



# Cloud Commerce Experience



USER GUIDE



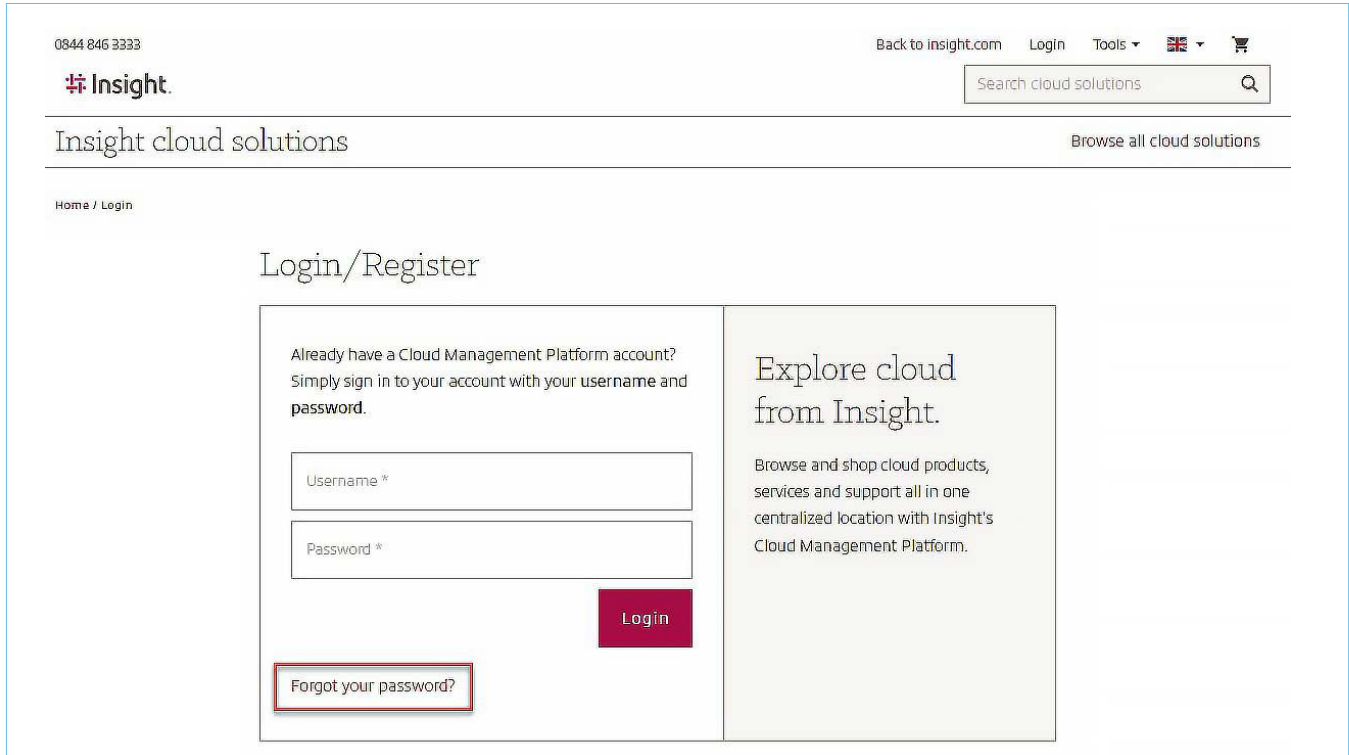
# Table of Contents

1. Cloud Commerce Experience .....	3
2. Dashboard .....	4
3. Users .....	4
3.1. Adding New Users .....	4
3.2. De-activating a User .....	6
4. Subscriptions .....	7
4.1 Adding a New Subscription .....	7
4.1.A. Co-Terminosity .....	12
4.2. Manage Existing Subscriptions .....	14
4.2.A. Manage Licence Quantity .....	14
4.2.B. The Exception of Azure Plan .....	17
4.2.C. Switching Auto-renewal on and off .....	17
4.2.D. Update Purchase Order Number .....	19
4.2.E. Cancel a Subscription .....	20
5. NCE Features .....	21
5.1. Upgrade .....	21
5.2. Change Terms .....	24
5.3. How to Migrate to NC .....	25
6. Invoices .....	27
7. Orders .....	28
8. Reports .....	29
9. Account .....	30

# 1. Cloud Commerce Experience

The Insight Cloud Commerce experience platform is designed so that clients can manage their business autonomously.

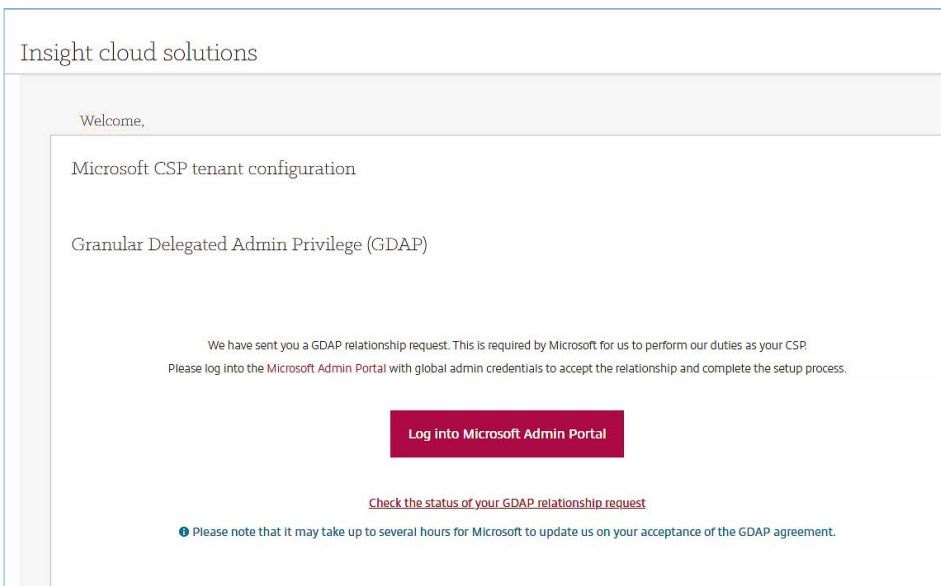
Login via [this link](#). If this is your first time accessing the platform, you may need to reset your password via the button below. You can select your country from the top right dropdown menu.



You may be asked to accept the terms and conditions which align with Microsoft Reseller Attestation requirements.

If this is your first time accessing the platform, you will be prompted to grant Insight GDAPs (Granular Delegated Admin Privileges).

This is required by Microsoft for us to perform our duties as your CSP. Please log into the Microsoft Admin Portal with global admin credentials to accept the relationship and complete the setup process.”

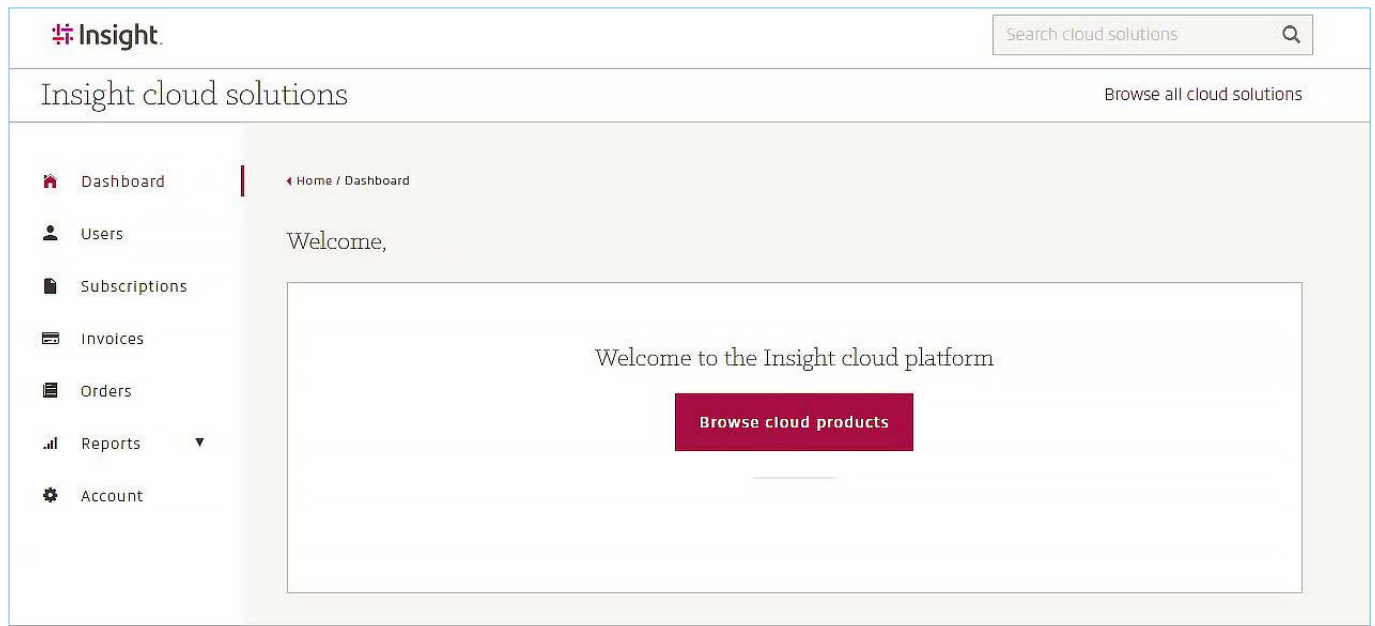


Simply follow the 'Microsoft Admin Portal' link, login as a Global Administrator, read the page that displays and, if you agree, accept the terms. After a time no longer than 24 hours, the access is granted.

Within the platform you can perform different functions that can be found in the menu on the left column.

## 2. Dashboard

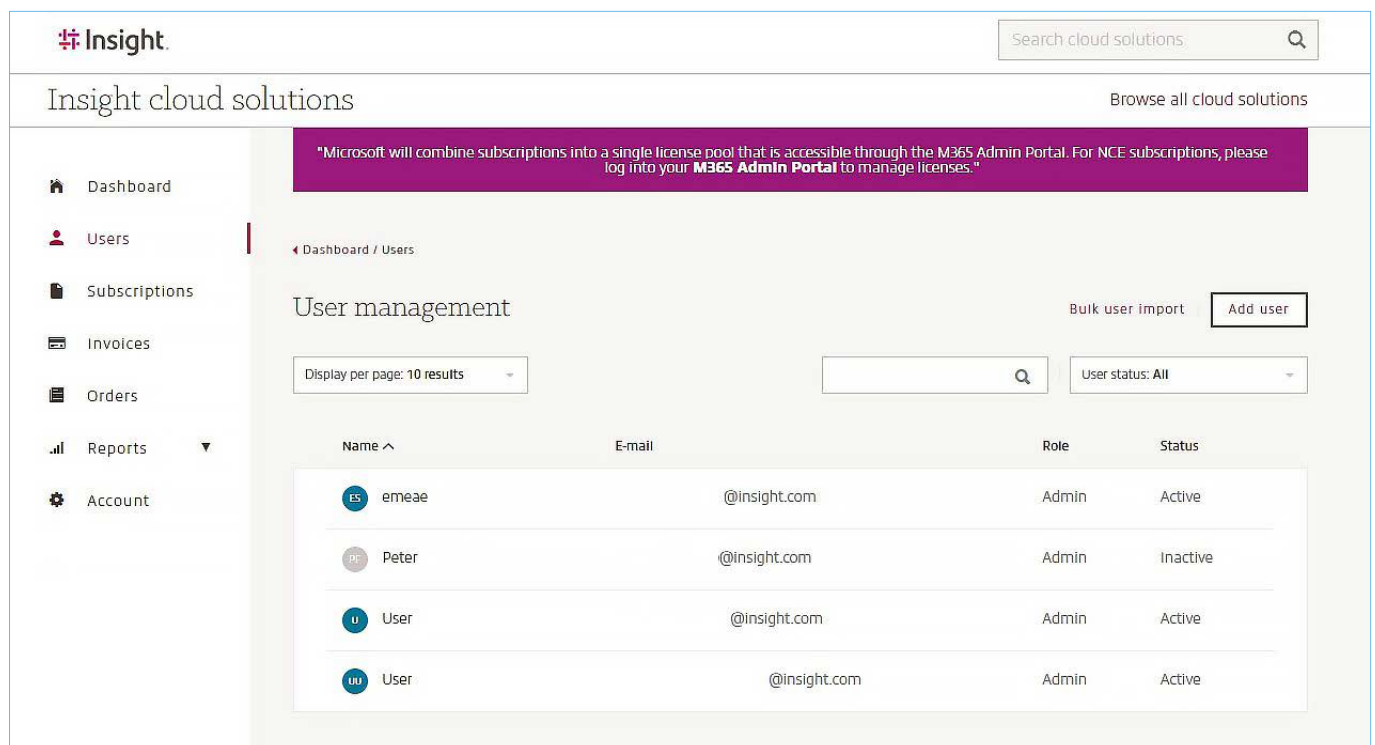
A simple welcome screen



## 3. Users

### 3.1 Adding users

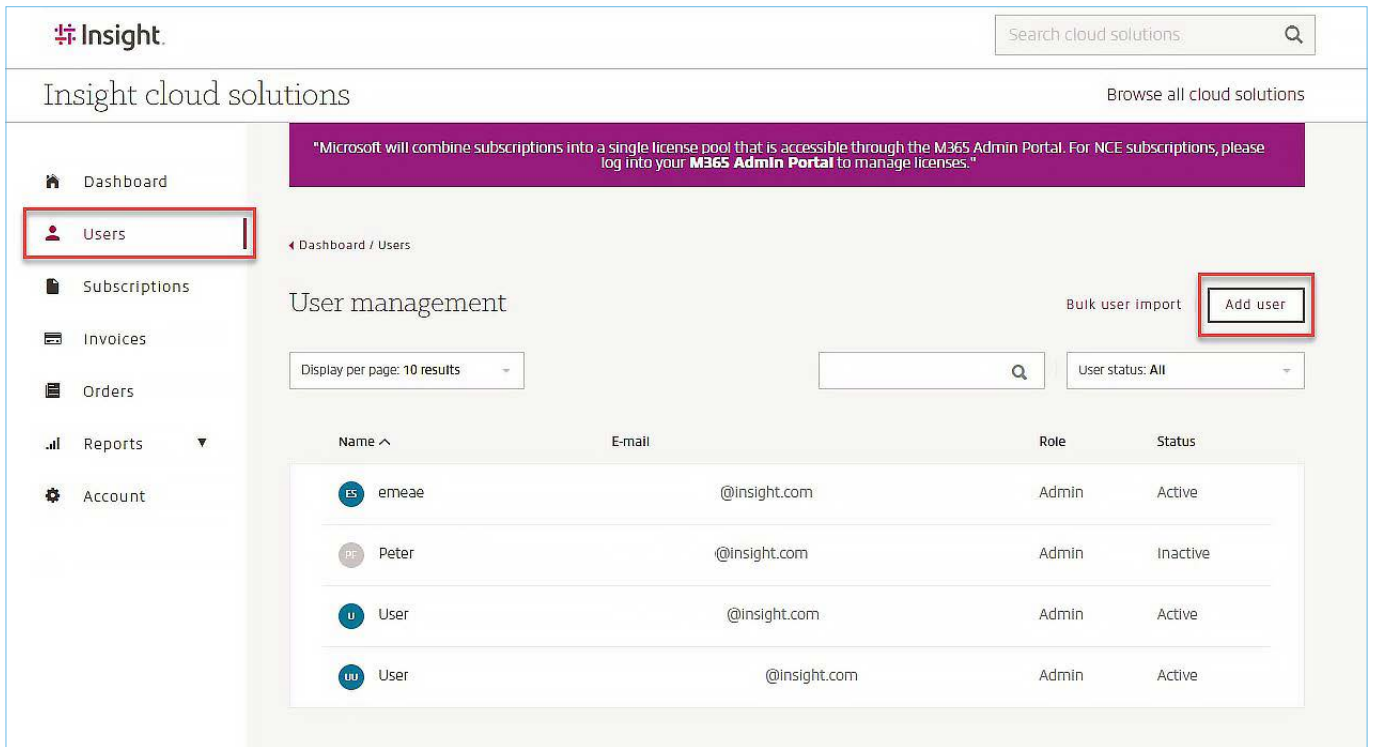
You can find the employee registered on the platform and the roles of each one.



### 3 roles can be assigned:

- **Admin:** can consult all the information on the platform, buy, modify, or cancel subscriptions.
- **User:** can only see information about their own account and licences assigned to themselves. Users cannot buy modify or cancel a subscription, nor can they access reports, orders or invoices.
- **Finance Admin:** can access financial reports, invoices, order information.

To create a new user, simply click the 'Add user' button and fill in the fields that display on screen:



The 'Add a user' form is a modal window with a close button (X) in the top right. It contains the following fields:

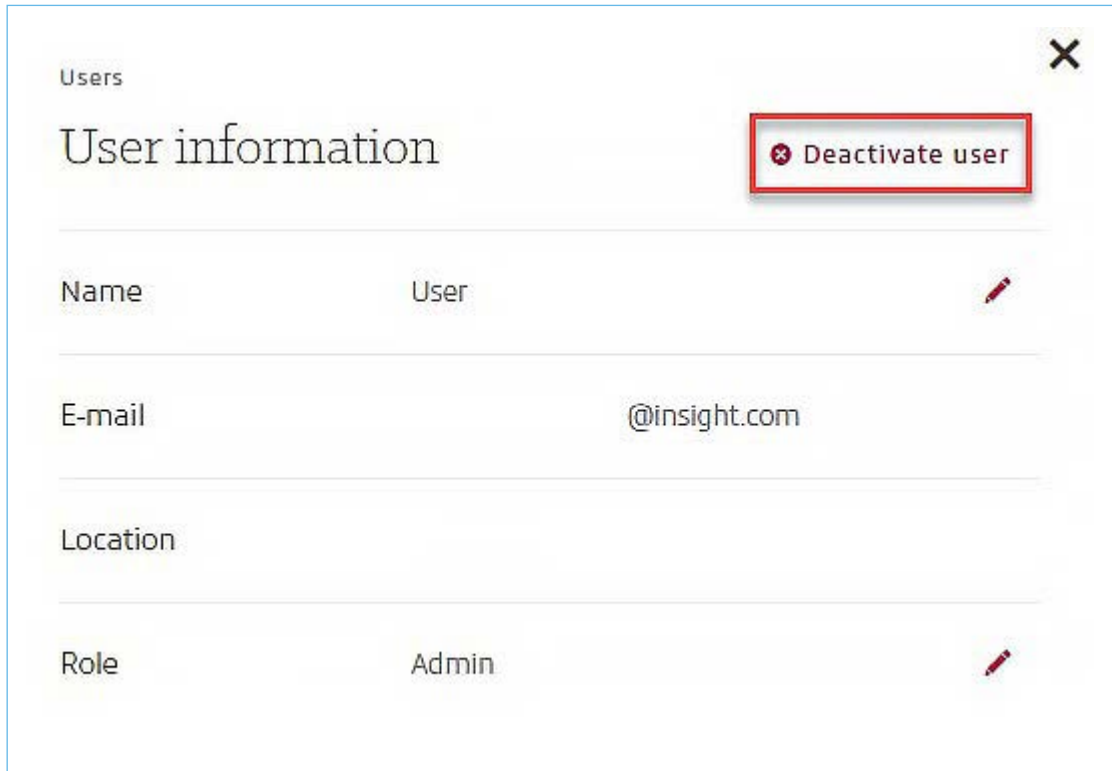
- First name\* (text input)
- Last name\* (text input)
- E-mail\* (text input)
- Location\* (dropdown menu)
- Role\* (dropdown menu with 'User' selected)

At the bottom are two buttons: 'Add' (red) and 'Cancel' (white).

## 3.2 De-activating a user

Please note users can only be de-activated, and not deleted.

To de-activate an existing user, please select the user in the list and click on “Deactivate user” button as per the below:

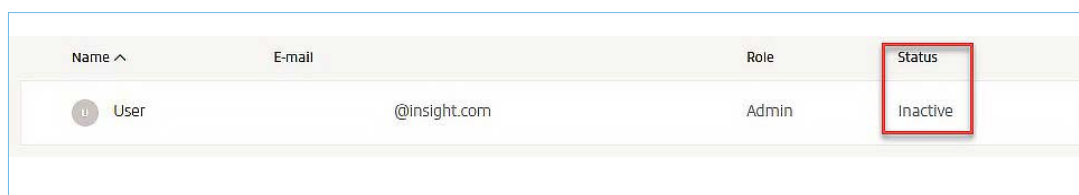


The screenshot shows a modal window titled 'Users' with a close button (X) in the top right corner. The main heading is 'User information'. Below this, there are four rows of user details, each with a label on the left and a value on the right, followed by a pencil icon for editing:


- Name: User
- E-mail: @insight.com
- Location: (empty)
- Role: Admin

A red rectangular box highlights the 'Deactivate user' button, which is located in the top right area of the modal window.

Once the user has been de-activate, the status should change to “Inactive”:



The screenshot shows a table with the following columns: Name, E-mail, Role, and Status. The 'Status' column is highlighted with a red box. The table contains one row of data:

Name ^	E-mail	Role	Status
 User	@insight.com	Admin	Inactive

# 4. Subscriptions

The portal lets you create new subscriptions or modify existing ones.

The screenshot shows the 'Insight' portal interface. At the top left is the 'Insight' logo. A search bar for 'cloud solutions' is at the top right. Below the header, the page title is 'Insight cloud solutions' with a link to 'Browse all cloud solutions'. A left-hand navigation menu includes 'Dashboard', 'Users', 'Subscriptions' (highlighted with a red box), 'Invoices', 'Orders', 'Reports', 'Account', and 'NCE Sync'. The main content area is titled 'Subscriptions' and includes a breadcrumb 'Dashboard / Subscriptions'. It features a search bar, filters for 'Subscriptions from' and 'Subscriptions to', and a 'Search' button. Below these are filters for 'Status: Active' and 'View: 100'. A table lists two active subscriptions:

Subscription id	Term	Frequency	Subscription	Status	Licenses	Creation date	Expiration date	Price per unit	PO Number
New Commerce Experience 00000K08C	Annual	Monthly	Power Automate per user plan	Active	1	Jun 2, 2023	Auto Renews on Jun 1, 2024	GBP £9.54	
New Commerce Experience 00000K08B	Annual	Monthly	Power Automate per user plan	Active	1	Jun 2, 2023	Auto Renews on Jun 1, 2024	GBP £9.54	

## 4.1. Adding a New Subscription

To create a new subscription, use the Search bar or click on 'Browse all cloud solutions' field to find the product you wish to purchase.

This screenshot shows the top portion of the Insight portal. The 'Insight' logo is on the left, and a search bar for 'cloud solutions' is on the right. Below the header, the text 'Insight cloud solutions' is displayed. A red box highlights the 'Browse all cloud solutions' button located at the bottom right of the header area.

Select the product you want to purchase by clicking 'See more details'.

The screenshot shows the Insight cloud solutions search results page. At the top left is the Insight logo. A search bar on the top right contains the text "Search cloud solutions". Below the search bar, the page title "Insight cloud solutions" is displayed, with a link "Browse all cloud solutions" on the right. The breadcrumb trail reads "Home / Microsoft 365 Business Basic". Below this, the page indicates "Results per page: 12" and "Sort by: Best match". A "Next page >" button is visible on the right. On the left side, under "Your search", the search term "Microsoft 365 Business Basic" is shown. Below that, the "Category" section shows a checkbox for "Microsoft Azure" with a count of "1". The main content area displays three product cards. The first card is for "Microsoft 365 Business Basic", described as "Best for businesses that need professional email, cloud file storage, and online m...". It features a "New Commerce Experience" badge and a "See more details" button, which is highlighted with a red rectangle. The second card is for "Microsoft 365 Business Premium" and the third is for "Microsoft 365 Business Standard", both also featuring "New Commerce Experience" badges and "See more details" buttons.

Choose the conditions and the quantity to apply and add the product to your basket.

The screenshot shows the product detail page for "Microsoft 365 Business Basic". At the top left is the Insight logo. A search bar on the top right contains the text "Search cloud solutions". Below the search bar, the page title "Insight cloud solutions" is displayed, with a link "Browse all cloud solutions" on the right. The breadcrumb trail reads "Home / All Cloud Products / Microsoft 365 Business Basic". The product title "Microsoft 365 Business Basic" is prominently displayed, with the Insight ID "Insight # CFQ7TTCOLH180001" below it. A "New Commerce Experience" badge is positioned above the pricing information. The pricing section shows "Your Price : EUR € 6,05". Below this, there are two columns of options: "Term" and "Billing Frequency". Under "Term", there are radio buttons for "Monthly" (which is selected), "Annual", and "Annual". Under "Billing Frequency", there are radio buttons for "Monthly", "Annual", and "Monthly". To the right of these options, a note says "Promotion may apply". Below the pricing and options, there is a quantity selector showing "1" and an "Add to basket" button, both highlighted with red rectangles. At the bottom left, the Microsoft 365 logo is displayed. Below the logo, the product description reads: "Best for businesses that need professional email, cloud file storage, and online meetings & chat. Desktop versions of Office apps like Excel, Word, and PowerPoint not included. For businesses with up to 300 employees."



The following screen enables you to verify the information about your order. If you are satisfied, click 'Proceed to checkout'.

**Insight** Search cloud solutions

Insight cloud solutions Browse all cloud solutions

\*Microsoft will combine subscriptions into a single license pool that is accessible through the M365 Admin Portal. For NCE subscriptions, please log into your **M365 Admin Portal** to manage licenses.\*

Home / Basket

Basket Save for later

Please review the contents of your basket below to ensure your order is correct. Click **Proceed to checkout** when you've finished shopping.

Your basket | 1 item

Item	Unit price	Qty	Total
<b>Microsoft 365 Business Basic</b> Insight #CFQ7TTCOLH180001MM New Commerce Experience Term : Monthly      Frequency : Monthly Align end date	EUR € 6,05	1 Update	EUR € 6,05

Recently viewed items

Microsoft 365

**Summary**

Recurring fees  
 Monthly EUR € 6,05

Subtotal: EUR € 6,05

Tax estimate Calculate

Total Ex VAT EUR € 6,05

**Proceed to checkout**

Continue Shopping

**NB:** When you place your very first order through our system, please note you may be prompted to enter your Microsoft tenant details. You will only be required to add in your domain details once, and this screen will no longer appear for future orders.

Place order

Fields denoted with \* are required to process your order.

**Order configuration**

**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.

Create your free Subdomain
  Enter existing account information

.onmicrosoft.com

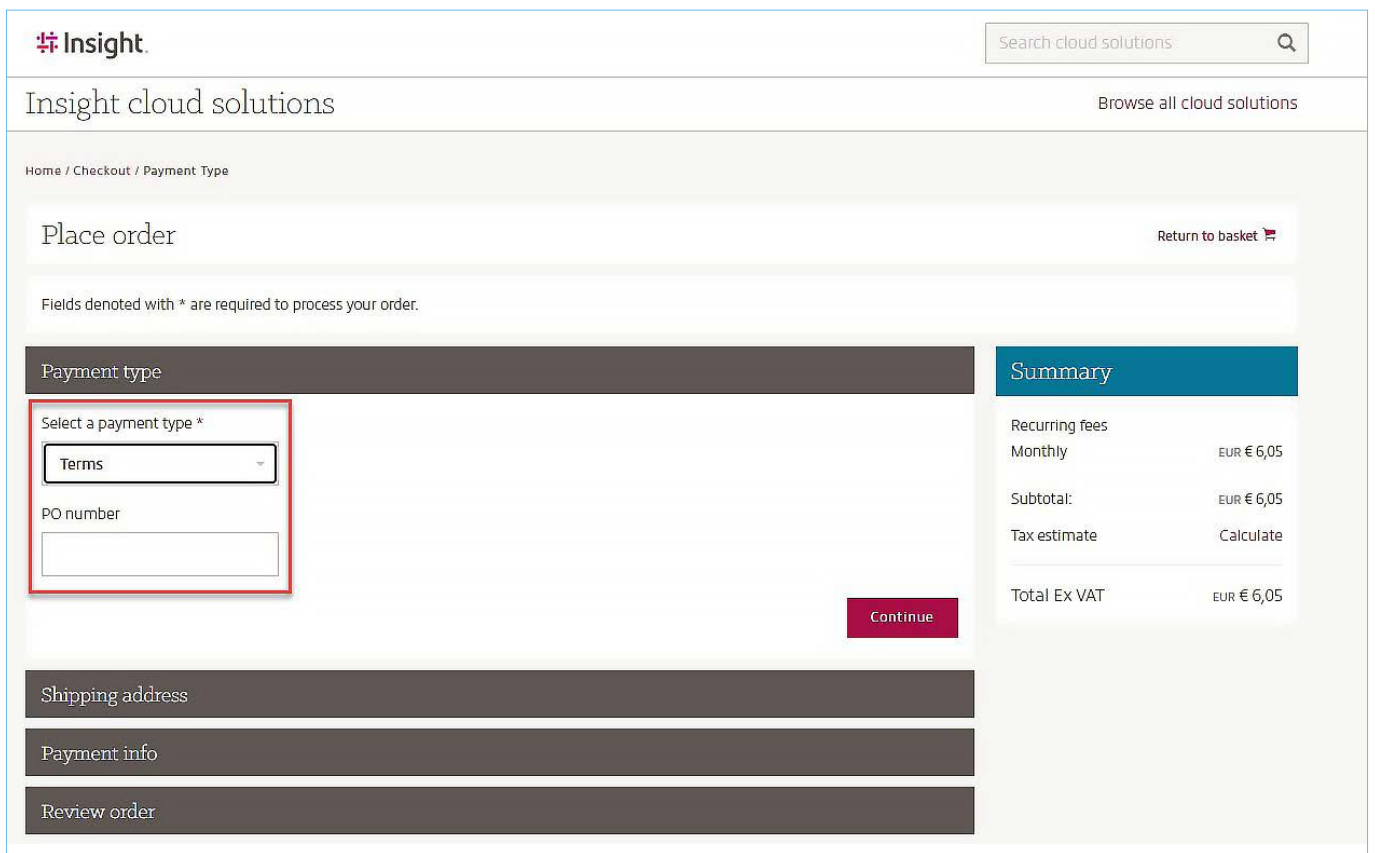
The subdomain name can only contain Latin letters and digits. It should be no more than 25 characters long. Ex: For mytenant.onmicrosoft.com, enter "mytenant".

**You can choose to create a new subdomain.** Simply select 'Create free subdomain' and enter the desired address while omitting the 'onmicrosoft.com'. For example, if your tenant is **testmay2023**, you will be required to add **testmay2023** as "onmicrosoft.com" is already implemented in the system. Login credentials will be sent to the email address used to register the Admin user on the Cloud Commerce Experience platform. For more details, please contact your Insight representative.

**If you already have a tenant**, select 'Enter existing subdomain' and type the address in the text field, omitting the 'onMicrosoft.com'.

**NB:** a Microsoft tenant can be assigned a custom domain. If you are unsure go to your M365 Admin portal in the Settings menu and look for the Domains tab. Your subdomain is the .onmicrosoft.com address.

Select your payment method – usually the terms of the contract your organisation signed with Insight. You can add a Purchase Order Number, which will figure on your following invoices. This can be modified at any point in time after the initial purchase.



Confirm your shipping and payment addresses – these can be modified any time by contacting your Insight representative – and validate the purchase.

Insight

Search cloud solutions

Insight cloud solutions [Browse all cloud solutions](#)

Home / Checkout / Final Review

Place order [Return to basket](#)

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
Microsoft 365 Business Basic Insight #CFQ7TTCOLH180001 <a href="#">New Commerce Experience</a>	Monthly	Monthly	EUR € 6,05	1	EUR € 6,05

**Summary**

Recurring fees  
 Monthly EUR € 6,05

Subtotal: EUR € 6,05

Tax estimate EUR € 1,27

**Total** EUR € 7,32

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.

[Place order](#)

Check the 'Orders' tab. Sort the list by chronological order and make sure the purchase is not set to 'in review'.

Insight

Search cloud solutions

Insight cloud solutions [Browse all cloud solutions](#)

Dashboard / Orders

Orders

Display per page: 10 results Search Orders from Orders to [Search](#)

Order number	Order Type	Order status	Order date	Amount	PO number
0063933417	CHANGE	Completed	Jun 29, 2023	EUR € 1.274,63	
0063851190	CHANGE	Completed	Jun 29, 2023	EUR € 732,05	
0063931492	INITIAL	Completed	Jun 29, 2023	EUR € 7,32	
0063615845	CHANGE	Completed	Jun 1, 2023	EUR € 3,36	

If that is the case, it may be a simple anti-fraud check. If the verification persists after an hour, your credit limit may have been reached. In any case it's best to contact your Insight representative.

The new line displays on the 'Subscriptions' menu. It goes through a few phases before finally going into 'Active' status.

Insight cloud solutions

Search cloud solutions

Dashboard / Subscriptions

Subscriptions

Vendor information

Search Subscriptions from Subscriptions to Search

Status: Active View: 100

Subscription id	Subscription	Status	Licenses	Creation date	Expiration date	Price per unit	PO Number
New Commerce Experience 00000KGC1	Microsoft 365 Business Basic	Pending	1	Jun 29, 2023		EUR € 6,05	
New Commerce Experience 00000JTHL	Microsoft 365 E5	Active	1	May 5, 2023	May 4, 2024	EUR € 644,76	

From there on, the licence is provisioned on your tenant and can be assigned via the [M365 Admin console](#).

**NB:** The Azure Plan is a particular case – it contains no licence, cannot be set to expire or renew and will be billed based on consumption ordered from the Azure Portal, see separate dedicated section. (4.2.B)

## 4.1A. Co-Terminosity

Subscriptions created on different dates have different renewal dates. Co-terminosity is the ability to align the end dates of subscriptions to make renewals easier.

You have the option to align the end / renewal date of subscriptions within the cart at the time of purchase:

Basket

Save for later

Please review the contents of your basket below to ensure your order is correct. Click Proceed to checkout when you've finished shopping.

Your basket | 1 item

Item	Unit price	Qty	Total
Microsoft 365 Business Basic Insight #CFQ7TTC0LH180001MM New Commerce Experience Term : Monthly      Frequency : Monthly <b>Align end date</b>	EUR € 6,05	1	EUR € 6,05

Recently viewed items

**Summary**

Recurring fees Monthly EUR € 6,05

Subtotal: EUR € 6,05

Tax estimate Calculate

Total Ex VAT EUR € 6,05

**Proceed to checkout**

Continue Shopping

If you wish to align end dates, you can select either to align to end of calendar month date or align to the end date of an existing subscription:

The screenshot shows the 'Insight' user interface. At the top, it says 'Your basket | 1 item'. Below this is a table with columns: Item, Unit price, Qty, and Total. The item is 'Microsoft 365 Business Basic' with a unit price of 'EUR € 6,05' and a quantity of '1'. There is an 'Update' button next to the quantity. Below the table, there are options for 'Term : Monthly' and 'Frequency : Monthly'. A red box highlights two radio button options: 'Align subscription renewal date with end of calendar month' and 'Align to existing subscription renewal date'. Below these are two dropdown menus. The first dropdown is set to 'September 16, 2023 (2 Subscription)' and the second to 'May 04, 2024 (2 Subscription)'. Below the dropdowns are two tables. The first table lists existing subscriptions with columns 'Friendly name', 'Term', and 'Subscription ID'. The second table also lists existing subscriptions with the same columns. At the bottom right, there are 'Cancel' and 'Align end date' buttons.

Item	Unit price	Qty	Total
Microsoft 365 Business Basic Insight #CFQ7TTC0LH180001MM New Commerce Experience	EUR € 6,05	1	EUR € 6,05

Term : Monthly      Frequency : Monthly

Align subscription renewal date with end of calendar month  
 Align to existing subscription renewal date

September 16, 2023 (2 Subscription)      ▼  
 Friendly name      Term      Subscription ID

Office 365 E1	P1Y	F284-4637-D9DE-07CC229BD3B9
Microsoft Stream Plan 2 for Office 365 Add-On	P1Y	FFEA-4F52-DBB0-3A1FA615D609

May 04, 2024 (2 Subscription)      ▼  
 Friendly name      Term      Subscription ID

Exchange Online (Plan 2)	P1Y	E682-420F-C38A-FDFE093C8AE4
Microsoft 365 E5	P1Y	D8D8-4953-DC37-AF4C722281FA

Scheduled renewal date :

Cancel      **Align end date**

Use of either option is governed by Microsoft alignment rules, where the scheduled renewal date will be presented based upon the Microsoft criteria.

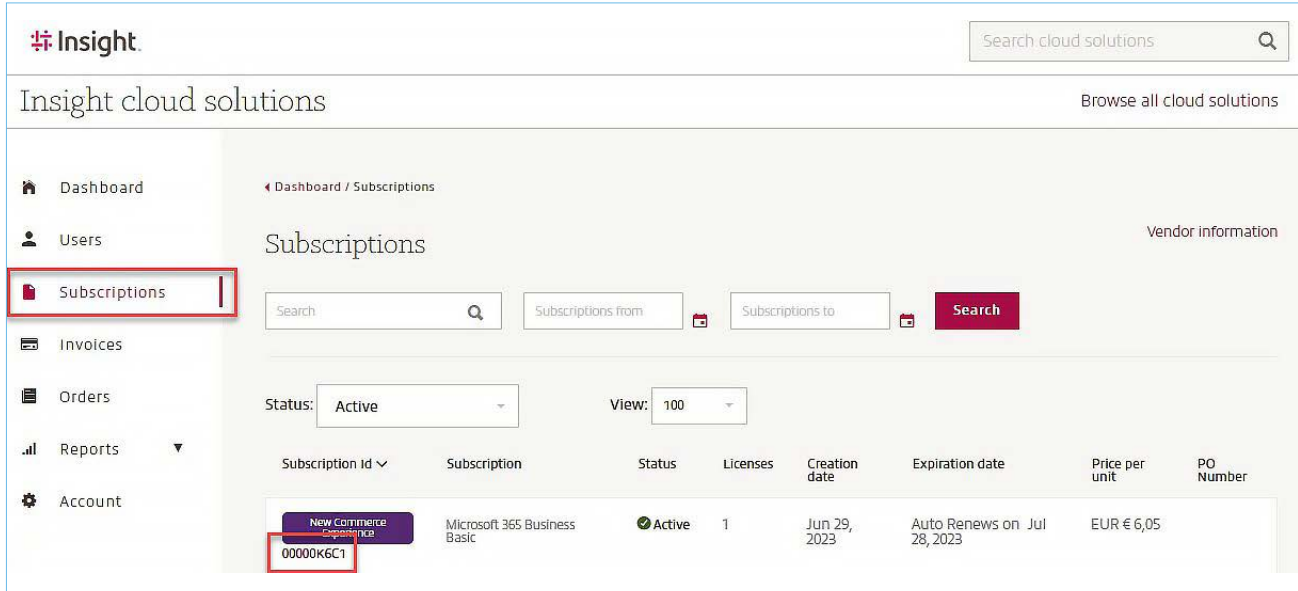
**NB:** Activating co-terminosity for an existing subscription does not change the end date of the existing term, rather it schedules the co-terminosity to be activated when the subscription next renews.

**NB:** Adding new licences to an existing subscription will maintain the renewal date of the pre-existing subscription.

## 4.2. Manage Existing Subscriptions

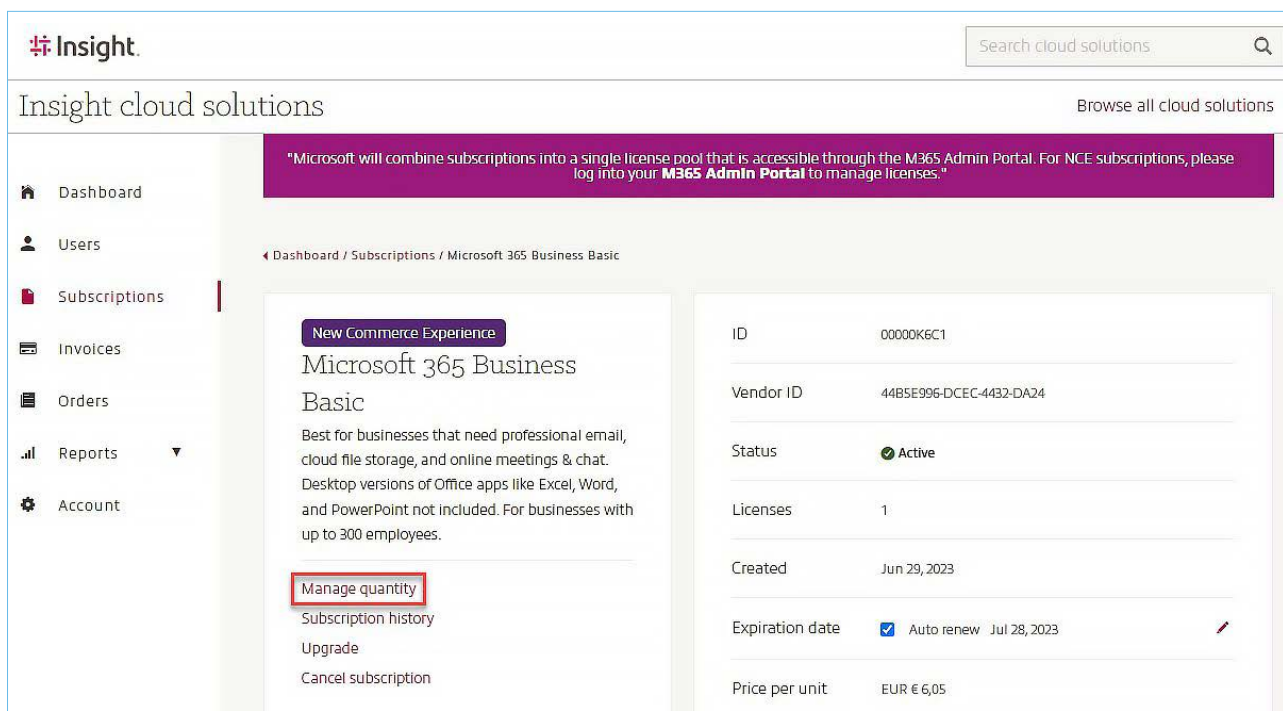
### 4.2.A. Manage Licence Quantity

To modify an existing subscription, go into your Subscriptions page and select the product you want to modify by clicking on the relevant ID.



This displays the subscription details page, with a complete summary of all information regarding your licences. Each individual subscription constitutes an individual contract with its own price, renewal date and conditions. To keep things simple or enjoy a discounted price after the offer is no longer available to new subscriptions, you may want to modify an existing one.

From the subscription details page, follow the 'Manage Quantity' link.



## Increase licences quantity

Enter the quantity of licences by which you want to increase the subscription and click 'Update'. Confirm you accept the terms and click 'Submit changes'.

The screenshot shows the 'Manage quantity' page for a Microsoft 365 Business Basic subscription. The interface includes a sidebar with navigation options like Dashboard, Users, Subscriptions, Invoices, Orders, Reports, Account, and NCE Sync. The main content area displays the subscription name and a description: 'Best for businesses that need professional email, cloud file storage, and online meetings & chat. Desktop versions of Office apps like Excel, Word, and PowerPoint not included. For businesses with up to 300 employees.' Below this, there are links for 'Manage quantity', 'Subscription history', 'Upgrade', and 'Cancel subscription'. The right-hand panel shows the current license quantity as 1, with an option to 'Increase license qty' selected. A text input field contains the number '99', and the 'Per unit price' is listed as 'EUR € 6,05'. A warning message states: 'There are no seats currently available for reduction. The 7 day cancellation window for each seat is closed'. At the bottom, there is a 'Cancel' button and a prominent 'Submit changes' button.

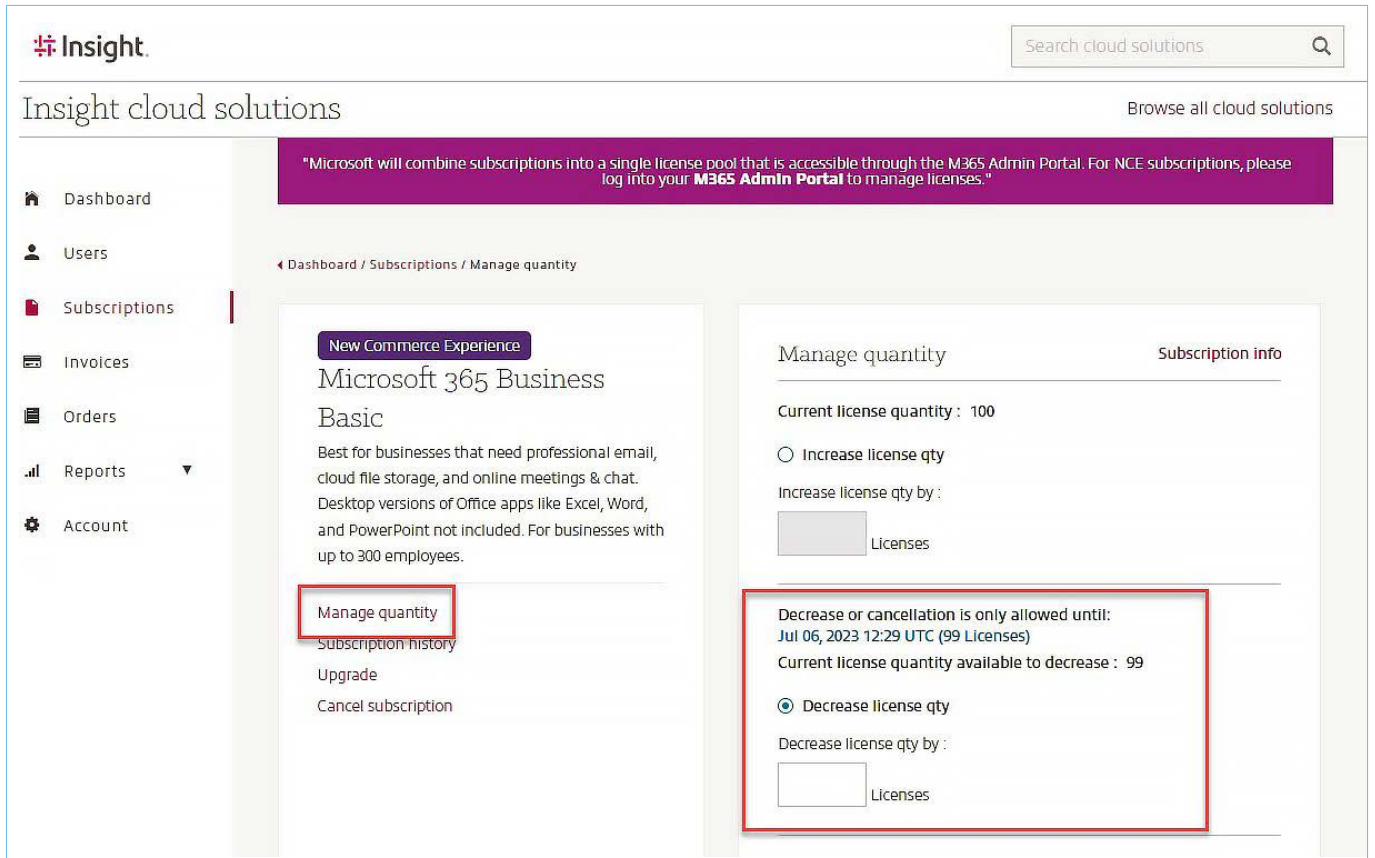
The subscription moves to 'change requested' status for a few minutes and is then back to active.

Subscription Id	Subscription	Status	Licenses
 00000K6C1	Microsoft 365 Business Basic	Change Requested	1

Subscription Id	Subscription	Status	Licenses
 00000K6C1	Microsoft 365 Business Basic	Active	100

## Decrease licences quantity

The same process as described above applies to reduce the number of licences in a subscription.



If the subscription is stuck in Change Requested status, please raise a Service Now ticket to ask for assistance from an Insight representative.

**NB:** Under New Commerce Experience, subscriptions may only be cancelled, or the volume of licences reduced (in each case for a pro-rata refund), within 7 days of the date of purchase or date of renewal of a subscription.



## 4.2.B The Exception of Azure Plan

To open your first Azure subscription, simply follow the process above in 4.1 by searching for 'Azure Plan'. You will be able to access your resources via the [Azure Portal](#).

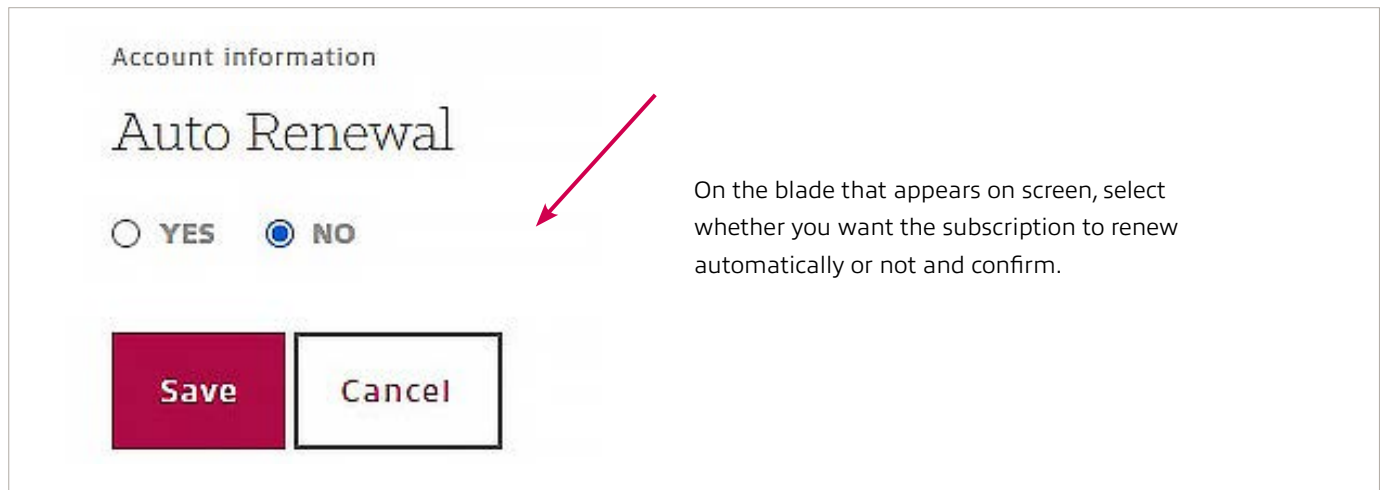
Any subsequent Azure subscription can only be opened by your CSP Partner, as per the editor's guidelines. To open an additional Azure subscription, please raise an Add/Modify/Cancel subscription request in Service Now confirming the following details:

- Microsoft tenant (ID or subdomain name) where the subscription must be added.
- Name of the subscription to add.
- Full name and Email address of the account(s) to be named owner(s) of the subscription.

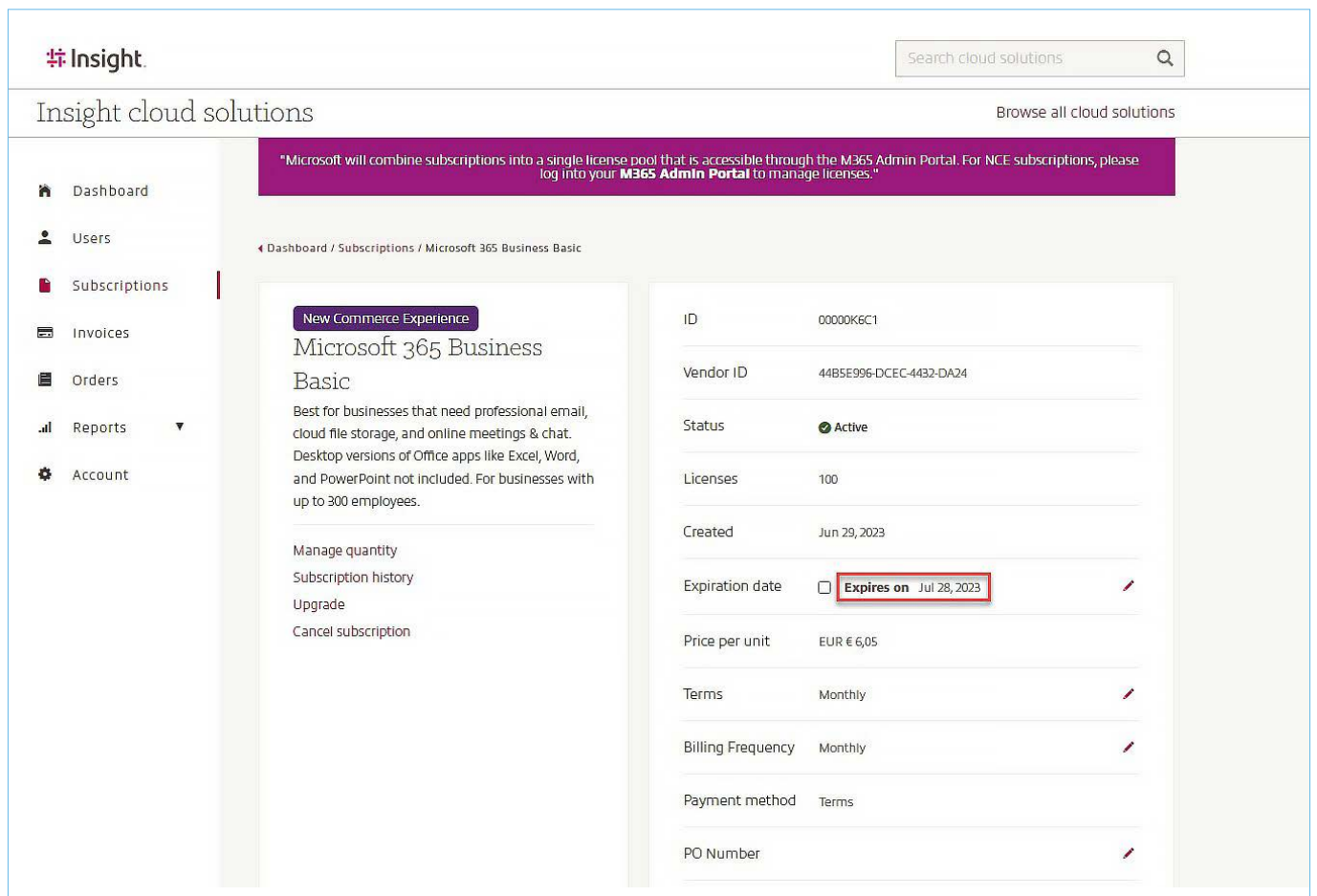
## 4.2.C Switching Auto-renewal on and off

From the Subscriptions details screen, select the pencil next to auto-renew.

The screenshot displays the 'Insight cloud solutions' interface. On the left is a navigation menu with items: Dashboard, Users, Subscriptions, Invoices, Orders, Reports, and Account. The main content area shows details for a 'Microsoft 365 Business Basic' subscription. A purple banner at the top states: "Microsoft will combine subscriptions into a single license pool that is accessible through the M365 Admin Portal. For NCE subscriptions, please log into your M365 Admin Portal to manage licenses." Below this, the subscription details are shown in two columns. The right column contains a list of fields: ID (0000K6C1), Vendor ID (44B5E996-DCEC-4432-DA24), Status (Active), Licenses (100), Created (Jun 29, 2023), Expiration date (Jul 28, 2023), Price per unit (EUR € 6,05), Terms (Monthly), Billing Frequency (Monthly), Payment method (Terms), and PO Number. The 'Expiration date' row is highlighted with a red border, and the 'Auto renew' checkbox is checked. A pencil icon is visible next to the date and the 'Auto renew' checkbox.



The page reloads after a few seconds and the change is displayed on screen.



## 4.2.D Update Purchase Order Number

From the subscription details screen, click the pencil icon on the 'PO Number' row. Apply the change by clicking the green button. The PO is mentioned on your invoice and can help differentiating between similar products.

The screenshot shows the Insight cloud solutions interface. At the top, there is a search bar for cloud solutions. Below it, the breadcrumb path is "Dashboard / Subscriptions / Microsoft 365 Business Basic". A purple banner at the top of the main content area contains a message: "Microsoft will combine subscriptions into a single license pool that is accessible through the M365 Admin Portal. For NCE subscriptions, please log into your M365 Admin Portal to manage licenses." The main content area is divided into two columns. The left column contains a "New Commerce Experience" badge and the subscription name "Microsoft 365 Business Basic". Below the name is a description: "Best for businesses that need professional email, cloud file storage, and online meetings & chat. Desktop versions of Office apps like Excel, Word, and PowerPoint not included. For businesses with up to 300 employees." Below the description are links for "Manage quantity", "Subscription history", "Upgrade", and "Cancel subscription". The right column contains a table of subscription details:

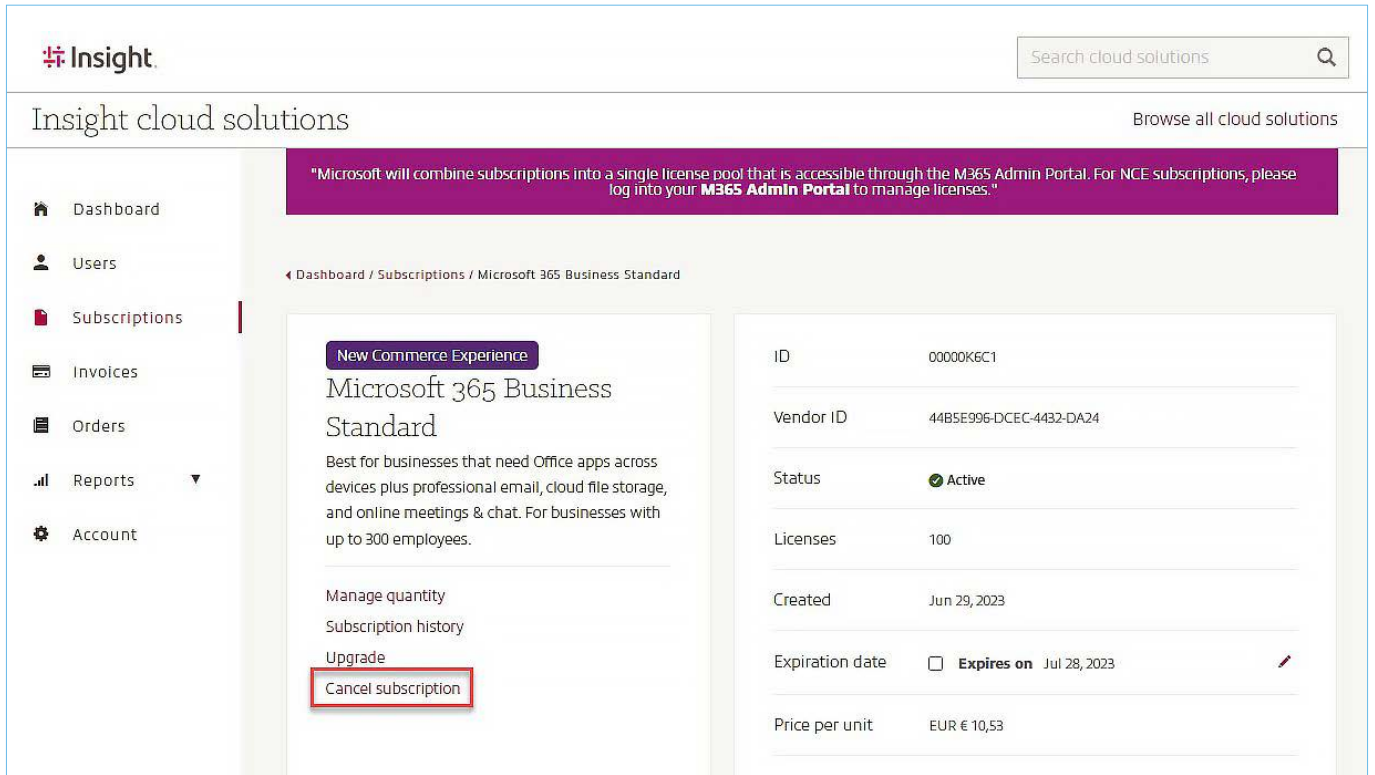
ID	00000K6C1
Vendor ID	44B5E996-DCEC-4432-DA24
Status	Active
Licenses	100
Created	Jun 29, 2023
Expiration date	<input type="checkbox"/> Expires on Jul 28, 2023
Price per unit	EUR € 6,05
Terms	Monthly
Billing Frequency	Monthly
Payment method	Terms
PO Number	

The "PO Number" field is highlighted with a red box, and a pencil icon is visible next to it, indicating it can be edited.

**NB:** You cannot use the 'space' character in the PO. Instead, use a hyphen, dash, or underscore.

## 4.2.E Cancel a Subscription

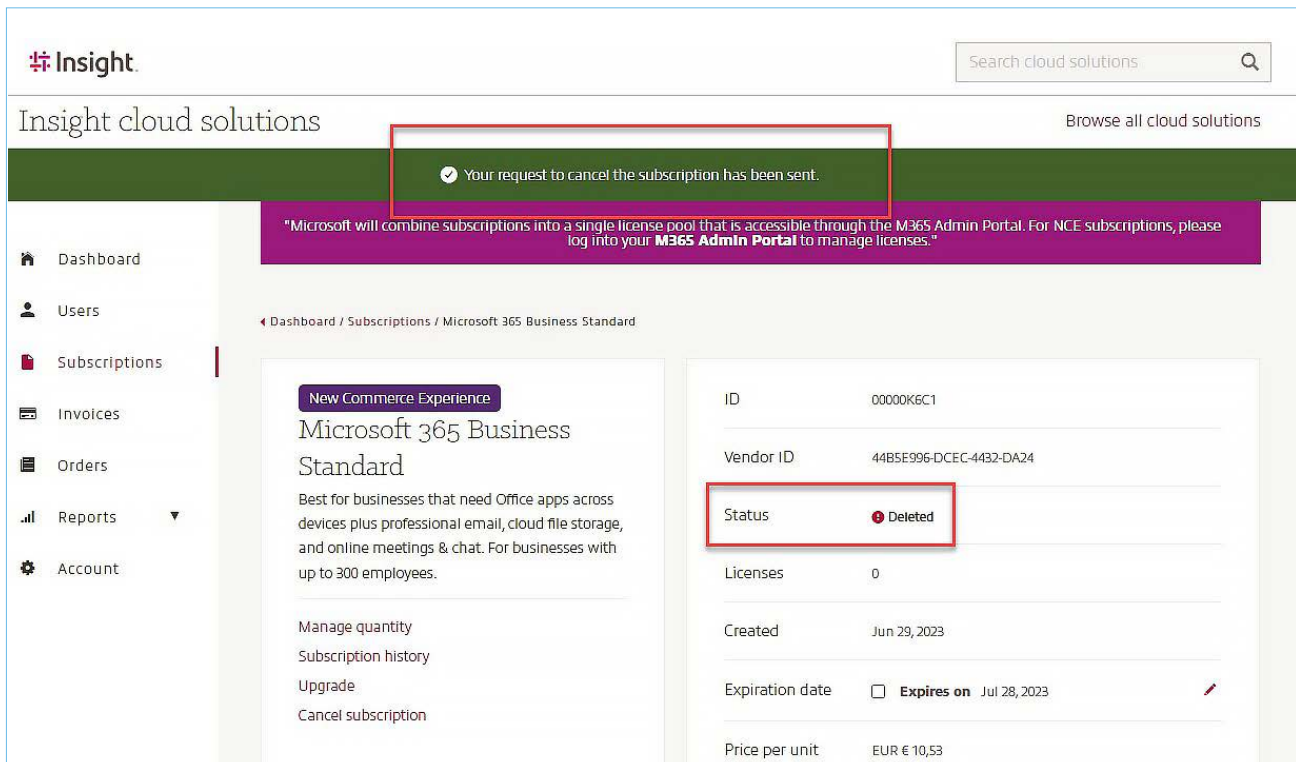
From the subscription details screen, select 'Cancel subscription'.



On the blade that appears, fill in a brief reason to confirm you are willingly removing the subscription.

The page reloads. You can see from the 'Subscription' menu the action is complete.

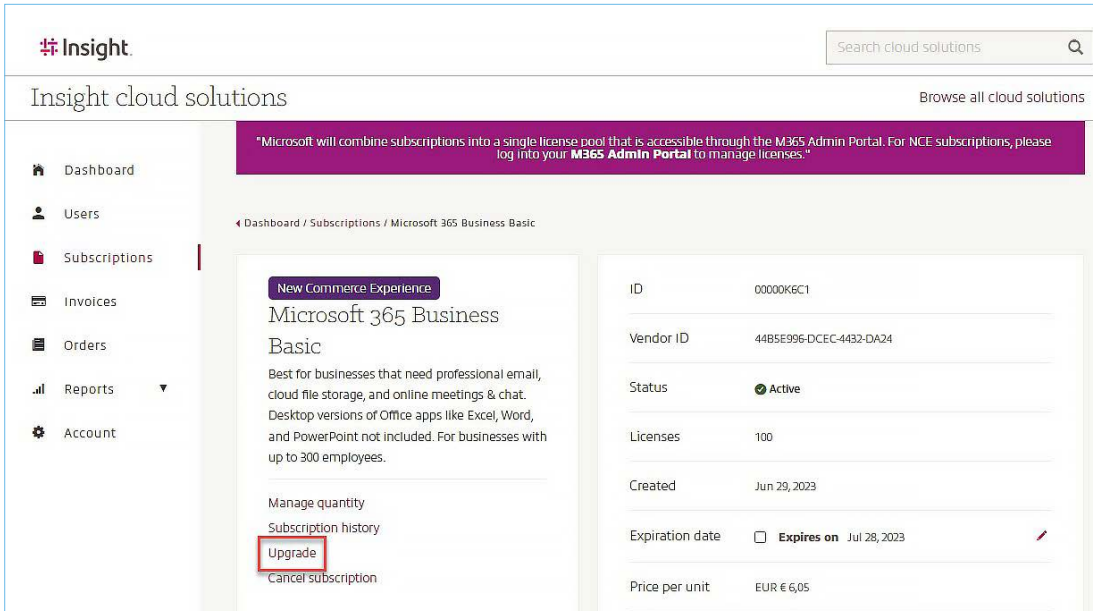
**NB:** Under Microsoft New Commerce Experience, you can cancel a subscription only during a 7 days (or 168 hours) window after purchase or renewal. After this window closes, the subscription will stay active until the end of the term.



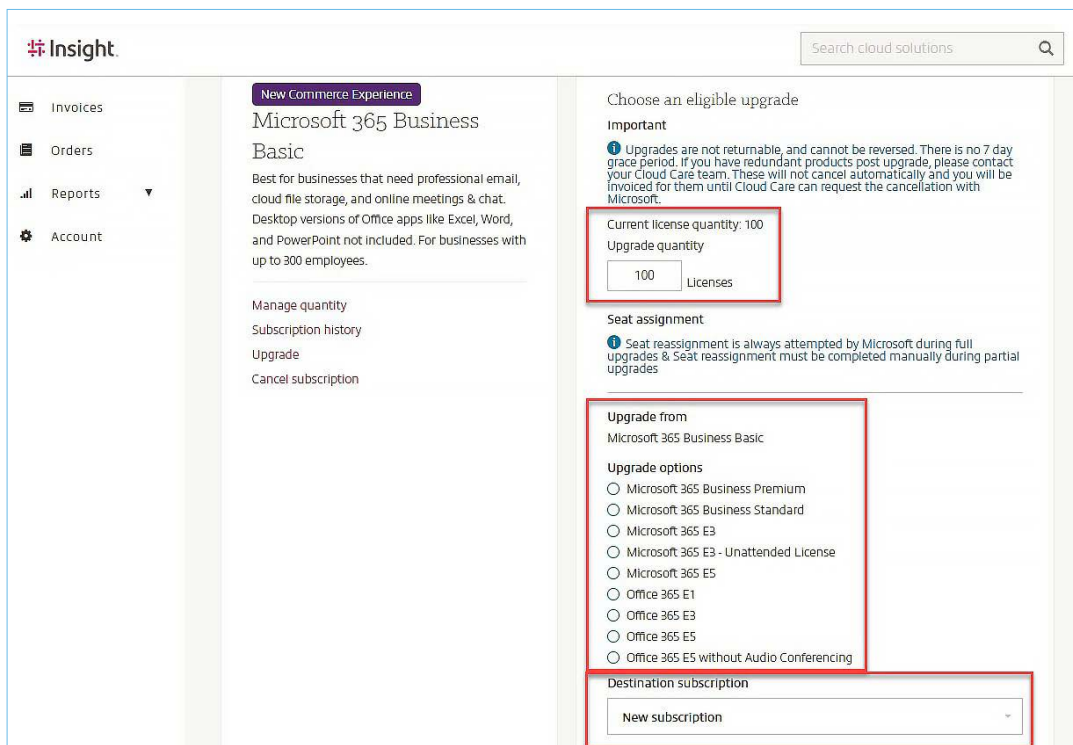
# 5. NCE Features

## 5.1 Upgrade

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. 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 licences contained in the subscription (partial upgrade) or all the licences (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 licence.

**Destination subscription:** you can choose to open a new subscription or, if available, to add the licences 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 checked="" type="radio"/> EUR € 12,64 EUR € 10,53	Monthly	Monthly <span style="color: #e91e63;">🏷️</span> Promotion Applied
<input type="radio"/> EUR € 126,36	Annual	Annual
<input type="radio"/> EUR € 10,53	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 licences contained in the subscription (this is called a ‘partial upgrade’), or to perform a full upgrade (i.e.: to upgrade the subscription entirely and all the licences it contains).

**NB:** Although it might be offered to you, Microsoft will not allow an upgrade towards a shorter term (i.e.: from yearly towards monthly commitment) as this would contravene to T&C’s. Please always make sure you are aware of this restriction.

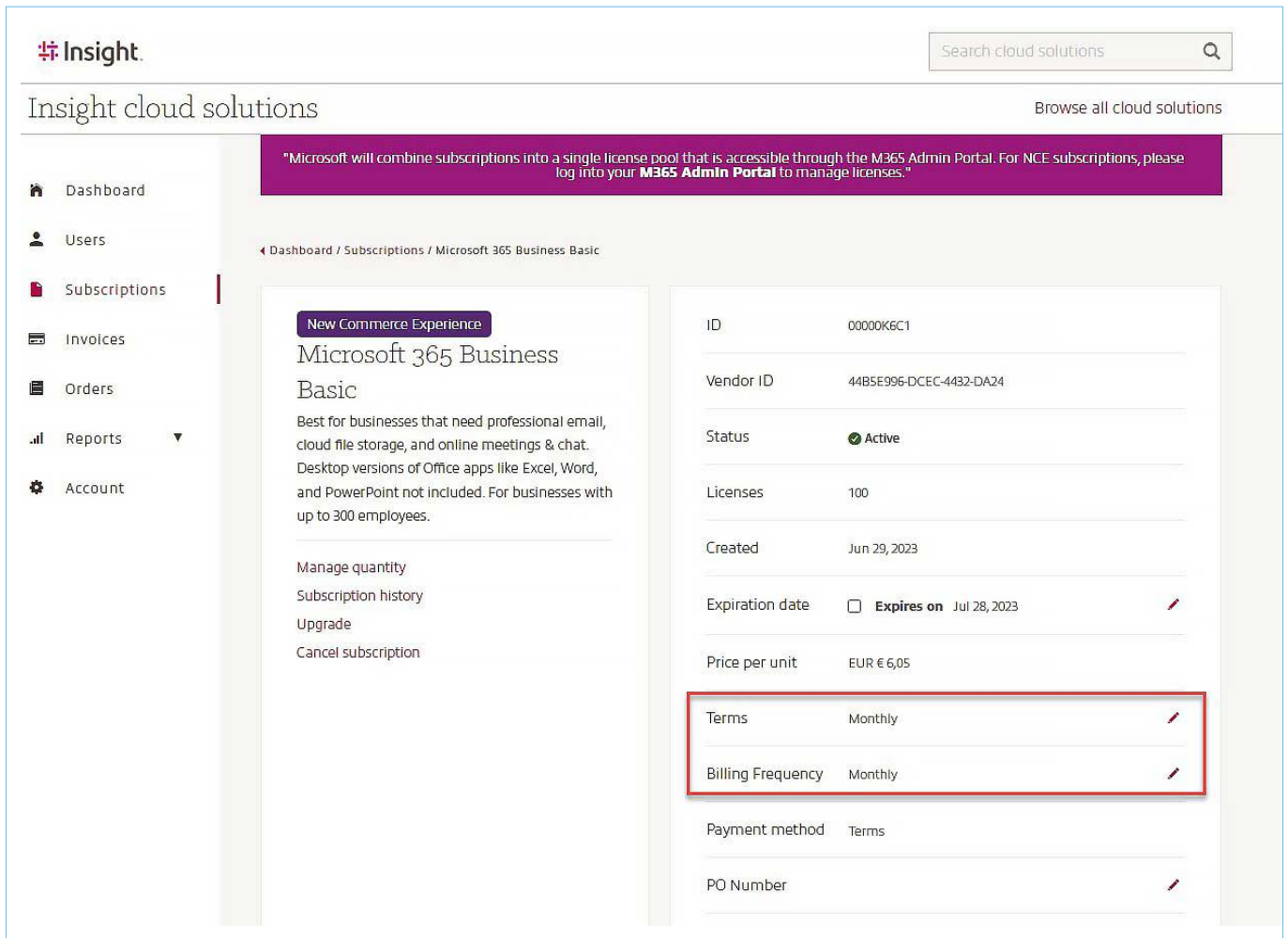
Once you click on Upgrade, your order is forwarded to Microsoft. After a time the subscription status updates on the platform.

The screenshot shows the Insight cloud solutions interface. At the top left is the Insight logo. A search bar for cloud solutions is at the top right. Below the header, there are two notification banners: a purple one about Microsoft combining subscriptions and a teal one stating "Your subscription has been successfully submitted for upgrade." The main content area is titled "Insight cloud solutions" and includes a breadcrumb trail: "Dashboard / Subscriptions / Microsoft 365 Business Standard". On the left is a navigation menu with items: Dashboard, Users, Subscriptions, Invoices, Orders, Reports, and Account. The "Subscriptions" menu item is highlighted. The main content area displays details for a "Microsoft 365 Business Standard" subscription. A red box highlights the title "Microsoft 365 Business Standard" and another red box highlights the "Active" status. The subscription details include: ID (0000K6C1), Vendor ID (44B5E996-DCEC-4432-DA24), Licenses (100), Created (Jun 29, 2023), Expiration date (Expires on Jul 28, 2023), Price per unit (EUR € 10,53), Terms (Monthly), and Billing Frequency (Monthly). A list of actions is shown below the description: Manage quantity, Subscription history, Upgrade, and Cancel subscription.

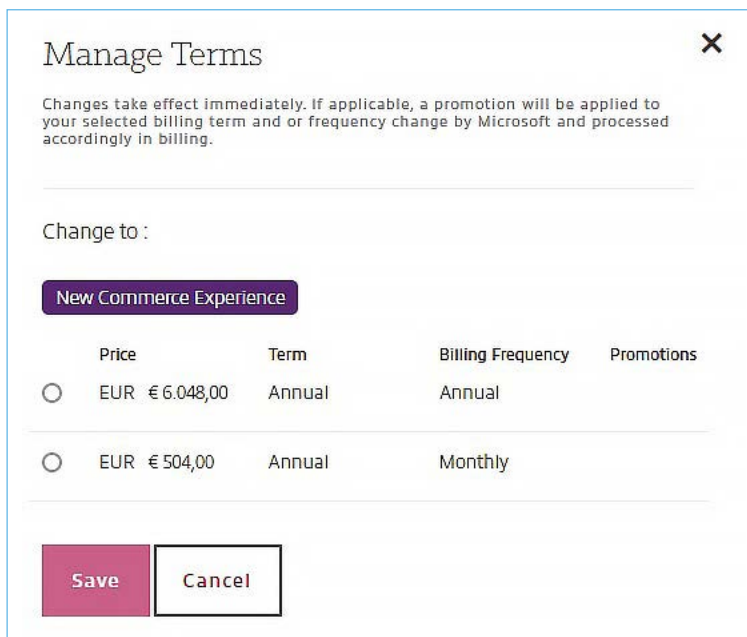
**NB:** Although M365 Admin will try to handle licence assignment, it is best practice to proceed to a manual check afterward to maintain service continuity.

## 5.2 Change Terms

If applicable and depending on NCE licensing rules, you can change the term and payment schedule of an existing subscription. From the subscription details click the pencil icon of the attribute you wish to modify (term or payment).



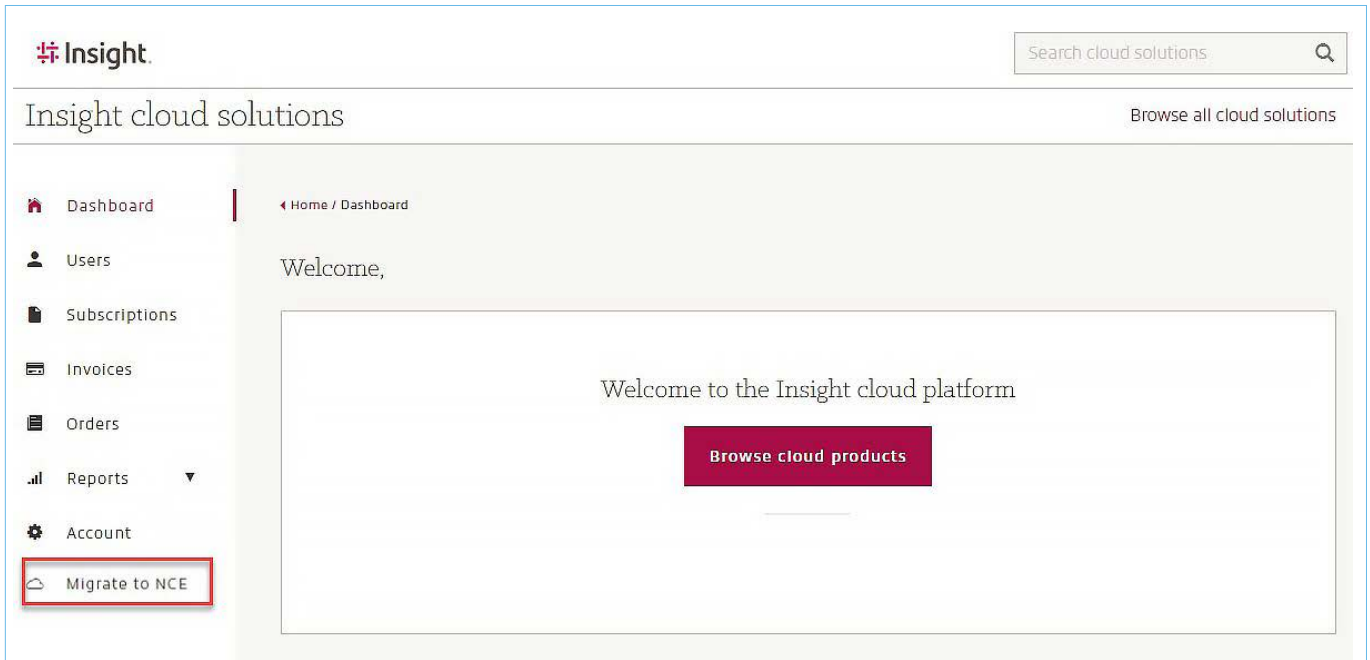
On the blade that displays, select the new terms and validate the operation. After a time, the page automatically updates to reflect the change.



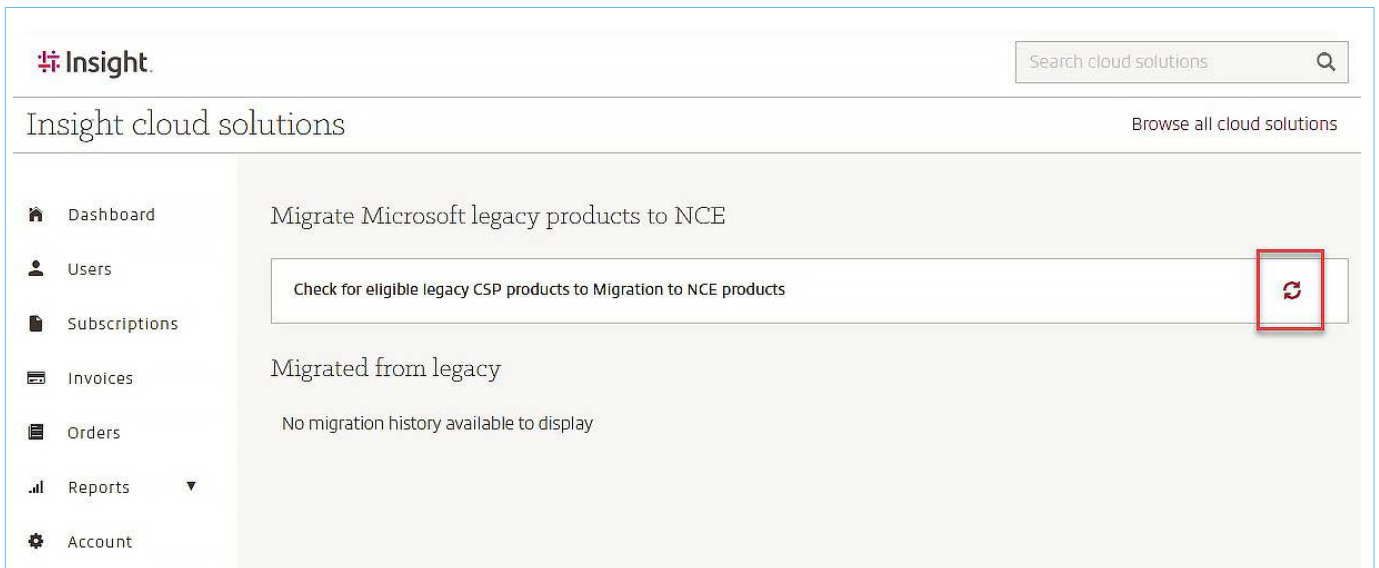


## 5.3 How to Migrate to NC

The Migrate to NCE feature can be found in the menu within the portal on the left side.



Upon selecting "Check for eligible legacy CSP products to upgrade to NCE products" the system will process the request to validate active legacy CSP subscriptions and determine eligibility.



Once eligibility has been determined, the process to identify and validate legacy CSP subscription suitability will commence and users will be presented with the results. The output will be sorted listing those legacy CSP products and add-ons eligible for migration first, followed by those that are ineligible.

**NB:** Eligibility is determined by Microsoft. A specific product may be categorised as "Ineligible" if the NCE not supported.

You will be presented with the ability to review eligible legacy CSP products and the corresponding NCE product to which they will migrate, offering the options to:

- Migrate the NCE subscriptions to a full term if desired by means of selecting the “Yes” button associated with the option. If “No” is selected the current subscription end date will remain and carried over to the new NCE subscription.
- Review and update the Purchase Order Number carried over from the corresponding legacy CSP product.

**NB:** The subscription term (one year) and billing frequency (annual upfront or monthly) will be carried over from the legacy subscription and can't be changed during the migration.

Insight cloud solutions

Search cloud solutions

Browse all cloud solutions

Dashboard / Migrate Microsoft legacy products to NCE / Migrate Microsoft Legacy to NCE

### Migrate Microsoft Legacy to NCE

Eligible products to migrate

All Legacy to NCE migrations will inherit the payment methods, shipping address, and billing address of their Legacy CSP equivalents.

Legacy					
Name	Subscription ID	Qty	Unit price	Total	
SharePoint (Plan 1)	52FD10ES-7410-467D	4	GBP £4.10	GBP £16.40	
		Terms	Billing frequency	PO number	
		Annual	Monthly	-	

NCE					
Name	Subscription ID	Qty	Unit price	Total	
SharePoint (Plan 1)	-	4	GBP £3.98	GBP £15.92	
		Terms	Billing frequency	PO number	
		Annual	Monthly	<input type="text"/>	

Migrate to full term  
 Yes  No

Once the request is completed, the user will be presented with the results page. The system will create the new NCE subscription in the portal and set the legacy CSP seat count to zero.

Migration history is updated to reflect the migration event and will update as the migration process progresses.

## 6. Invoices

This section displays a list of past invoices, which can be sorted by various criteria.

The screenshot shows the 'Invoices' section of the Insight cloud solutions interface. The sidebar on the left has 'Invoices' highlighted with a red box. The main content area shows the current balance as GBP £7,326.27. Below this is a search and filter section with a 'Display per page: 10 results' dropdown, a search input, and date range filters. A table lists three invoices with columns for ID, Invoice date, Invoice due date, Bill amount, Status, and Download PDF.

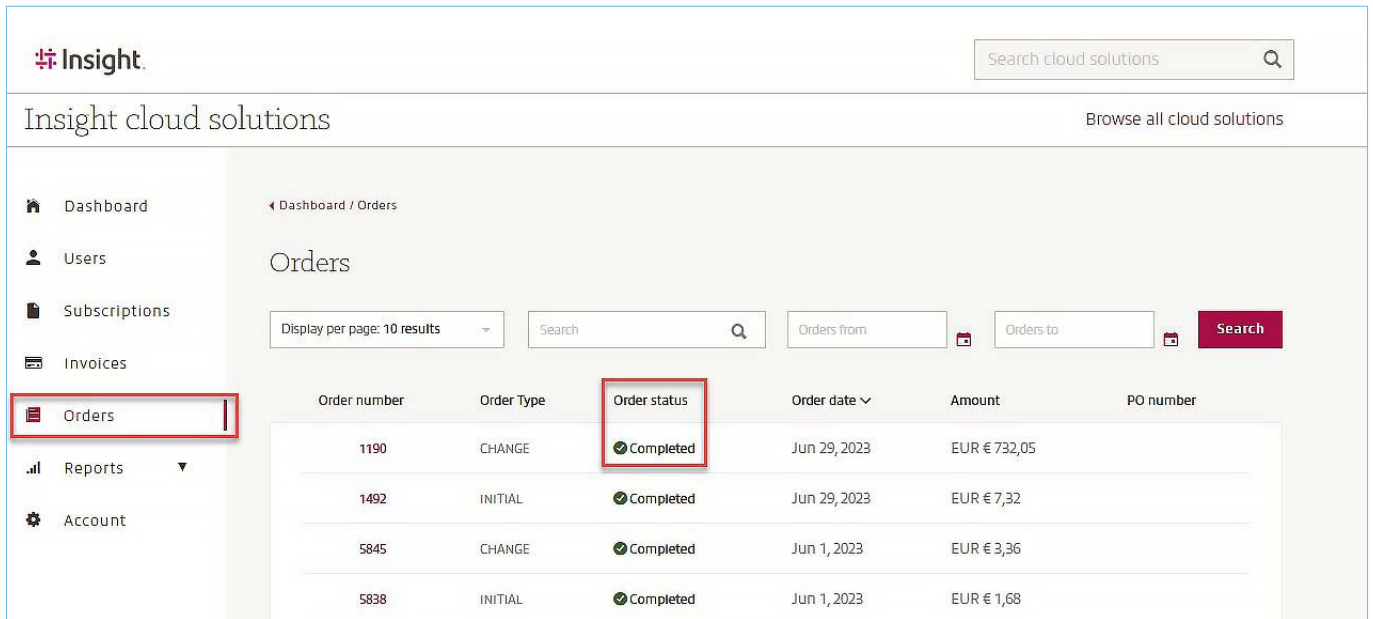
ID	Invoice date	Invoice due date	Bill amount	Status	Download PDF
32765	Jun 19, 2023	Jul 19, 2023	GBP £5,693.48	Unpaid	View
15400	May 30, 2023	Jun 29, 2023	GBP £56.71	Paid	View
04393	May 17, 2023	Jun 16, 2023	GBP £5,241.70	Paid	View

You can display each document in a different tab for download or consultation purpose. The screen also lets you consult your Credit Limit. Be advised, if too many invoices are allowed to go unpaid, Insight may be required to block some parts of your account and products used until settlement.

The screenshot shows a 'Credit limit' modal window. It features a gauge showing 7% credit usage. To the right, it displays 'Available' as GBP £92,673.73 and 'Limit' as GBP £100,000.00. Below this, it states 'Last updated Feb 25, 2021'. At the bottom, there is a section titled 'Need more credit?' with contact information for customer service at 0844 846 3333. A 'Close' button is located in the bottom left corner.

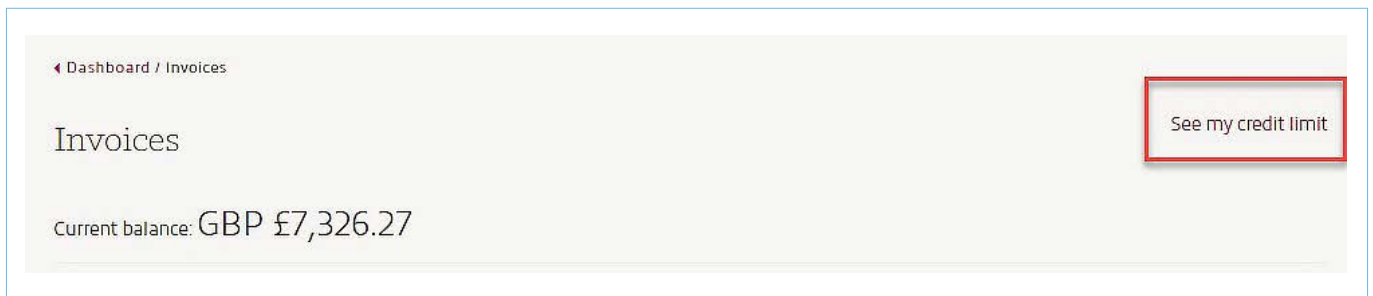
# 7. Orders

To view the status of your orders or to verify the details of past orders, please click on Orders in the left menu:



If the status of your order is In Review, please contact your Insight representative, as this might indicate an issue with your payment, or the credit limit being reached on your account.

To check if your credit limit has been reached, please access the Invoices tab and click on "See my credit limit":



# 8. Reports

This section gathers useful information about your 365 and Azure consumption if applicable. Please note you will be able to download all these details from [Enterprise License Dashboard](#). If you need access, get in touch with your Insight representative.

Select the solution you wish to obtain more information about and allow for up to a few minutes of loading time.

The screenshot shows the Insight web application interface. On the left is a navigation menu with items: Dashboard, Users, Subscriptions, Invoices, Orders, Reports (highlighted with a red box), and Account. The main content area is titled 'Reports' and features a 'NCE Billable Items Report' button. Below this, there are filters for Product Name, Invoice #, Invoice Date, and Subscription ID, all set to 'All'. A 'Latest Invoice Date' of '30-May-23' is displayed. A note states: '\*Exports are possible by selecting the below grid and clicking "..." button in the top right corner and requesting Export data.' Below the note is a table with the following data:

Invoice #	Account #	PO Number	Company Name	Subscription ID	Product Name	Price Per Unit	Quantity	Total Price	Currency	Charge Sta
					Microsoft 365 E5 Security	0.00	1	11.52	GBP	30-Apr-23
					Enterprise Mobility + Security E3	0.00	1	10.13	GBP	30-Apr-23
					Office 365 E3	0.00	1	25.61	GBP	30-Apr-23
					Microsoft 365 E5 Security	0.00	1	10.48	GBP	31-Mar-23
					Enterprise Mobility + Security E3	0.00	1	9.31	GBP	31-Mar-23
					Office 365 E3	0.00	1	23.51	GBP	31-Mar-23
<b>Total</b>								<b>6</b>	<b>90.56</b>	

# 9. Account

This section displays a list of useful information about this specific billing account.

The screenshot displays the 'Account' page in the Insight cloud solutions interface. The page is divided into several sections:

- Header:** 'Insight' logo on the left and a search bar 'Search cloud solutions:' on the right.
- Navigation:** A sidebar on the left with menu items: Dashboard, Users, Subscriptions, Invoices, Orders, Reports, and Account (highlighted).
- Breadcrumbs:** 'Insight cloud solutions' and 'Browse all cloud solutions'.
- Main Content:**
  - Account information:** A box containing:
    - Private
    - Company ID: e1001
    - Created date: Oct 17, 2019
    - Line of business: Corporate
    - Customer class: PAV 85
    - Microsoft tenant ID: 12FD047F-C7B5-4F39-9AB6-
    - Subdomain: onmicrosoft.com
  - Login:** A box containing:
    - Username: onmicrosoft.com
    - Password: \*\*\*\*\*
    - No default payment method found
  - Addresses:** A box containing:
    - Default billing address: LONDON, GB EC2N
    - Default shipping address: EASTBOURNE, GB BN21

If you need any profile information amended, please contact your Insight representative.



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 [BACK TO CONTENTS PAGE](#)