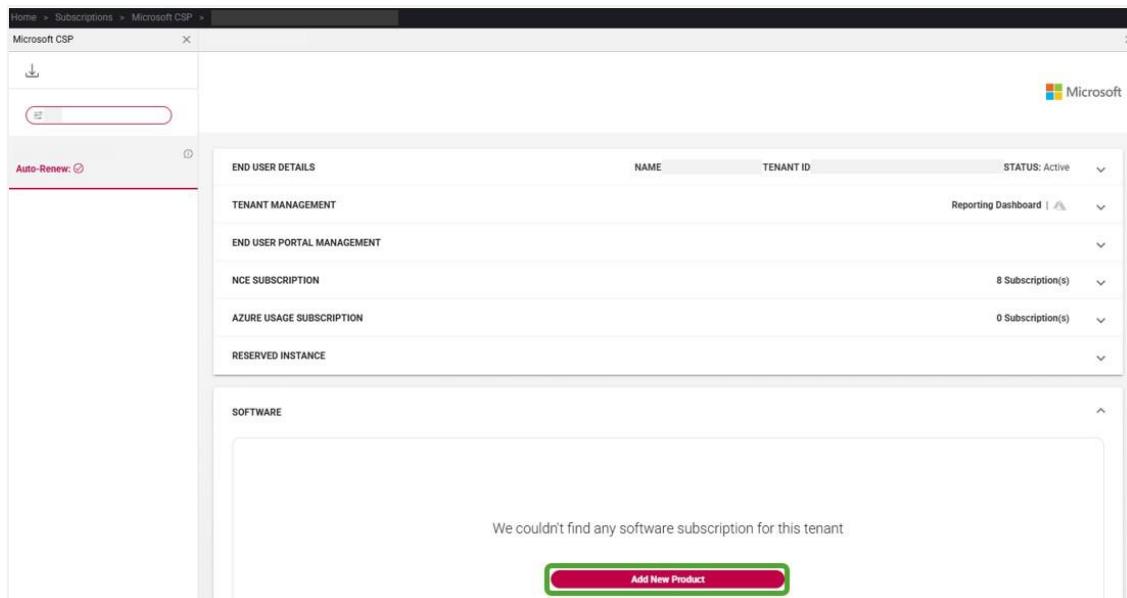
Date alignment can be done in the portal by clicking **Manage** on the relevant subscription and then using the **End Date Alignment** drop down:

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](#)

Software Subscriptions

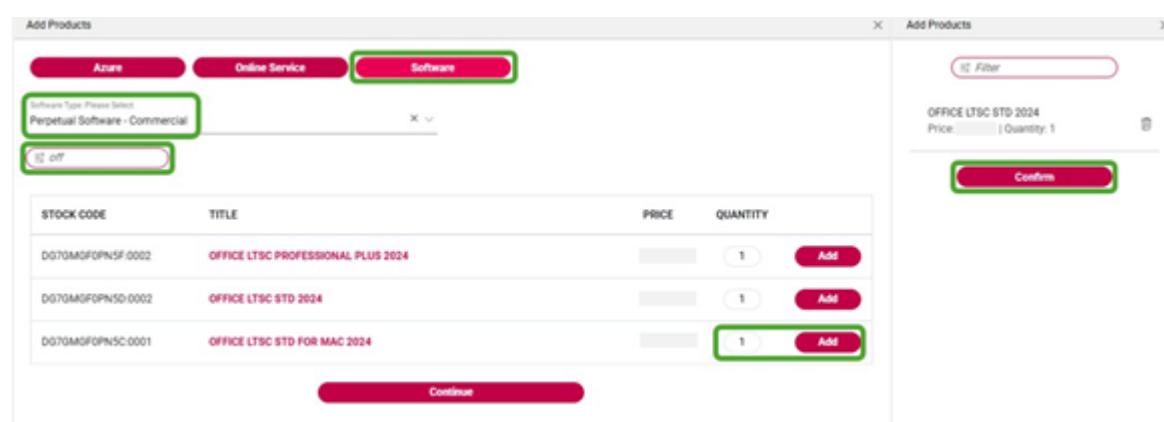
The Software section lists all Software Subscriptions and Perpetual Software for the Tenant. In the tenant page, drop down the **Subscription** section. Click **Add New Product** button.



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

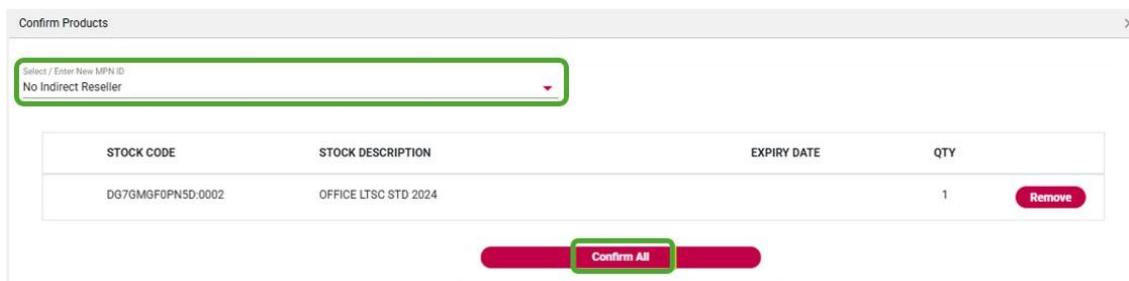
Type a search in the filter field to filter on the list of subscriptions.

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

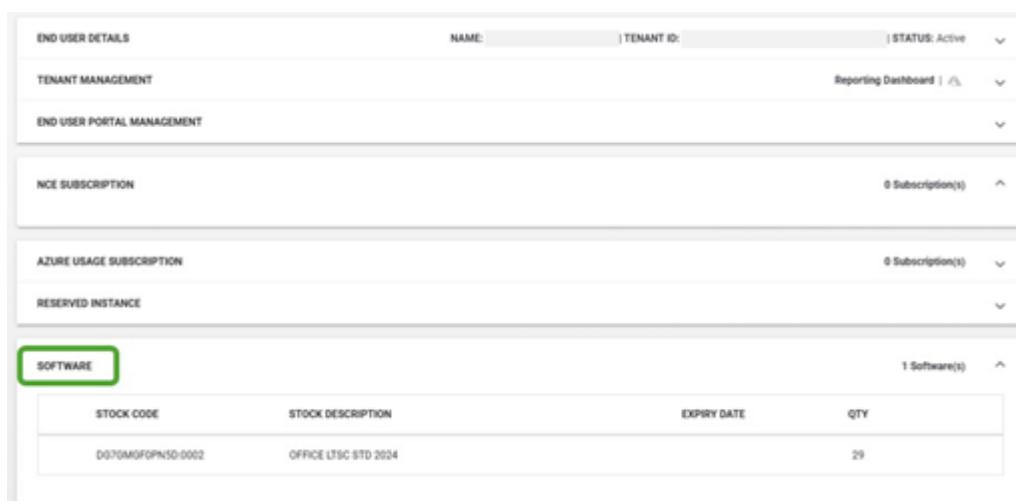


In the **Confirm Products** section enter your PLA from the drop-down menu (Do not select "No Indirect Reseller") - *No Indirect Reseller means your PLA is not linked, which can be deemed non-compliant under Microsoft's CSP Indirect Reseller agreement and may impact incentive earnings and purchasing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

Click **Confirm all**.



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



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.

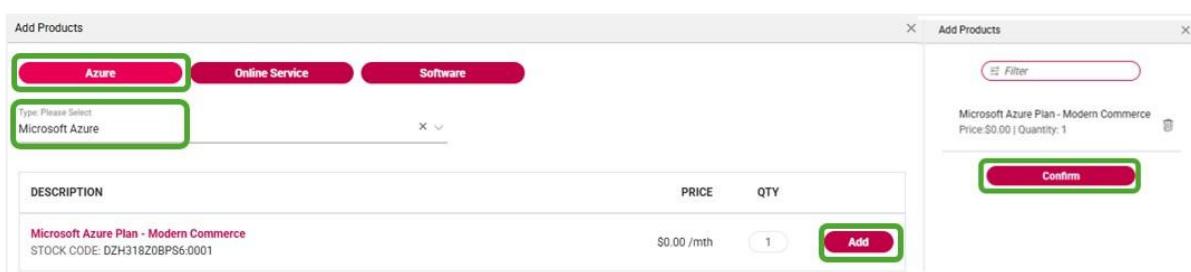
To learn more about cancellation policy click [here](#)

How to buy Azure Plan

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



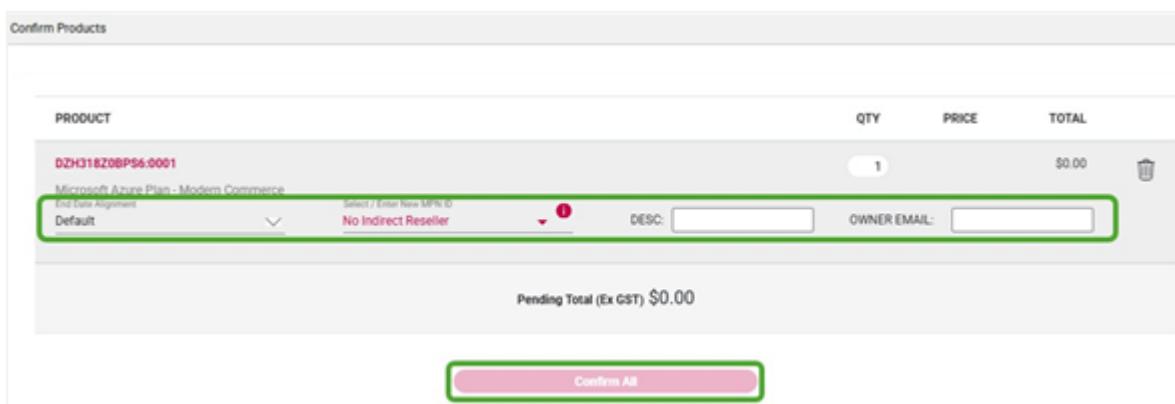
Select Azure > Select Azure Plan > Add > Confirm.



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 Usage Subscription

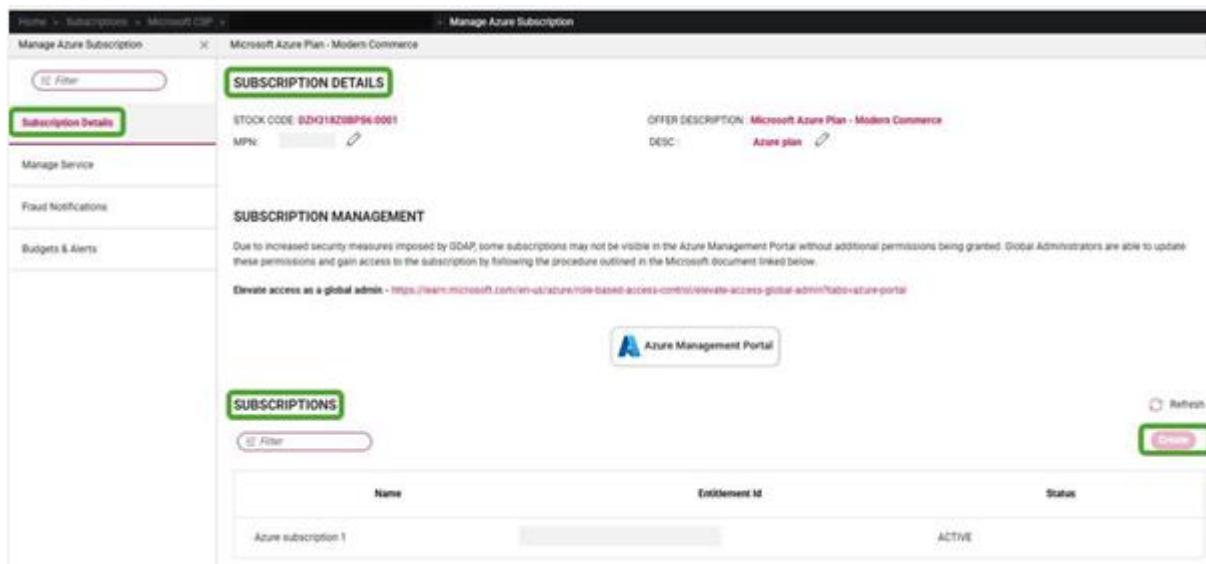
1 Subscription(s)

DESCRIPTION	CONFIRMED QTY	QTY	PRICE	TOTAL	STATUS	Manage
Microsoft Azure Plan - Modern Commerce MPN: DESC: Azure plan STOCK CODE: DZH318Z0BPS6:0001 BILLING: Monthly Renewal (1 Mths) BILLED UNTIL: 20-NOV-2024	1	1	\$0.00 /mth	\$0.00	Active	Manage

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 Azure Subscription

Subscription Details

Offer Description: Microsoft Azure Plan - Modern Commerce

Stock Code: DZH318Z0BPS6:0001

MPN: DESC: Azure plan

Subscription Management

Due to increased security measures imposed by GDRP, some subscriptions may not be visible in the Azure Management Portal without additional permissions being granted. Global Administrators are able to update these permissions and gain access to the subscription by following the procedure outlined in the Microsoft document linked below.

Elevate access as a global admin - <https://learn.microsoft.com/en-us/azure/role-based-access-control/elevate-access-global-admin#azure-portal>

Azure Management Portal

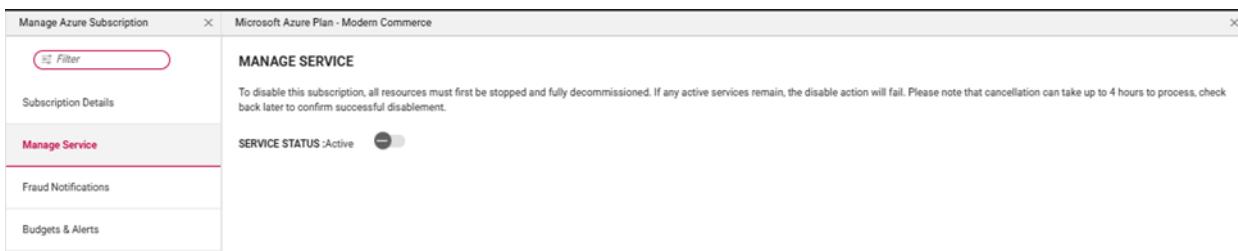
Subscriptions

Create

Name	Entitlement ID	Status
Azure subscription 1		ACTIVE

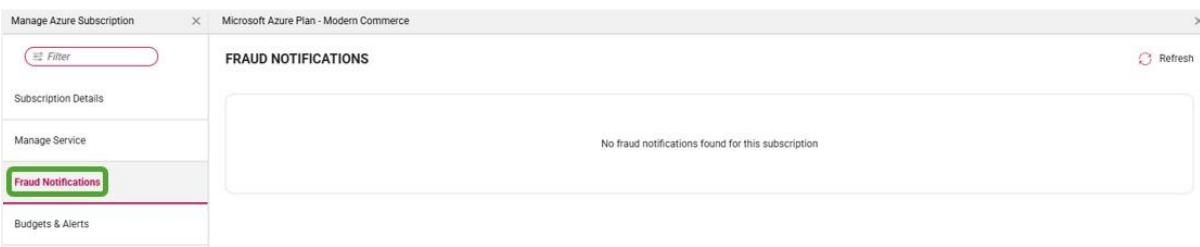
Manage Services

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)

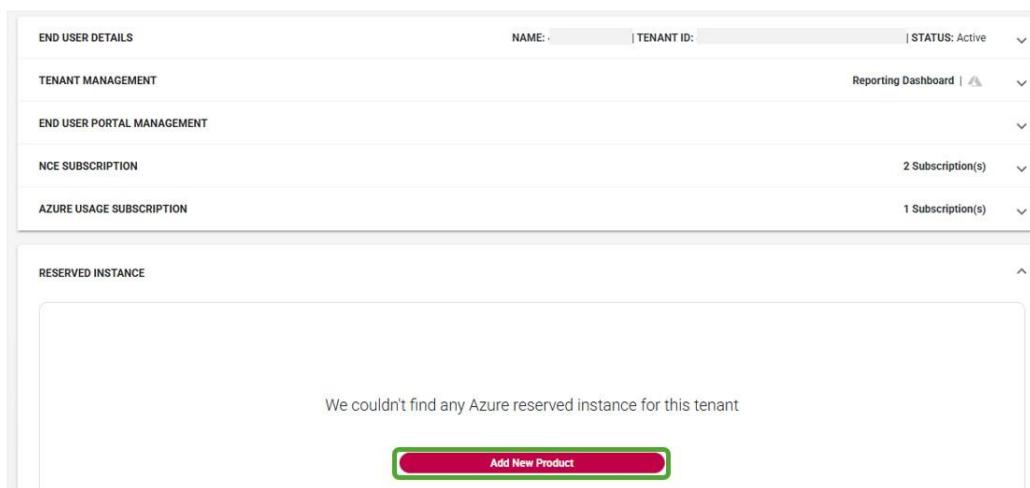
* At least one email is mandatory
It is recommended to add azure-noreply@microsoft.com to your email white list to ensure alert mails do not go to your spam folder.

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

How to buy Reserved Instances

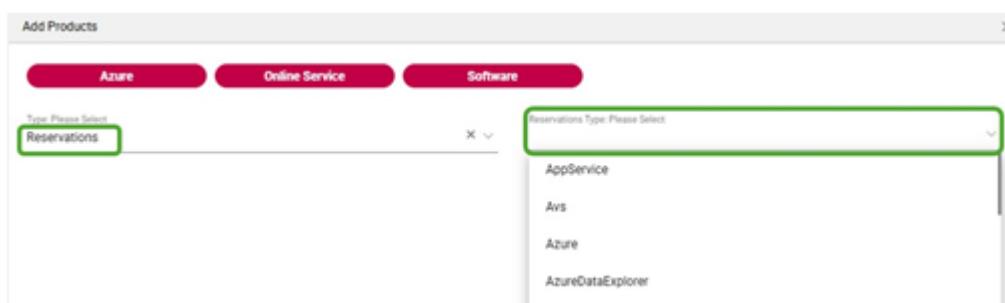
Azure Reserved Instances allow a tenant to reserve Microsoft Virtual Machines for a fixed term, such as 1 year or 3 years. These reservations can be paid upfront or through monthly payments over the term. An active Azure subscription is required to add an Azure Reserved Instance.

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



The screenshot shows the Microsoft Azure portal interface. At the top, there are sections for 'END USER DETAILS', 'NAME: .', 'TENANT ID: .', and 'STATUS: Active'. Below this are sections for 'TENANT MANAGEMENT' (with a 'Reporting Dashboard' link), 'END USER PORTAL MANAGEMENT', 'NCE SUBSCRIPTION' (showing '2 Subscription(s)'), and 'AZURE USAGE SUBSCRIPTION' (showing '1 Subscription(s)'). The main content area is titled 'RESERVED INSTANCE'. It displays a message: 'We couldn't find any Azure reserved instance for this tenant'. At the bottom of this section is a red rectangular button with the text 'Add New Product' in white.

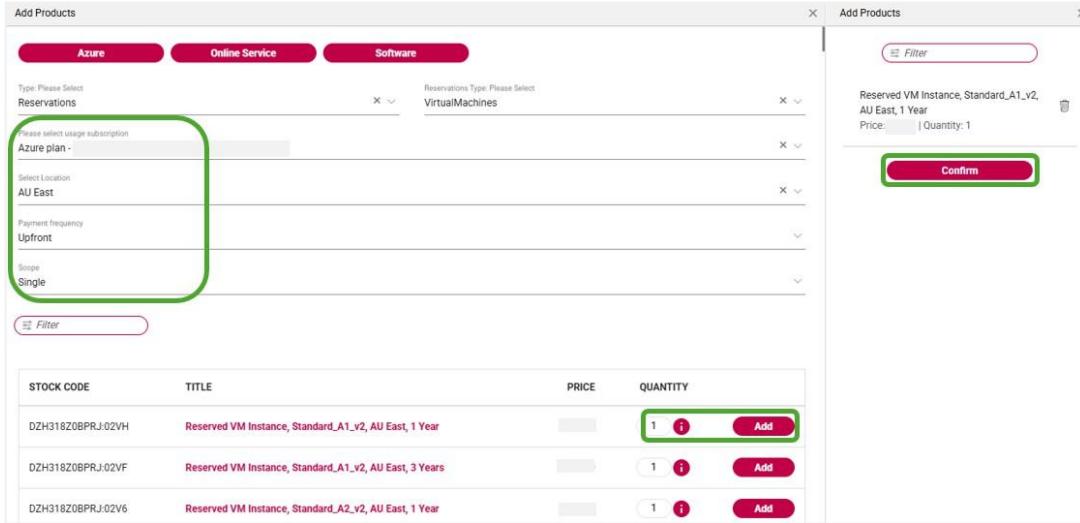
Reservations will be the default Type, select **the Reservations Type** from the drop-down menu.



The screenshot shows a 'Add Products' dialog box. At the top, there are three tabs: 'Azure' (which is selected and highlighted in red), 'Online Service', and 'Software'. Below the tabs, there is a dropdown menu labeled 'Type: Please Select' with the option 'Reservations' highlighted with a green border. To the right of this dropdown is another dropdown menu labeled 'Reservations Type: Please Select' which contains the following options: 'AppService', 'Avs', 'Azure', and 'AzureDataExplorer'. The 'Azure' option is also highlighted with a green border.

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

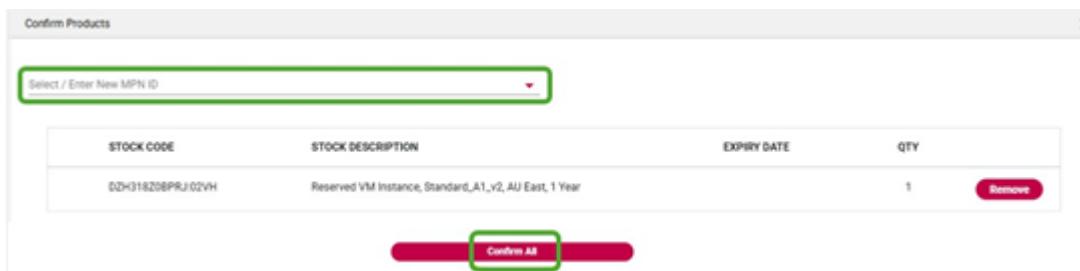
Enter the quantity of the required subscription and click **Add**. Review the added reservations, click **Confirm**.



The screenshot shows two windows side-by-side. The left window is titled 'Add Products' and has tabs for 'Azure', 'Online Service', and 'Software'. Under 'Azure', there are fields for 'Type: Please Select Reservations' (set to 'Azure plan'), 'Reservations Type: Please Select' (set to 'VirtualMachines'), 'Select Location' (set to 'AU East'), 'Payment frequency' (set to 'Upfront'), and 'Scope' (set to 'Single'). The 'Scope' field is highlighted with a green box. The right window is also titled 'Add Products' and shows a single item: 'Reserved VM Instance, Standard_A1_v2, AU East, 1 Year' with a price of 1. The 'Confirm' button is highlighted with a green box.

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 a 'Confirm Products' dialog box. It has a dropdown menu for 'Select / Enter New MPN ID'. Below it is a table with columns 'STOCK CODE', 'STOCK DESCRIPTION', 'EXPIRY DATE', and 'QTY'. One row is shown: 'DZH318Z0BPRJ:02VH' and 'Reserved VM Instance, Standard_A1_v2, AU East, 1 Year' with a quantity of 1. A 'Remove' button is next to the quantity. At the bottom is a 'Confirm All' button, which is highlighted with a green box.

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

RESERVED INSTANCE				6 Reserved Instance(s)
STOCK CODE	STOCK DESCRIPTION	EXPIRY DATE	QTY	
DZH318Z0BQ35.00F9	Reserved VM Instance,Standard_B4ms,AU/E,TY	18/06/2025	1	
DZH318Z0BQ35.00F8	Reserved VM Instance,Standard_B4ms,AU/E,TY	23/06/2025	2	
DZH318Z0BQ4X.00P2	Reserved VM Instance,Standard_F4s_v2,AU/E,TY	4/02/2026	1	
DZH318Z0BQ50.0032	Reserved VM Instance,Standard_D4s_v3,AU/E,TY	4/02/2026	1	
DZH318Z0BQ35.00FF	Reserved VM Instance,Standard_B2ms,AU/E,TY	24/05/2026	4	
DZH318Z0BQ35.00F8	Reserved VM Instance,Standard_B4ms,AU/E,TY	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

The Reporting Dashboard is a place where you can access standardised reports which provide detailed information pertaining to billing and usage data.

Transactional Summary

Business Reports

- Sell Through Reports
- ETA and Backorder Reports
- ESD Report
- Web Audit Log

Subscription Reports

- Subscription Invoice Reports
- Azure Usage Reports
- Upcoming MS CSP Renewals
- NCE Orders Report
- Adobe Schedule Renewal Reports

END USER DETAILS	NAME: <input type="text"/>	TENANT ID: <input type="text"/>	STATUS: Active <input type="button" value="▼"/>
TENANT MANAGEMENT			<input style="border: 2px solid green; border-radius: 5px; padding: 2px 10px;" type="button" value="Reporting Dashboard"/> <input type="button" value="▼"/>
END USER PORTAL MANAGEMENT			<input type="button" value="▼"/>
NCE SUBSCRIPTION			2 Subscription(s) <input type="button" value="▼"/>
AZURE USAGE SUBSCRIPTION			1 Subscription(s) <input type="button" value="▼"/>
RESERVED INSTANCE			<input type="button" value="▼"/>
SOFTWARE			<input type="button" value="▼"/>
ORDER HISTORY			<input type="button" value="▼"/>

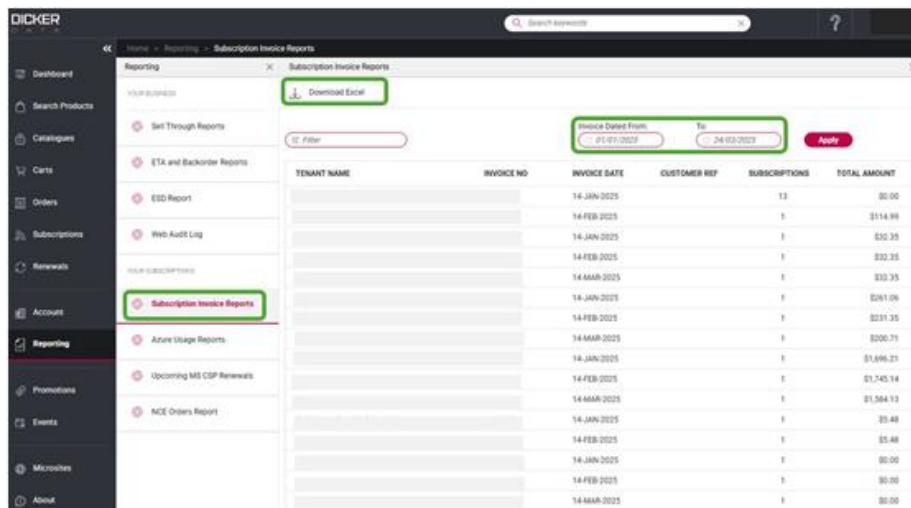
Types of Available Reports

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



TENANT NAME	INVOICE NO	INVOICE DATE	CUSTOMER REF	SUBSCRIPTIONS	TOTAL AMOUNT
	14-JAN-2023		13	00.00	
	14-FEB-2023		1	3114.99	
	14-JAN-2023		1	030.39	
	14-FEB-2023		1	330.39	
	14-MAR-2023		1	330.39	
	14-JAN-2023		1	8281.09	
	14-FEB-2023		1	2211.39	
	14-MAR-2023		1	8200.71	
	14-JAN-2023		1	51,696.21	
	14-FEB-2023		1	61,745.14	
	14-MAR-2023		1	21,584.13	
	14-JAN-2023		1	05.49	
	14-FEB-2023		1	05.49	
	14-JAN-2023		1	00.00	
	14-FEB-2023		1	00.00	
	14-MAR-2023		1	00.00	

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.

TENANT NAME	SUBSCRIPTION ID	SUB NAME	TOTAL AMOUNT	ACTION
[REDACTED]	[REDACTED]	Azure plan	\$125.44	
[REDACTED]	[REDACTED]	Azure plan	\$1,900.90	
[REDACTED]	[REDACTED]	Azure plan	\$926.79	

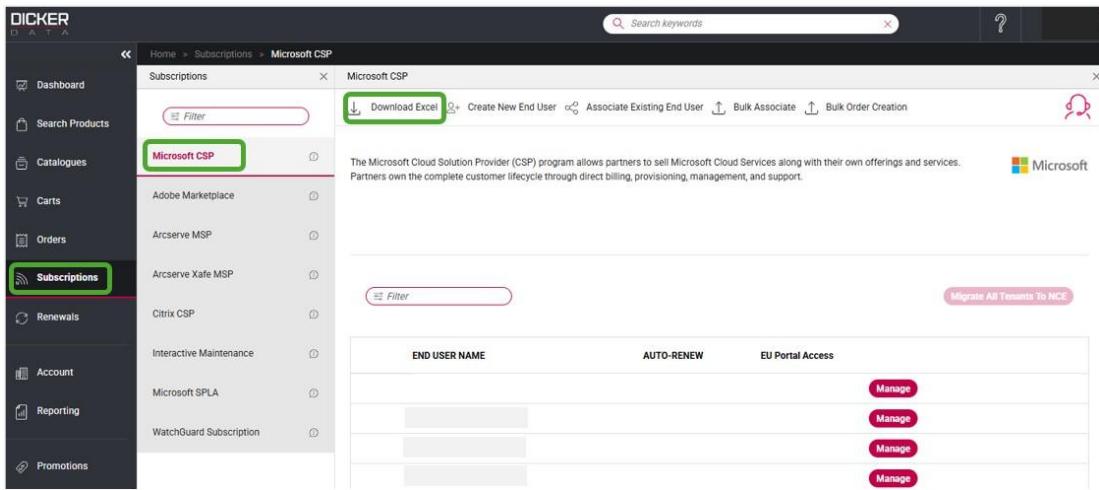
Show Archive toggle allows viewing and download of archived usage reports.

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.

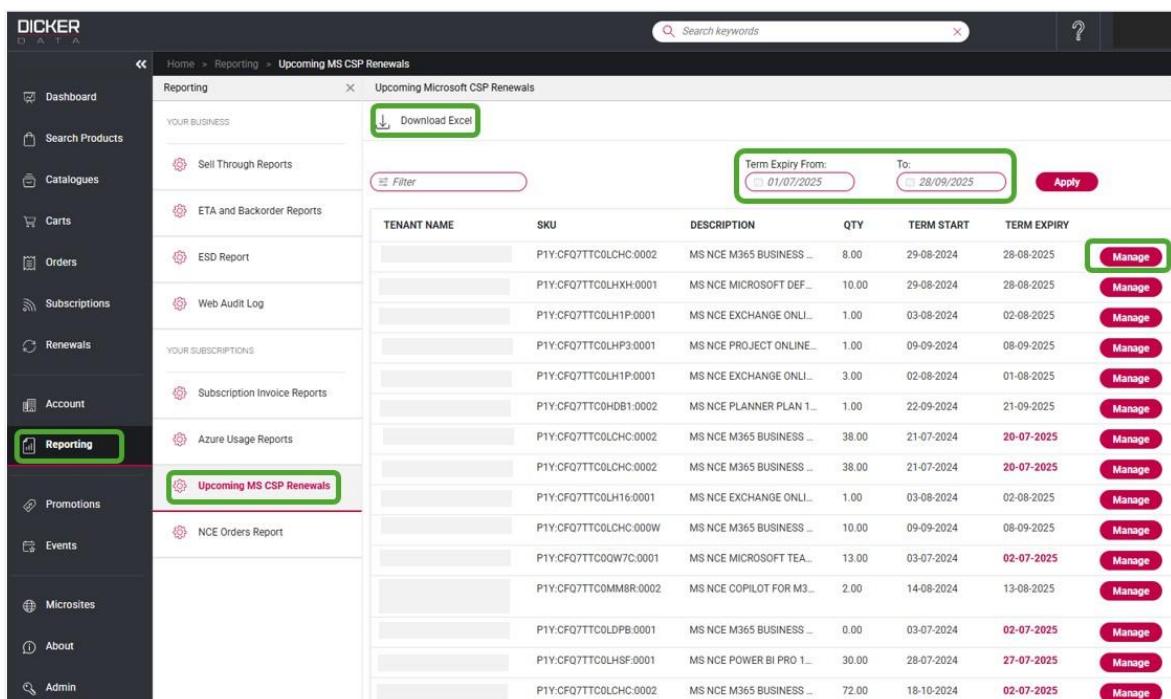
- Details tab: Lists Subscriptions and details for all Tenants.
- Tenant Details tab: A tab per Tenant showing subscription details, including Start and Expiry Dates.

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:CFQ7TTC0LCHC:0002	MS NCE M365 BUSINESS ...	8.00	29-08-2024	28-08-2025	
	P1Y:CFQ7TTC0LHXH:0001	MS NCE MICROSOFT DEF... ...T 365 BUSINESS	10.00	29-08-2024	28-08-2025	
	P1Y:CFQ7TTC0LHP1P:0001	MS NCE EXCHANGE ONLI... ...T 365 BUSINESS	1.00	03-08-2024	02-08-2025	
	P1Y:CFQ7TTC0LHP3:0001	MS NCE PROJECT ONLINE... ...T 365 BUSINESS	1.00	09-09-2024	08-09-2025	
	P1Y:CFQ7TTC0LH1P:0001	MS NCE EXCHANGE ONLI... ...T 365 BUSINESS	3.00	02-08-2024	01-08-2025	
	P1Y:CFQ7TTC0HDB:0002	MS NCE PLANNER PLAN 1... ...T 365 BUSINESS	1.00	22-09-2024	21-09-2025	
	P1Y:CFQ7TTC0LCHC:0002	MS NCE M365 BUSINESST 365 BUSINESS	38.00	21-07-2024	20-07-2025	
	P1Y:CFQ7TTC0LCHC:0002	MS NCE M365 BUSINESST 365 BUSINESS	38.00	21-07-2024	20-07-2025	
	P1Y:CFQ7TTC0LH16:0001	MS NCE EXCHANGE ONLI... ...T 365 BUSINESS	1.00	03-08-2024	02-08-2025	
	P1Y:CFQ7TTC0LCHC:000W	MS NCE M365 BUSINESST 365 BUSINESS	10.00	09-09-2024	08-09-2025	
	P1Y:CFQ7TTC00W7C:0001	MS NCE MICROSOFT TEA... ...T 365 BUSINESS	13.00	03-07-2024	02-07-2025	
	P1Y:CFQ7TTC0MMBR:0002	MS NCE COPilot for M3... ...T 365 BUSINESS	2.00	14-08-2024	13-08-2025	
	P1Y:CFQ7TTC0LDPB:0001	MS NCE M365 BUSINESST 365 BUSINESS	0.00	03-07-2024	02-07-2025	
	P1Y:CFQ7TTC0LHSF:0001	MS NCE POWER BI PRO 1... ...T 365 BUSINESS	30.00	28-07-2024	27-07-2025	
	P1Y:CFQ7TTC0LCHC:0002	MS NCE M365 BUSINESST 365 BUSINESS	72.00	18-10-2024	02-07-2025	

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

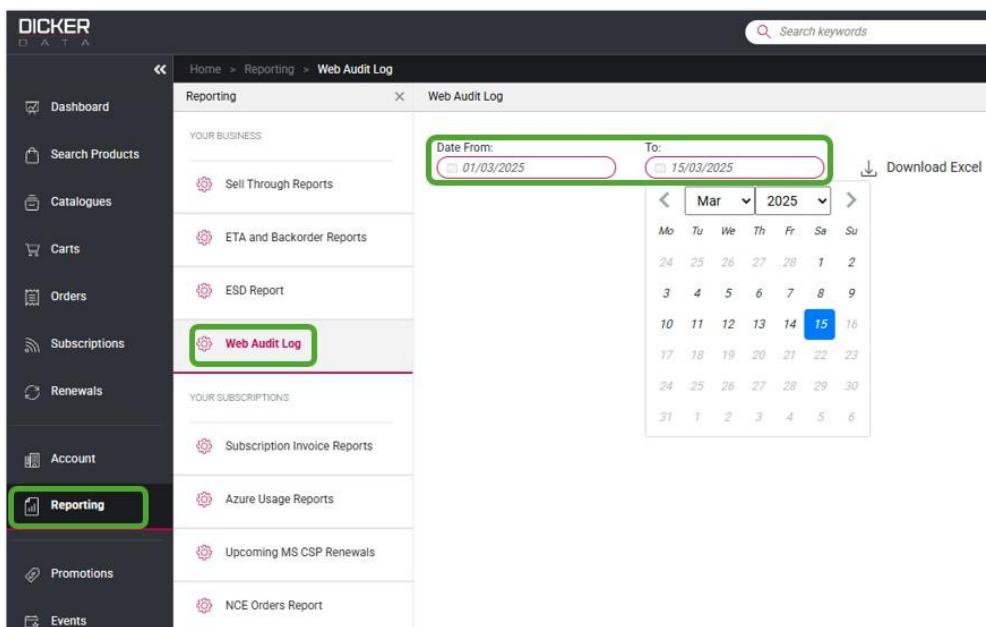
- Tenant ID and Name
- Subscription ID, SKU, Description, Qty
- Term Start and Expiry Date

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

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.