Cloud Solution Provider (CSP) handbook

DICKER DATA

DICKER
D A T A

Table of Contents

Reporting   42

Types of Available Reports   43

CSP Billing   48

P2P Transfer Check list   48

Onboarding with Dicker Data

Create an account with Dicker Data.

Thanks for choosing to **sign** up as a Dicker Data reseller. Our team are here to help you deliver the best technology solutions and we cannot wait to get started with you

Subscribe to our Microsoft Mailing list.

Register to make sure you are kept up to date with the latest news and events. (Australia)

Register to make sure you are kept up to date with the latest news and events. (New Zealand)

Set up your MPN ID (formally known as Microsoft Partner Network).

If you haven't already **set up a MPN**, you can get started **here**.

Take note of your location MPN as you need this to transact all products on the Dicker Data portal.

Enrol with Microsoft as an Indirect Reseller.

You will need to sign up as an indirect reseller. Click **here** to become an Indirect Reseller.

Authorise Dicker Data as your Indirect Provider.

Click the following **link** to accept this invitation and to authorize Dicker Data Ltd to be your Microsoft indirect provider. Welcome aboard!

Australia
Freecall 1800 688 586
www.dickerdata.com.au
ABN 95 000 969 362
238 Captain Cook Drive, Kurnell NSW 2231

New Zealand
Freecall 0800 337 253
www.dickerdata.co.nz
NZBN 9429038460227
68 Plunket Avenue, Auckland 2104

Microsoft Support Pack

Dicker Data helpdesk is operated and staffed locally by Dicker Data employees.

We offer complementary Level 1 and Level 2 24*7*365 support to our transacting Microsoft CSP Partners.

Please contact **csp.support@dickerdata.com.au** or 1300 289 277 to lodge your ticket.

Should the request be identified as a Microsoft issue, we will continue to leverage our PSfP Support contract to escalate the issue directly with Microsoft.

When a ticket is lodged with Microsoft, we include details of the partner on the ticket to ensure when an engineer is allocated, they are in discussion directly with the stakeholder rather than going through Dicker as an intermediary

For tickets raised on Microsoft, we are guided by the below SLAs as per our contract:

Minimal business impact (Sev C) <4 hours

Moderate business impact (Sev B) <2 hours

Critical business impact (Sev A) <1 hours

Australia
Freecall 1800 688 586
www.dickerdata.com.au
ABN 95 000 969 362
238 Captain Cook Drive, Kurnell NSW 2231

New Zealand
Freecall 0800 337 253
www.dickerdata.co.nz
NZBN 9429038460227
68 Plunket Avenue, Auckland 2104

Getting Started

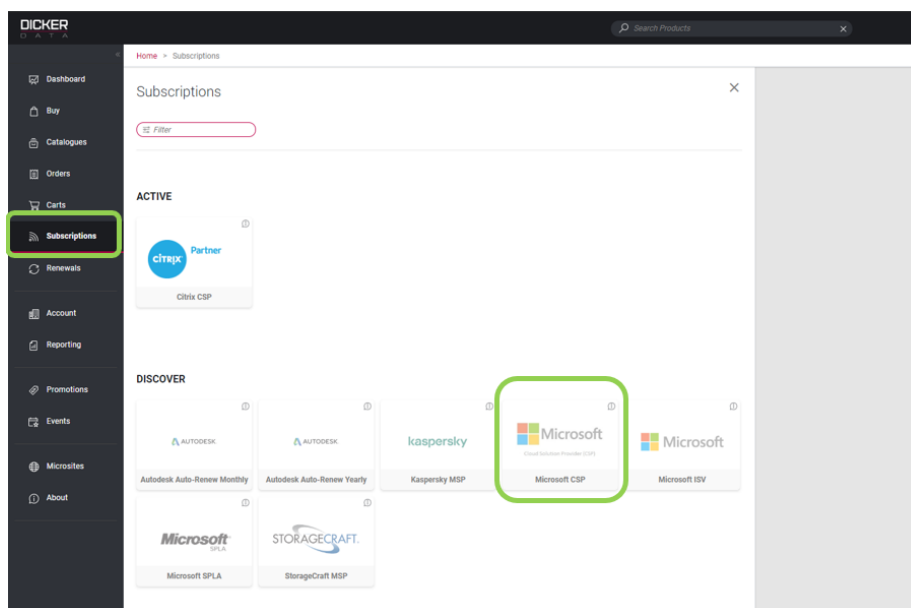Log In to www.dickerdata.com.au or www.dickerdata.co.nz with your username, reseller account number and password.

Select Subscriptions **https://portal.dickerdata.com.au/manageSubscriptions**
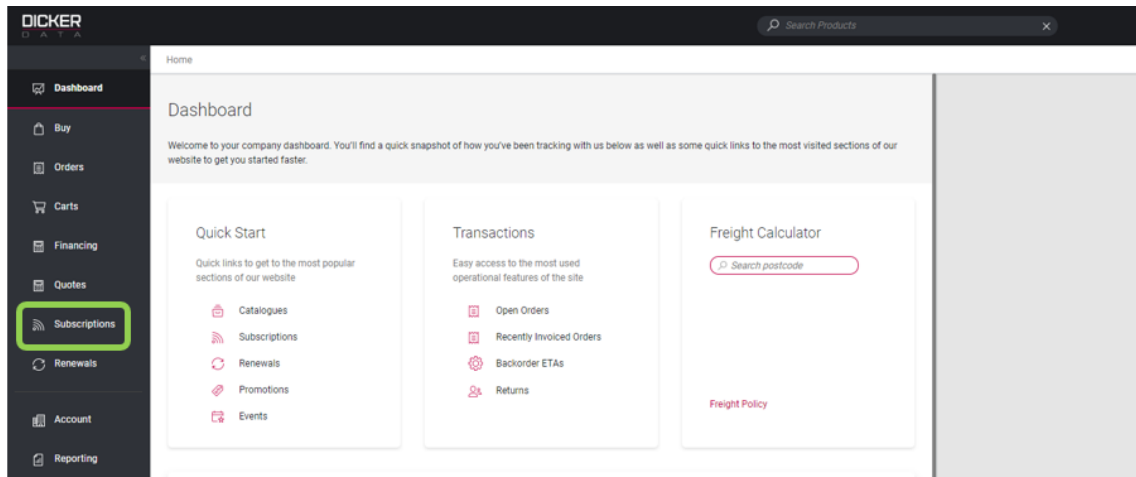
Creating a new tenant

In the **DISCOVER** section click on the ⓘ in the **Microsoft CSP** option.

New Tenant: Click on "create a tenant".

Ensure the **Domain Prefix** entered is the one used for the **onmicrosoft.com** email
- Example: **csptenant.onmicrosoft.com (csptenan**t is the **Domain Prefix)**

Australia
Freecall 1800 688 586
www.dickerdata.com.au
ABN 95 000 969 362
238 Captain Cook Drive, Kurnell NSW 2231

New Zealand
Freecall 0800 337 253
www.dickerdata.co.nz
NZBN 9429038460227
68 Plunket Avenue, Auckland 2104

Please use a **valid** email address here to make sure you receive the Tenant Creation email. (these emails cannot be generated again)
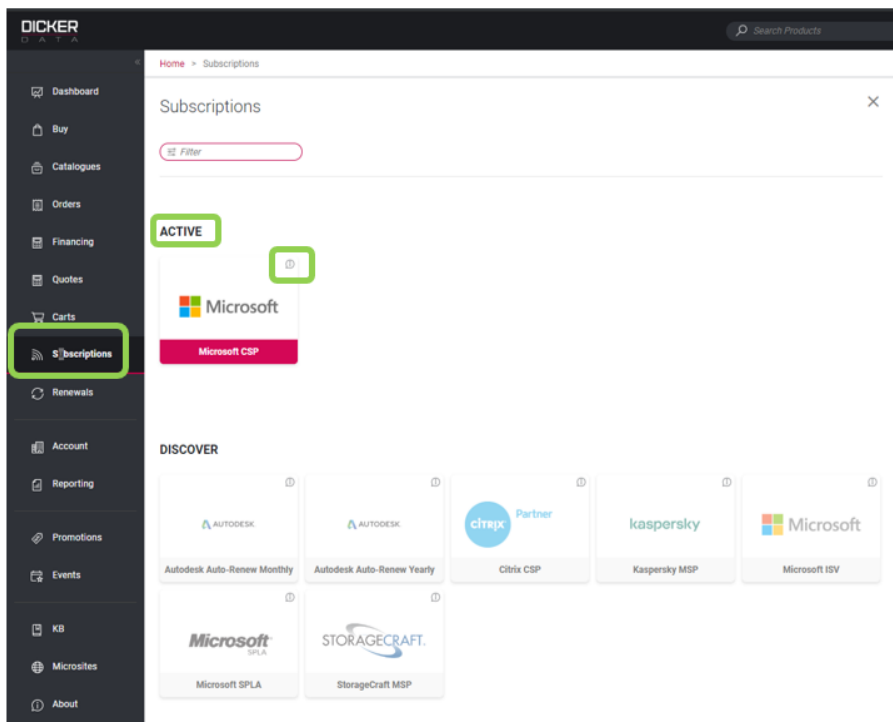

Creating a New Tenant from the Microsoft CSP Information blade

Click on the in the Active **Microsoft CSP** subscription from the **Subscription** menu option

Australia
Freecall 1800 688 586
www.dickerdata.com.au
ABN 95 000 969 362
238 Captain Cook Drive, Kurnell NSW 2231

New Zealand
Freecall 0800 337 253
www.dickerdata.co.nz
NZBN 9429038460227
68 Plunket Avenue, Auckland 2104

Ensure the **Domain Prefix** entered is the one used for the **onmicrosoft.com** email
- Example: **csptenant.onmicrosoft.com (csptenan**t is the **Domain Prefix**

Please use a **valid** email address here to make sure you receive the Tenant Creation email. (these emails cannot be generated again)

Australia
Freecall 1800 688 586
www.dickerdata.com.au
ABN 95 000 969 362
238 Captain Cook Drive, Kurnell NSW 2231

New Zealand
Freecall 0800 337 253
www.dickerdata.co.nz
NZBN 9429038460227
68 Plunket Avenue, Auckland 2104

Associating tenants (Individually or by bulk)

Option 1. If the End User has Access/Global admin rights, ensure the Association Email is sent to their email address (We recommend you talk to your End Users before you start the process, so they are aware)

Option 2. If you (the partner) have global admin rights to your End Users, you could enter your email address as these notifications would be sent to you instead of the End User.
Please note the association request needs to be accepted by a "Global Admin" for the end user's tenancy.

For an existing Tenant that you have not transacted with before via Dicker Data Ltd.
  • Click Microsoft CSP
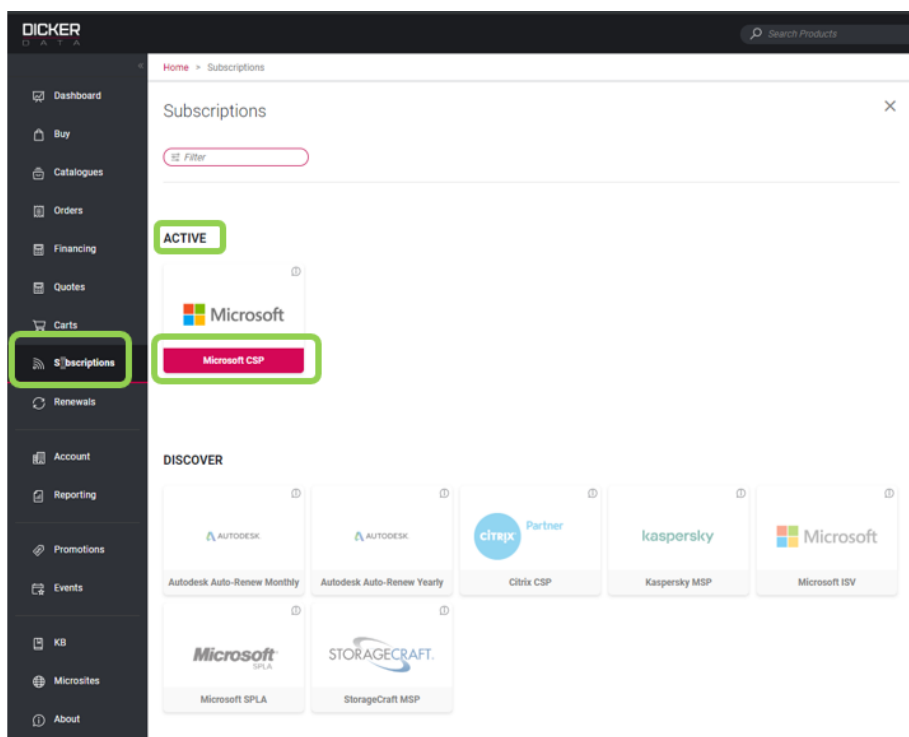
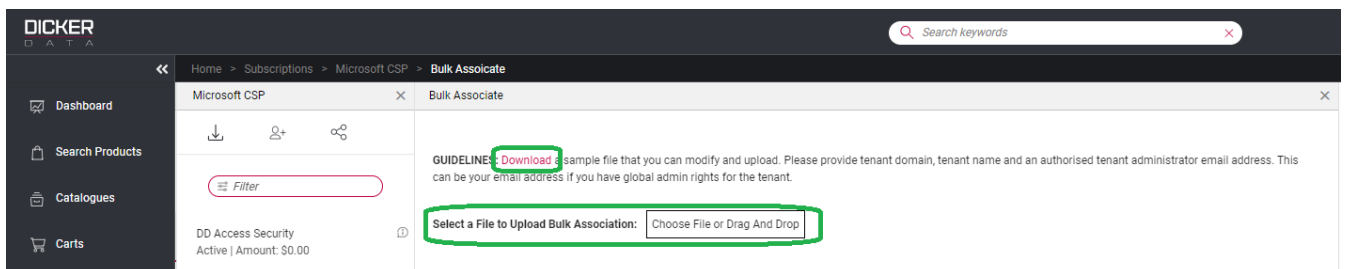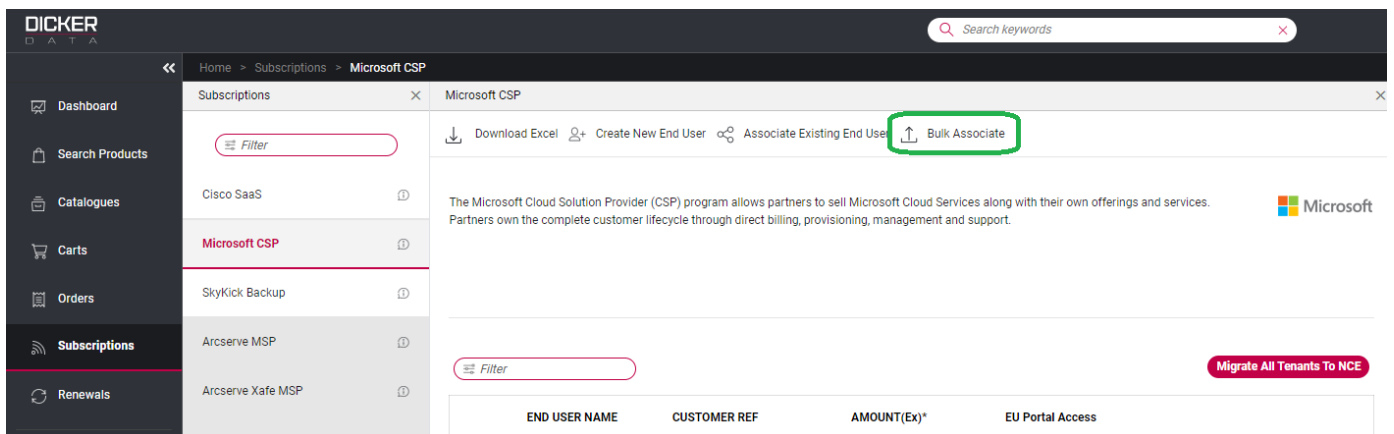**Individual association:** Click associate existing end user.
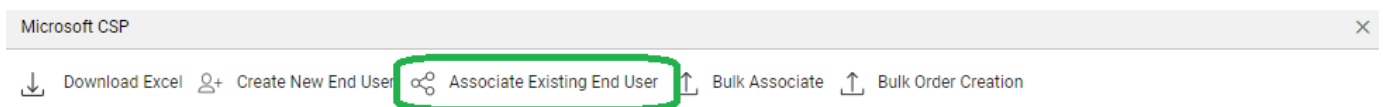
Bulk Associate: Bulk association is a feature that allows you to associate multiple tenants in a single action. You will need to download the CSV file and add the mandatory columns (Green) in the table. This helps you to avoid the manual process of associating each tenant individually with each subscription.

- Log in to your account on the Dicker Data website and go to the Bulk Association under the subscriptions page.
- Download a 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.

Australia
Freecall 1800 688 586
www.dickerdata.com.au
ABN 95 000 969 362
238 Captain Cook Drive, Kurnell NSW 2231

New Zealand
Freecall 0800 337 253
www.dickerdata.co.nz
NZBN 9429038460227
68 Plunket Avenue, Auckland 2104

Tenants overview

Clicking on the ⌄ will expand the section and display the details for that section.
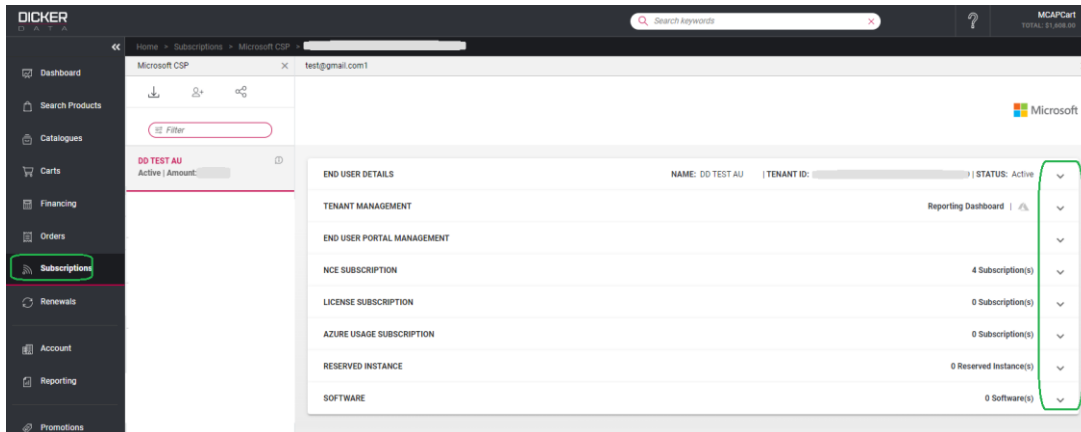
End User Details section

To edit the End User Details, click on the Edit End User button which will open the Edit Tenant Details blade

- The Edit Payment Details will allow you edit the payment Alert Limits as well as adding a Digital Wallet as a payment method.

- The Customer Permissions allows you to toggle
    User to purchase **Azure Reserved Instances** directly through portal.azure
    Users to view **Cost Management** User to purchase savings plan
    User to purchase **savings plan**

- The View Agreement selection 👁 , will take you to the Microsoft Cloud Agreement site.
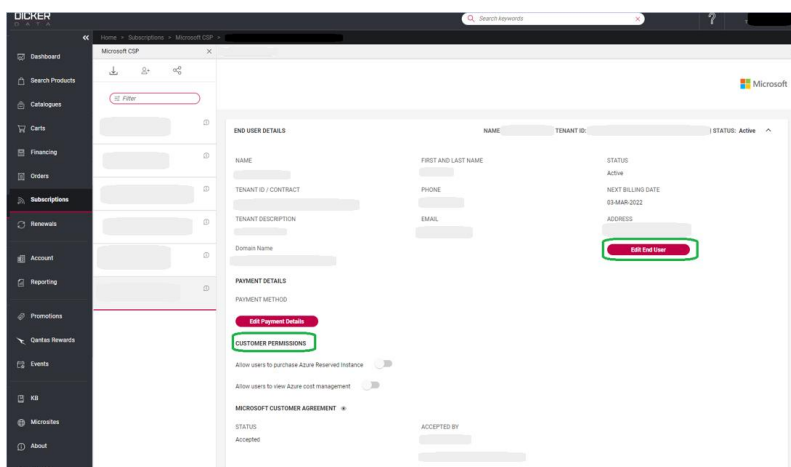
Tenant Management section (GDAP)

Provides links to various portals such as **Office 365** and **Microsoft Azure Management Portals**.

Select the **Reporting Dashboard** to access available Subscription Reports.

New Admin Relationship lets partners configure granular and time-bound access to their customers.

Go to the "**Tenant**" Click the drop down on "**Tenant Management**" in here you will see "**New Admin Relationship**"
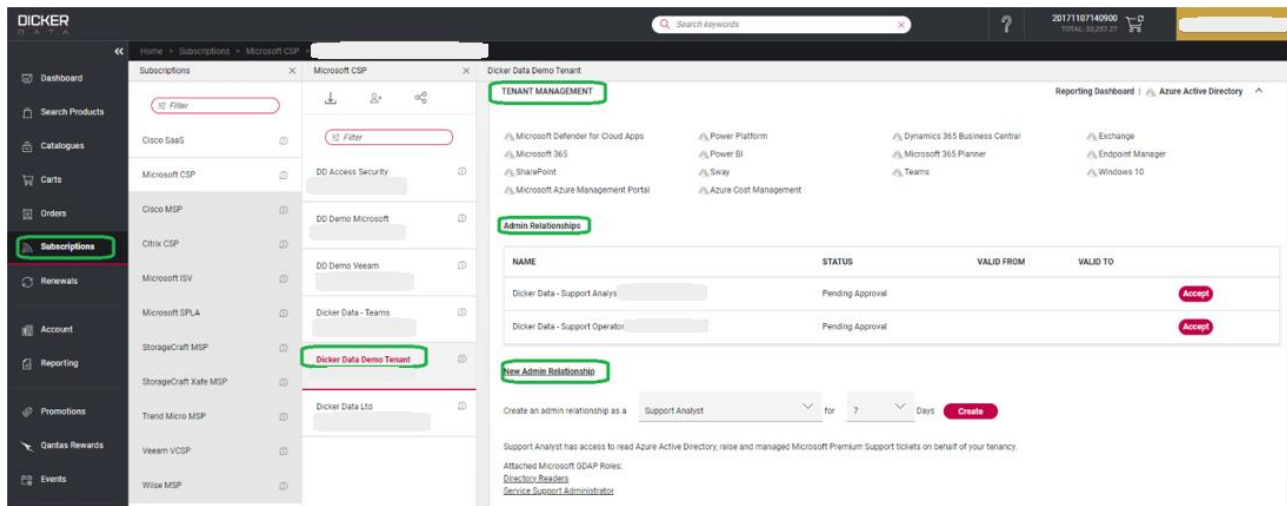
There are four admin relationship to choose from "**Support Analyst**" "**Support Operator**" "**Support Admin**" and "**Tenancy Technician**" each containing details on what the GDAP roles are.

Australia
Freecall 1800 688 586
www.dickerdata.com.au
ABN 95 000 969 362
238 Captain Cook Drive, Kurnell NSW 2231

New Zealand
Freecall 0800 337 253
www.dickerdata.co.nz
NZBN 9429038460227
68 Plunket Avenue, Auckland 2104

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.
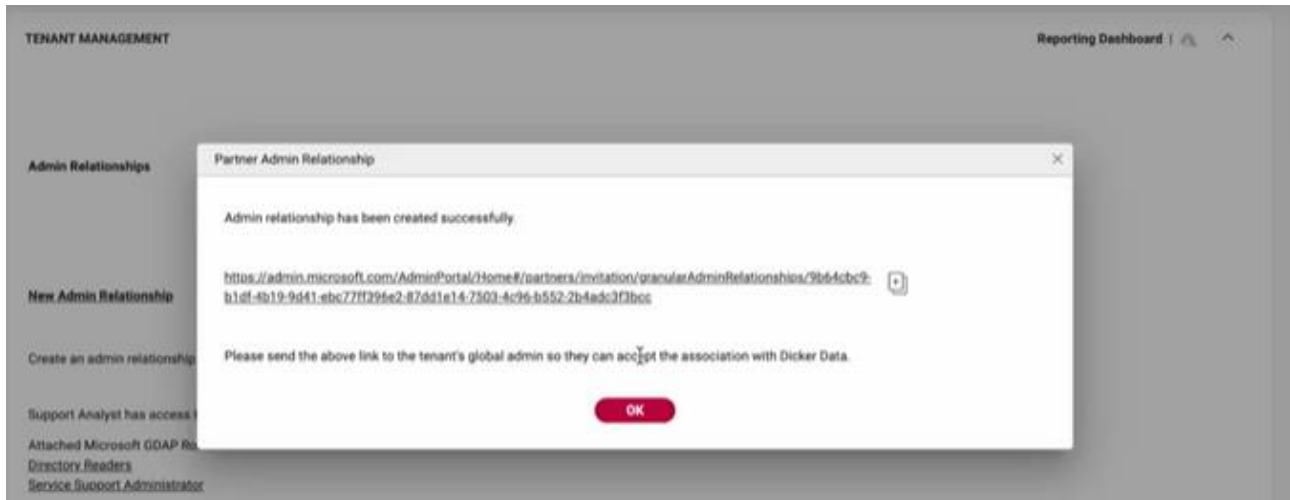
"**Global Admin**" to accept and give partner access.

Australia
Freecall 1800 688 586
www.dickerdata.com.au
ABN 95 000 969 362
238 Captain Cook Drive, Kurnell NSW 2231

New Zealand
Freecall 0800 337 253
www.dickerdata.co.nz
NZBN 9429038460227
68 Plunket Avenue, Auckland 2104
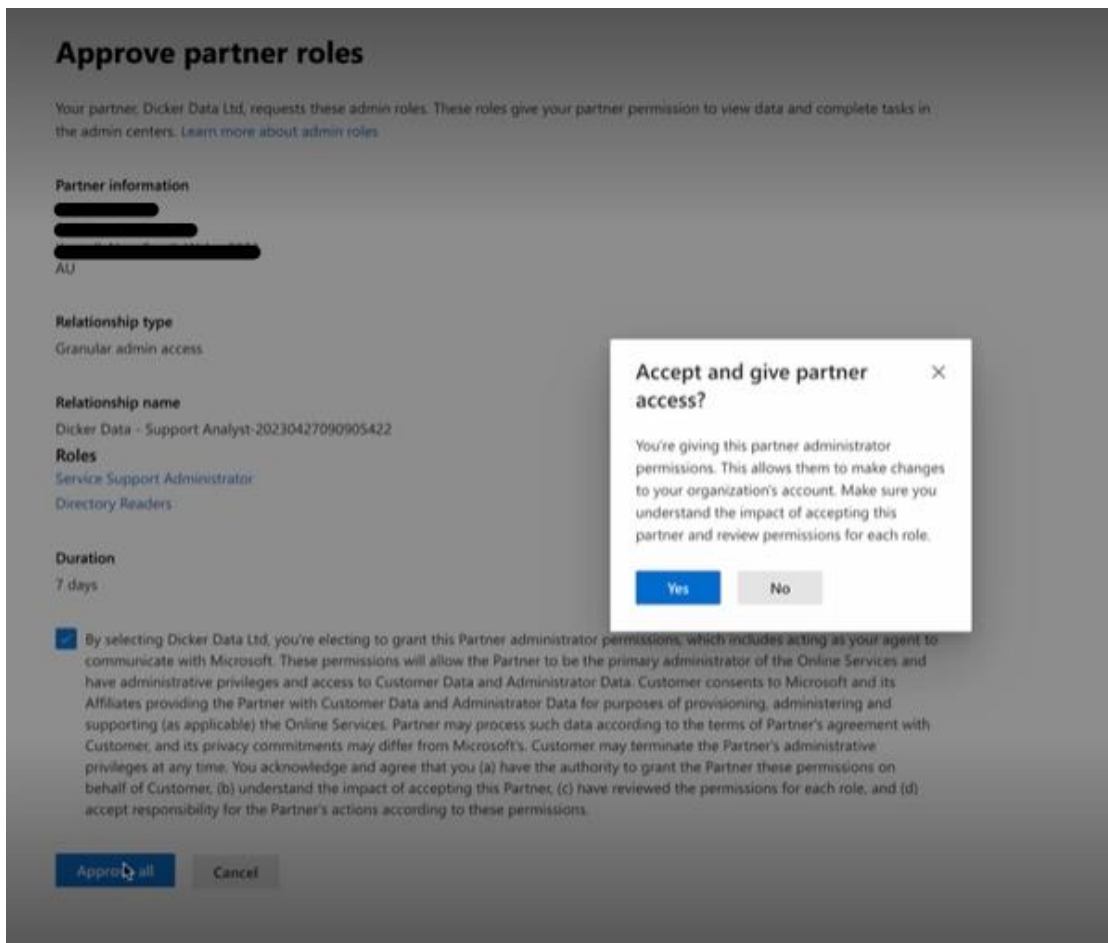
Partner Relationships will show GDAP privileges here.

"**Admin Relationship**" Status Active

Australia
Freecall 1800 688 586
www.dickerdata.com.au
ABN 95 000 969 362
238 Captain Cook Drive, Kurnell NSW 2231

New Zealand
Freecall 0800 337 253
www.dickerdata.co.nz
NZBN 9429038460227
68 Plunket Avenue, Auckland 2104

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

"**Dicker Data**" will receive a notification that the customer has approved the relationship.

To learn more about granular delegated admin permissions (GDAP) click **here**

Australia
Freecall 1800 688 586
www.dickerdata.com.au
ABN 95 000 969 362
238 Captain Cook Drive, Kurnell NSW 2231

New Zealand
Freecall 0800 337 253
www.dickerdata.co.nz
NZBN 9429038460227
68 Plunket Avenue, Auckland 2104

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** option to upload your company logo, manage user preferences and add a Contact Us page.
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)

END USER PORTAL MANAGEMENT

⇄ Filter

UserName	Email

Configure Portal   **Configure Users**

Subscription Overview

Clicking on the ﹀ will expand the section to display the licenses under the tenant.

NCE SUBSCRIPTION	3 Subscription(s)	﹀
LICENSE SUBSCRIPTION	0 Subscription(s)	﹀
AZURE USAGE SUBSCRIPTION	1 Subscription(s)	﹀
RESERVED INSTANCE		﹀
SOFTWARE		﹀

Australia
Freecall 1800 688 586
www.dickerdata.com.au
ABN 95 000 969 362
238 Captain Cook Drive, Kurnell NSW 2231

New Zealand
Freecall 0800 337 253
www.dickerdata.co.nz
NZBN 9429038460227
68 Plunket Avenue, Auckland 2104

Subscription section

How to buy (NCE) Subscriptions

Click Microsoft CSP
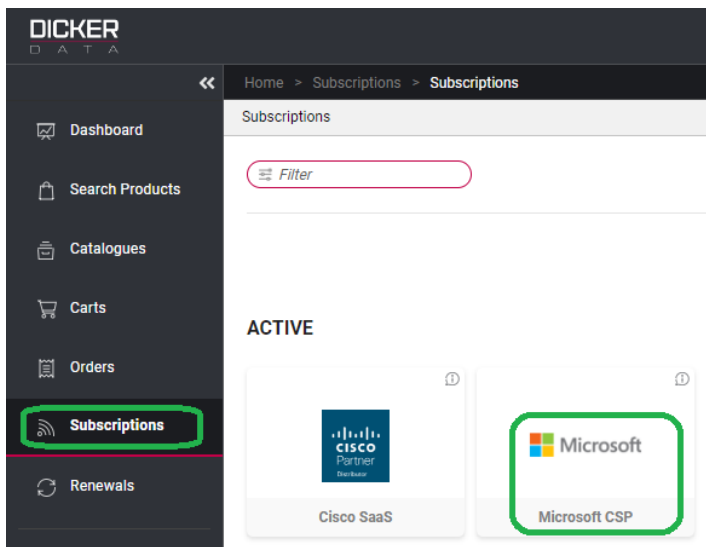
Click **Manage >** Click Add **New Product**
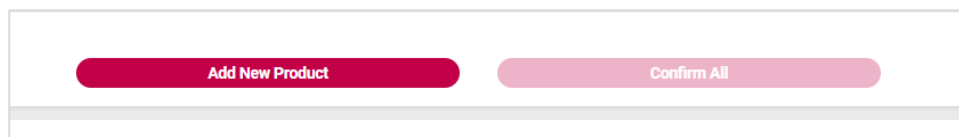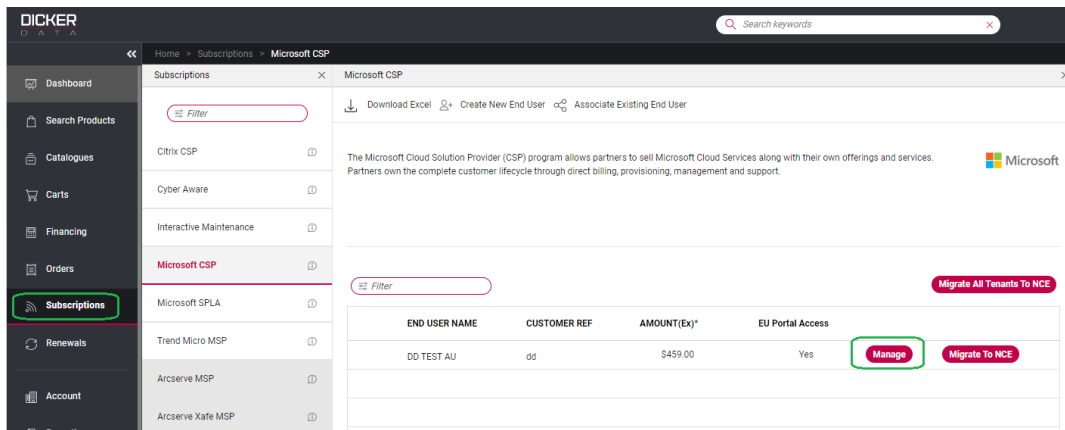
Subscription Type is New Commerce Experience then select the product, commitment and quantities required and click **Add**

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

Enter your MPN. If you have selected an **Annual** commit subscription you will need to select the Billing Frequency. Click **Confirm**

Australia
Freecall 1800 688 586
www.dickerdata.com.au
ABN 95 000 969 362
238 Captain Cook Drive, Kurnell NSW 2231

New Zealand
Freecall 0800 337 253
www.dickerdata.co.nz
NZBN 9429038460227
68 Plunket Avenue, Auckland 2104

How to use bulk order creation

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 subscriptions 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.

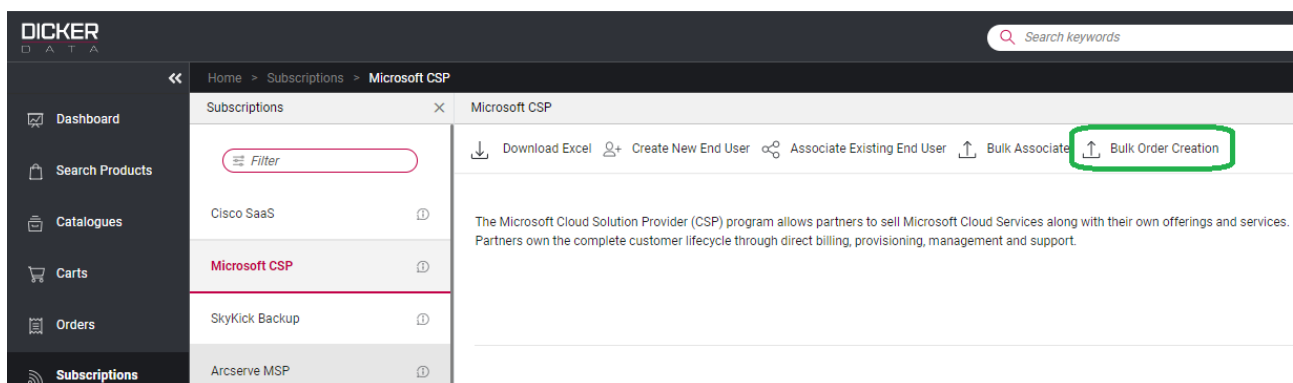**How do I adjust the auto renew settings:**
If you want to turn off the auto renew for some or all of your orders, you need to manually change this setting. This can be done by going to the tenant and subscription that you want to modify and clicking manage. There you can see the auto renew toggle and switch it off. You can also change other settings such as the term, the quantity, but these changes will only happen at renewal.

What if I need 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 a problem:
You have **7 days** to check the orders that you created with the bulk order feature. 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.

Australia
Freecall 1800 688 586
www.dickerdata.com.au
ABN 95 000 969 362
238 Captain Cook Drive, Kurnell NSW 2231

New Zealand
Freecall 0800 337 253
www.dickerdata.co.nz
NZBN 9429038460227
68 Plunket Avenue, Auckland 2104

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

How to add new products

The **Subscription** section lists all CSP Subscription Licenses for the Tenant. With **CSP** Subscriptions you can add or remove users and products and only pay for the licenses you use.

Click on the **Add New Product** to add CSP Licenses for the selected tenant.

Australia
Freecall 1800 688 586
www.dickerdata.com.au
ABN 95 000 969 362
238 Captain Cook Drive, Kurnell NSW 2231

New Zealand
Freecall 0800 337 253
www.dickerdata.co.nz
NZBN 9429038460227
68 Plunket Avenue, Auckland 2104

How to Manage Existing CSP Licences

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

How to buy Add-On's (NCE)

Add-on licenses are listed in the portal in the same way as other licenses that may be purchased through the new commerce experience. The Add-on relies on another license having been purchased for it to work. Teams Phone Standard, for example, relies on products such as Office 365 E3 to already be present on the tenant. Add-ons in the new commerce experience are technically enforced, which means that the purchase of them is blocked if no qualifying prerequisite license is found on the tenant.

How to Change quantities

Select the subscription that needs to be adjusted in their subscription list and click Manage.

__Note: The number of licenses on a subscription can be increased at any time and can be decreased only within the first 7 days of when seats were added or at the end of commitment term__

Change the quantity to the amount required.

Click **Schedule Subscription Renewal** then select whether you would like the increase to happen immediately or if they would prefer to wait until the license renewal date:

If you have an existing scheduled change in place and you make a change mid-term that will delete that scheduled change, you will need to re-schedule the change if it is still required.

Australia
Freecall 1800 688 586
www.dickerdata.com.au
ABN 95 000 969 362
238 Captain Cook Drive, Kurnell NSW 2231

New Zealand
Freecall 0800 337 253
www.dickerdata.co.nz
NZBN 9429038460227
68 Plunket Avenue, Auckland 2104

How to Suspend Subscriptions

Suspending NCE subscriptions does not cancel licenses as it does in the CSP Legacy program. **Suspending subscriptions will not stop the billing or renewing.** This function should only be used to restrict a tenant's access to their licenses (in cases of non-payment). This can be done in the portal by clicking Manage on the relevant subscription and then using the Suspend toggle:

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

SUSPEND:

Confirm Suspension

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

Continue

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 **Auto-renew** 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

Australia
Freecall 1800 688 586
www.dickerdata.com.au
ABN 95 000 969 362
238 Captain Cook Drive, Kurnell NSW 2231

New Zealand
Freecall 0800 337 253
www.dickerdata.co.nz
NZBN 9429038460227
68 Plunket Avenue, Auckland 2104

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** button if you are within the renewal date time frame (7 days).

Cancelling monthly licenses will just 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.

Select the Subscription you want to upgrade and click **Upgrade**.

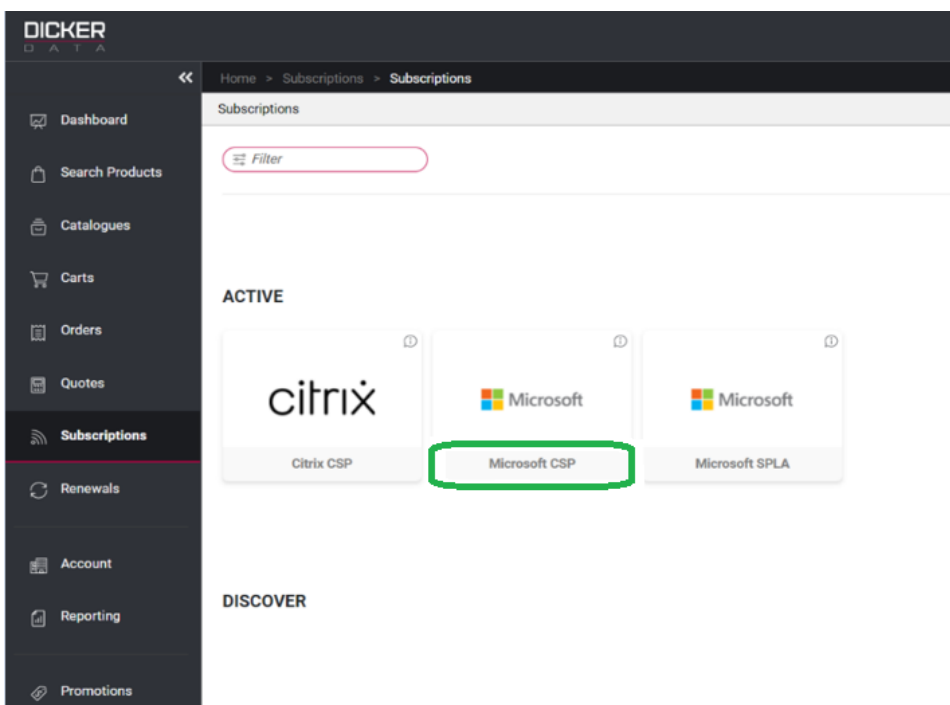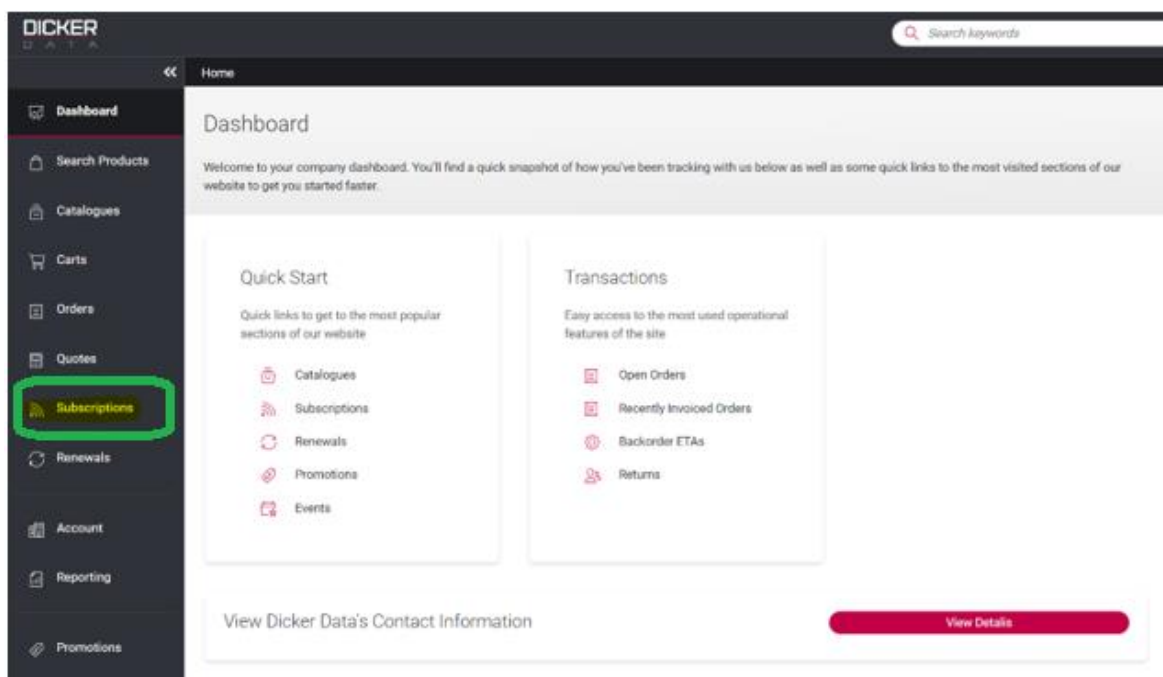| UPGRADE OPTIONS		
Stock Code	**Title**	
CFQ7TTC0LH1P:0001	Exchange Online (Plan 2)	Upgrade
CFQ7TTC0LF8S:0002	Office 365 E5	Upgrade
CFQ7TTC0LH18:0001	Microsoft 365 Business Basic	Upgrade
CFQ7TTC0LFLX:0001	Microsoft 365 E3	Upgrade
CFQ7TTC0LFLX:0003	Microsoft 365 E3 - Unattended License	Upgrade
CFQ7TTC0LFLZ:0002	Microsoft 365 E5	Upgrade
CFQ7TTC0LF8S:0001	Office 365 E5 without Audio Conferencing	Upgrade

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 licenses to Business Premium (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	2.0000
	>Usage for 24-FEB-2022 to 19-MAR-2022	
	MS NCE M365 BUSINESS BASIC 1YR	
P1Y:CFQ7TTC0LH18:000	Microsoft Corporation - Microsoft 365 Business BasCOMMIT	2.0000
	>Usage for 20-FEB-2022 to 19-MAR-2022	
	MS NCE M365 BUSINESS BASIC 1YR	
P1Y:CFQ7TTC0LH18:000	Microsoft Corporation - Microsoft 365 Business BasCOMMIT	-2.0000
	>Usage for 24-FEB-2022 to 19-MAR-2022	
	MS NCE M365 BUSINESS BASIC 1YR	

Australia
Freecall 1800 688 586
www.dickerdata.com.au
ABN 95 000 969 362
238 Captain Cook Drive, Kurnell NSW 2231

New Zealand
Freecall 0800 337 253
www.dickerdata.co.nz
NZBN 9429038460227
68 Plunket Avenue, Auckland 2104

How to Migrate to NCE

Migrating a single tenant to NCE

Select Subscriptions > Select Microsoft CSP

Australia
Freecall 1800 688 586
www.dickerdata.com.au
ABN 95 000 969 362
238 Captain Cook Drive, Kurnell NSW 2231

New Zealand
Freecall 0800 337 253
www.dickerdata.co.nz
NZBN 9429038460227
68 Plunket Avenue, Auckland 2104

From your tenant list, **Click Migrate to NCE** for the tenant you are wishing to move.

Select your billing term and frequency and **Confirm**. Please remember that if you commit to a 1 year term, you will continue to be billed for this license for the full 12 months regardless of any circumstances. Once you add an NCE license you only have 7 days to make any alterations before you are committed to the full term. **Any changes made to the Term or Billing Frequency will only take effect on the renewal date.**

Click OK to move forward

Australia
Freecall 1800 688 586
www.dickerdata.com.au
ABN 95 000 969 362
238 Captain Cook Drive, Kurnell NSW 2231

New Zealand
Freecall 0800 337 253
www.dickerdata.co.nz
NZBN 9429038460227
68 Plunket Avenue, Auckland 2104

You will now receive an email confirming that your request has been received. These emails are sent to the email address associated to your login to the Dicker Data Portal.

If there are any issues or errors with the migration you will be notified via email. Please contact microsoft@dickerdata.com.au / (02) 8556 8061 for Australia or microsoft.sales@dickerdata.co.nz / 0800 337 253 for New Zealand.

Once the migration is complete you will receive the following email.

Australia
Freecall 1800 688 586
www.dickerdata.com.au
ABN 95 000 969 362
238 Captain Cook Drive, Kurnell NSW 2231

New Zealand
Freecall 0800 337 253
www.dickerdata.co.nz
NZBN 9429038460227
68 Plunket Avenue, Auckland 2104

Reports for the migration can be downloaded from the tenancy in the Dicker Data portal. The report will show confirmation of completion, products migrated, by whom, date and time the migrations were requested and completed.

How to Migrate all tenants to NCE

Select Subscriptions > Select Microsoft CSP

Select Migrate All Tenants To NCE

Select your billing term and frequency and Confirm. Please remember that if you commit to a 1-year term, you will continue to be billed for this license for the full 12 months regardless of the customer's circumstances. Once you add an NCE license you only have 7 days to make any alterations before you are committed to the full term.

Australia
Freecall 1800 688 586
www.dickerdata.com.au
ABN 95 000 969 362
238 Captain Cook Drive, Kurnell NSW 2231

New Zealand
Freecall 0800 337 253
www.dickerdata.co.nz
NZBN 9429038460227
68 Plunket Avenue, Auckland 2104

Migrate to NCE   ✕

This action will migrate all legacy subscriptions to NCE for **ALL** the tenants under your reseller account, this will take sometime to get fulfilled by Microsoft. Please be aware that this action cannot be cancelled.

Term:
Please Select *
⌄

Billing Frequency:

Please Select *   ⌄

Note: New term duration will be started during this migration

Cancel   Confirm

Click OK to move forward

Migrate to NCE   ✕

Eligible subscriptions will be migrated to New Commerce Experience platform and an email notification will be sent.

Ok

You will now receive an email confirming that your request has been received. These emails are sent to the email address associated to your login to the Dicker Data Portal.

NCE Migration request received -

N noreply@dickerdata.co.nz
   To ●

Hi

Your request for migrating legacy subscriptions to NCE platform for this tenant 'MS Secure DEMO' has been recieved successfully, it will be processed shortly and an email report will be sent.

Thanks

Dicker Data IT Team

If there are any issues or errors with the migration you will be notified via email. Please contact microsoft@dickerdata.com.au / (02) 8556 8061 for Australia or microsoft.sales@dickerdata.co.nz / 0800 337 253 for New Zealand.

Australia
Freecall 1800 688 586
www.dickerdata.com.au
ABN 95 000 969 362
238 Captain Cook Drive, Kurnell NSW 2231

New Zealand
Freecall 0800 337 253
www.dickerdata.co.nz
NZBN 9429038460227
68 Plunket Avenue, Auckland 2104

Once the migration is complete you will receive the following email.
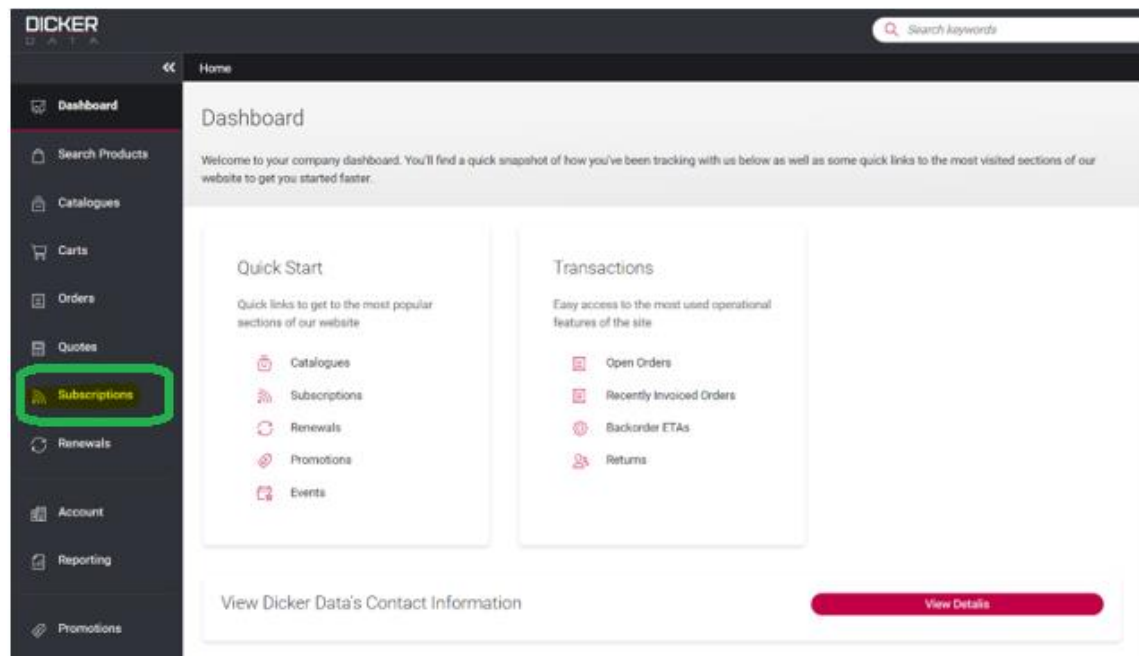

Reports for the migration can be downloaded from the tenancy in the Dicker Data portal. The report will show confirmation of completion, products migrated, by whom, date and time the migrations were requested and completed.
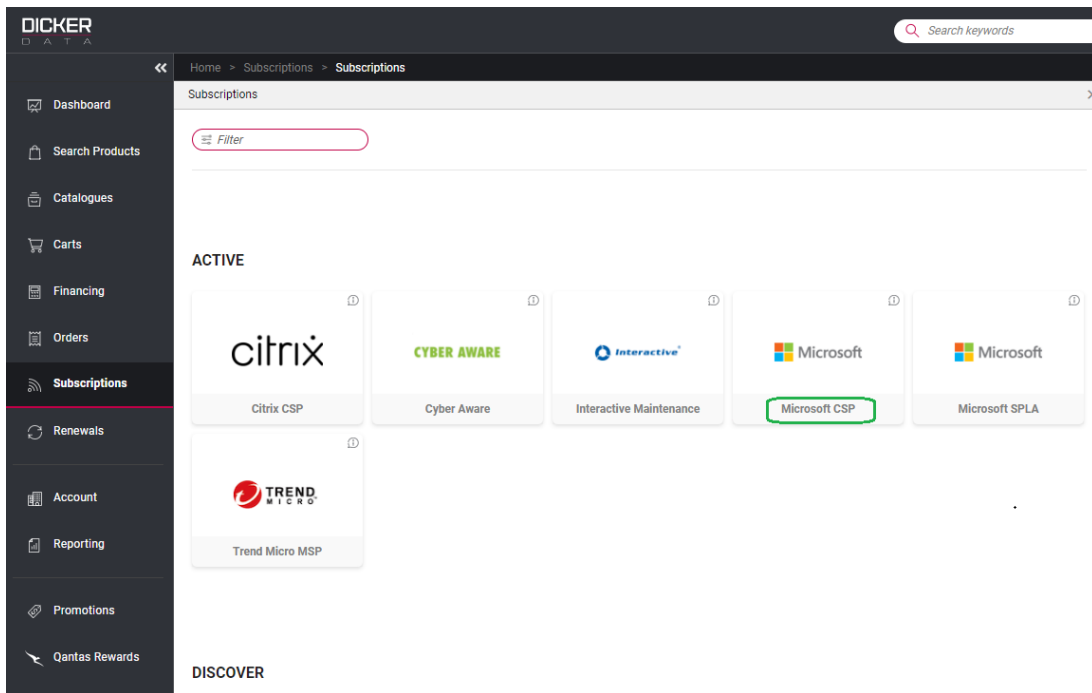

Australia
Freecall 1800 688 586
www.dickerdata.com.au
ABN 95 000 969 362
238 Captain Cook Drive, Kurnell NSW 2231

New Zealand
Freecall 0800 337 253
www.dickerdata.co.nz
NZBN 9429038460227
68 Plunket Avenue, Auckland 2104

TENANT ID	TENANT NAME	SUBSCRIPTION ID	NCE SUBSCRIPTION ID	STOCK CODE	NCE STOCK CODE	QTY	STATUS	LOGIN	DATE REQUESTED	DATE PROCESSED	ERROR
	MS Secure DEMO			CSP1065-417A-B624-4901E2B252F5	P1M:CFQ7TTC0LGV0:0001	1	Completed	Jo	8/08/2022 12:57:10	8/08/2022 3:02:11 AM	
	MS Secure DEMO			CSP1006-4BB0-8F41-37AC05DF5DC7		1	Eligibility Error	Jo	8/08/2022 12:57:10	8/08/2022 12:57:45 PM	Subscription cannot be migrated to New Commerce

FAQ

Can I move one legacy license to NCE and leave the rest? *Yes, but not with the Migration tool. These need to be added individually to the tenant you are working on and then the corresponding legacy license suspended.*

Is there a price difference between NCE and Legacy licenses? *Yes, for some products. You can check pricing on the Dicker Data website.*

Can I go back/change my mind once I have migrated? *No, this is a one-way process.*

Who can I talk to if I need help? *Contact microsoft@dickerdata.com.au / (02) 8556 8061 for Australia or microsoft.sales@dickerdata.co.nz / 0800 337 253 for New Zealand.*

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		
Existing Subscription	1-month	1-year	3-years
1-month	Yes	No	No
1-year	Yes	Yes	Yes
3-years	Yes	Yes	Yes

In summary, a new or renewing 1- or 3-year subscription may not be made coterminous with a 1-month subscription.

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

Australia
Freecall 1800 688 586
www.dickerdata.com.au
ABN 95 000 969 362
238 Captain Cook Drive, Kurnell NSW 2231

New Zealand
Freecall 0800 337 253
www.dickerdata.co.nz
NZBN 9429038460227
68 Plunket Avenue, Auckland 2104

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:

[2]

TERM : Current : Monthly
CHANGE TO:

[No Change ⌄]

BILLING FREQUENCY : Current : Monthly
CHANGE TO:

[No Change ⌄]

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

[No Change ⌄]
| No Change |
| Align Calendar Month |

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.

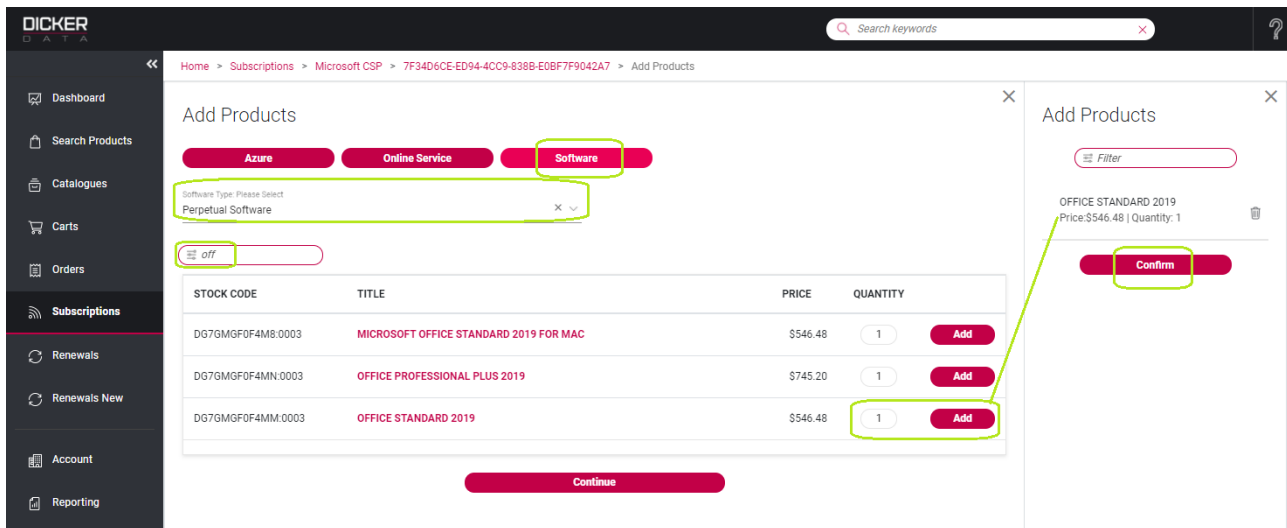To learn more about aligning end dates click **here**

How to buy Perpetual Software

The **Software** section lists all Software including Perpetual Software Subscriptions for the Tenant.
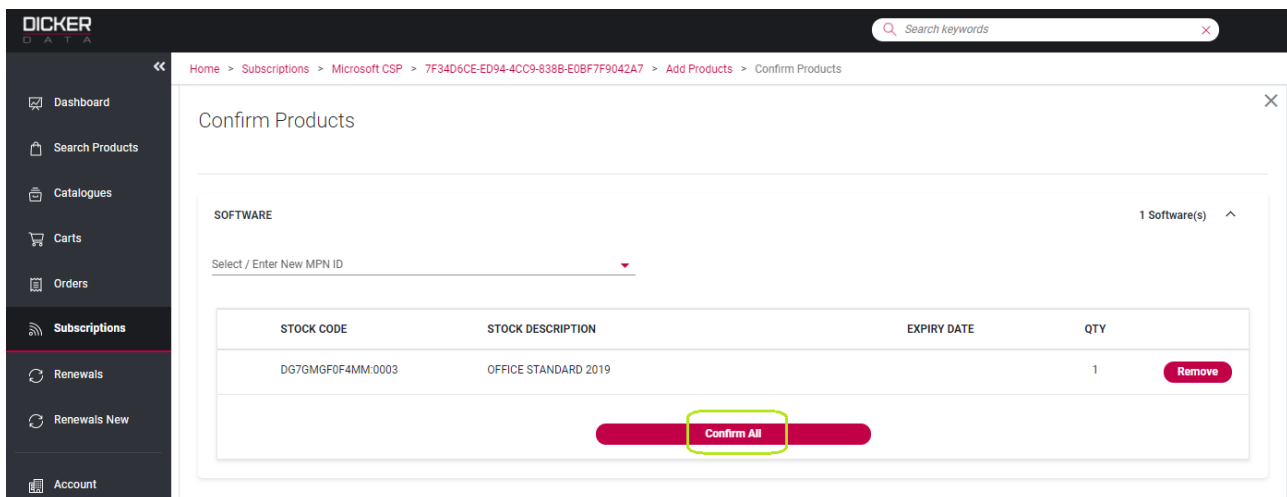
Software Subscriptions list software licences that are purchased for a specific term e.g. 1 year or 3-year term.

Perpetual Software lists all Perpetual Licenses that allows the Tenant (End User) to use the software continually (without expiry) with payment of a single fee.

- Clicking in the **Add New Product** selection, in the **Subscription** section, will open the **Add Products** blade.
- Click on **Software** and then select the **subscription type** required to display the list of Software or Perpetual Subscriptions available.
- Type a search in the filter field to filter on the list of subscriptions.
- Type the **Qty** and click **Add**.

Australia
Freecall 1800 688 586
www.dickerdata.com.au
ABN 95 000 969 362
238 Captain Cook Drive, Kurnell NSW 2231

New Zealand
Freecall 0800 337 253
www.dickerdata.co.nz
NZBN 9429038460227
68 Plunket Avenue, Auckland 2104

- Review the added subscriptions and click on **Confirm** to be taken to the **Confirm Products blade**

- Click **Confirm all** to include the subscription.

- Added Perpetual and Software Subscriptions will be listed in the Software section of the selected Tenant.
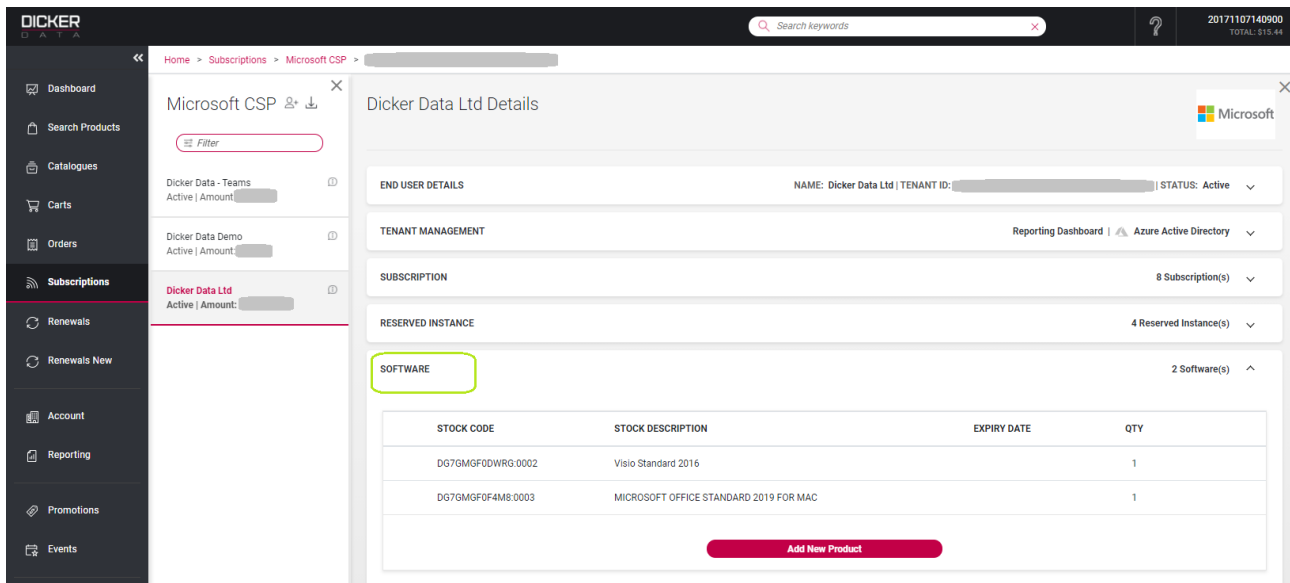
How to buy Azure Plan
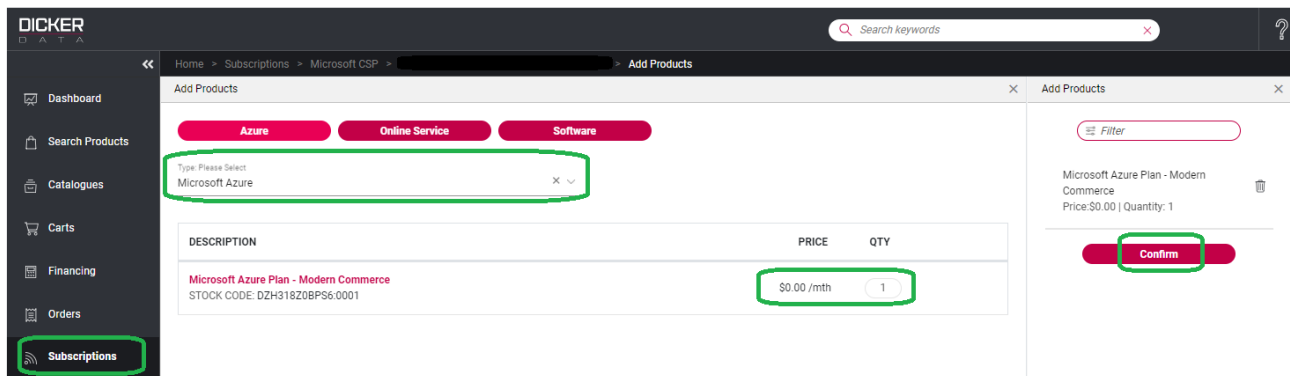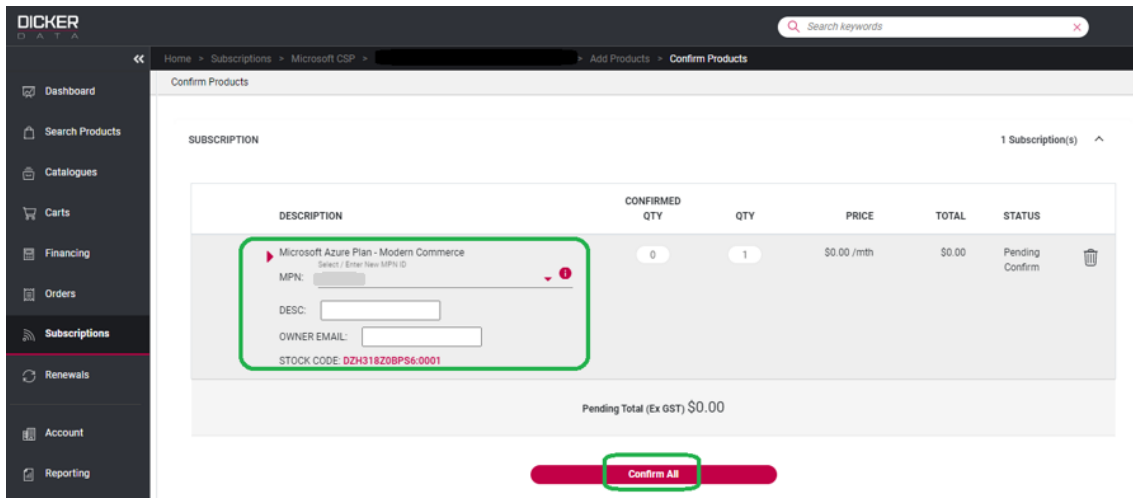
To add an Azure Plan Subscription:

- Click the **Add New Product** button, in the Azure usage **Subscription** section to open the **Add Products** blade.

- Select **Microsoft Azure**

- Review the added subscriptions and click on **Confirm** to be taken to the **Confirm Products** blade

- Enter a **Subscription Description**, **MPN** and the **Owner Email**

- Click **Confirm all** to include the subscription.
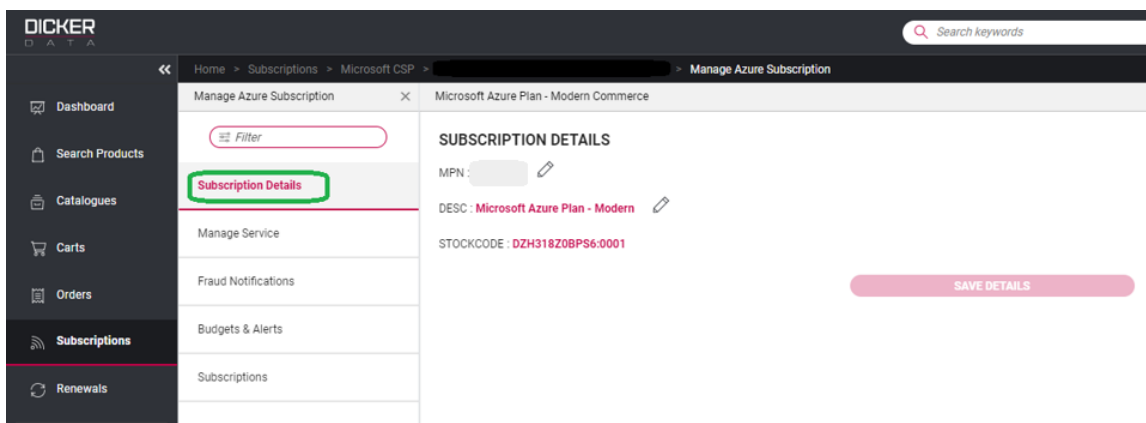
Australia
Freecall 1800 688 586
www.dickerdata.com.au
ABN 95 000 969 362
238 Captain Cook Drive, Kurnell NSW 2231

New Zealand
Freecall 0800 337 253
www.dickerdata.co.nz
NZBN 9429038460227
68 Plunket Avenue, Auckland 2104

- Once you click on **Confirm All** you will get a pop up to enter your PO number.

## How to Manage Azure Subscriptions
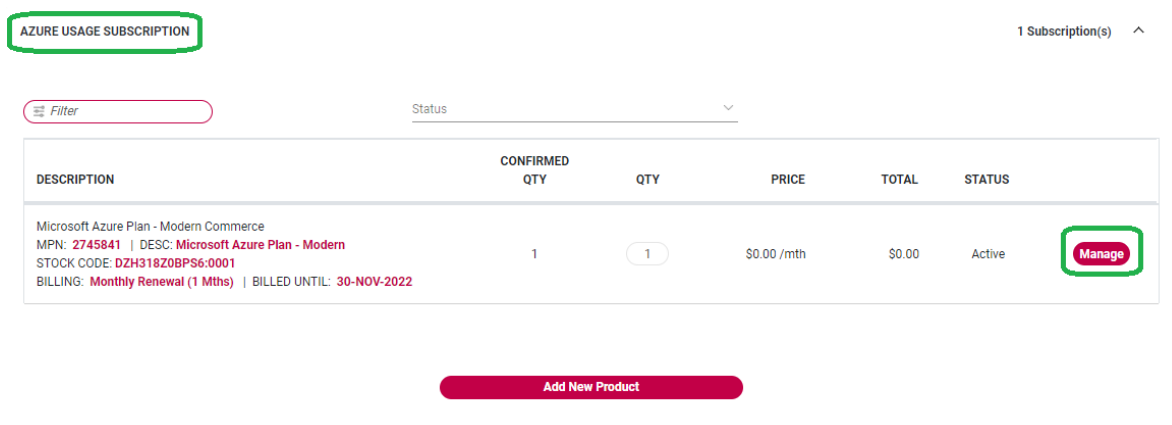
Subscription Details: This allows you to change the **MPN** number and subscription description **DESC**

Australia
Freecall 1800 688 586
www.dickerdata.com.au
ABN 95 000 969 362
238 Captain Cook Drive, Kurnell NSW 2231

New Zealand
Freecall 0800 337 253
www.dickerdata.co.nz
NZBN 9429038460227
68 Plunket Avenue, Auckland 2104

Manage Services: This will suspend resources, you will continue to accrue charges as per this subscriptions existing commitment. Additional commitments will also accrue if auto-renew is still enabled
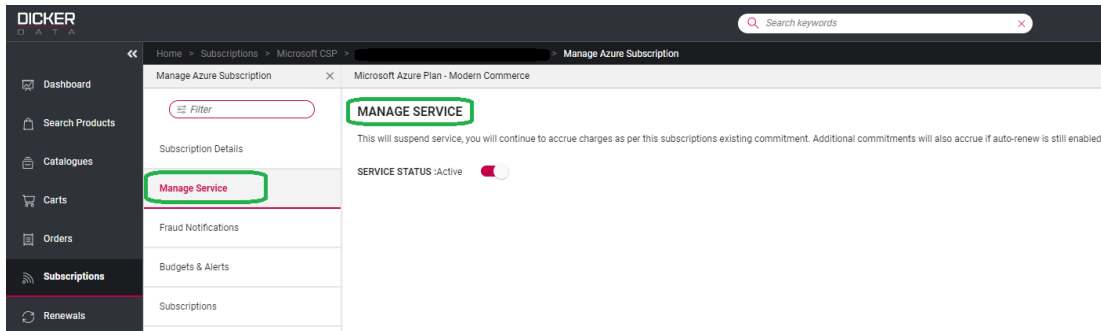
Fraud Notifications: Partners who are impacted will only receive notification from Microsoft here.
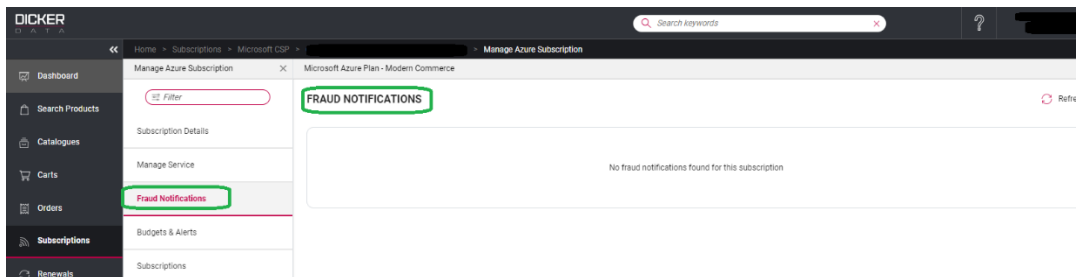
Budget Details: These options may help you spot misconfigured services or unusual trends that might suggest fraud.

Subscriptions: This allows you to create additional Azure subscriptions under your Azure Plan.
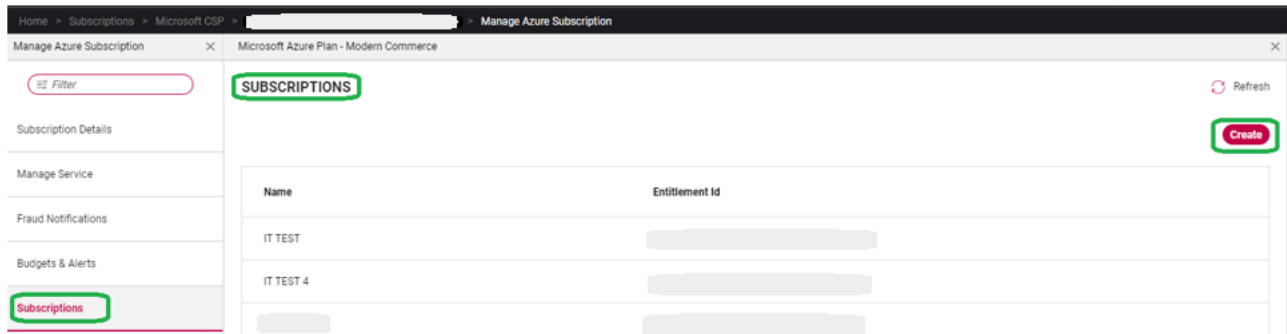
How to buy Reserved Instances

Azure Reserved Instance allows the tenant to reserve Microsoft (Virtual Machines) for a specific term e.g. 1 year or 3 year. These Microsoft can be purchased as one upfront payment or as Monthly payments for the term.

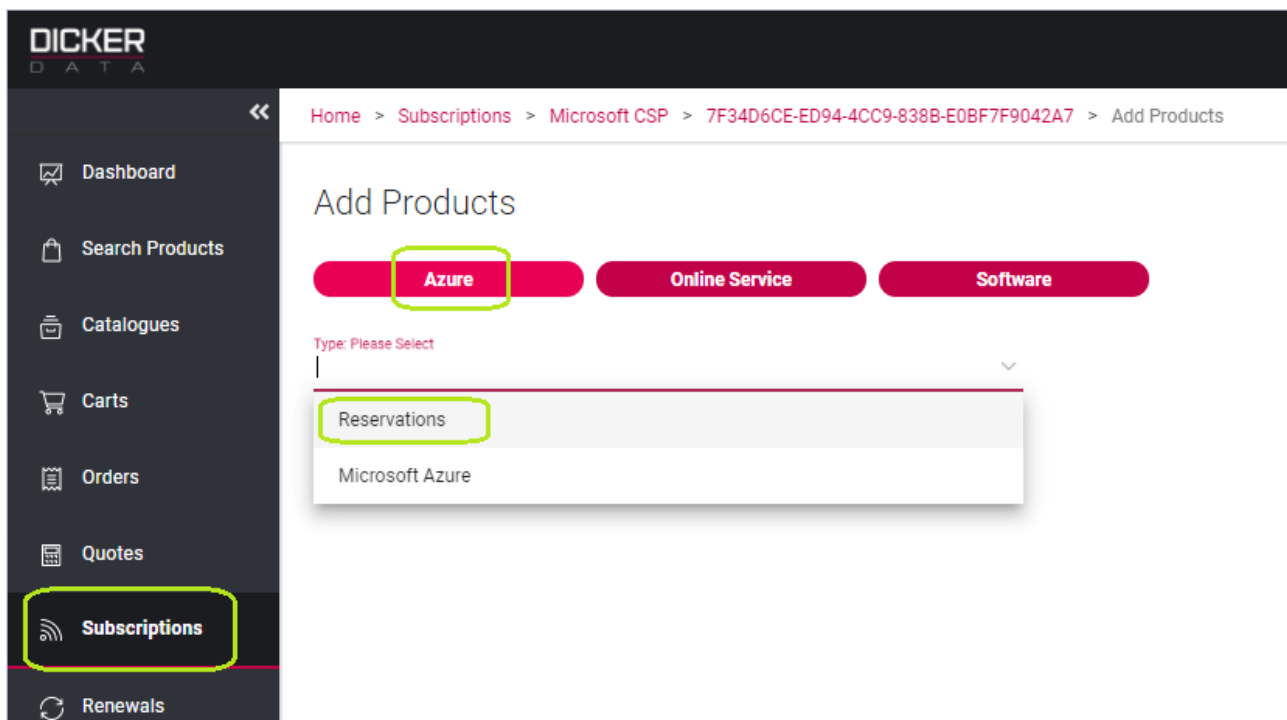You will need to have an active Azure Subscription in order to add an Azure Reserved instance. For assistance regarding Azure requirements please contact your local Dicker Data representative.

- Click the **Add New Product** button, in the **Subscription** section to open the **Add Products** blade.
- Click on **Azure** and then select **Reservations**

Australia
Freecall 1800 688 586
www.dickerdata.com.au
ABN 95 000 969 362
238 Captain Cook Drive, Kurnell NSW 2231

New Zealand
Freecall 0800 337 253
www.dickerdata.co.nz
NZBN 9429038460227
68 Plunket Avenue, Auckland 2104

- Select the **Reservations Type** from the drop-down list

- Enter the **Usage Subscription**, **Location,** and the **Payment frequency**

- Type the **Qty** of the required subscription and click **Add**.

- Review the added reservations and click on **Confirm** to be taken to the **Confirm Products blade**

- Enter the **MPN ID** and click on **Confirm All**

- Once you click on **Confirm All** you will get a pop up to enter your PO number.

- Added Azure Reserved Instances will be listed in the **Reserved Instances** section of the selected Tenant.

Australia
Freecall 1800 688 586
www.dickerdata.com.au
ABN 95 000 969 362
238 Captain Cook Drive, Kurnell NSW 2231

New Zealand
Freecall 0800 337 253
www.dickerdata.co.nz
NZBN 9429038460227
68 Plunket Avenue, Auckland 2104

Reporting

Accessing Available Reports

Subscription Reports are listed in the **Reporting Dashboard** which can be found either at:

- the **Reporting** menu selection
- or at the Tenant Management blade
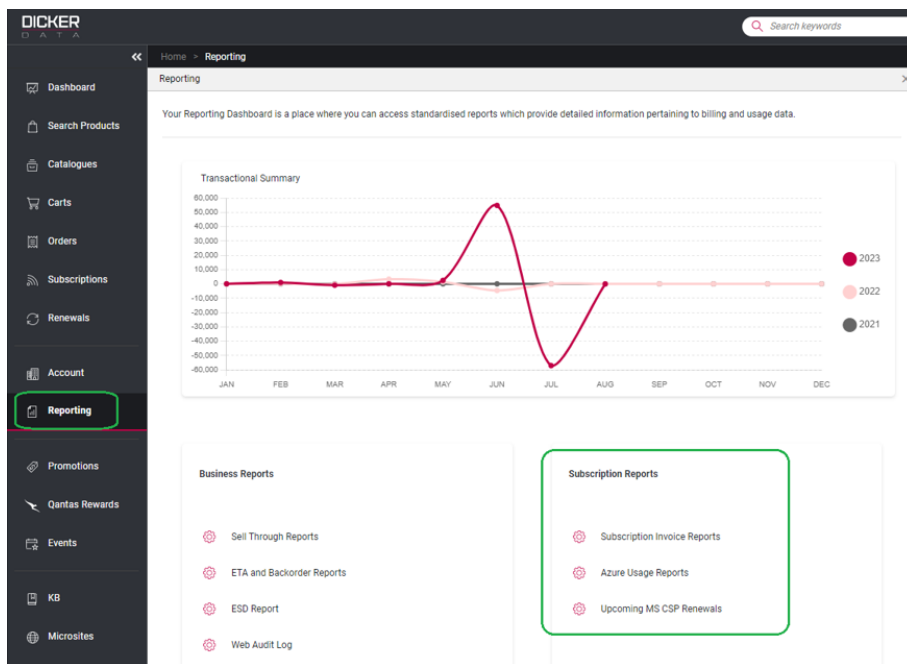
Australia
Freecall 1800 688 586
www.dickerdata.com.au
ABN 95 000 969 362
238 Captain Cook Drive, Kurnell NSW 2231

New Zealand
Freecall 0800 337 253
www.dickerdata.co.nz
NZBN 9429038460227
68 Plunket Avenue, Auckland 2104

Types of Available Reports

Subscription Invoice Reports

Subscription Invoice Reports produces an Excel report listing all Subscription Invoices within a given date range with the following worksheet tabs:

- **Invoice Summary tab** – Lists the total Subscription Invoice Amount for each Tenant.

- **Invoice Details tab** – Lists all the Subscription Invoices for each Tenant.

- **Tenant Details tab** – Tabs are created for each Tenant listing all the Subscription Invoice details for each of the listed Tenants.

Azure Usage Reports

The **Azure Usage Reports** blade allows you to display data on the **Billed Usage** within a given date range.

- Selecting **Billed Usage** will display a list of Tenants and their current usage details.

The Download option allows you to download the usage details to an Excel report which will include the following worksheet tabs:

- **Tenant Summary tab** – Lists all the Subscriptions and Usage details for each Tenant.

- **Tenant Details tab** – Tabs are created for each Tenant listing all the Subscription and Usage details for each of the listed Tenants.

Individual Download Excel reports are also available for each tenant which can be found in the **Action** column for each Tenant record.

Annuity Information Report

The **Annuity Information Report** blade displays the **Microsoft CSP Subscription** details for each End User.

The Download option allows you to download the list of End Users and the CSP Subscription details for each End User. The Report includes the following worksheet tabs:

- **Summary tab** – Lists all the End Users and the Total amount for each listed Domain.

- **Details tab** – Lists all the SKUs and details for all the End Users.

- **End User Details tab** – Tabs are created for each End User listing the Subscription details including Start Date and Expiry Date.

Australia
Freecall 1800 688 586
www.dickerdata.com.au
ABN 95 000 969 362
238 Captain Cook Drive, Kurnell NSW 2231

New Zealand
Freecall 0800 337 253
www.dickerdata.co.nz
NZBN 9429038460227
68 Plunket Avenue, Auckland 2104

Upcoming MS CSP Renewals

The **Upcoming MS 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, Azure Reserved Instances and Software Subscriptions expiring in the specified date range. Those which have expired are highlighted for easy visibility.

Australia
Freecall 1800 688 586
www.dickerdata.com.au
ABN 95 000 969 362
238 Captain Cook Drive, Kurnell NSW 2231

New Zealand
Freecall 0800 337 253
www.dickerdata.co.nz
NZBN 9429038460227
68 Plunket Avenue, Auckland 2104

NCE Orders Report

The **NCE Orders Report** displays purchases within the previous 7 days. This report is downloadable as an Excel file.

Australia
Freecall 1800 688 586
www.dickerdata.com.au
ABN 95 000 969 362
238 Captain Cook Drive, Kurnell NSW 2231

New Zealand
Freecall 0800 337 253
www.dickerdata.co.nz
NZBN 9429038460227
68 Plunket Avenue, Auckland 2104

Web Audit Log

The **Web Audit Log** presents a record of actions performed, but it's restricted to providing data for a maximum of two weeks at a time. Should you need information for multiple date ranges, you'll have to generate distinct reports for each period.

Australia
Freecall 1800 688 586
www.dickerdata.com.au
ABN 95 000 969 362
238 Captain Cook Drive, Kurnell NSW 2231

New Zealand
Freecall 0800 337 253
www.dickerdata.co.nz
NZBN 9429038460227
68 Plunket Avenue, Auckland 2104

CSP Billing

Modern Based Billing

These invoices will include both variance charges as well as cycle charges on a single invoice simplifying the process for your accounts team.

Dicker Data will issue a separate invoice for Modern subscriptions for the previous calendar month. These invoices will include Software Licenses, Perpetual Licenses, Reserved Instances and Azure Plans.

Consumption Based Billing

Dicker Data will issue a separate invoice for consumption-based subscriptions with usage data for the previous calendar month. Example: You will receive an invoice generated in December for all usage in November.

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 (**AU Only**) etc. If you have multiple Digital wallet IDs set up, then each individual digital wallet ID will be on a separate invoice.

P2P Transfer Check list

This Step-by-Step process will ensure a smooth transfer to Dicker Data from your existing Indirect CSP Provider.

The steps below must be completed in full:
Step 1: Partner

Visit **www.dickerdata.com.au** and sign in with your username, account number and password.

Select Subscriptions option **https://portal.dickerdata.com.au/manageSubscriptions**

Australia
Freecall 1800 688 586
www.dickerdata.com.au
ABN 95 000 969 362
238 Captain Cook Drive, Kurnell NSW 2231

New Zealand
Freecall 0800 337 253
www.dickerdata.co.nz
NZBN 9429038460227
68 Plunket Avenue, Auckland 2104
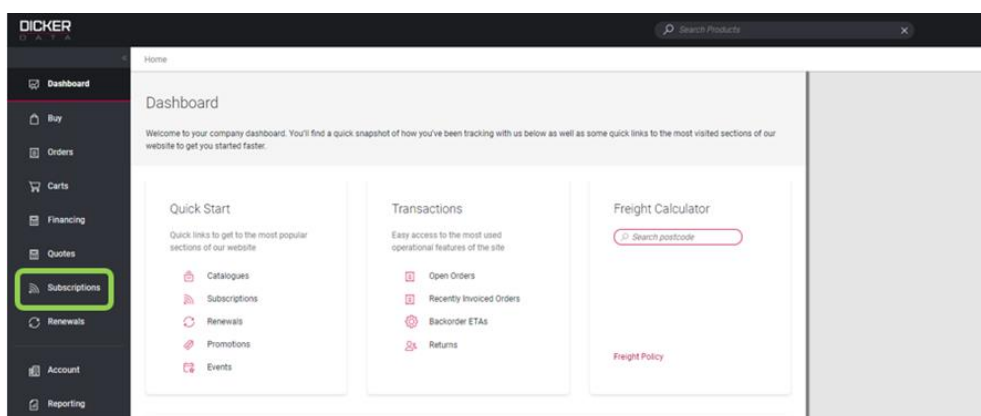
Step 2: Partner

Estimated Timeline for uploading bulk tenant list 1 hour if no errors.

Estimated Time for associating tenants: 1 Day (might be longer depending on the information available)

Associate your tenants on the Dicker Data website either individually or by bulk

Option 1. If the End User has Access/Global admin rights, ensure the Association Email is sent to their email address (We recommend you talk to your End Users before you start the process so they are aware)

Option 2. If you (the partner) have global admin rights to your End Users you could enter your email address as these notifications would be sent to you instead of the End User.
Please note the association request needs to be accepted by a global admin for the end user's tenancy.

Bulk association is a feature that allows you to associate multiple tenants in a single action. This helps you to avoid the manual process of associating each tenant individually with each subscription. (Request a full list of tenants from your current provider as this will help in this section)
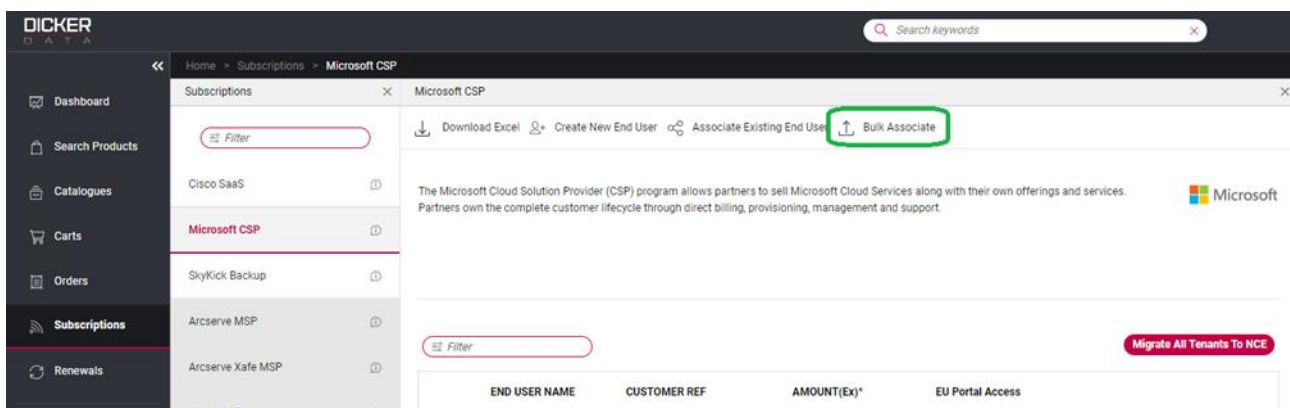
Click on "Download" to populate the template enter the mandatory columns Upload the completed CSV file and review the summary. You can edit or remove any lines before sending them.
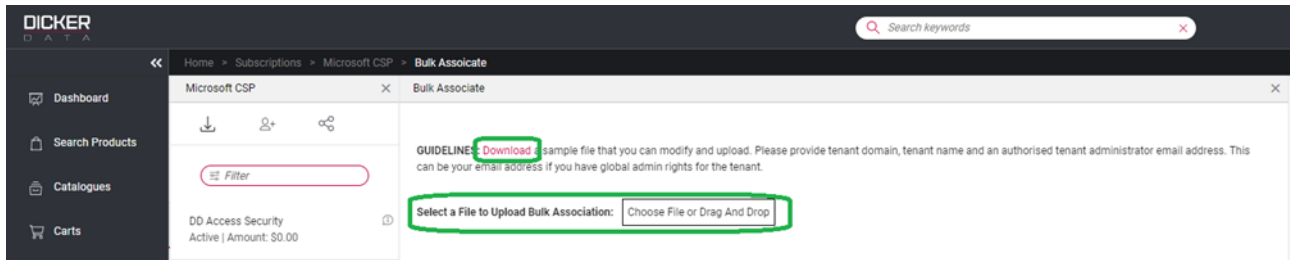
If there are Azure subscription that will be transferring with this request, a new $0 subscription under the New Indirect Provider will need to be created so the transferring subscription has a destination.

The bulk order creation feature allows you to create multiple Azure subscriptions for multiple tenants at once. This saves you time and hassle when having to upload multiple Azure subscriptions to your tenants.

Click on "Download" to populate the template enter the mandatory columns Upload the completed CSV file and review the summary.

Click on "Download" to populate the template enter the mandatory columns Upload the completed CSV file and review the summary.

Australia
Freecall 1800 688 586
www.dickerdata.com.au
ABN 95 000 969 362
238 Captain Cook Drive, Kurnell NSW 2231

New Zealand
Freecall 0800 337 253
www.dickerdata.co.nz
NZBN 9429038460227
68 Plunket Avenue, Auckland 2104
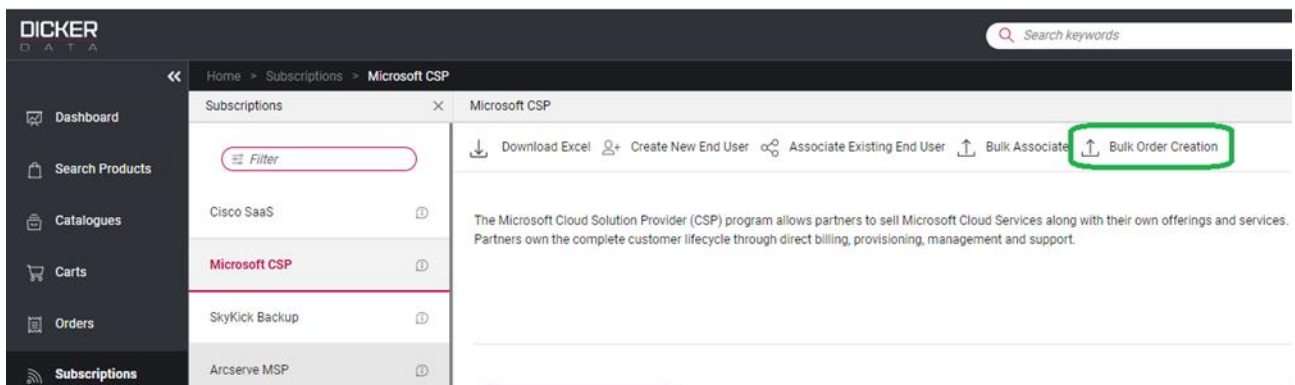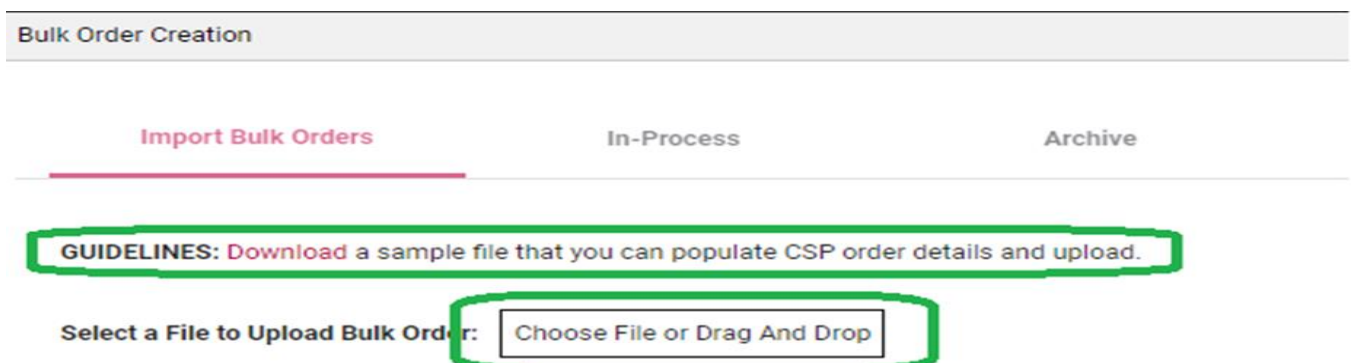
Step 4: Partner

Estimated Timeline: 1 Day if there are no errors

Once you have done the above steps, email **microsoft.sales@dickerdata.com.au** / **Microsoft.sales@dickerdata.co.nz** with the below information Provide Dicker Data the below information to start the transfer from the current Indirect CSP provider.

- Customer name: (End User)
- Customer email: (Global Admin)
- Current partner name: (Tier 1 Name)
- Current partner Microsoft ID: (Microsoft ID Number (Account Settings>Entra Profile)
- Reseller (MPNID)

Transfer requests | Add new

Invite the customer's current partner to transfer billing ownership of Azure subscriptions, Reservations, Savings plans and/or new commerce license-based subscriptions to your billing account. By sending this transfer request, you acknowledge and agree that the transfer items selected by your customer's current partner will transfer to your account as of the Transition Date. Any moved items may be used for this customer only. You agree that you may not cancel any prepaid subscriptions (including Reservations) transferred to your account. If the recipient does not act in 30 days, the transfer request will expire.

Before you proceed:

- Confirm that the customer has identified the Azure plan subscriptions, Reservations, and Savings plans and/or new commerce license-based subscriptions to be transferred and has notified the current partner.
- Ensure that the customer has accepted your terms and conditions since you will be responsible for charges based on the existing billing terms and frequency for subscriptions after the transfer is complete.
- If you are transferring an Azure reserved instance or Azure savings plan and the billing currencies of the current and target partners are different, the Azure reserved instanced or Azure savings plan will be cancelled at the start of the next billing cycle. In order to continue service, the future partner will need to repurchase the Azure reserved instance or Azure savings plan.

Details

Customer name *

Customer email * ⓘ

Current partner name *

Current partner Microsoft ID * ⓘ

Reseller (MPNID) *

| Indirect reseller(MPNID) ▾ |

By opting in to this process, you represent and warrant to Microsoft that you are initiating/participating in this transfer in good faith, and agree to indemnify, defend, and hold Microsoft harmless from and against any and all third-party claims arising from or relating to this transfer. For Azure items, you will be invoiced for usage from the date this request is accepted and will be responsible to Microsoft for all ongoing, scheduled billings related to the transfer items as of the Transition Date, provided that Microsoft will move any prepaid subscriptions (including Reservations and Savings plans) for the transfer items to your account. License-based subscriptions will result in new subscriptions being created under your partner account. You assume the financial responsibility of the new subscriptions being created from the data transferred to the end of the subscription's term.

[Send transfer request] [Cancel]

Step 5 Dicker Data

Estimated Timeline: 1 Day to send the transfer requests

Dicker Data will send the transfer requests to incumbent Indirect CSP Provider through Partner Centre

The incumbent Indirect CSP Provider needs to approve the transfer and if they do not approve the transfer within 30 days the transfer request expires and must be re-submitted.

Partner – *We recommend you notify your incumbent Indirect CSP Provider to expedite the transfer to ensure it is not delayed.*

Important Notes

Transfer requests only support Azure Plan subscriptions, reservations, savings plans and/or new commerce license-based monthly and annual subscriptions. **_Legacy Subscriptions, Software subscriptions, perpetual software, and third-party subscriptions cannot be transferred using this transfer capability._**

Important to Note _Most Azure Marketplace products can be transferred with their Azure Subscription. However sometimes a product will be ineligible. An error message is generated when something is ineligible at which point it is recommended that all Azure Marketplace products under the sub be cancelled. These can be reprovisioned once the sub completes transfer._

Foreign Principal Rights _does not automatically get provided to the subscription once transferred. We recommend adding this by having a user that has global admin rights to the subscription run the PowerShell for this. Learn more_ **here**_._

Our 'AdminAgents' resource ID (ObjectID) : e727c534-c0e2-4440-81b0-f5a28a5dac51

Azure Cost Management was previously enabled via the old Indirect Provider the settings do not carry across with the transfer.

Australia
Freecall 1800 688 586
www.dickerdata.com.au
ABN 95 000 969 362
238 Captain Cook Drive, Kurnell NSW 2231

New Zealand
Freecall 0800 337 253
www.dickerdata.co.nz
NZBN 9429038460227
68 Plunket Avenue, Auckland 2104