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Introduction

Below is a basic overview of the new CloudServus CSP Self-Service Portal. This guide breaks down different drop-down menu items within the portal. New features and functionality will be released throughout the year.

If you cannot find answers within this guide, please reach out to CSPSupport@CloudServus.com for assistance.

Self-Service Portal – Quick Links

- After you sign into the Self-Service Portal you will see three icons in the middle of the page
- Click on each icon to be directed to:
  - **View and Change Current Licensing** –View your organization's Active Billing Contracts
  - **Manage Portal Admins** - View your organization's Active/Inactive portal users and their assigned roles
  - **Azure Usage Data (Beta)** – View previous 3-12 months of Azure consumption

CSP SELF-SERVICE
PORTAL GUIDE

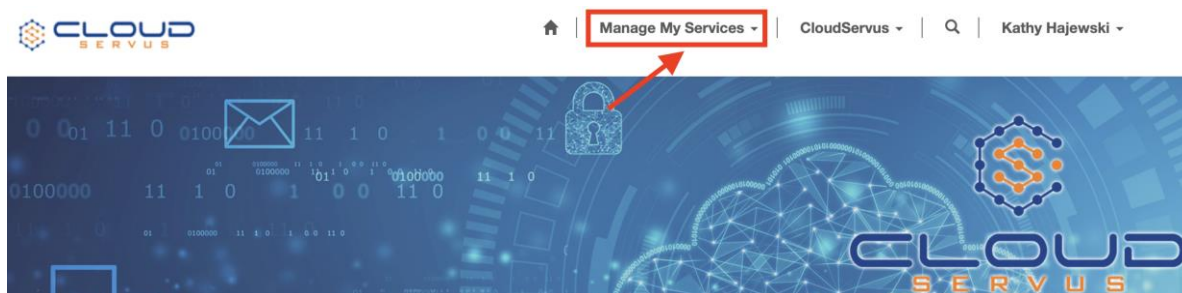View and Change Current Licensing

Manage Portal Admins

Azure Usage Data (Beta)

Manage My Services

- Manage My Services drop-down menu includes:
  - o View and Change Current Licensing
  - o Azure Usage Data (Beta)
  - o Manage Portal Admins
  - o Licensing Agreements (Beta)

View and Change Current Licensing

- Shows your Active Billing Contract information:
  - o Billing Frequency (Annual or Monthly)
  - o Expiration/End Date
  - o Status (Active/Disabled)

- Click into contract or arrow to view individual subscription details:

- Click into Subscription Name to edit subscription parameters (change quantity, etc.)

Annual Term Change Requests

Note on Net New Subscriptions

- For <u>net new</u> subscriptions please reach out to CSPsupport@CloudServus.com
- Current subscriptions quantities can be adjusted in the 'View and Change Current Licensing' section.

- *Request quantity <u>reduction</u>*:
  - o *Note*: Under New Commerce (NCE), customers can no longer reduce quantities for subscription 'mid-term' and must instead schedule reduction for term renewal
  - o Input desired total quantity in 'Quantity' box
  - o Select 'On Renewal' from the 'Change Effective' drop-down menu
    - ▪ This will schedule a quantity reduction on this subscription for the date of your Annual Term renewal

- ▪ *Best practice*: Do not schedule an Annual Term reduction if your renewal date is more than 30-60 days out
  - o Click 'Submit' to save changes - This will trigger a notification once provisioned successfully

- • *Request quantity <u>increase</u>*:
  - o Input desired total quantity in 'Quantity' box
  - o If quantity increase is needed now, select 'Immediately' from the 'Change Effective' drop-down menu
  - o To schedule a future quantity increase, select 'Custom' from the 'Change Effective' drop-down menu, then select desired 'Effective Date'
  - o Click 'Submit' to save changes - This will trigger a notification once provisioned successfully

- • *Optional*: **Additional information can be included in the requests**
  - o 'Order Reference' box can be used to reference PO number or another label/identifier (i.e. location, sub entity)
  - o 'Description' box can be used to include additional information about the request

Monthly Term Change requests

Note on Net New Subscriptions

- • For <u>net new</u> subscriptions please reach out to CSPsupport@CloudServus.com
- • Current subscriptions quantities can be adjusted in the 'View and Change Current Licensing' section.

- • *Request quantity <u>reduction</u>*:
  - o Note: Under New Commerce (NCE), customers can no longer reduce quantities for subscription 'mid-term' and must instead schedule reduction for term renewal
  - o Input desired total quantity in 'Quantity' box
  - o Select 'On Renewal' from the 'Change Effective' drop-down menu
    - ▪ This will schedule a quantity reduction on this subscription for the date of your Monthly Term renewal
  - o Click 'Submit' to save changes - This will trigger a notification once provisioned successfully

- *Request quantity <u>increase</u>:*
  - o Input desired total quantity in 'Quantity' box
  - o If quantity increase is needed now, select 'Immediately' from the 'Change Effective' drop-down menu
  - o To schedule a future quantity increase, select 'Custom' from the 'Change Effective' drop-down menu, then select desired 'Effective Date'
  - o Click 'Submit' to save changes - This will trigger a notification once provisioned successfully

- *Optional*: **Additional information can be included in the requests**
  - o 'Order Reference' box can be used to reference PO number or another label/identifier (i.e. location, sub entity)
  - o 'Description' box can be used to include additional information about the request

Subscription Edit

General

Customer *
Air Servus

Subscription Name *	**Currency ***	**Commitment**
Microsoft 365 Business Premium	US Dollar	Annual

Billing Contract *	**Unit Price**	**Is Trial**
Air Servus-NCE Annual Term	$240.00	⦿ No ◯ Yes

Effective Start Date *	**Order Date**	**Commitment End Date**
2/16/2022	12/15/2022	2/15/2023

Quantity *	**Change Effective**	**Effective Date ***
2	Custom	M/D/YYYY

- **View Subscription 'Change Logs' and 'Future Changes'**
  - o Quantity adjustments will show in the 'Change Logs' log at the bottom of the 'Subscription Edit' page
  - o Scheduled changes will show in the 'Future Changes' log at the bottom of the 'Subscription Edit' page
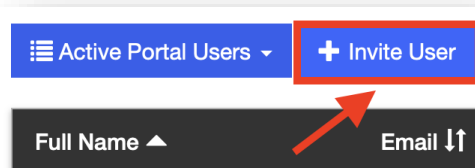
Manage Portal Admins

- View Active/Inactive portal users and assigned roles
  1) Invite additional admins and users to the portal
  - o Click on 'Invite User'

  - o Input user information (required: First Name, Last Name, Office 365 Email ID)
  - o Click 'Submit'

o The new user will receive an email invitation which includes this self-service portal guide

2) Assign web roles
- o Once portal invitation has been sent, be sure to assign the appropriate web role(s) to the new user:

> ### Self-Service Roles to Assign
>
> **Administrator:** Has access to full CloudServus self-service portal menu items. They are able to view and edit company information and current licensing, increase and decrease subscription quantities, manage portal admins, and view Azure usage.
>
> **Subscription Manager:** They are able to view and edit company information and current licensing, increase and decrease subscription quantities, and view Azure usage.
>
> **Finance Manager:** Has access to company information and agreements.

- o On the 'Manage Portal Admins' screen, click the name of the user which will take you to the 'User Edit' page
  - ▪ Note: You may need to filter 'Active Portal Users' to 'Inactive Portal Users' to find the proper contact

Manage Portal Admins

Full Name ▲	Email ⬍	Job Title ⬍	Department ⬍

- o On the the 'User Edit' page, click on the 'Associate' button and select the roles to assign to the user and click 'Add'

User Edit

ℹ Click on 'Enable Portal Access' to send an invite. This invitation should only be sent for people within your organization
This will send an invitation email to the user with instructions to create an account to access this portal.
Please make sure you have granted the right web roles for the user.

General

First Name *
John

Last Name *
Smith

Office 365 Email Id *
johnsmith@yourcompany.com

Job Title
IT Director

Mobile Phone
5121112222

Business Phone
Provide a telephone number

Address
123 Main St

City
Austin

Zip Code
78701

State
TX

Country
USA

Web Roles

Associate

- **Important Note:** We highly recommend the account/portal Admin provision accounts for the remainder of the organization's team. Please ensure anyone who has access to the self-service portal understands the rules regarding New Commerce Experience terms (Annual Term vs. Monthly Term), and license cancellation policy (Within 24 hours for full refund, within 168 hours for prorated refund, and no refund available after 168 hours).
- If you have any trouble with provisioning users, please have your account/portal Admin reach out to CSPSupport@CloudServus.com to add new portal users to your org.

Licensing Agreements (Beta) - Future

- View list of signed Microsoft and CloudServus agreements

Azure Usage Data (Beta)

- Graphics for rolling 3-12 months of Azure consumption
- Costs reflected in these graphs match Microsoft Cost Management (retail pricing)
- Provides the ability to filter by 'Subscription' and 'Time Period'
- **To view consumption:**
  - Select 'Azure Usage Data' from the 'Manage My Services' drop-down menu
  - Select the subscription from the 'Select subscription' drop-down menu

o Select the time frame you want to see usage for from the 'Select time frame' drop-down menu
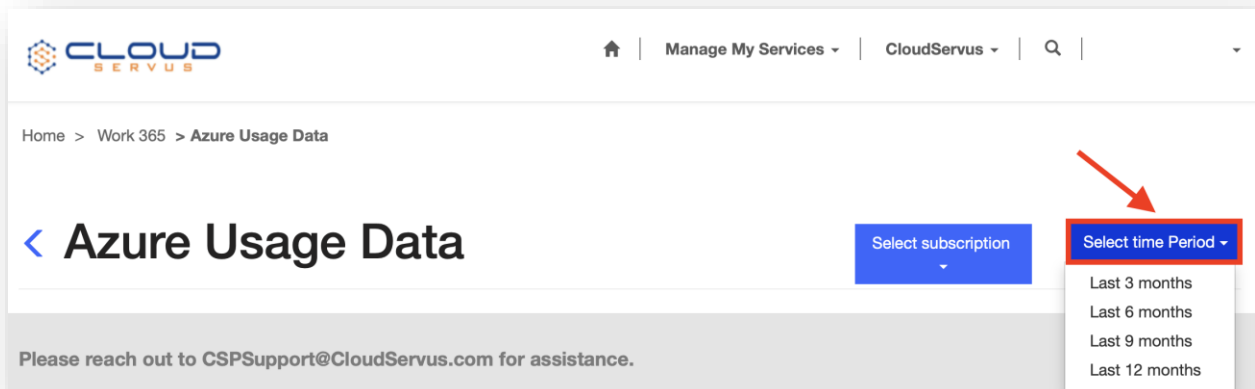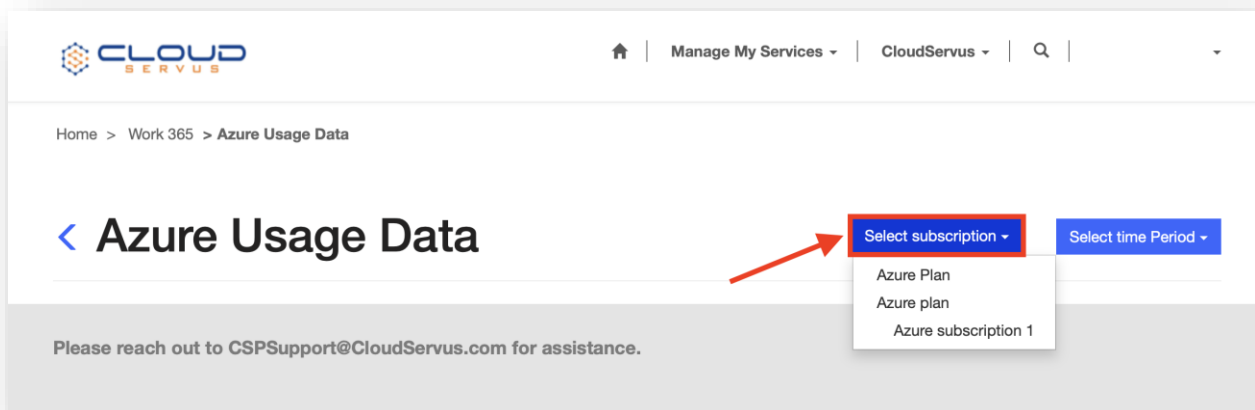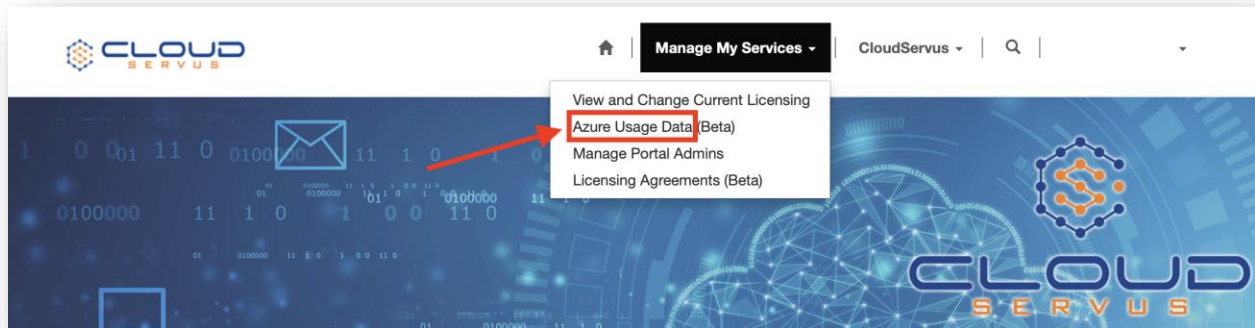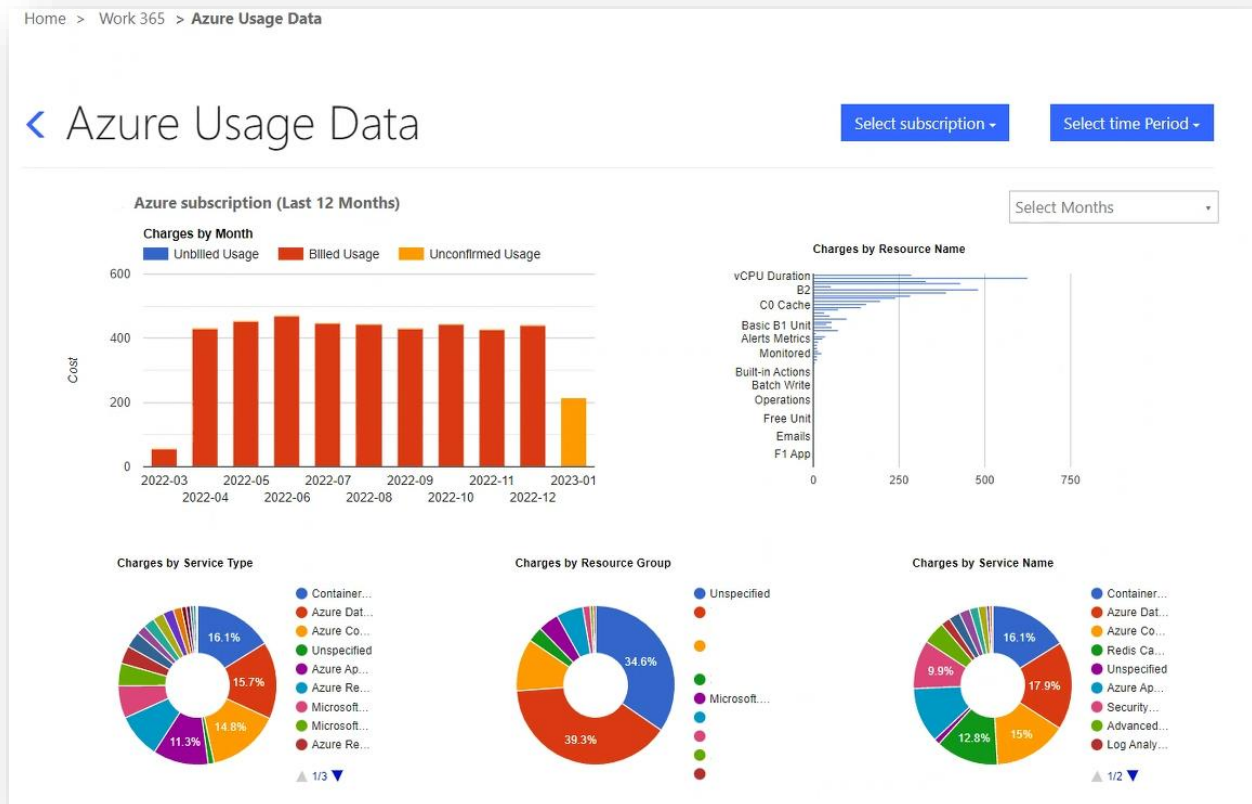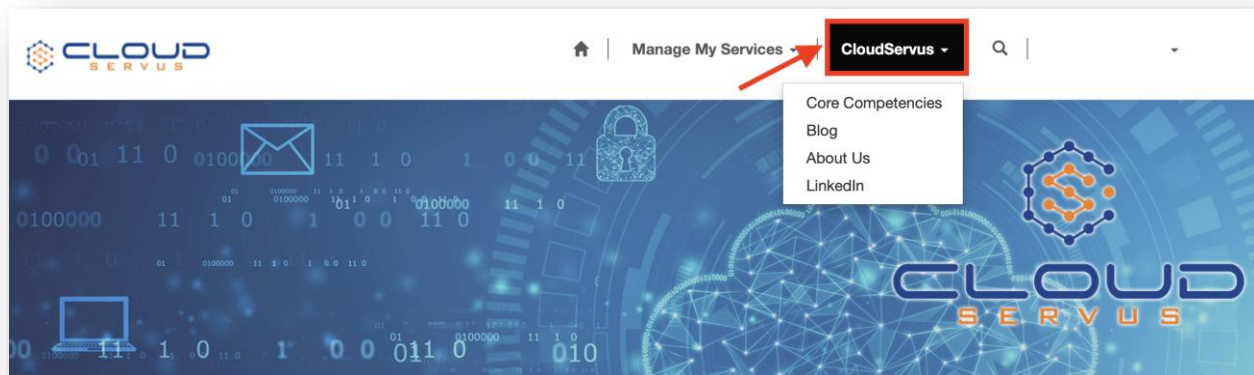
CloudServus

- The CloudServus drop-down menu includes links to:
  - ***Core Competencies*** – Includes CloudServus' mission statement and outlines our capabilities, knowledge, and skills.
  - ***Blog*** – Our blog posts focus on CloudServus case studies, technology updates and current trends, tips and tricks, and recent Microsoft licensing changes.
  - ***About Us*** – Learn more about our company, partner competencies, and values.
  - ***LinkedIn*** – Directs you to our LinkedIn page. Follow us to receive notifications on latest technology trends, our blog posts, and upcoming events.

Have ideas on how we can improve our self-service portal? Let us know! We are constantly looking for ways to improve your experience. Share your self-service portal ideas with your CloudServus Account Manager.