



# Fusion Connect Microsoft Services User Guide

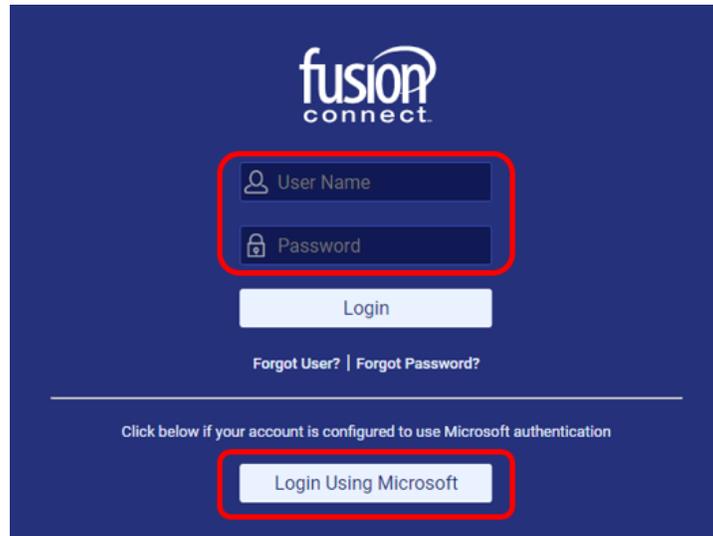


\*\*\*Click to view our online video: [Microsoft Services](#)\*\*\*

To log into your Fusion Connect Client Portal to access your Microsoft Services options, click *(and save as a favorite)*, this URL: <https://login.fusionconnect.com>.

Enter your *Admin Username* and *Admin Password*. \*\*\*Your login credentials were sent via an auto-generated Fusion Connect email. \*If needed, you can click *Forgot Password* before signing in.

**Note:** You may also click “*Login Using Microsoft*” if you have enabled Microsoft authentication. You can reference this video for enabling this feature: <https://youtu.be/OqpmckyaQEE>



Once logged in, to access your Microsoft Services, click on the **IT Software & Services** option in your *Services Tile*. A new tab will open. Click on the cabob *(the 3-dot icon)* of the site you wish to access and choose “**Manage Services**”:



*Note: If needed you can click “Create Ticket” to open a ticket pertaining to your Microsoft Services.*

Your Microsoft Services Tab allows access to:

- View / Edit existing Microsoft Services (*view how you’re billed- Monthly, Annually, etc, view your Term, Unit Price, Quantity, your Billing Total, Effective Activation Date(s) and Term End dates*). You can also edit Auto Renewals
- Change Quantity of your already active Microsoft services listed on your account
- You can request other Microsoft Services to become “Available” in our Fusion Connect catalog.
- Add Product - Once the Microsoft Service is available, you can “Add Product” - adding the product to your account
- View and export your “Change History” and any “Scheduled Changes”

\*\*\*NOTE: All tickets created will be available in your Tickets Tile of your Portal login **Overview** tab. There, you can access your ticket(s) to make comments to the Fusion Connect Team working your specific ticket request.\*\*\*

## View / Edit existing Microsoft Services

Once selecting “Manage Services” from your Kabob icon of the site you wish to access, in your new tab under the Service section, you will see a list of your existing Microsoft Services. This will provide a view of *how you’re billed- Monthly, Annually, etc, view your Term, Unit Price, Quantity, your Billing Total, your Effective Activation date(s) and Term End date(s)...*

Services for Sample Company Provider (samplecompany.something.com)

Service	Billing Type	Billed	Term	Unit Price	Quantity	Total	Effective	Term End	Auto Renew
 Microsoft 365 E3	License	Monthly	Monthly	43.20	1	43.20	03/18/2024	04/18/2024	<input checked="" type="checkbox"/>
 Microsoft 365 E5	License	Annual	Annual	684.00	1	684.00	03/18/2024	03/18/2025	<input checked="" type="checkbox"/>

To edit a Service, click on its pop-out window icon-  This will open a new tab.

Here, you can change the quantity of your service by clicking “Change Quantity”. You can also “Open Ticket Reporting License Problem”. You can **click “EDIT” to edit your Auto Renew:**

Service	Microsoft 365 E3	Unit Price	43.20
Billed	Monthly	Quantity	2
Term	Monthly	Total	86.40
Effective	03/18/2024		
Term End	04/18/2024		
Auto Renew	<input checked="" type="checkbox"/>		

Change Quantity  
Open Ticket Reporting License Problem  
Edit 



## Change Quantity

This allows the ability to change the quantity of your service. Add your *New Quantity\** of service.

For “Change Effective\*”, click the drop down and choose either “Immediately” (*if you want the additional services immediately*) -or choose “On Renewal” *if you want services added when you auto-renew*. You can also add your own alpha/numeric *Order Reference* if you wish. Clicking “**Submit Order**”, your new service will be added within the Change Effective time frame chosen:

### Change Quantity of Microsoft 365 E3

Current Quantity

**New Quantity \***

Change Effective \*  ▼

Order Reference

**Terms & Conditions**

Immediately  
 On Renewal

By clicking “Submit Order”, Customer is ordering the Services described on the Order Submission page and agrees to pay the fees associated therewith. All fees for Services ordered using the Fusion Connect Customer Portal shall be in addition to existing fees for Customer’s previously ordered Services. Customer’s use of the Services are subject to the terms of the Master Service Agreement between Fusion Connect and Customer, or, in the absence of such agreement, Fusion Connect’s Basic Terms and Conditions found at <http://www.fusionconnect.com/legal>, including the Tariff(s) and/or Service Addendum(s) applicable to the Services described in this Online Order. Failure to adhere to these terms may result in delays in your Service installation, interruption, and/or complete loss of Service, and additional charges. Fusion Connect’s Fees and Surcharges Guide found at <http://www.fusionconnect.com/legal> contains the optional and miscellaneous Service fees associated with Fusion Connect Services and is hereby incorporated into this Online Order. If Customer is ordering Microsoft Services, Customer acknowledges that Fusion Connect may seek association to Customer’s Tenant ID as part of the Microsoft Partner Incentives program and that Microsoft may share Customer subscription information with Fusion Connect. You represent that you are authorized to accept this Service Order on the terms set forth herein on behalf of Customer.

\*\*\*NOTE: If your requested increased amount of Product will cost more than your Microsoft Services Credit Limit allows, you will receive the below message stating a *Ticket has been created on your behalf* to review your Microsoft Services credit limit. **Click CANCEL:**

### Change Quantity of Microsoft 365 E3

Current Quantity

New Quantity \*

This order is more than your current available credit. We have opened ticket AN9989207 on your behalf to review your credit. You can manage this ticket in your tickets view.

Change Effective \*

Order Reference

After clicking “Cancel”, go back to your login *Overview Tab*:

Sample Company Microsoft 365 E3

Service	Microsoft 365 E3	Unit Price	43.20
Billed	Monthly	Quantity	2
Term	Monthly	Total	86.40
Effective	03/18/2024		
Term End	04/18/2024		
Auto Renew	<input checked="" type="checkbox"/>		

[Change Quantity](#)  
[Open Ticket Reporting License Problem](#)

Click Refresh (*top right corner*), and in your *TICKETS Tile*, you will see your “Credit Limit Review” ticket listed.

Note: All Microsoft Service-related tickets will be worked within 24 hours.

Once your Credit Limit has been approved, you will receive an email. You can also view and make ticket comments to your ticket by clicking the “**Ticket Id**”

*\*See the next page screen capture...*

Tickets + New Ticket ?

Open  
1

Ticket Id	Site	Category	Open Time
AN9989204	Sample Company	Credit Limit Review	09/12/2024 1:12:33

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[View Tickets >](#)

After your Microsoft Services Credit Limit has been increased, you can now add your additional Microsoft Service licenses, simply by accessing your License page again and click **“Change Quantity”**:

Service	Microsoft 365 E3	Unit Price	43.20
Billed	Monthly	Quantity	2
Term	Monthly	Total	86.40
Effective	03/18/2024		
Term End	04/18/2024		
Auto Renew	<input checked="" type="checkbox"/>		

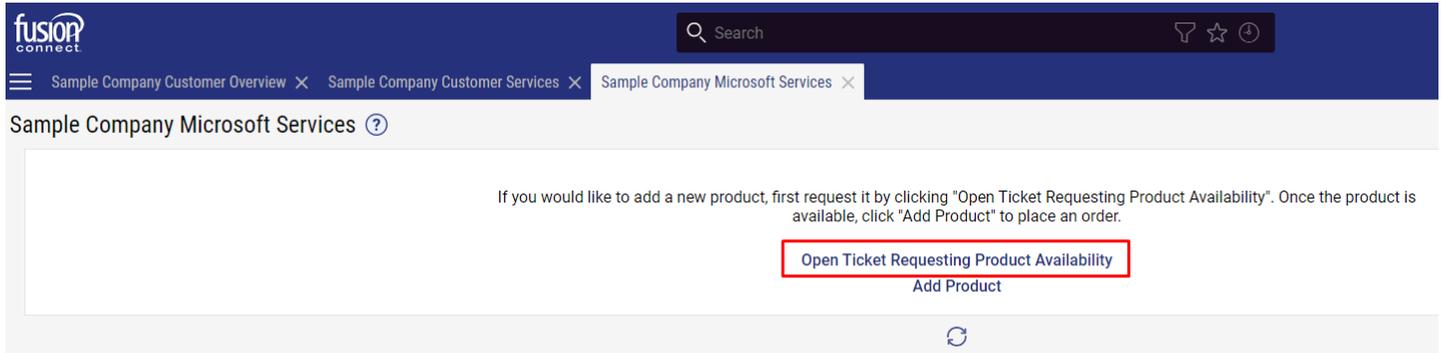
[Change Quantity](#)

[Open Ticket Reporting License Problem](#)

[Edit](#)

## Requesting Product Availability

Once in your Microsoft Services tab, you can request “availability” of a new Microsoft Product by opening a Ticket. Click on “Open Ticket Requesting Product Availability”...



In the “Request Product Availability” window:

**Product\***, enter the specific name of the Microsoft Product you want available to add

**Billing Frequency\***, choose from the dropdown how you want to be billed for the service, i.e Monthly/Annually/Triennial

**Commitment\***, choose from the dropdown how long you wish to commit to term for the product, i.e Monthly/Quarterly/Annually/Triennial

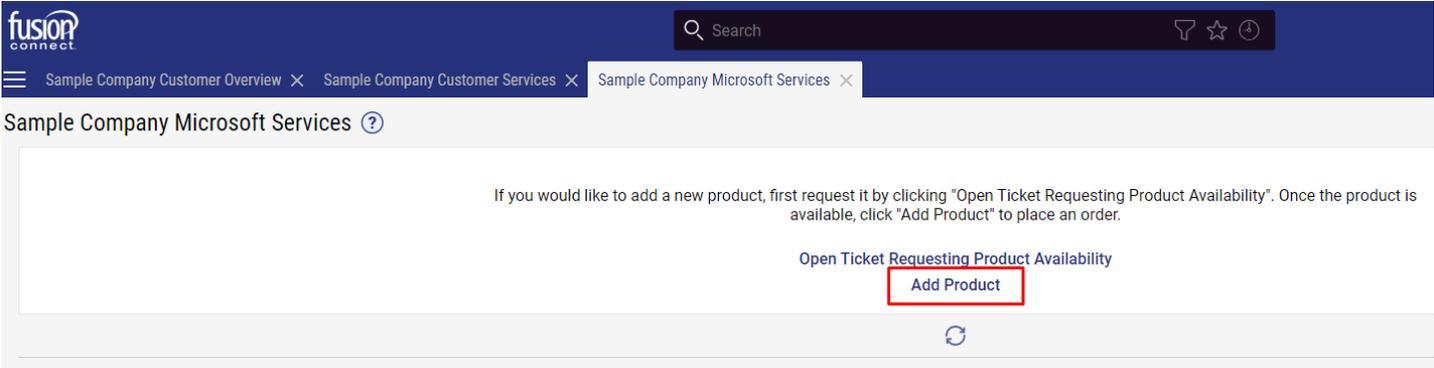
\*\*\*Please add in the “Additional Message” field why you’re requesting the product to become “available”.\*\*\*

Click “Open Ticket”

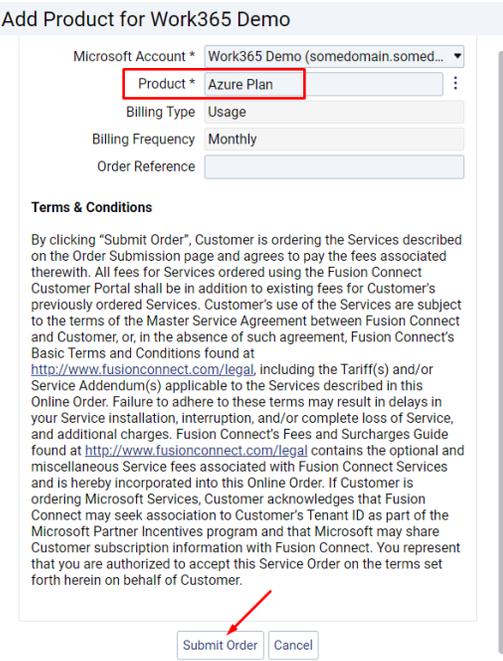
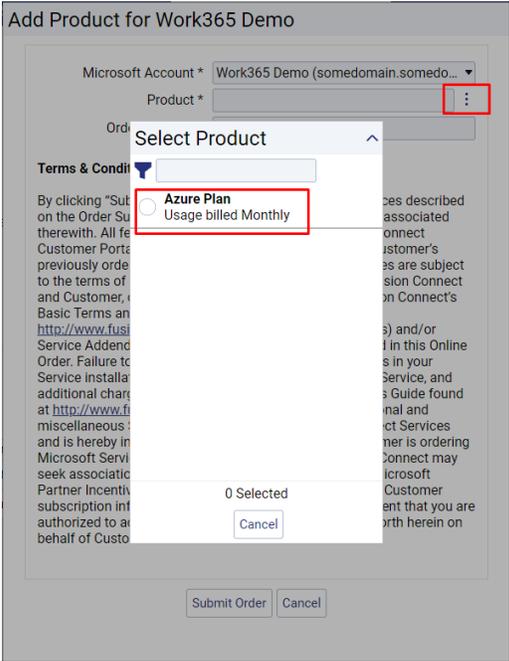
\*\*\*After your ticket is created, you will receive a response via email once your Product is available to “ADD” it as a Microsoft Service.

# Add Product

Once notified by Fusion Connect your requested Microsoft Service/Product is available to add ...in your Microsoft Services tab, you can add the Product by clicking “Add Product”...

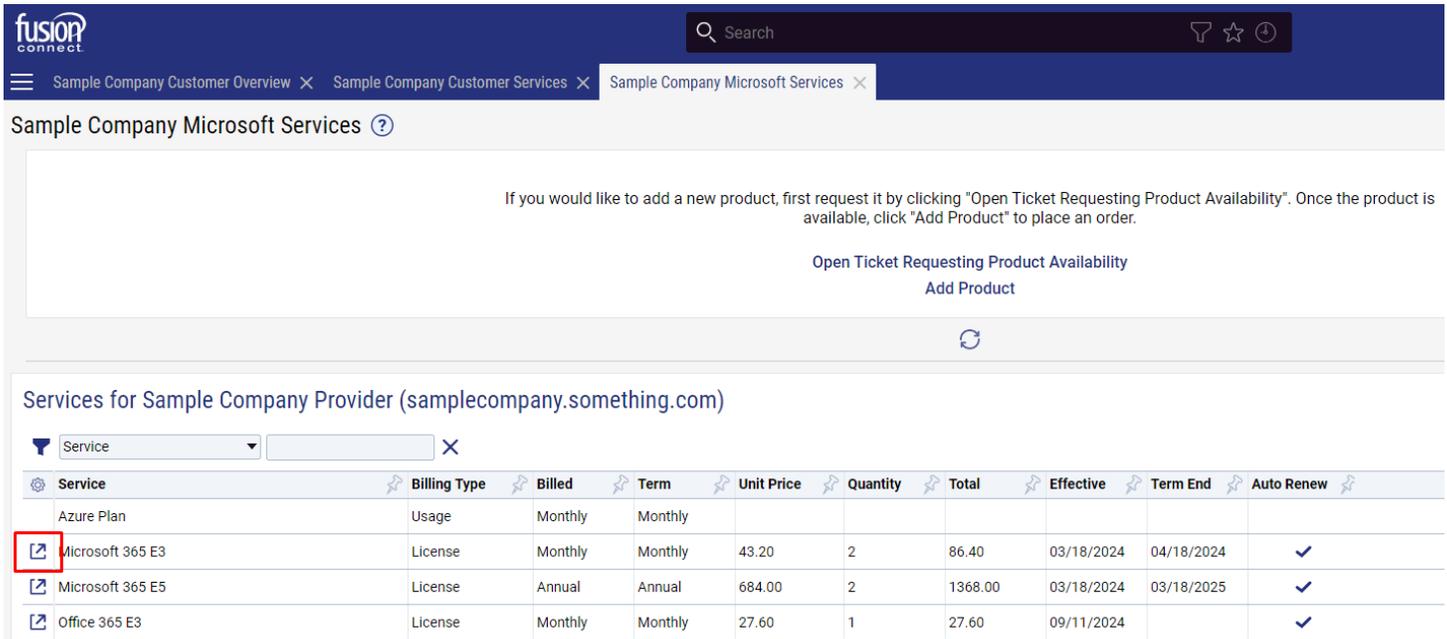


Click the Kabob icon for **Product\***. Select the Product that you requested to become “available” and click **Submit** to Add your Product. Note: If adding Microsoft License(s) the quantity of licenses will be required at that time:



## Change History and Scheduled Changes

Upon clicking the pop-out window icon  for a particular Microsoft Service....



Sample Company Microsoft Services 

If you would like to add a new product, first request it by clicking "Open Ticket Requesting Product Availability". Once the product is available, click "Add Product" to place an order.

[Open Ticket Requesting Product Availability](#)  
[Add Product](#)



Services for Sample Company Provider (samplecompany.something.com)

Service  

 Service	 Billing Type	 Billed	 Term	 Unit Price	 Quantity	 Total	 Effective	 Term End	 Auto Renew
Azure Plan	Usage	Monthly	Monthly						
 Microsoft 365 E3	License	Monthly	Monthly	43.20	2	86.40	03/18/2024	04/18/2024	
 Microsoft 365 E5	License	Annual	Annual	684.00	2	1368.00	03/18/2024	03/18/2025	
 Office 365 E3	License	Monthly	Monthly	27.60	1	27.60	09/11/2024		

...you will be able to view the product's *Change History* and any *Scheduled Changes*.

### Change History section details:

- The Change Date/Time
- Change Description
- Effective Date
- Order Reference (if added by the Admin)
- Ordered By (who ordered the product/Service)
- Source / Source values:
  1. *Customer* - change made in the Client Portal by the Admin
  2. *Provider* - The change came from Microsoft (someone changed in partner center which shouldn't happen or there was a mismatch between Microsoft and Work365 that was fixed up by a system process.
  3. *Sales Order* - When the order is initially provisioned by Fusion Connect
- Provisioning Status
  1. *Awaiting Provisioning* - Awaiting provisioning with Microsoft
  2. *Failed Provisioning* - Failed to provision with Microsoft
  3. *Provisioned* - Successfully provisioned with Microsoft
  4. *Not Applicable* - The operation considered successful / nothing required by Microsoft

\*See next page for a screen capture example....

**Change History**

Change Time	Change Description	Effective	Order Reference	Ordered By	Source	Provisioning Status
03/20/2024 4:13:06 PM	Quantity increased by 5	03/20/2024		Admin	Customer	Not Applicable
03/20/2024 4:11:49 PM	Quantity decreased by 5	03/20/2024		Admin	Customer	Not Applicable
03/20/2024 4:11:05 PM	Quantity increased by 5	03/20/2024		Admin	Customer	Not Applicable
03/20/2024 3:45:40 PM	Quantity increased by 5	03/20/2024		Rachel Claibourn	Customer	Not Applicable
03/20/2024 1:39:59 PM	Auto Renew enabled	03/20/2024		Billy Fisher	Customer	Not Applicable
03/20/2024 1:39:31 PM	Auto Renew disabled	03/20/2024		Billy Fisher	Customer	Not Applicable
03/19/2024 2:16:04 PM	Created	03/19/2024	ORD-01004-N7F8J6	Douglas.Seitsinger@fusionconnect.com	Sales Order	Not Applicable

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**Scheduled Changes**

Effective: MM/DD/YYYY

Change Time	Effective	Quantity	Ordered By	Source
No Records Found				

**Scheduled Changes** section details:

- Change Time (*date/time the change was scheduled*)
- Effective (*when the change will take place*)
- Quantity (*number of changes*)
- Ordered By (*who requested the Change*)
- Source (*request made via the Portal*)

**Change History**

Change Time	Change Description	Effective	Order Reference	Ordered By	Source	Provisioning Status
03/20/2024 4:13:06 PM	Quantity increased by 5	03/20/2024		Admin	Customer	Not Applicable
03/20/2024 4:11:49 PM	Quantity decreased by 5	03/20/2024		Admin	Customer	Not Applicable
03/20/2024 4:11:05 PM	Quantity increased by 5	03/20/2024		Admin	Customer	Not Applicable
03/20/2024 3:45:40 PM	Quantity increased by 5	03/20/2024		Rachel Claibourn	Customer	Not Applicable
03/20/2024 1:39:59 PM	Auto Renew enabled	03/20/2024		Billy Fisher	Customer	Not Applicable
03/20/2024 1:39:31 PM	Auto Renew disabled	03/20/2024		Billy Fisher	Customer	Not Applicable
03/19/2024 2:16:04 PM	Created	03/19/2024	ORD-01004-N7F8J6	Douglas.Seitsinger@fusionconnect.com	Sales Order	Not Applicable

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**Scheduled Changes**

Effective: MM/DD/YYYY

Change Time	Effective	Quantity	Ordered By	Source
03/21/2024 6:04:24 PM	03/19/2025	-14	Billy Fisher	Customer



**Note:** Any “Scheduled Changes” created can be canceled before the Effective Date by *clicking “Delete”* at the bottom of the page, *choosing each Change* and **click “DELETE”**:

Scheduled Changes

Effective

Change Time	Effective	Quantity	Ordered By	Source
03/21/2024 6:04:24 PM	03/19/2025	-14	Billy Fisher	Customer

1 - 1 of 1

Delete

Scheduled Changes

DELETING

Change Time	Effective	Quantity	Ordered By	Source
<input checked="" type="checkbox"/> 03/21/2024 6:04:24 PM	03/19/2025	-14	Billy Fisher	Customer

Clear All Show Modified Only

Delete Cancel

