

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: <u>https://login.fusionconnect.com</u>.

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: <u>https://youtu.be/OgpmckyaQEE</u>



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*) i 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.

Manage Services Create Ticket 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

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

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)...*

T	Service	×	-	. ,						
(ĝ)	Service	Billing Type	Billed	Term	Unit Price	Quantity	Total	Effective	Term End	Auto Renew
Z	Microsoft 365 E3	License	Monthly	Monthly	43.20	1	43.20	03/18/2024	04/18/2024	~
Z	Microsoft 365 E5	License	Annual	Annual	684.00	1	684.00	03/18/2024	03/18/2025	~

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	~		
	Change	Ouantity	
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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:

Cha	nge Quantity of M	icrosoft 365 I	Ξ3			
	Current Quantity	1				
	New Quantity *	4				
	Change Effective *	Immediately	•			
	Order Reference	e (No Selection)				
т	Terms & Conditions					
B ott C p t t a B <u>h</u> S C y a f f n a o C M C t t f f	by clicking "Submit Order", (an the Order Submission para herewith. All fees for Service Sustomer Portal shall be in- reviously ordered Services to the terms of the Master S and Customer, or, in the abs- sasic Terms and Conditions ttp://www.fusionconnect.co ervice Addendum(s) applice our Service installation, inter additional charges. Fus- bound at http://www.fusioncon- niscellaneous Service fees and is hereby incorporated in- rdering Microsoft Services connect may seek associat Microsoft Partner Incentives customer subscription infor- hat you are authorized to ar- orth herein on behalf of Customer Su	Customer is ordering ge and agrees to pa ces ordered using th addition to existing . Customer's use of Gervice Agreement b ence of such agreer s found at com/legal, including cable to the Services ere to these terms merruption, and/or co ion Connect's Fees a connect.com/legal c associated with Fus nto this Online Order , Customer acknowl ion to Customer's Te s program and that I rmation with Fusion ccept this Service O stomer.	g the Services described y the fees associated e Fusion Connect fees for Customer's the Services are subject etween Fusion Connect nent, Fusion Connect's the Tariff(s) and/or a described in this hay result in delays in mplete loss of Service, and Surcharges Guide ontains the optional and sion Connect Services r. If Customer is edges that Fusion enant ID as part of the Vicrosoft may share Connect. You represent rder on the terms set			



*****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 Mic	Change Quantity of Microsoft 365 E3						
Current Quantity	2						
	2000						
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 *	Immediately •						
Order Reference							
Order Reference Submit Order Cancel							

After clicking "Cancel", go back to your login Overview Tab:

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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	~				
				Change Open Ticket Report	Quantity ing License Problem			
				Edi	t C			

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 Open 1			+ New Ticket
Ticket Id	Site	Category	Open Time
AN9989204	Sample Company	Credit Limit Review	09/12/2024 1:12:33
1 - 1 of 1			C 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	✓							
Change Quantity Open Ticket Reporting License Problem								
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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"...

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Sample Company Microsoft Services	Sample Company Microsoft Services ③							
lf you would lii	ke to add a new product, first request it by click available, click "Add Open Ticket Requ Ar	ing "Open Ticket Requesting Product Availability". Once the product is d Product" to place an order. esting Product Availability dd Product						
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In the "Request Product Availability" window:

<u>Product</u>*, enter the specific name of the Microsoft Product you want available to add

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

<u>Commitment</u>*, 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.

	Contact Name *	Billy Fisher			
	Contact Phone *	+18885551	010		
	Broduct	+100000012	212		
	Pilling Frequency	Azure			_
	Billing Frequency	Monthly			
	Commitment ?	Monthly			
Additional M Please add I of purchase	essage Vicrosoft Azure as an	available serv	ice for	the reason	Ū
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Additional M Please add I of purchase Access H Use (essage Microsoft Azure as an DUITS Custom Service Hours	available serv	ice for	the reason	



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"**...

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Sample Company Microsoft Services 🕐	ample Company Microsoft Services 🕐								
If you would l	ike to add a new product, first request it by c available, click Open Ticket R	slicking "Open Ticket Requesting Product Availability". Once the product is 'Add Product" to place an order. equesting Product Availability Add Product							
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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:

Add Product for Work365 Demo	Add Product for Work365 Demo
Add Product for Work365 Demo Microsoft Account * Work365 Demo (somedomain.somedo • Product * Ord Select Product Terms & Condi By clicking "Sut on the Order Sut Customer Ports previously orde to the terms of and Customer, Basic Terms an http://www.fus Service Addenc Order Failure to Service installa Service installa additional chare at http://www.fus Service installa Service installa dis hereby in Microsoft Servic Partner Incentin O Selected ot Selected ot Selected ot herein no miscellaneous: and is hereby in Microsoft Servic Partner Incentin O Selected ot Selected ot herein no other Selected other inter of other Selected other inter of other Service and other Service and is hereby in Microsoft Servic other Service other Service	Add Product for Work365 Demo Microsoft Account * Work365 Demo (somedomain.somed • Product * Azure Plan Billing Type Usage Billing Trequency Monthly Order Reference Terms & Conditions 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'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, 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 Parther Incervices program and
Submit Order Cancel	forth herein on behalf of Customer.



Change History and Scheduled Changes

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

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	Sample Company Customer Overview 🗙 Sample (company Customer Se	rvices 🗙 Sar	nple Company N	Aicrosoft Services	s ×				
Sam	ple 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									
							C			
Ser	vices for Sample Company Provide	(samplecomp	any.somet	hing.com)						
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	Azure Plan	Usage	Monthly	Monthly						
Z	Microsoft 365 E3	License	Monthly	Monthly	43.20	2	86.40	03/18/2024	04/18/2024	~
Z	Microsoft 365 E5	License	Annual	Annual	684.00	2	1368.00	03/18/2024	03/18/2025	~
Z	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....



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Change History								
Change Description	•	×						
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		
1-7 of 7								
				BERTS				
Scheduled Changes								
T Effective	 MM/DD/YYYY) Ē						
Ohange 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)

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Change History											
T	Change Description	•		×							
©	Change Time	Change Desci	iption	Effective	Order Reference	Ordered By			Source	Provisioning Status	
	03/20/2024 4:13:06 PM	Quantity incre	ased by 5	03/20/2024		Admin			Customer	Not Applicable	
	03/20/2024 4:11:49 PM	Quantity decre	eased by 5	03/20/2024		Admin			Customer	Not Applicable	
	03/20/2024 4:11:05 PM	Quantity incre	ased by 5	03/20/2024		Admin			Customer	Not Applicable	
	03/20/2024 3:45:40 PM	Quantity incre	ased by 5	03/20/2024		Rachel Claibourn			Customer	Not Applicable	
	03/20/2024 1:39:59 PM	Auto Renew e	nabled	03/20/2024		Billy Fisher			Customer	Not Applicable	
	03/20/2024 1:39:31 PM	Auto Renew d	isabled	03/20/2024		Billy Fisher			Customer	Not Applicable	
	03/19/2024 2:16:04 PM	Created		03/19/2024	ORD-01004-N7F8J6	Douglas.Seitsinge	r@fusionconnect	t.com	Sales Order	Not Applicable	
1-7 of 7 :											
Scheduled Changes											
T	Effective	MM/DD/YY	YY	÷							
(ĝ)	Change Time	Effective	Quantity	Ordered By		S	ource				
	03/21/2024 6:04:24 PM	03/19/2025	-14	Billy Fisher	-	C	ustomer				



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":**

Scl	Scheduled Changes							
▼ Effective VMM/DD/YYYY								
٩	Ohange 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			

S	Scheduled Changes						
		DELETING					
	Change Time	Effective	Quantity	Ordered By	Source		
E	✓ 03/21/2024 6:04:24 PM	03/19/2025	-14	Billy Fisher	Customer		
Clear All Show Modified Only					Delete		

