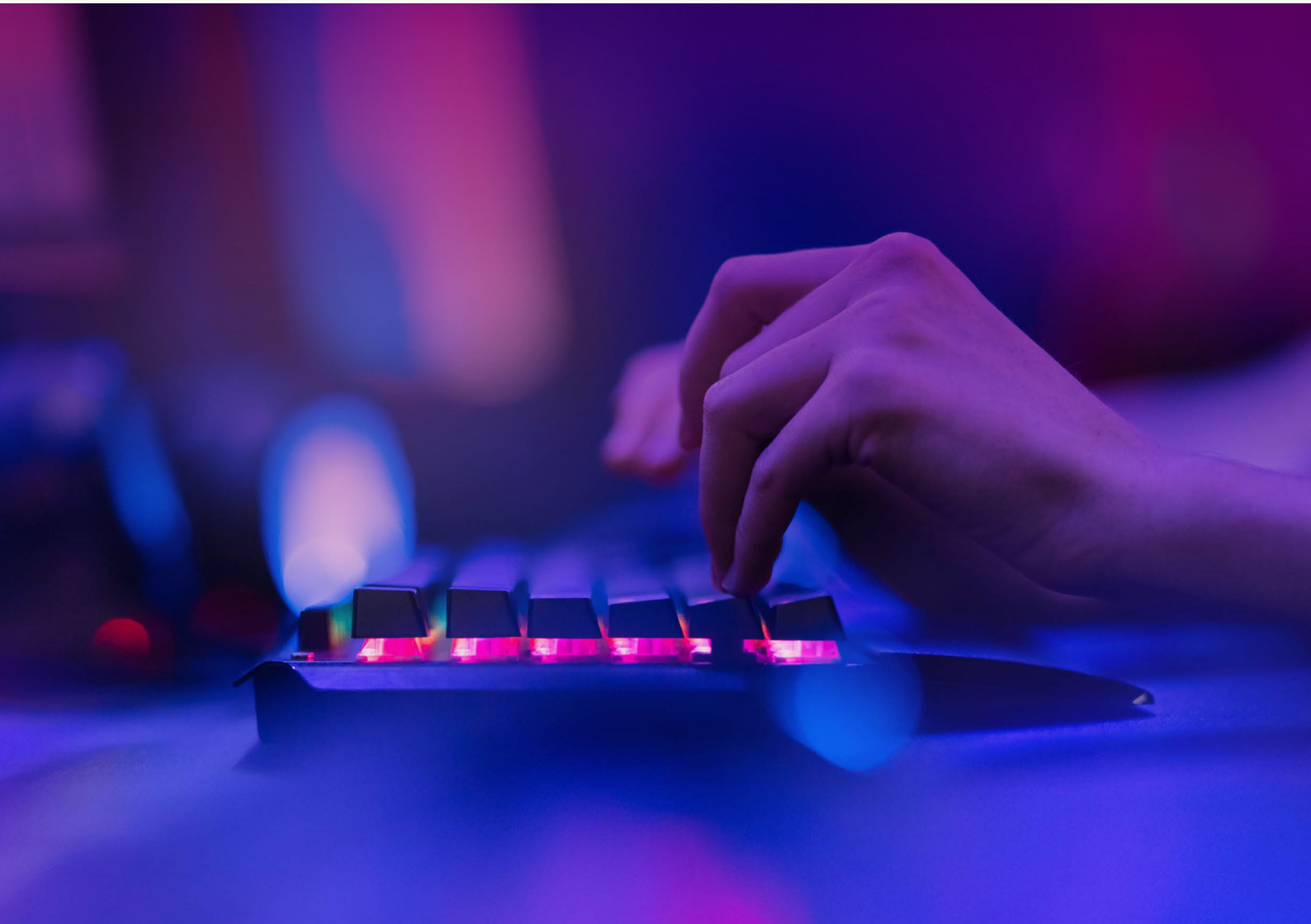




Reseller Admin Portal



USER GUIDE



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1. The Reseller Admin Portal

A. Microsoft Reseller Attestation as of February 23, 2022

i) The Insight Cloud Commerce Platform deployed a revised set of Site Terms and Conditions on February 23, 2022 in order to align with Microsoft Reseller Attestation requirements.

the first time you log in to the reseller portal you will be asked to accept our TC&s and agree to the microsoft Attestation. If you require a copy of our T&C, please contact you CSM/AM

ii) The Microsoft Attestation reads as follows:

"I confirm that my organization is acting as an Indirect Partner when choosing a Reseller and as a Direct Partner in the absence of selecting a reseller. I confirm that I am not reselling products purchased within this order to partners that are affiliated with my parent organization."

iii) Insight Site Terms and Conditions (Section 2.1.3.d)

(Partner Attestation. Client agrees and attests that when purchasing Cloud Services from Insight, Client (i) is acting as an indirect partner of Insight, and (ii) is not and will not at any time be reselling products purchased from Insight to partners that are affiliated with its parent organization and will not itself use such products for its own internal use (or that of its affiliates).

B. Reseller Admin Portal Overview

The Reseller Administration Portal (RAP) is a web-based application offering you the ability to:

- a) Link to your end customers storefront, where customers can self-serve, offering them the ability to buy subscriptions, and self-manage licenses and users (for storefront management only);
- b) Log in to your end customer storefront to manage the subscriptions, licenses and users;
- c) Set credit limits for your end customers;
- d) Manage end customer payment status;
- e) Access statements, reports, and other relevant details.

Please note: all license assignments and user creation should be done directly in the M365 Admin portal of your end customer.

The home page, or Dashboard of the Reseller Admin Portal (RAP) provides the ability to navigate & perform functions used to manage your business.

The screenshot shows the Insight Reseller Admin Portal interface. At the top, there's a header with the phone number 1.800.INSIGHT, a 'Back to insight.com' link, a 'Log out - EMEA DEMO TEST' button, and 'Tools' and 'Language' dropdown menus. Below the header, a user profile bar shows 'ET Test Reseller - e10066831' with a red box labeled '1' next to it. The main navigation menu on the left includes links to Dashboard (2), Statements (3), Products (4), Orders (5), Reports (6), Employees (7), Invoices (8), and Account (9). The main content area is titled 'Dashboard' (10) and features a search bar, filters for 'Display per page: 10 results', 'Created from', 'Created to', and 'Select status', and a 'Search' button. Below this is a table of customers with columns for Customer ID, Customer, Credit limit, Balance, Created date, Status, and Login as. The table lists four customers: R000000334 (Insight Test 2020), R0000003UW (TEST14), R0000004MO (Dana's Awesome Software), and R0000004MP (McGregor Consulting). A red box labeled '9' is next to the 'TEST14' customer name. To the right of the table, there's a 'View storefront' link (11) and a 'Login as' button (12) with a red arrow pointing to it.

1. Tools:

- (a) My cloud dashboard
- (b) Manage my account
- (c) Reseller guide

2. Statements:

- (a) Customer Statements

3. Products:

- (a) Listing of Products by category
 - (i) Ability to set customer specific pricing, or published prices for all
 - (ii) Publish or unpublish products for a customized catalogue

4. Orders:

- (a) Order history for all customers

5. Reports:

- (a) Microsoft Legacy: Billable Items Report
- (b) Microsoft NCE: NCE Billable Items Report

6. Employees:

- (a) Add, De-activate, Manage user access to the RAP

7. Invoices:

- (a) Your Invoices from Insight

8. Account:

- (a) Manage your account information
- (b) Link your PayPal account

9. Dashboard:

- (a) Listing of all end customers

10. Dashboard Filter

- (a) Ability to sort, edit, and view dashboard

11. View Storefront:

- (a) Access to your public storefront
- (b) Create New End Customer Accounts

12. Login As:

- (a) Icon to log in as the end customer
- (b) Buy & Manage on the customer's behalf

2. Notifications

When you submit the New Reseller Setup Form you will have the ability to define the contact email to be used to send event notifications to your end customers; however, if not defined, the default “from” email address will be: DoNotReply@MSPstores.com.

a. Event Notifications:

- (i) Order Confirmations
- (ii) Change Orders

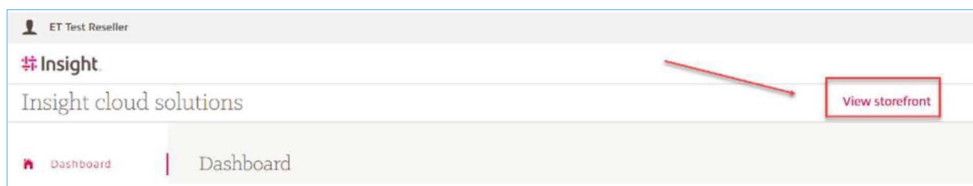
By default, the designated Reseller Admin on your account will be copied on event notifications, if an alternative email address is not provided.

3. Adding New Customer

3.1 Complete the registration form

New end customers can be added by:

1. The end customers themselves via Self-Registration: Send the customer the link to your White Label Storefront, offering them the ability to self-register.
 - (i) The link to your customized end customer Storefront is in the upper right-hand corner of the Reseller Admin Portal (RAP).



- (ii) Note: This link will be a generic Insight provided domain unless you opted to host the storefront on your own domain when completing the Insight Reseller Migration form or have requested customization.

NOTE: When end customers are creating their own accounts, please ensure they are using a valid email address

2. You (The Reseller) by completing the registration page on their end customer’s behalf. You will use the “View storefront” link to create new customers.

The illustration below demonstrates the view when accessing the White label Storefront:

 A screenshot of the White Label Storefront login page. The page has a light gray background. On the left, there is a 'Login' section with the text 'Already have a Cloud Management Platform account? Simply sign in to your account with your username and password.' Below this are two input fields for 'Username *' and 'Password *', followed by a blue 'Login' button. At the bottom left, there is a link 'Forgot your password?'. On the right, there is a 'Explore cloud' section with the text 'Browse and shop cloud products, services and support all in one centralized location.' Below this is a red-bordered button labeled 'Create account'.

NOTE: When you create an account on the end customer's behalf, please consider the following:

- a. This email address cannot be the same as the address used as the Admin for the Reseller Admin Portal.
- b. Any email address that hasn't been used before can be used to create the account. The platform does not require the user to have access to the email address filled in the form to complete the end customer account creation.
- c. However, we strongly recommend using a valid email address that you have access to.

Please complete the following fields, as per the below screenshot:

The screenshot shows a 'Create account' form with the following fields and labels:

- 1** Email Address *
- 2** Password *
- 3** Confirm Password *
- 4** First Name *
- 5** Last Name *
- 6** Company Name *
- 7** Line of Business *

Below the fields, there is a 'Back to Login' link and a blue 'Create account' button.

1. Email address

2. Password

3. Confirm Password

4. First Name

5. Last Name

6. Company Name

7. Line of Business

a. Corporate

b. Government

c. Education

d. Non-Profit

e. Note: All customers will have access to "Corporate" products; specific line of business (Government, Education, Non-Profit) must be selected during account creation to provide customers with access to related products. Microsoft Terms & Conditions apply. For a change that would happen after the account creation, please contact your Insight representative.

NOTE: Once the account is created, you will need to contact your Insight representative to create, and/or configure the Tenant Attributes of the end customer to activate the account.

When done, select **"Create Account"**, and the new customer will be created on the RAP; however, you now need to create a new Microsoft Tenant if the customer does not have one, or link the existing Tenant of your new customer.

Create account

Email Address *
exampleguide@gmail.com ✓

Password *
***** ✓

Confirm Password *
***** ✓

First Name *
Example ✓

Last Name *
Guide ✓

Company Name *
Exampleguide ✓

Line of Business *
Corporate ✓

[Back to Login](#) **Create account**

3.2 Create a new tenant or link an existing one

- (i) Once the account has been created it requires a Microsoft Tenant to be associated to
- ii) There are two options available:

1. Create a new Microsoft tenant

- a. Select the "Create free subdomain" option as illustrated below:

Welcome, **Example**

Subdomain

Microsoft account

Every new Office 365 account is provided with a free subdomain similar to example.onmicrosoft.com. To transfer an existing Office 365 account, please enter your current subdomain or create a new one below.

☒ Create free subdomain ☐ Enter existing subdomain

.onmicrosoft.com **Check Availability**

The subdomain name can only contain Latin letters and digits. It should be no more than 25 characters long.
Ex: For mytenant.onmicrosoft.com, enter "mytenant".

Continue

- b. Enter the desired subdomain to be used by the customer tenant, then click the "Check Availability" button. This will make an API call to Microsoft to confirm if the entered subdomain ID is available.

NOTE: Only enter the domain name to be used to check availability, where the “onmicrosoft.com” extension will be added automatically, as per the example below “waoscout4”

- (i) **Available** – If the subdomain name entered is available select “Continue” to proceed.
- (ii) **Not Available** – If the subdomain name is already in use enter another subdomain name and check for availability.
Repeat this process until an available subdomain name is identified.

Welcome, **Example**

Subdomain

Microsoft account

Every new Office 365 account is provided with a free subdomain similar to example.onmicrosoft.com. To transfer an existing Office 365 account, please enter your current subdomain or create a new one below.

☒ Create free subdomain
 ☐ Enter existing subdomain

exampleguide

Check Availability

Available
OR
Not Available

The subdomain name can only contain Latin letters and digits. It should be no more than 25 characters long.
Ex: For mytenant.onmicrosoft.com, enter "mytenant".

Continue

2. Link an existing subdomain

- a. Select “Enter Existing subdomain”
- b. Enter the subdomain name associated with the customer Tenant ID.
- c. Select “Check Availability” to process the API call to Microsoft in order to validate the subdomain. Once validated the “Continue” button will activate and you can proceed to enter the customer address.

Welcome, **Example**

Subdomain

Microsoft account

Every new Office 365 account is provided with a free subdomain similar to example.onmicrosoft.com. To transfer an existing Office 365 account, please enter your current subdomain or create a new one below.

☐ Create free subdomain
 ☒ Enter existing subdomain

exampleguide

Check Availability

The subdomain name can only contain Latin letters and digits. It should be no more than 25 characters long.
Ex: For mytenant.onmicrosoft.com, enter "mytenant".

Continue

3.3 Add and validate the end customer's address

Enter a valid address for the customer and click on "Confirm Address".

Welcome, **Cloud**

Subdomain
waoscout4.onmicrosoft.com

Account address

Address 1*
27A Foley St

Address 2

City*
London

ZIP/Postal code*
W1W 6DY

Country*
United Kingdom

Phone
1-123-456-7890

Organization registration ID

Previous step

Confirm address

NOTE: "Organizational registration ID" is a Microsoft Partner Center requirement in European countries.

- The address validation process may offer recommendations based upon the information entered. Select the correct address and "Save Address". Select "Edit Address" if changes are needed and then reconfirm.
- Upon address confirmation the platform will make the API call to Microsoft in order to create the tenant for your end customer. This process may take a few minutes depending on processing times.

3.4 Accept the Reseller Relationship

(i) If you created a new tenant subdomain:

The Reseller Relationship should associate the new tenant with you as the Reseller automatically. This process is Microsoft dependent and may take some time as Microsoft works through their validation processes.

(ii) If you linked an existing subdomain for an end customer:

The Global Admin (or you on their behalf) will need to log into the Microsoft Partner Center and accept the Reseller Relationship request.

Welcome, **Example**

Microsoft CSP tenant configuration
exampleguide.onmicrosoft.com

Reseller Relationship Acceptance Agreement

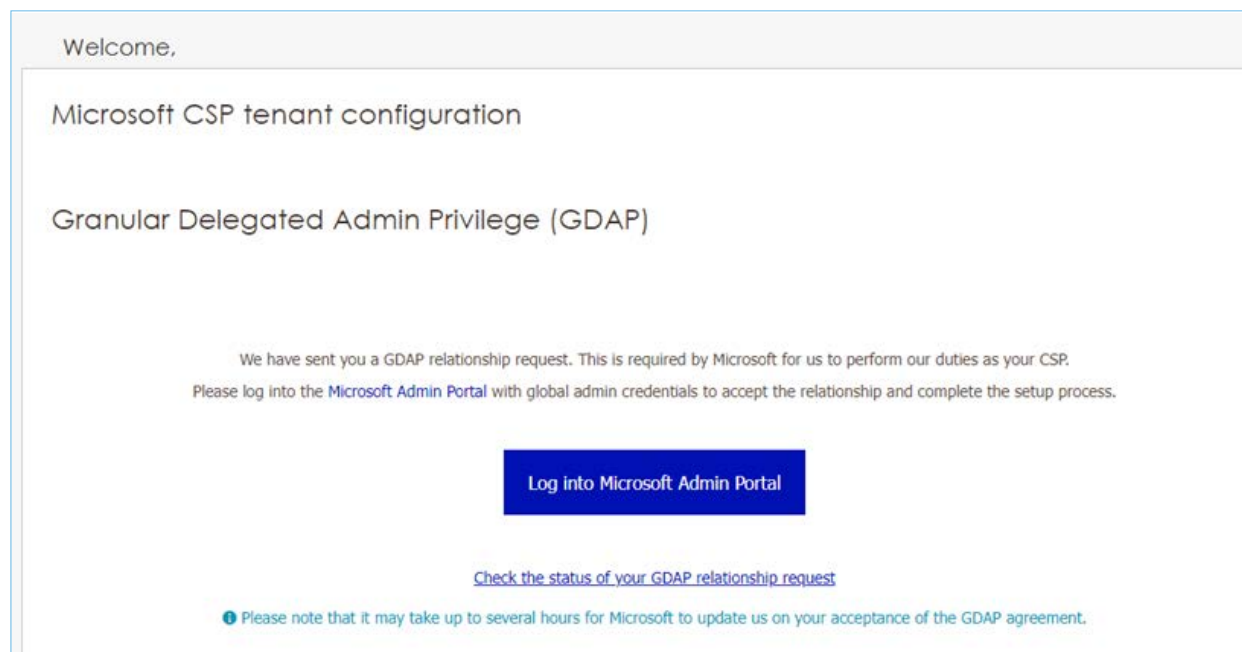
Proceed to the Microsoft 365 Administrator Portal to accept the [Reseller Relationship Agreement](#).
You will be able to continue once the agreement has been verified.
You can check the status of the agreement by clicking below. Please note, the verification process can take up to 24hrs.
Please contact your Reseller Support Team if you feel you are receiving this message in error.

Check status

3.5 Accept the Granular Delegated Admin Permissions (GDAP)

GDAP capabilities allow partners to control access to their customers' workloads in order to better address their security concerns. Partners can offer more services to customers who may be uncomfortable with the current levels of partner access. They can also offer services to customers who have regulatory needs that require least-privileged access to partners.

Once the account is linked to the CCx portal, GDAP is needed to be accepted for the Reseller to be able to access the dashboard of the customer.



By clicking on the **Microsoft Admin Portal** link, you will be prompted to sign the GDAP permissions. It should take less than 2 hours to become active in our system, depending on Microsoft processes.

Once this process is complete, the Reseller can place an order for the new customer.

4. Customer Credit Limits

Once a new customer has been added, please note the credit limit by default will be set to 1. However, you do have the ability to change it if needed.

- (i) From the Dashboard, click on the “Customer ID” for the account you wish to update:

The screenshot shows the 'Insight cloud solutions' dashboard. A table lists customer information. The row for customer ID R0000080LM is highlighted with a red box, and a red arrow points to the ID.

Customer ID	Customer	Credit limit	Balance	Created date	Status	Login as
R000009H15	Testcustomer 17.09.2022	GBP £5,000.00	GBP £0.00	Sep 17, 2022	Active	🔗
R000008XRC	July reg	GBP £1,000,000.00	GBP £0.00	Jul 16, 2022	Active	🔗
R0000080LM	Client Domaine	GBP £10,000.00	GBP £0.00	May 7, 2022	Active	🔗
R0000080LN	XXXXXXXXXXClient	GBP £1.00	GBP £0.00	May 8, 2022	Active	🔗
R000007ZT4	Ted's Wild Adventures	GBP £500,000.00	GBP £0.00	Apr 23, 2022	Active	🔗

- ii) Click on the pencil icon to the right of the credit limit.

The screenshot shows the 'Company information' page for customer R000009H15. The credit limit field is highlighted with a red circle, and a red arrow points to a pencil icon next to it.

Company information	
Testcustomer 17.09.2022	
Customer ID	R000009H15
Created date	Sep 17, 2022
Line of business	Corporate
Customer class	All 2T Customers
Credit limit	GBP £5,000.00
Outstanding balance	GBP £0.00
Account status	Active
Default billing address	Insight Campus, 9 Terry St TECHNOLOGY BUILDINGS INSIGHT CAMPUS TERRY STREET SHEFFIELD, GB S9 2BU
Default shipping address	Insight Campus, 9 Terry St TECHNOLOGY BUILDINGS INSIGHT CAMPUS TERRY STREET SHEFFIELD, GB S9 2BU

(iii) Adjust the credit as shown below:

- Select the check mark to update
- Select the X to cancel

The screenshot shows the 'Insight cloud solutions' dashboard for a reseller. The left sidebar contains navigation links: Dashboard, Statements, Products, Orders, Reports, Employees, Invoices, and Account. The main content area is titled 'Dashboard / Customer information' and displays 'Company information' for 'Testcustomer 17.09.2022'. The customer ID is R000009H15, created on Sep 17, 2022, with a corporate line of business. The credit limit is set to GBP 5000. The outstanding balance is GBP \$0.00. The account status is 'Active', and there is a 'Hold account' button. The default billing and shipping addresses are listed as 'Insight Campus, 9 Terry St TECHNOLOGY BUILDINGS INSIGH T CAMPUS TERRY STREET SHEFFIELD, GB S9 2BU'. Red annotations include a box around the 'Credit limit' field, an arrow pointing to the 'Hold account' button, and a red circle around the 'X' icon next to the 'Hold account' button.

Credit checks against the set credit limit are based upon the extended term of the purchase as compared to the available credit limit.

For example: a monthly SKU priced at \$10.00 per month for a 36-month term will check for the available credit amount of \$360.00 (\$10 x 36)

Outstanding end customer statements for a given customer will also impact available credit. (See Appendix b for additional details)

(iv) The new credit limit will now be reflected in the Dashboard.

NOTE: Net New Customer Credit Limits will default to <\$1.00 providing you the ability to validate customer orders. The result being that orders placed by a customer without a valid credit limit will be presented to you for review, and approval. Once validated, you can set the credit limit as shown above and allow future orders to proceed without review.

5. Modified Product Pricing

a) The Global Product catalog is updated monthly to reflect changes made by the publisher – products are added, removed, or modified regularly. The catalog provided to you as a Reseller includes end customer pricing at MSRP (Manufacturers Suggested Retail Price). You can:

1. Set Customer specific prices for a given product, or
2. Set Default pricing of a product for all customers

b. The Products section of the RAP offers the ability to:

1. Review Products by category
2. Review default & custom cost, price, and effective dates
3. Publish, or remove products from the catalog view of your customers
4. Create & Edit cost, price, and effective dates
 - (a) Set Default price for all customers
 - (b) Set customer specific pricing

1. Review Product by category:

a. From the Dashboard, select “Products” from the navigation bar on the left:

Insight

Dashboard

Statements

Products

Analytics, Automation, Development

Collaboration and Communication

Dynamics 365 Applications

Dynamics 365 EE Plans

Exchange Online

Identity, Security, Management

Microsoft Azure

Office 365 Business

Office 365 Enterprise

Project Management

Windows 10

Orders

Reports

Products

Product:

[Bulk Publish & Unpublish Products](#)

Product ID	Product Name	Current Cost	Custom Price	Default Price	Term	Bill Period	Published	Add/View Price
B456810AC4144E0798_12m	Microsoft 365 E5 with Audio Conferencing (Nonprofit Staff Pricing)	£235.37		£252.00	12 month contract - yearly billing	yearly	<input checked="" type="checkbox"/>	Add/View Price
F94DE68EF907471F88_12m	Office 365 E1 (Nonprofit Staff Pricing)	£23.22		£25.20	12 month contract - yearly billing	yearly	<input checked="" type="checkbox"/>	Add/View Price
1A7A1BCCC7BF4C6BBS	Microsoft Defender for Endpoint P2 for EDU	£1.81		£2.10	12 month contract - monthly billing	monthly	<input checked="" type="checkbox"/>	Add/View Price
72DAB54C7A8244629A_12m	Microsoft 365 A3 - Unattended License for students	£40.46		£46.80	12 month contract - yearly billing	yearly	<input checked="" type="checkbox"/>	Add/View Price
E009BED1510843198D	Microsoft 365 F1 (Nonprofit Staff Pricing)	£0.69		£0.74	12 month contract - monthly billing	monthly	<input checked="" type="checkbox"/>	Add/View Price
6DC6CB1D7BCB423480	Microsoft 365 F5 Compliance Add-on	£5.74		£6.60	12 month contract - monthly billing	monthly	<input checked="" type="checkbox"/>	Add/View Price
8C930D38DB614AFA83	Topic Experiences for faculty	£0.71		£0.82	12 month contract - monthly billing	monthly	<input checked="" type="checkbox"/>	Add/View Price
E14CE8D109F442D29B	10-Year Audit Log Retention Add On	£1.43		£1.64	12 month contract - monthly billing	monthly	<input checked="" type="checkbox"/>	Add/View Price
E14CE8D109F442D29B_12m	10-Year Audit Log Retention Add On	£17.15		£19.68	12 month contract - yearly billing	yearly	<input checked="" type="checkbox"/>	Add/View Price
9F8F1756F56F421E9	Microsoft 365 A5 Co	£2.17		£2.50	12 month	monthly	<input checked="" type="checkbox"/>	Add/View Price

b. Click on “Products” in the menu bar to display a list of product categories. Select the desired product category (example: Office 365 Enterprise) to view all products within that category:

Product:

[Bulk Publish & Unpublish Products](#)

Published **Unpublished**

Product ID	Product Name	Current Cost	Custom Price	Default Price	Term	Bill Period	Published	Add/View Price
B456810AC4144E0798_12m	Microsoft 365 E5 with Audio Conferencing (Nonprofit Staff Pricing)	£235.37		£252.00	12 month contract - yearly billing	yearly	<input checked="" type="checkbox"/>	Add/View Price
F94DE68EF907471F88_12m	Office 365 E1 (Nonprofit Staff Pricing)	£23.22		£25.20	12 month contract - yearly billing	yearly	<input type="checkbox"/>	Add/View Price
1A7A1BCCC7BF4C6BBS	Microsoft Defender for Endpoint P2 for EDU	£1.81		£2.10	12 month contract - monthly billing	monthly	<input checked="" type="checkbox"/>	Add/View Price

2. Review default & custom cost, price, and effective dates

On this page you will be able to search and review the following items:


1. Product ID
2. Product Name
3. Current cost (The current cost is populated with the actual cost paid by you as the Reseller for the given product and will be updated monthly when publisher product catalogs are updated to reflect current product cost)
4. Custom Price (The custom price represents the Custom Default price you set for all customers, where customer specific pricing is set and viewed in the "Add/ViewPrice" window.)
5. Default Price (The default price will be set to Microsoft's MSRP (Manufacturers Suggested Retail Price). Changes to the default price will be applied to the entire customer catalog for all customers, unless a custom price has been defined for a given customer)
6. Term (term of the listed product)
7. Bill Period (monthly / annual)
8. Published (Green = yes)
9. Add/View Price

3. Review default & custom cost, price, and effective dates

As an Insight Reseller you have the option to determine what products are published to your end customer product catalogues.

This toggle button is used to determine whether or not products are published to the end customer catalog, with the default being Published, as indicated by the green light on the button associated with the given product.

If you wish to unpublish, click on the toggle button in red to hide a product from your customer catalog.

Product : <input type="text" value="Search Products"/> 							Bulk Publish & Unpublish Products		Published	Unpublished
Product ID	Product Name	Current Cost	Custom Price	Default Price	Term	Bill Period	Published	Add/ViewPrice		
B456810AC4144E0798_12m	Microsoft 365 E5 without Audio Conferencing (Nonprofit Staff Pricing)	£235.37		£252.00	12 month contract - yearly billing	yearly		Add/ViewPrice		
F94DE68EF907471FB8_12m	Office 365 E1 (Nonprofit Staff Pricing)	£23.22		£25.20	12 month contract - yearly billing	yearly		Add/ViewPrice		
1A7A1BCCC7BF4C6BB5	Microsoft Defender for Endpoint P2 for EDU	£1.81		£2.10	12 month contract - monthly billing	monthly		Add/ViewPrice		

NOTE: Unpublishing a product will not impact customers with existing purchases of the product in question. They will continue to have the ability to manage existing subscriptions for this product until it expires. The unpublish function will remove the product from the catalog, and not allow for any new, or additional purchases of the product.

4. Create & Edit cost, price, and effective dates

a. Set Default price for all customers

Click on Add/View Price

Product ID	Product Name	Current Cost	Custom Price	Default Price	Term	Bill Period	Published	Add/ViewPrice
B456810AC4144E0798_12m	Microsoft 365 E5 without Audio Conferencing (Nonprofit Staff Pricing)	£235.37		£252.00	12 month contract - yearly billing	yearly		Add/ViewPrice

Then select the option A as per the screenshot below:

Back to insight.com
Log out - EMEA DEMO TEST

831

Add Product Price -
B456810AC4144E0798_12m

Customer	Custom Price	Effective from	Effective to
Add default pricing			1
Add customer pricing			2

Cancel

Add in the price you wish to be applied, the effective dates and save the changes:

Products

Add Product Price -
B456810AC4144E0798_12m

Customer	Custom Price	Effective from	Effective to
All	252	Jul 3, 2023	Jul 4, 2023

Add customer pricing

Cancel

b. Set customer specific pricing

Please follow the same steps as per 4.(a), and select option B for the customer pricing.

In the Add Product Price window –

- Enter the customer name & select from the drop down list of your customers,
- The green check will appear when matched
- Enter the customer specific price to be applied
- Enter the effective from & to dates
- Select the green check button to apply
- Pricing can be applied to existing & future purchases
- Follow the onscreen prompts to define

6. Placing Orders

Orders can be placed directly by the end customer on the White Label Storefront, or on their behalf as the Service Provider once tenant attributes have been configured and verified with Microsoft.

Before placing an order on behalf of your customer, you might want to consider the following:

1. Each end customer account is assigned a Credit limit. The default value is set to 1 of your local currency (see section 4, page 13)
2. If the value of an order placed exceeds the Credit Limit, the order will be set to 'In Review' status. The product WILL NOT be provisioned until you manually confirm the purchase.
3. To avoid having to manually validate each order you can replace the default Credit Limit with a higher value.
4. To do so:
 - a. Open the Customer details page by clicking on the relevant ID number from the RAP Dashboard.

The screenshot shows the 'Insight cloud solutions' dashboard for 'ET Test Reseller - e10066831'. A sidebar on the left contains navigation links: Dashboard, Statements, Products, Orders, Reports, Employees, Invoices, and Account. The main area displays a 'Dashboard' section with a search bar and filters. Below this is a table of customers. A red box highlights the 'Customer ID' column, which contains the following IDs: R000000334, R0000003UW, R0000004MO, R0000004MP, R0000005EG, and R0000005EH. The table also shows columns for Customer, Credit limit, Balance, Created date, Status, and Login as.

Customer ID	Customer	Credit limit	Balance	Created date	Status	Login as
R000000334	Insight Test 2020	GBP £200.00	GBP £0.00	Mar 8, 2020	Active	🔗
R0000003UW	TEST14	GBP £300.00	GBP £0.00	Mar 14, 2020	Active	🔗
R0000004MO	Dana's Awesome Software	GBP £200.00	GBP £0.00	Mar 20, 2020	Active	🔗
R0000004MP	McGregor Consulting	GBP £500.00	GBP £-16.82	Mar 24, 2020	Active	🔗
R0000005EG	Shelleys Awesome Software	GBP £5,000.00	GBP £0.00	Mar 23, 2020	Active	🔗
R0000005EH	Simon MC Test	GBP £200.00	GBP £0.00	Mar 23, 2020	Active	🔗

- b. On the next screen, click the pencil icon to open the text field and modify the limit to the selected amount.

The screenshot shows the 'Customer information' page for 'Testcustomer 17.09.2022'. The page is divided into two main sections. The left section contains company information: Customer ID R000009H1S, Created date Sep 17, 2022, Line of business Corporate, and Customer class All 2T Customers. The right section contains financial and address information. A red box highlights the 'Credit limit' field, which is set to 'GBP £5,000.00' and has a pencil icon next to it. Below this are fields for 'Outstanding balance' (GBP £0.00) and 'Account status' (Active). At the bottom, there are fields for 'Default billing address' and 'Default shipping address', both showing the same address: 'Insight Campus, 9 Terry St TECHNOLOGY BUILDINGS INSIGH T CAMPUS TERRY STREET SHEFFIELD, GB S9 2BU'.

c. Don't forget to validate your choice by clicking the green tick button.

Company information

Testcustomer 17.09.2022

Customer ID
R000009H15

Created date
Sep 17, 2022

Line of business
Corporate

Customer class
All 2T Customers

Credit limit GBP 4000

Outstanding balance GBP £0.00

Account status Active [Hold account](#)

Default billing address
Insight Campus, 9 Terry St TECHNOLOGY BUILDINGS INSIGHT CAMPUS TERRY STREET SHEFFIELD, GB S9 2BU

Default shipping address
Insight Campus, 9 Terry St TECHNOLOGY BUILDINGS INSIGHT CAMPUS TERRY STREET SHEFFIELD, GB S9 2BU

NOTE: If you decide to proceed like this for all your customers, it may be a good idea to set your statements to default as Paid. This keeps orders from reaching the Credit Limit so that you do not need to repeat the above operation. To do so, visit the 'Account' page from the RAP Dashboard and set the 'Default statements to Paid' slider to true.

Account information

ET Test Reseller

Company ID
e10066831

Created date
Nov 22, 2019

Line of business

Customer class
PAV 34

Username
smita.singh@insight.com

Password

Default Statements to Paid ☒

Invoice PO Number
test21

7. Manage Subscriptions

a. To place an order on behalf of your customer, use the 'login as' button from the 'Dashboard' menu.

The screenshot shows the 'Insight cloud solutions' dashboard. A sidebar on the left contains navigation links: Dashboard, Statements, Products, Orders, Reports, Employees, Invoices, and Account. The main content area displays a table of customer subscriptions. A red box highlights the 'Login as' button in the 'Status' column of the table.

Customer ID	Customer	Credit limit	Balance	Created date	Status	Login as
R000000334	Insight Test 2020	GBP £200.00	GBP £0.00	Mar 8, 2020	Active	[Login as]
R0000003uW	TEST14	GBP £300.00	GBP £0.00	Mar 14, 2020	Active	[Login as]
R0000004MO	Dana's Awesome Software	GBP £200.00	GBP £0.00	Mar 20, 2020	Active	[Login as]
R0000004MP	McGregor Consulting	GBP £500.00	GBP £ 16.82	Mar 24, 2020	Active	[Login as]
R0000005EG	Shelleys Awesome Software	GBP £5,000.00	GBP £0.00	Mar 23, 2020	Active	[Login as]
R0000005EH	Simon MC Test	GBP £200.00	GBP £0.00	Mar 23, 2020	Active	[Login as]
R0000005Y0	April Off Cycle	GBP £500.00	GBP £273.00	Apr 4, 2020	Active	[Login as]
R0000007PS	ResellerDemo	GBP £500.00	GBP £0.00	Apr 14, 2020	Active	[Login as]
R0000007PT	Judy Shop	GBP £1,000.00	GBP £0.00	Apr 21, 2020	Active	[Login as]
R00000090C	May Company	GBP £500.00	GBP £705.64	May 3, 2020	Active	[Login as]

b. This logs you into the customer's account on the White label via ASM (Assisted Service Mode).

c. Click on the arrows (1) in the top center of the screen to hide the ASM menu. Click them again to view the ASM menu.

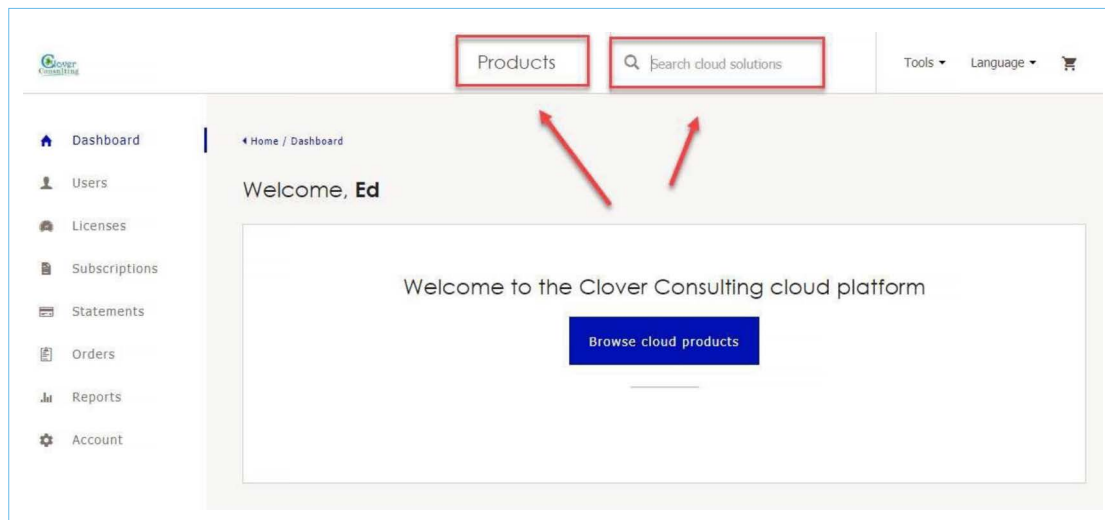
d. Click on the Dashboard (2) to return to the Reseller RAP (Reseller Admin Portal)

The screenshot shows the 'Assisted Service Mode' interface. At the top, there is a header bar with 'CUSTOMERS' and 'SESSION TIMEOUT 10:00 min'. Below this, there is a 'CUSTOMERS VIEW' header. The main content area shows a welcome message for 'Test customer' and a 'Browse cloud products' button. A red circle highlights the 'Dashboard' button in the top right corner, and a red arrow points to the 'CUSTOMERS VIEW' header.

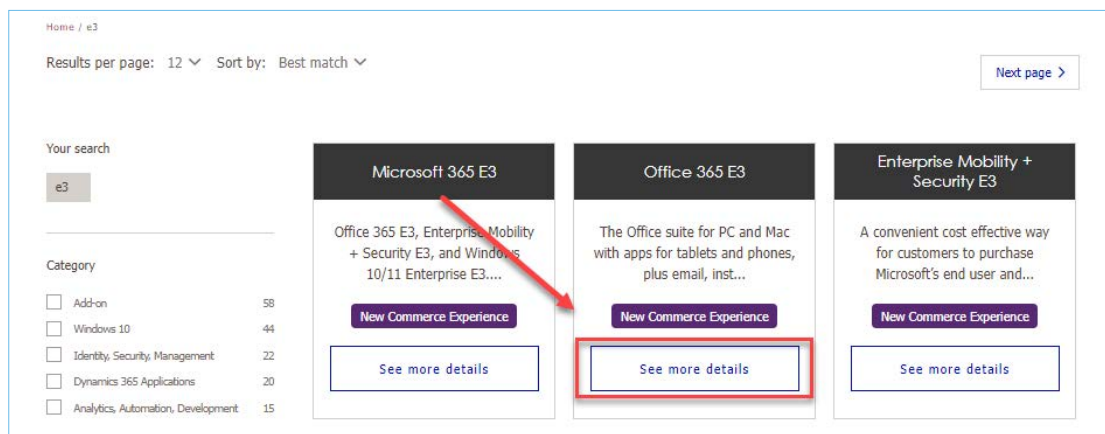
The process differs depending on whether you wish to add licenses to an existing subscription or create a new subscription entirely. That decision is up to your preference and can vary based on pricing, renewal date or internal policies.

7.1. Buy a new subscription

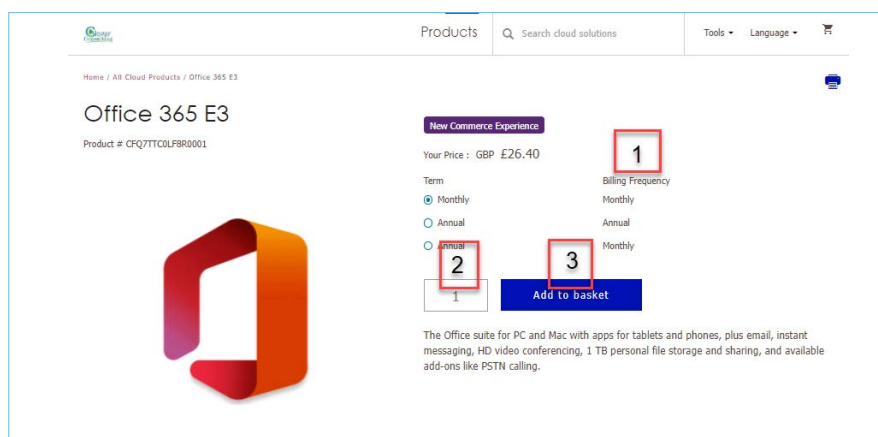
a. Click on “Products” to browse cloud solutions or enter search criteria to Search cloud products,



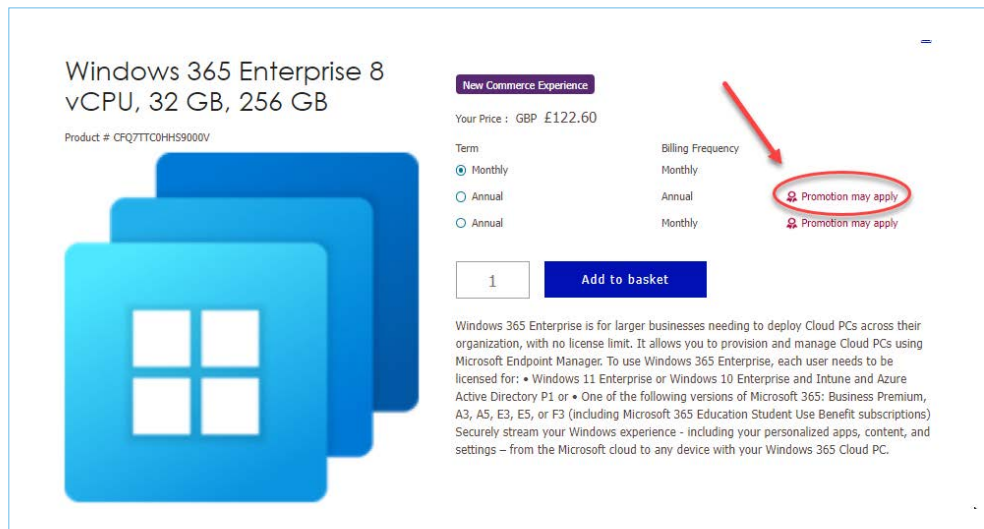
b. Click on “See More Details” to select a given product,



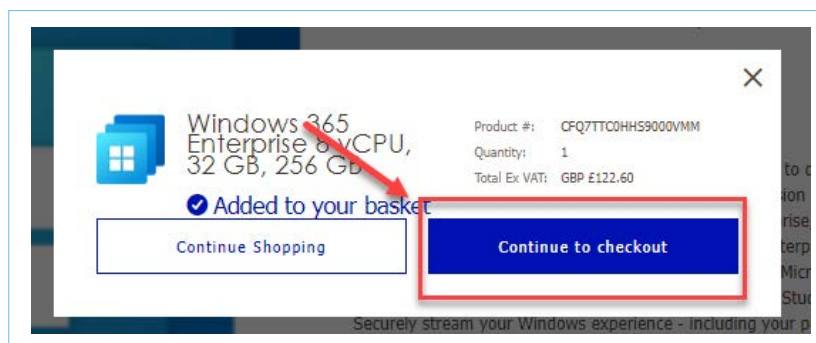
c. Select billing frequency (1), then adjust quantity (2) and click 'Add to basket' (3):



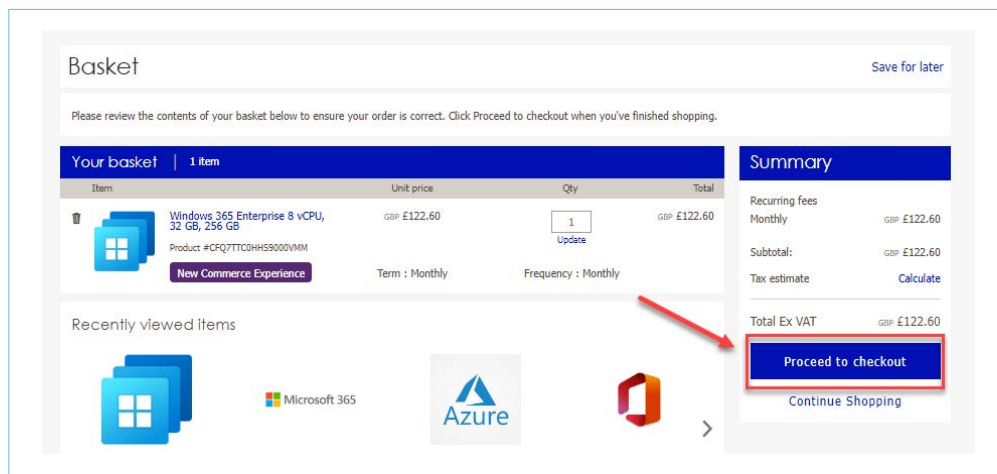
NOTE: Promotional prices will be displayed on the Product Details page when a promotion is available for a given product. Click on "Promotion available" to view the promotional offerings.



d. On the pop-up window that displays, click 'Continue Shopping' if you wish to add products to your order, or 'Continue to checkout' if you are done.



e. The following window gives you one more occasion to confirm the content of your order. If you are satisfied with the content of your basket, click 'Proceed to Checkout'.



f. The main elements of the order must be confirmed:

- (i) The payment type will always be the 'Terms' of the contract that unite the end customer, the reseller and the CSP Partner
- (ii) A Purchase Order number can be filled in. This will be displayed in your invoices under the corresponding lines.

Place order Return to basket

Fields denoted with * are required to process your order.

Payment type

Select a payment type *
Select a payment type ▼

PO number

Summary

Recurring fees
Monthly GBP £122.60

Subtotal: GBP £122.60

Tax estimate [Calculate](#)

Total Ex VAT GBP £122.60

[Continue](#)

(iii) Review the order one last time.

(iv) Confirm you accept the terms & conditions by ticking the box then click the 'Place Order' button.

Home / Checkout / Final Review Return to basket

Place order

Fields denoted with * are required to process your order.

Payment type [Edit](#)
Shipping address [Edit](#)
Payment info [Edit](#)
Review order | 1 item

Item	Term	Frequency	Unit price	Qty	Total
Windows 365 Enterprise 8 vCPU, 32 GB, 256 GB Product: #CFQ7TTC0HHS9000V New Commerce Experience	Monthly	Monthly	GBP £122.60	1	GBP £122.60

Summary

Recurring fees
Monthly GBP £122.60

Subtotal: GBP £122.60

Tax estimate GBP £24.52

Total GBP £147.12

g. At this stage, if the order amounts to less than the available Credit Limit on the customer's account, the licenses provision automatically. If the credit limit is reached, you will need to approve the order manually as showed below:

- (i) Deploy the ASM panel by clicking the double downward arrows. Click the 'Dashboard' button to return to the RAP.

Assisted Service Mode

CUSTOMERS SESSION (MEGAL 8:00 min) [Reset](#) [Dashboard](#) [Sign Out](#)

Test customer 17/09/2022 0063873334 [CUSTOMERS VIEW](#)

Microsoft will combine subscriptions into a single license pool that is accessible through the Admin Portal. For NCE subscriptions, please log into your PEBS Admin Portal to

(ii) On the RAP, navigate to your Orders tab from the left menu and arrange the data by most recent.

Insight cloud solutions

View storefront

Dashboard / Orders

Orders

Display per page: 10 results

Search

Orders from

Orders to

Search

Order number	Company	Order Type	Order status	Order date	Amount	PO number
01079564	Test ZTC	INITIAL	Completed	Nov 23, 2019	GBP £21.00	12345
01079885	Test ZTC	INITIAL	Completed	Nov 23, 2019	GBP £21.00	12345
01080110	Test ZTC	INITIAL	Completed	Nov 23, 2019	GBP £21.00	12345

(iii) Select the order up for review by clicking on the Order Number in the left column.

Products

Orders

Reports

Employees

Invoices

Display per page: 10 results

Search

Orders from

Orders to

Search

Order number	Company	Order Type	Order status	Order date	Amount	PO number
20902622	Products Cutover	INITIAL	Not approved	Dec 12, 2020	GBP £3.62	
0049772708	Initial Order Test	INITIAL	See details	Jun 20, 2022	GBP £9.00	

(iv) From the dropdown menu, select 'Approve' or 'Reject' and validate using the green button.

Dashboard / Orders / Order 0049772708

Order 0049772708

Print

Order status

In review

Approve

Reject

PO number

None

Summary

Subtotal

GBP £7.50

Tax estimate

GBP £1.50

Total

GBP £9.00

Office 365 E1

Status

In review

Sku

CFQ7TTCOLJ8Q0001MM

Term

Monthly

Frequency

Monthly

License qty

1 seats

Unit price

GBP £7.50

Total

GBP £7.50

Promotion Applied

Order status

Approve

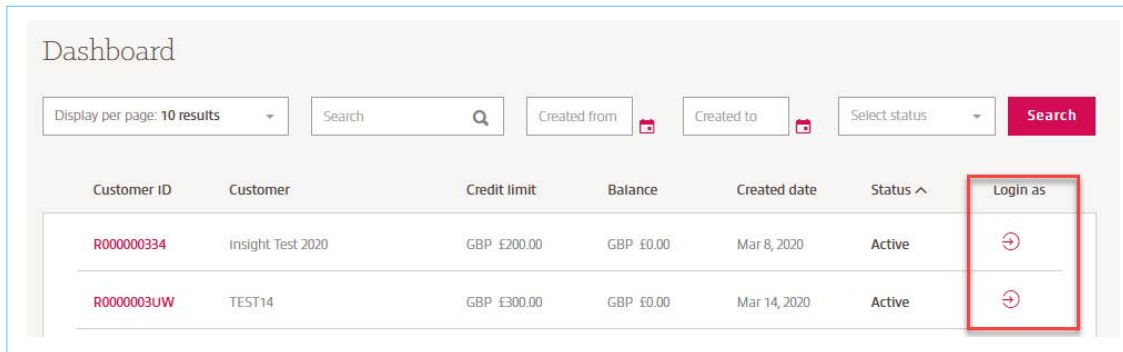
✓

✗

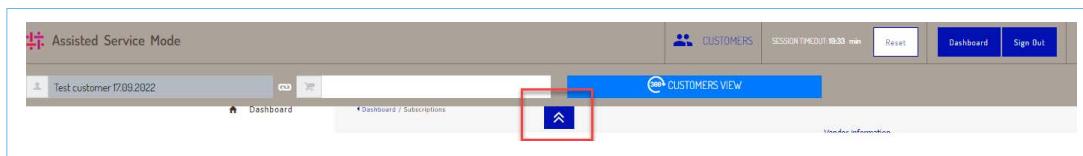
(v) You can log back into the end customer's profile to confirm the order went through.

7.2. Add licences to an existing subscription

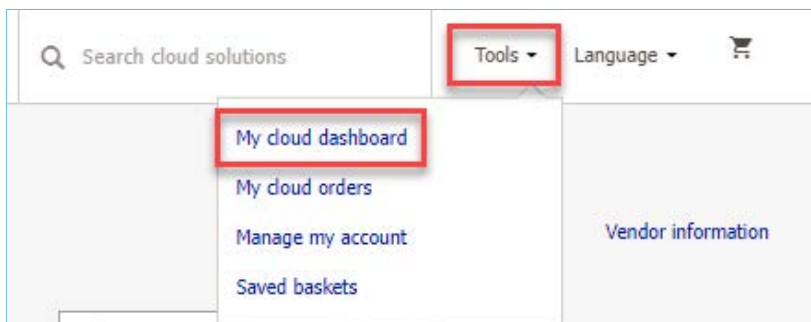
- a. From the RAP Dashboard, select the customer for which you wish to add licenses by clicking on the corresponding 'Login as' button



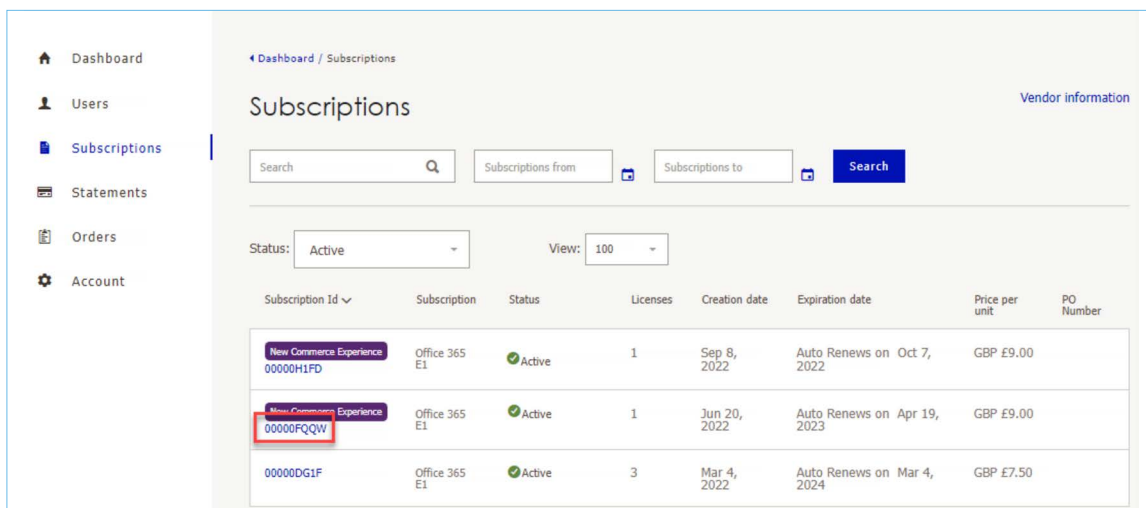
- b. Fold back the ASM panel via the double upward arrow



- c. Click the 'Tools' dropdown menu and select 'My Cloud IT Dashboard'



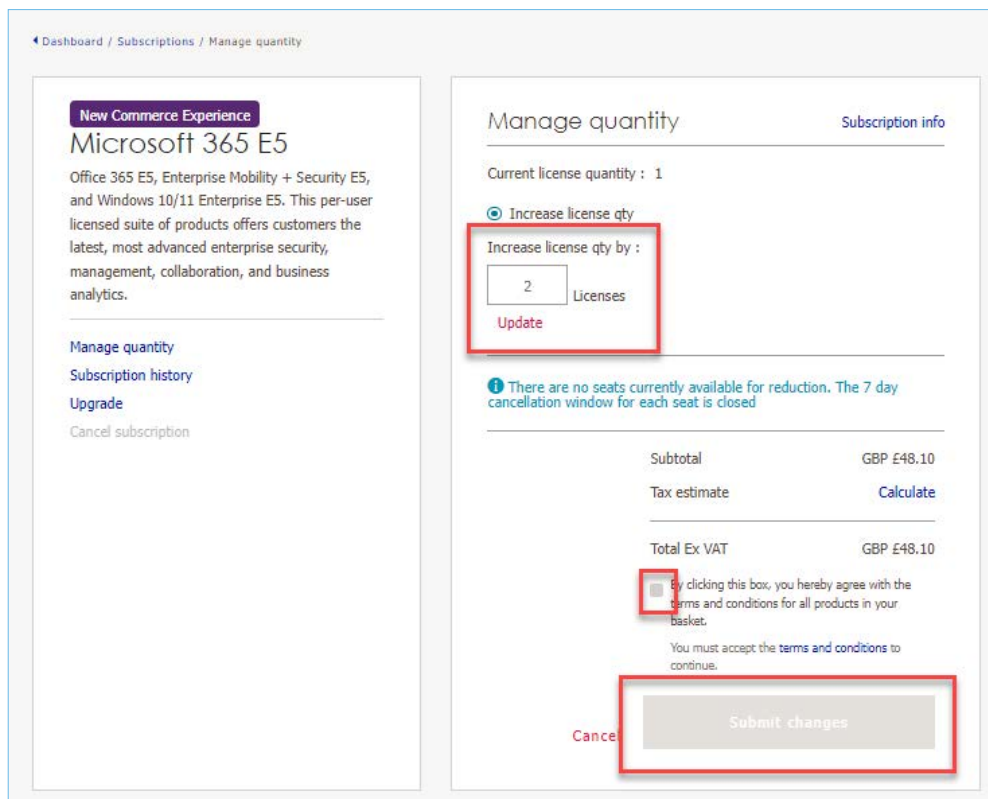
- d. Navigate to the 'Subscriptions' tab using the left menu. Select the subscription you want to amend by clicking on the ID in the leftmost column.



e. This is the Subscription details screen. Click the 'manage quantity' link on the left tab menu



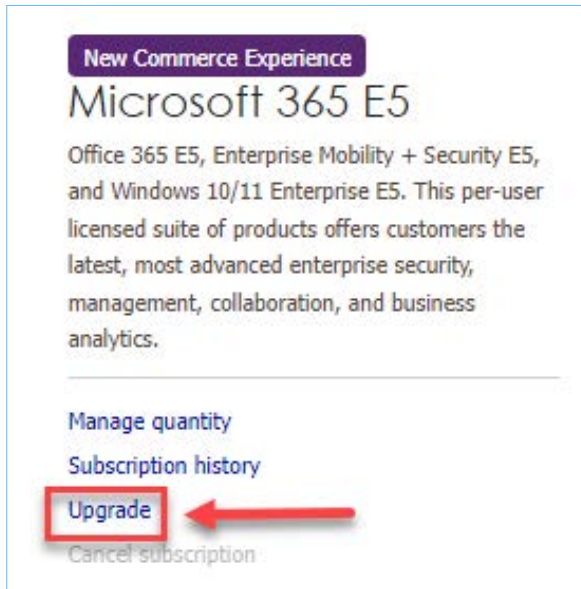
f. Enter the number of licenses you need to add to the existing total and confirm. After a few seconds, the cost and VAT calculations are displayed. Tick the box to confirm you accept the terms and conditions, then confirm the purchase.



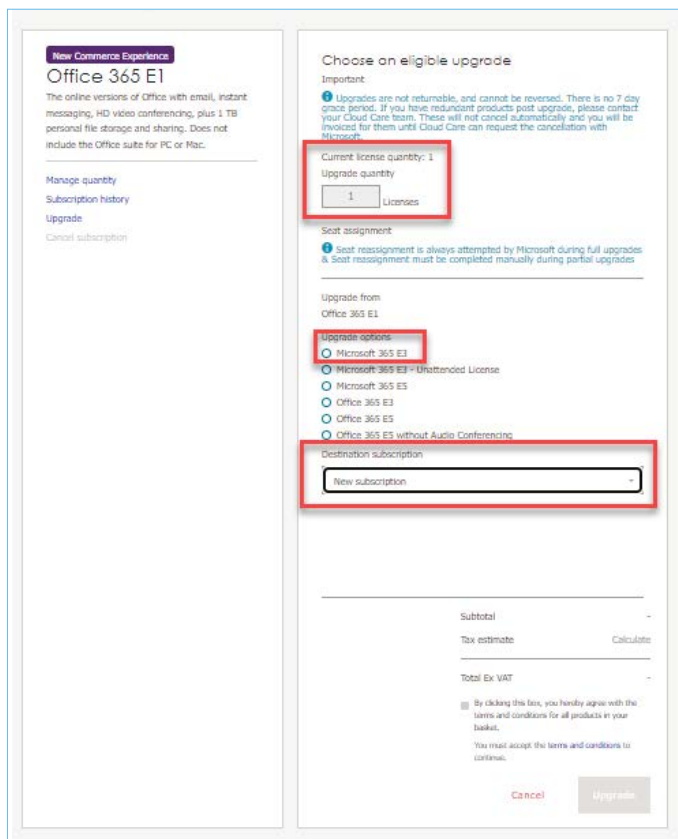
NOTE: Depending on the Credit Limit assigned to the end customer you may need to manually confirm the purchase. Please refer to the beginning of this chapter for more information.

7.3. Upgrade subscription

Upgrades are available in the New Commerce Experience so that a customer may move from one offer to another eligible offer before the renewal date of the initial subscription. Please note that it's not possible to go from one offer to any other one, rather you need to choose from a list of eligible upgrades that are allowed by the system. In addition, partners may not upgrade a subscription purchased through another partner. From the subscription details page, select 'Upgrade'.



The screen that displays lets you select the following details:



- **Upgrade quantity:** you can choose to upgrade only some of the licenses contained in the subscription (partial upgrade) or all the licenses (full upgrade).
- **Destination subscription:** You may also choose to upgrade to an existing subscription or to a new subscription.
- **Upgrade options:** the eligible products are listed on screen and depend on your base license,
- **Destination subscription:** you can choose to open a new subscription or, if available, to add the license to a pre-existing one (this feature is to be released in a future update)

Based on your selection, the window then displays the new cost and lets you select new terms if applicable (you will not be able to end your term early). Confirm that everything is as desired and go through with the purchase.

Destination subscription

New subscription

Unit price	Term	Billing Frequency
<input type="radio"/> GBP £39.72	Monthly	Monthly
<input type="radio"/> GBP £397.20	Annual	Annual
<input type="radio"/> GBP £33.10	Annual	Monthly

Subtotal
-

Tax estimate

Total Ex VAT
-

☐ By clicking this box, you hereby agree with the terms and conditions for all products in your basket.
You must accept the [terms and conditions](#) to continue.

Cancel
Upgrade

NB: you can choose to upgrade only some of the licenses contained in the subscription (this is called a 'partial upgrade'), this feature is not available through our platform but can be requested through a ticket in Service Now and then manually synced back into the platform (see Out of platform features section in this guide).

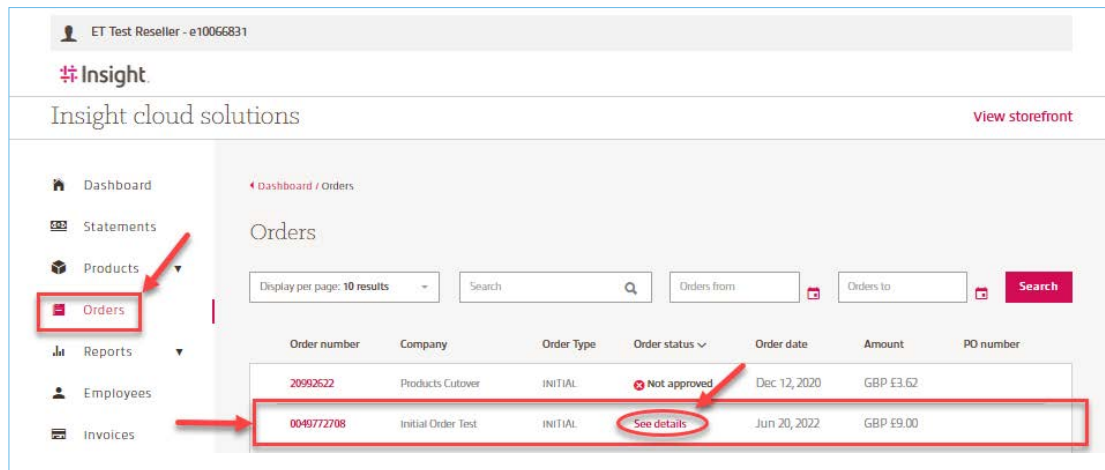
NB: Although the option might be visible to you in the platform, Microsoft will not allow an upgrade towards a shorter term (i.e.: from yearly towards monthly commitment) as this would contravene the applicable T&C's. Please always make sure you are aware of this restriction.

8. Order / Release / Reject

Customer orders can be placed in a Review, or Hold status for several reasons, such as they have exceeded the established credit limit. When this occurs, as a Reseller you will receive an email notification that an order is in review and requires attention.

To review the order, select Orders from the menu on the left

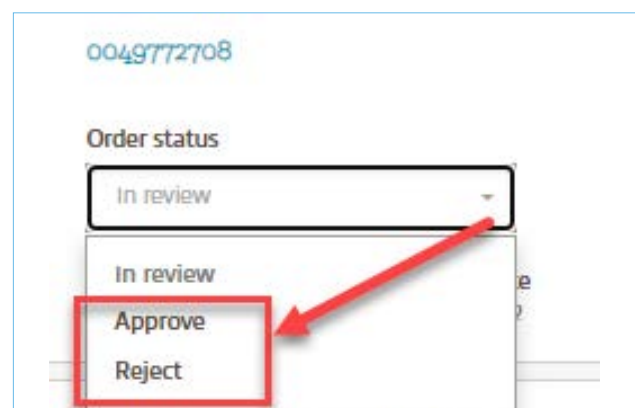
- Review orders, sort or filter as needed to identify non "Completed" orders
- Select the order number to review



- Select the order status drop down to review options.



- Select the appropriate action for the order:
 - Approve – to release the order for processing,
 - Reject – to not allow the order to process.



9. New Commerce Experience

Customer orders can be placed in a Review, or Hold status for several reasons, such as they have exceeded the established credit limit. When this occurs, as a Reseller you will receive an email notification that an order is in review and requires attention.

Microsoft New Commerce Experience or Let's Simplify the changes in the New Commerce Experience

a. Subscription Terms in the new commerce experience (NCE)

(i) 1 - month Subscription

- Enables a customer to change number of licenses month by month
- 20% on average more expensive than an annual Subscription

(ii) 12 – month Subscription

- Billing Options: monthly or upfront

iii. 36 – month Subscription

- Enables a customer to lock pricing for a full 36 months
- Billing options: monthly, annual or upfront

b. Pause, Cancellation, and Auto-renew

(i) a use

1. Reseller continues to be billed,
2. Subscription immediately enters "Disabled" status:
 - a. User can't access services or files,
 - b. Admin can access data until end of subscription term.

3. Subscription can be made "active" again.

NOTE – Please submit a Service Now request to our support team in order to pause a subscription for your end customer, where this functionality is not currently available on the portal.

Please be aware that Insight can pause subscriptions for Resellers where payment has not been made by the Reseller.

(ii) Cancellation

1. First 7 Days (168 hours) of any term prorated refund (Proration calculated daily)
2. After first 7 Days of any term no cancellation is available. (Applicable to any billing plan)
3. Subscription immediately enters "Disabled" status:
 - a. Users can't access services or files,
 - b. Admin can access data for 90 days,
 - c. Cancellation cannot be reversed.

(iii) Auto-Renew

1. On:

- a. Subscription auto-renews at end of the term,
- b. 7 Day cancellation period starts with renewal date.

2. Off:

- a. Subscription does not renew at the end of the term,
- b. Subscription enters "Disabled" status.

c. Subscription Ownership Limits

- (i) Existing license-based subscriptions enforced ownership limits, or the number of subscriptions a partner could purchase for a customer.
- (ii) New commerce implements a Seat constraint across provisioned SKUs
- (iii) New commerce small business subscription with less than a 300 maximum will apply to the maximum at the provisioned SKU level. A partner could have multiple small business subscriptions for customers as long as the aggregate of seat counts stays under the declared maximum.
- (iv) The maximum for small business applies regardless of where the customer's provisioned SKU came from, i.e.: multiple-partner or channel

d. Out-of-platform Features

Insight is working continuously to bring all NCE features to the Reseller Administration Portal, yet some still require out-of-platform intervention:

- (i) Co-terminosity: under certain conditions, it is possible to align the renewal (and thus billing) date of a new or existing subscription on that of another one. This can be particularly helpful to organize your renewal and avoid forgetting an important change.
- (ii) Partial upgrade: it is possible to upgrade one or more licenses in a subscription to a higher tier (e.g., from Microsoft 365 Business Basic to Microsoft 365 Business Standard, Premium, E3 etc.) Please note: the term and payment period of the subscription cannot be changed during that upgrade to comply with NCE guidelines.
- (iii) Azure consumption, Reservations, software subscriptions, etc.: such products cannot be ordered directly from the Portal.

For any such task, simply contact your Sales representative or open a Request in Service Now with complete details about the tenant, end customer account, product to be purchased or modified and whether you wish to be given a quote before purchase.



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