



# Microsoft Licensing Self-Service Portal

Instructional Guide

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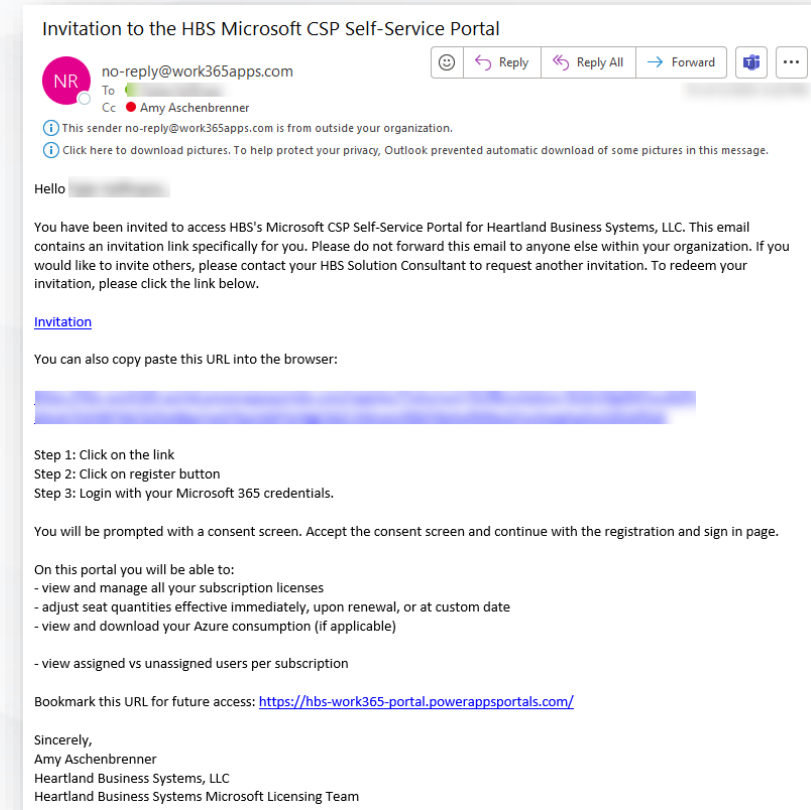


# Invitation and Access

## Request individual access via HBS Microsoft CSP Self-Service Portal

- Repeat the request to grant access to more individuals within your organization
- Within 2-3 business days, you will receive a plain text email invitation unique to you. (See image on right)
- Redeem the invitation using your Azure Active Directory / Entra ID Credentials

Contact your HBS Solutions Consultant for assistance.

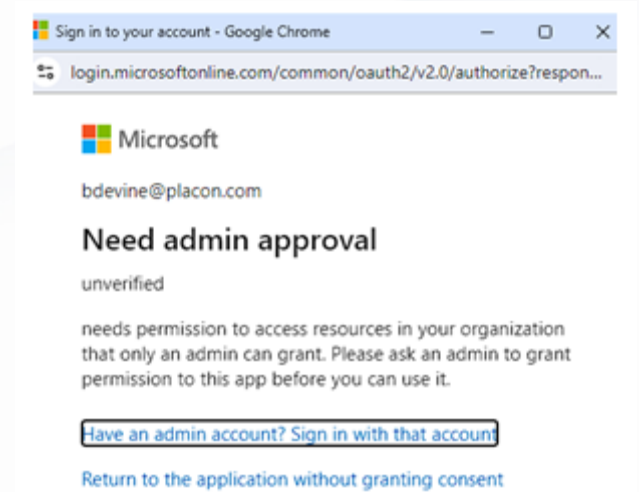


# Troubleshooting: Pop-Ups

## Scenario 1: “Needs admin approval” pop-up

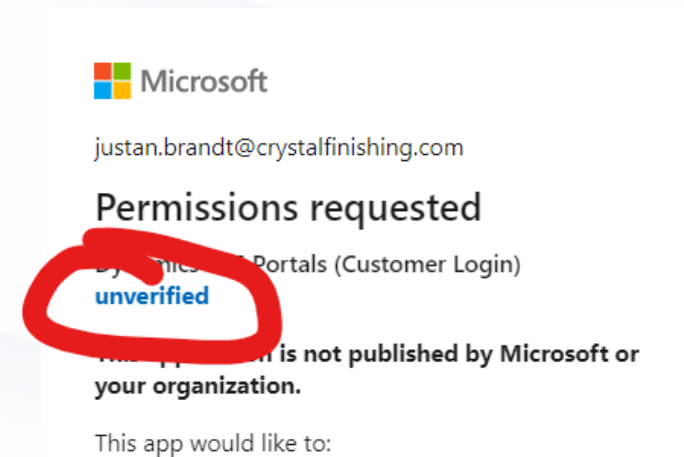
Why: The portal relies on Azure Entra ID as the authentication method. This issue arises due the security policies in place for some organizations, which require authentication to be granted by your Global Admin of your tenant.

Resolution: Have your Global Admin request and redeem an invitation.



## Scenario 2: “Permissions requested” pop-up

Their tenant is requiring admin approval for the 1) authentication and/or 2) apps be verified for their tenant to be able to access them.



# Troubleshooting: “This page isn’t responding”

The customer Self-Service page may become unresponsive due to outdated browser versions, excessive cache and cookies, or conflicting browser extensions.

Ways to resolve the issue:

## Clear Cache and Cookies:

1. Open browser settings
2. Navigate to privacy / history
3. Clear cache and cookies
4. Restart the browser and try again

## Check Network Connection:

1. Ensure a stable and fast internet connection
2. Restart your router or modem if needed

## Update Your Browser:

1. Ensure you have the latest browser version
2. Update if necessary
3. Restart the browser and try again

## Try an Alternate Browser:

1. Use a different browser to access the page
2. Determine if the issue is browser-specific

## Disable Browser Extensions:

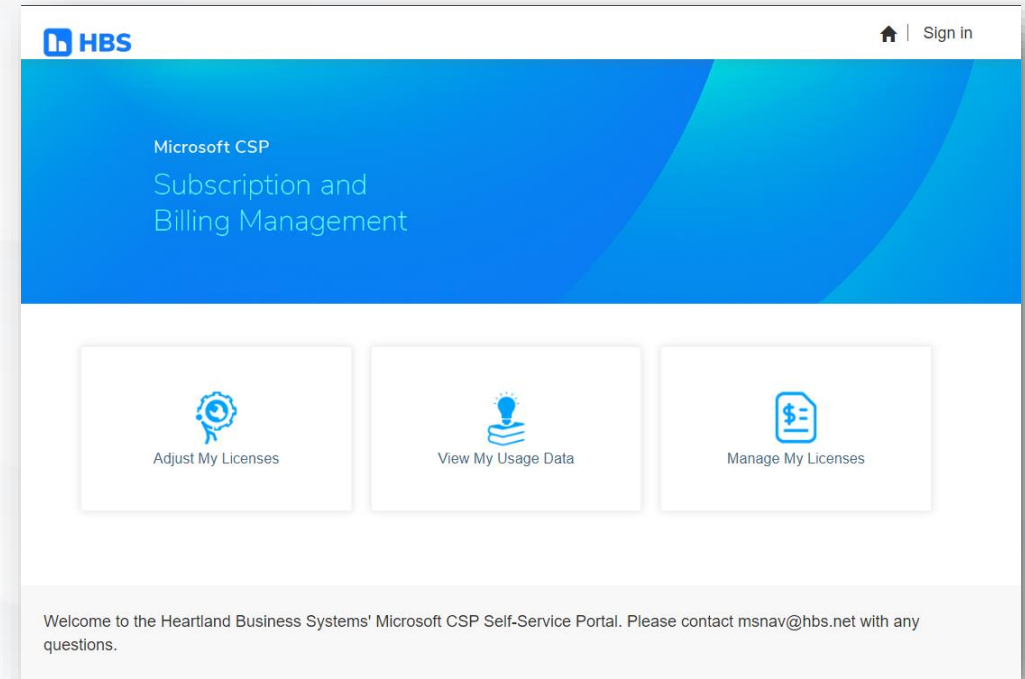
1. Open browser settings
2. Got to extensions / add-ons
3. Disable all extensions
4. Restart the browser and try again
5. Re-enable extensions one by one to identify conflicts

**Need Help?** Email [msnav@hbs.net](mailto:msnav@hbs.net)  
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# Portal Landing Page

## HBS Microsoft CSP Landing Page

Request access by following steps on the previous slide.



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# Adjust My Licenses: Viewing Subscriptions

The “My Services” section allows you to view all subscriptions managed by HBS.

Subscriptions are group based on the following criteria:

- Monthly billed, seat-based subscriptions and / or reserved instances
- Monthly billed pay-as-you go Azure consumption
- Annually billed seat-based subscriptions

One-time billed subscriptions may be found in any grouping.

The screenshot displays the 'Active Billing Contracts' section of the Microsoft Licensing Self-Service Portal. It shows three contract cards for 'TEST - Microsoft CSP' with various billing frequencies (Azure, Monthly, Annual). The 'Monthly' contract is expanded to show a table of subscriptions.

Subscription Name	Effective Date	Commitment	Unit Price	Quantity	Discount	Total
Microsoft 365 F1	2/7/2024	Annual	\$27.60	3.00	\$0.00	\$82.80
Visio Plan 2:	2/21/2022	Annual	\$180.00	5.00	\$0.00	\$900.00
Microsoft Defender for Endpoint Server	5/12/2022	Annual	\$62.40	1.00	\$3.12	\$59.28
Microsoft 365 Business Premium:	2/21/2022	Annual	\$264.00	42.00	\$0.00	\$11088.00
Project Plan 3:	2/21/2022	Annual	\$360.00	8.00	\$0.00	\$2880.00
Microsoft Teams Audio Conferencing with dial-out to USA/CAN:	7/22/2022	Annual	\$0.00	44.00	\$0.00	\$0.00
Microsoft Intune Plan 1 Device	4/28/2022	Annual	\$32.40	1.00	\$0.00	\$32.40

Below the table, there is a section for 'One Time Purchase Item Name' with columns for Effective Date, Term, Unit Price, Quantity, Discount, and Total. It currently shows 'No data available in table'.

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# Adjust My Licenses: Editing Subscriptions

## Steps to Modify Subscriptions:

1. Select Subscription: Choose from the previous view.
2. Enter Quantity: Type the desired quantity.
  - Reductions are only allowed within the first 7 days of the subscription term.
3. Effective Date Options:
  - Immediately
  - Upon Commitment End Date
  - Custom Effective Date
4. Submit Changes: Click Submit to apply changes immediately.

**Note:** Order Reference and Description fields will not appear on the invoice.

**Subscription Edit**

Quantity reduction is not allowed for this subscription outside the cancellation window.

**General**

<b>Customer *</b> [Redacted]	<b>Subscription Name *</b> Microsoft 365 F1	<b>Currency *</b> US Dollar	<b>Commitment</b> Annual
<b>Billing Contract *</b> Microsoft CSP - Monthly - [Redacted]	<b>Unit Price</b> \$2.30	<b>Is Trial</b> <input checked="" type="radio"/> No <input type="radio"/> Yes	
<b>Effective Start Date *</b> 2/7/2024	<b>Commitment End Date</b> 2/20/2025	<b>Effective Date</b> M/D/YYYY	
<b>Quantity</b> 5	<b>Change Effective</b> Immediately	<b>Effective Date</b> M/D/YYYY	
<b>Ordered By</b> Amy Aschenbrenner (aaschenbrenner@hbs.n)	<b>Order Reference</b> [Empty]	<b>Order Source</b> Portal	

**Description**  
[Empty text area]

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# Adjust My Licenses: Change Log and Future Changes

To view a list of historic changes, see “Change Logs”

To view a list of scheduled changes, see “Future Changes”

Note: “System” order indicates changes by HBS using partner-only tools.

The screenshot displays two sections: 'Change Logs' and 'Future Changes'. The 'Change Logs' section contains a table with two rows of data. The 'Future Changes' section is currently empty, showing a message that there are no records to display.

Effective Start Date ↓	Quantity	Order By	Order Reference	Order Source	Provisioning Status
2/10/2024	2	System	dec2b0bf4968	Provider	Not Applicable
2/7/2024	1	System	dec2b0bf4968	Provider	Not Applicable

Effective Date ↑	Quantity Change	Order By	Order Reference	Order Source	Status Reason
There are no records to display.					

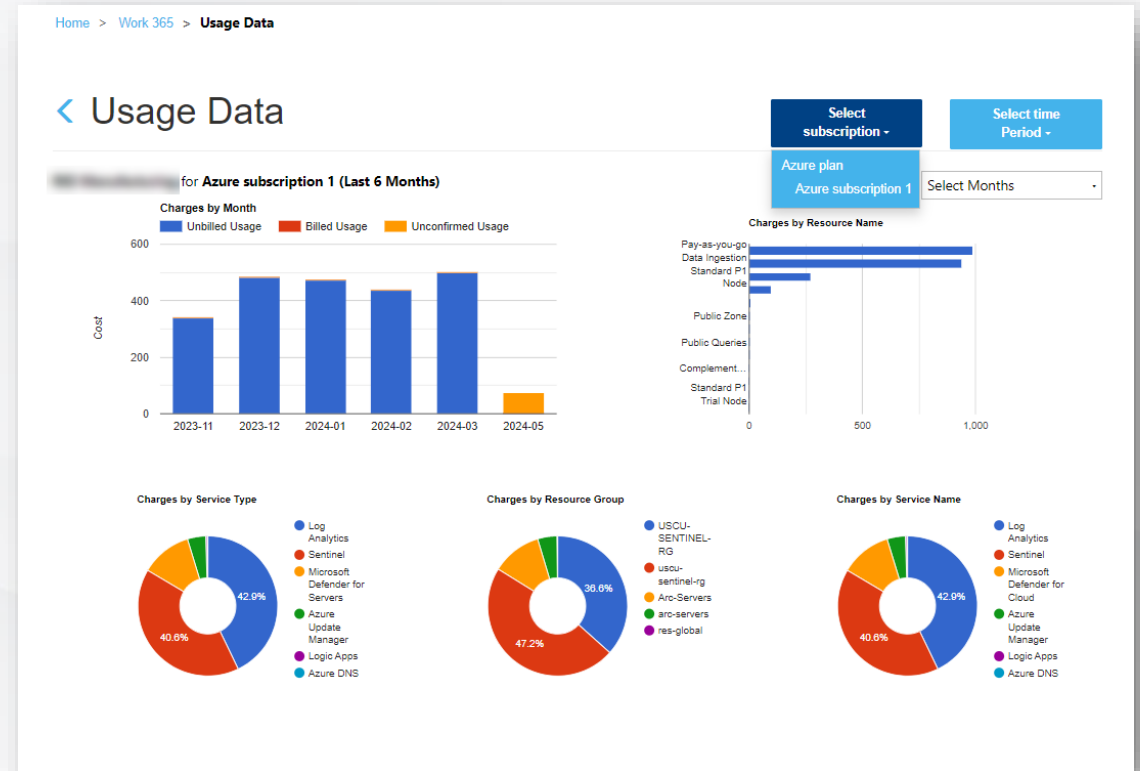
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# View My Usage: Azure Consumption

Azure Subscription Report Instructions:

1. Select Subscription: Use the “Select subscription” dropdown at the top.
2. Populate Data: Wait for the report to load consumption data.
  - Default View: Displays the last 6-months of invoice / consumption data.
  - Max View: Displays up to 12-months of data
  - Reserved Instances are not included. Check the “My Services” view for details.

Questions about your Azure consumption? Contact your HBS Solutions Consultant to connect with an HBS Azure Cloud Architect.

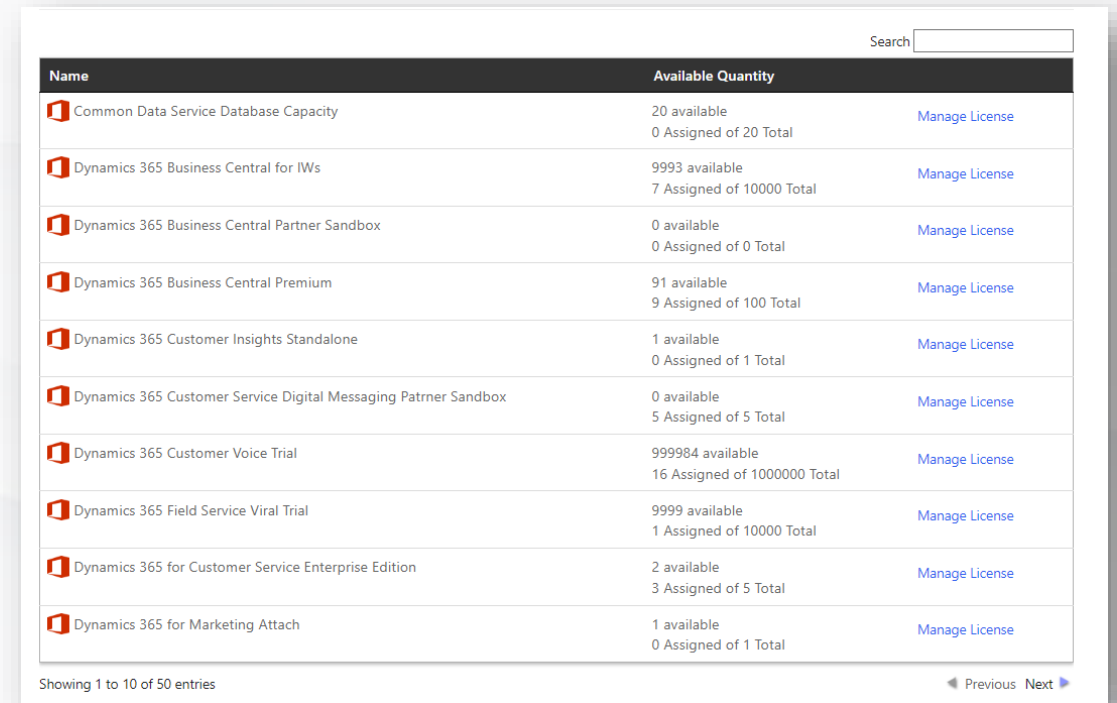


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# Manage My Licenses: Tenant-wide Subscriptions

## License Management Overview

- Displays all licenses associated with your Microsoft tenant, including those not managed by HBS.
- Click Manage Licenses to access the Microsoft 365 admin center for license administration (Admin permissions required. Contact IT for assistance)



The screenshot displays a table of Microsoft 365 licenses. At the top right, there is a search bar. The table has two main columns: 'Name' and 'Available Quantity'. Each row includes a red Microsoft icon, the license name, the available and assigned quantities, and a 'Manage License' link. At the bottom, it shows 'Showing 1 to 10 of 50 entries' and navigation arrows for 'Previous' and 'Next'.

Name	Available Quantity	
 Common Data Service Database Capacity	20 available 0 Assigned of 20 Total	<a href="#">Manage License</a>
 Dynamics 365 Business Central for IWS	9993 available 7 Assigned of 10000 Total	<a href="#">Manage License</a>
 Dynamics 365 Business Central Partner Sandbox	0 available 0 Assigned of 0 Total	<a href="#">Manage License</a>
 Dynamics 365 Business Central Premium	91 available 9 Assigned of 100 Total	<a href="#">Manage License</a>
 Dynamics 365 Customer Insights Standalone	1 available 0 Assigned of 1 Total	<a href="#">Manage License</a>
 Dynamics 365 Customer Service Digital Messaging Partner Sandbox	0 available 5 Assigned of 5 Total	<a href="#">Manage License</a>
 Dynamics 365 Customer Voice Trial	999984 available 16 Assigned of 1000000 Total	<a href="#">Manage License</a>
 Dynamics 365 Field Service Viral Trial	9999 available 1 Assigned of 10000 Total	<a href="#">Manage License</a>
 Dynamics 365 for Customer Service Enterprise Edition	2 available 3 Assigned of 5 Total	<a href="#">Manage License</a>
 Dynamics 365 for Marketing Attach	1 available 0 Assigned of 1 Total	<a href="#">Manage License</a>

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# Self-Service Portal Support Paths

Situation	Contact	Information to include in request
Unable to access portal; need invitation or new invitation	<a href="#">Request Access</a>	N/A
Unable to modify seat quantity	HBS Microsoft Licensing Team <a href="mailto:msnav@hbs.net">msnav@hbs.net</a>	<ul style="list-style-type: none"> <li>Name of license and desired seat count</li> <li>The team will adjust the quantity first, then troubleshoot the issue</li> </ul>
Portal is down, technical bugs preventing use of portal	HBS Microsoft Licensing Team <a href="mailto:msnav@hbs.net">msnav@hbs.net</a>	Screenshots and description of error
Net new subscription purchases	HBS Solutions Consultant	Name of license and quantity needed
Break-Fix Support for Microsoft related outage or technical issue	HBS Solutions Consultant, HBS Field Engineer, HBS CSP Help Desk ( <a href="mailto:cspsupport@hbs.net">cspsupport@hbs.net</a> )	Screenshots, description of the error, and best contact method



# Microsoft Licensing Self-Service Portal

Thank you for choosing HBS as your Microsoft Licensing partner.