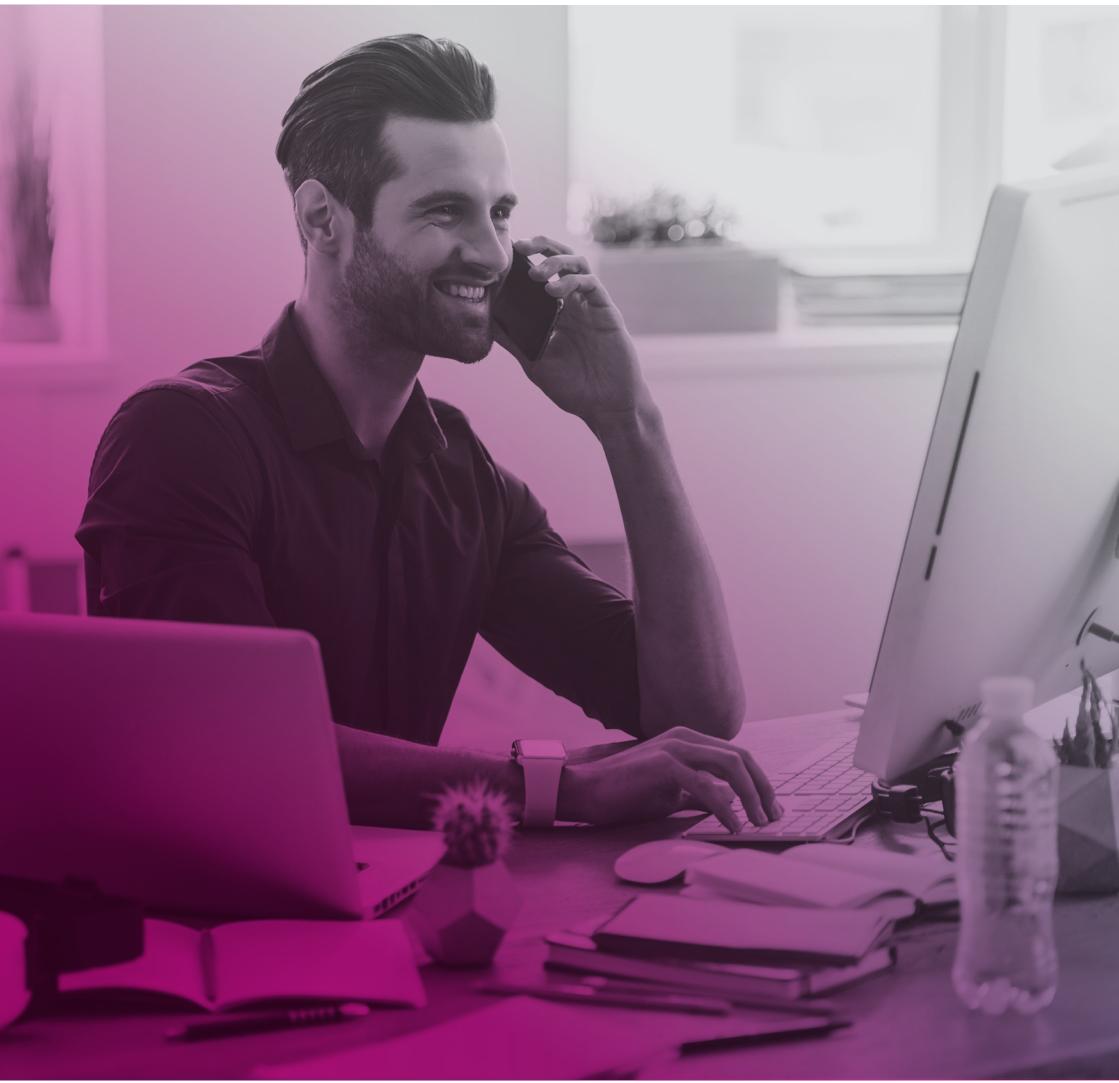


Insight Cloud Management Platform User-Guide



Introduction

The Insight Cloud Management Platform (CMP) has many in-depth and advanced features. The intent of this guide is to provide general instructions for the most commonly used features. The instructions provided here cover topics that resellers will find most useful to manage their customers day to day cloud business.

A high-level overview of the CMP functionality, reseller responsibilities and other important information can be found in this section.

Cloud Management Platform Functionality

- Insight Delegated Service Plans
 - Insight-configured Cloud product offerings (subscription terms and sales price)
- Customer management capability
 - Management tool to enable various customer-centric functionality including customer creation, credit terms, and sales history
- Order management capability
 - Management tool to enable various order management functionality, including order entry, processing, and in some cases order procurement (based on vendor availability)
- White Label Storefront
 - The ability to login as a customer from the Reseller Admin Portal (RAP) to the White Label Storefront, offering the functionality of the end use customer to order on behalf, manage, and assign licenses

Reseller Responsibilities

- Any changes and validations of:
 - Insight Delegated Service Plans and associated data including pricing
 - All customer setup/configurations and management
 - All order setup/configurations and management
 - All end-user/end-customer support and training
- All day-to-day business operations and processes utilizing the platform capabilities listed above
- Order entry done on behalf of end customers
- All management of orders on behalf of customers
- Configuration and use of Management Reporting

Pricing

End customer pricing for the Managed Service Provider (Reseller) is provided at MSRP by default. As a Reseller, you are responsible for managing end customer pricing, and adjust as needed to meet specific business needs.

It is important for you to adjust pricing as required, and review service plans in detail as part of your go-to-market preparation.

Taxation

Insight offers functionality through a third-party application to calculate taxes based on information provided by RESELLER'S end customer during order processing. However, as RESELLER you are solely responsible for: (a) the accuracy of all applicable taxes, including without limitation, direct and indirect, federal, national, state, provincial, local, VAT, GST or other taxes and fees associated with your commercial enterprise on the platform, including, without limitation, any taxes related to the purchase or sale of products or services on the platform by you and your end customers; (b) collecting, reporting and remitting required taxes to relevant government authorities; (c) informing your end customers of required taxes, and providing them with invoices as required by applicable laws; (d) registering for indirect taxes in countries where you are required to register; and (e) taxes an out-of-state seller is required to collect on remote sales made to end customers in-state if your activity creates sales tax nexus with the state.

You also agree that any tax estimates, reporting or related materials that Insight provides via the platform are for illustration purposes only, and you may not rely on them to comply with your tax obligations. Insight does not give tax advice, and nothing we say should be interpreted as such.

If you are selling products or services online, we recommend you speak with a tax advisor to evaluate your sales tax collection obligations considering existing laws.

Platform Notifications

End Customers receive notifications on:

- Subscription lifecycle events (i.e. order placed, order in review, subscription suspended/resumed/cancelled)
- Vendor lifecycle events (i.e. new account, new user, delegated admin rights)
- Payment events (i.e. charge failed)
- Additional events may be added in the future

Resellers can be copied on any events that generate communications to a customer.

Resellers will also receive email notification when a new customer is created.

Support

U.S. & Canada:

The Cloud Enablement Specialist (CES) Team is your dedicated support staff in North America, and is available Monday through Friday from 8:00 AM to 7:00 PM EST.

By Email: CloudEnablement@Insight.com

By Phone: **800-776-3475**

For Reseller Technical Support (Not End Customer)

By Phone: **1-800-535-1506**

By E-mail: CSP.Support@Insight.com

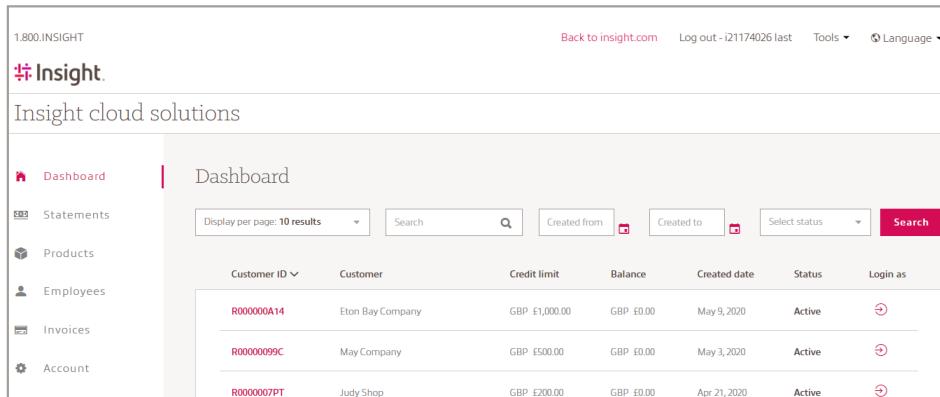
Europe

Number	Number Description
+448444723245	UK MS Cloud Services
+61289782142	AU MS Cloud Services
+6531080112	SG MS Cloud Services
+6448310276	NZ MS Cloud Services
+35315268502	IE MS Cloud Services
+31207975840	NL MS Cloud Services
+33185653504	FR MS Cloud Services
+390683364803	IT MS Cloud Services
+34935452384	ES MS Cloud Services
+3228954009	BE MS Cloud Services
+4372070028585	AT MS Cloud Services
+41225954952	CH MS Cloud Services
+46853527961	SE MS Cloud Services
+4961316244399	DE MS Cloud Services

Navigation Overview

Navigation Overview – Reseller Admin Portal (RAP)

Upon logging into to the Cloud Management Platform, you will be directed to the Reseller Admin Portal where the Cloud Dashboard will be displayed. This Reseller Admin Portal will give you the ability to manage your end-customers and your cloud business.



1.800.INSIGHT Back to insight.com Log out - i21174026 last Tools ▾ Language ▾

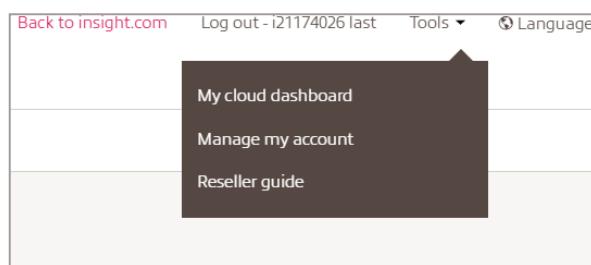
Insight

Insight cloud solutions

Dashboard

Customer ID	Customer	Credit limit	Balance	Created date	Status	Login as
R000000A14	Eton Bay Company	GBP £1,000.00	GBP £0.00	May 9, 2020	Active	⊕
R00000099C	May Company	GBP £500.00	GBP £0.00	May 3, 2020	Active	⊕
R0000007PT	Judy Shop	GBP £200.00	GBP £0.00	Apr 21, 2020	Active	⊕

Under the “Tools” section in the top right corner you will find links to My Cloud Dashboard, Manage my account:



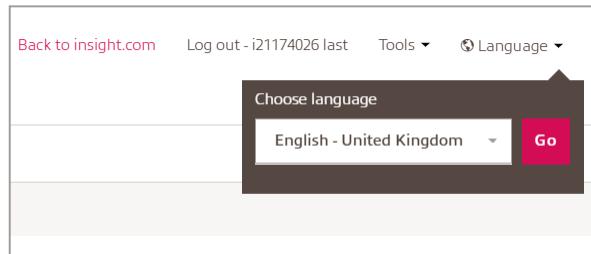
Back to insight.com Log out - i21174026 last Tools ▾ Language ▾

My cloud dashboard

Manage my account

Reseller guide

In the “Language” section in the upper right-hand corner you can change the language:



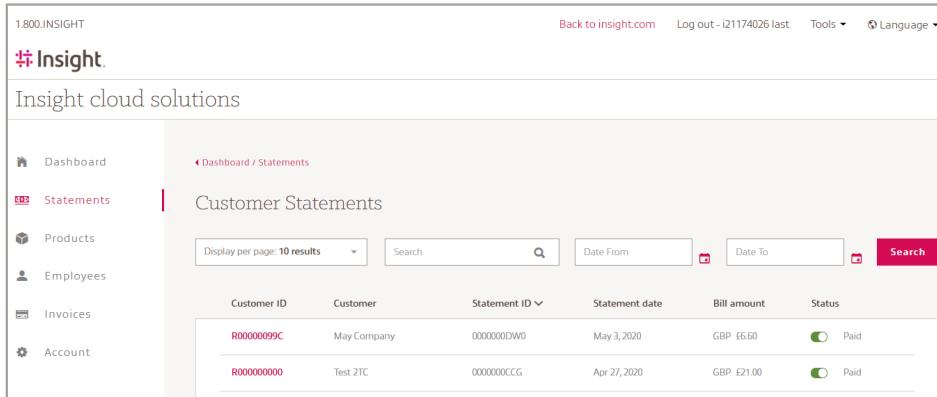
Back to insight.com Log out - i21174026 last Tools ▾ Language ▾

Choose language

English - United Kingdom ▾ Go

1. Dashboard: The dashboard screen is your home screen for your Reseller Admin Portal. This is where you will be able to see the complete list of your end-customers.

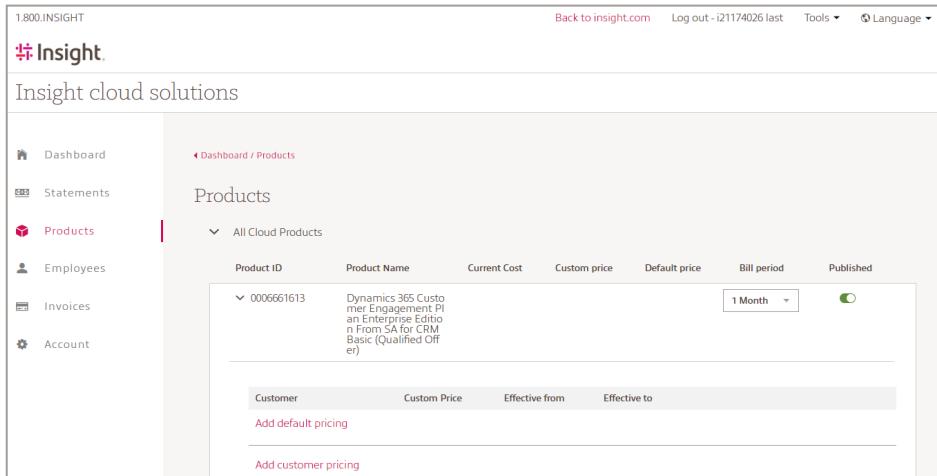
2. Statements: In this section you will be able to review & manage statements for your end customers:



The screenshot shows the 'Customer Statements' section of the Insight Reseller Admin Portal. On the left, a sidebar menu includes 'Dashboard', 'Statements' (which is currently selected and highlighted in red), 'Products', 'Employees', 'Invoices', and 'Account'. The main content area is titled 'Customer Statements' and displays a table of statements. The table has columns for Customer ID, Customer, Statement ID, Statement date, Bill amount, and Status. Two statements are listed:

Customer ID	Customer	Statement ID	Statement date	Bill amount	Status
R00000099C	May Company	0000000DWO	May 3, 2020	GBP £6.60	<input checked="" type="checkbox"/> Paid
R000000000	Test 2TC	0000000CCG	Apr 27, 2020	GBP £21.00	<input checked="" type="checkbox"/> Paid

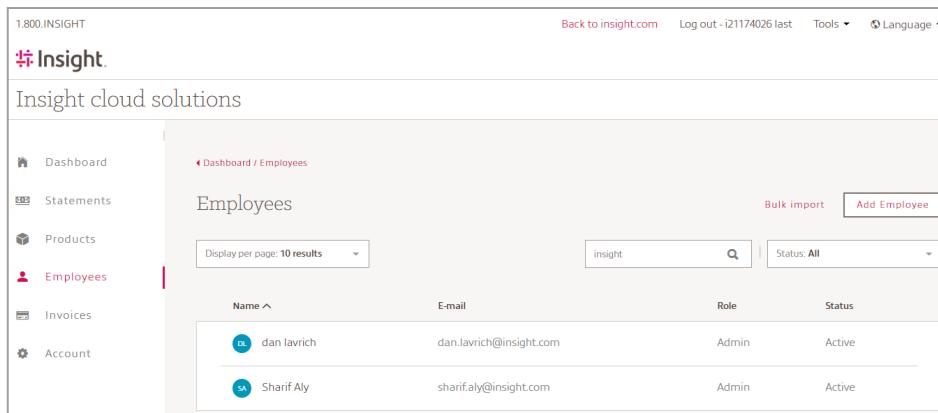
3. Products: This section provides a view of all products in the catalogue, cost, price, and published status.



The screenshot shows the 'Products' section of the Insight Reseller Admin Portal. On the left, a sidebar menu includes 'Dashboard', 'Statements', 'Products' (which is currently selected and highlighted in red), 'Employees', 'Invoices', and 'Account'. The main content area is titled 'Products' and shows a table of products. The table has columns for Product ID, Product Name, Current Cost, Custom price, Default price, Bill period, and Published. One product is listed:

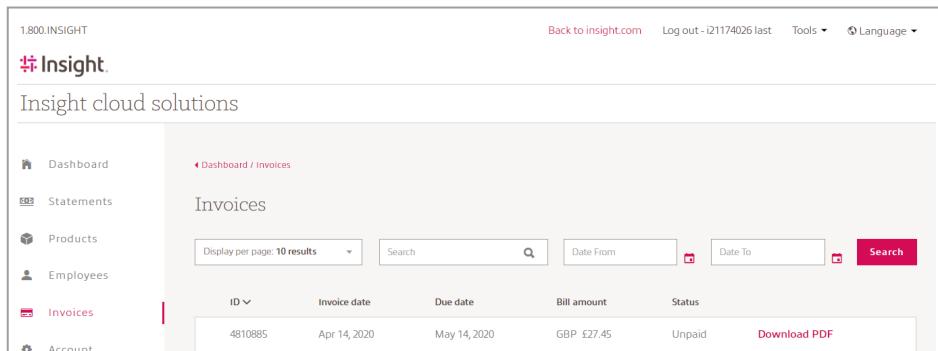
Product ID	Product Name	Current Cost	Custom price	Default price	Bill period	Published
0006661613	Dynamics 365 Customer Engagement Plan Enterprise Edition for Microsoft CRM Basic (Qualified Offer)				1 Month	<input checked="" type="checkbox"/>

4. Employees: This is a list of your employees/users that have access to the Reseller Admin Portal:



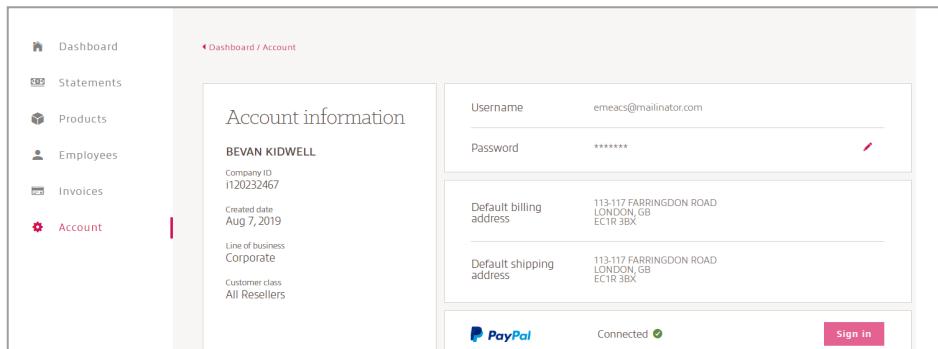
The screenshot shows the 'Employees' section of the Insight Reseller Admin Portal. On the left, a sidebar menu includes 'Dashboard', 'Statements', 'Products', 'Employees' (which is highlighted in red), 'Invoices', and 'Account'. The main content area is titled 'Employees' and shows a table with two rows of data. The columns are 'Name', 'E-mail', 'Role', and 'Status'. The first row shows 'dan lavrich' with email 'dan.lavrich@insight.com', role 'Admin', and status 'Active'. The second row shows 'Sharif Aly' with email 'sharif.aly@insight.com', role 'Admin', and status 'Active'. There are buttons for 'Bulk import' and 'Add Employee' at the top right of the table.

5. Invoices: This is where you will find your Invoices and can download them as a PDF:



The screenshot shows the 'Invoices' section of the Insight Reseller Admin Portal. The sidebar menu is identical to the previous screenshot. The main content area is titled 'Invoices' and shows a table with one row of data. The columns are 'ID', 'Invoice date', 'Due date', 'Bill amount', and 'Status'. The row shows '4810885' with 'Apr 14, 2020' as the invoice date, 'May 14, 2020' as the due date, 'GBP £27.45' as the bill amount, and 'Unpaid' as the status. A 'Download PDF' button is located at the bottom right of the table.

6. Account: Here you will find information on your account, your username and can reset a password:



The screenshot shows the 'Account' section of the Insight Reseller Admin Portal. The sidebar menu is identical to the previous screenshots. The main content area is titled 'Account information' and shows a table with two rows of data. The first row is for 'BEVAN KIDWELL' with fields: 'Username' (emeacs@mailinator.com), 'Password' (*****), 'Default billing address' (113-117 FARRINGDON ROAD, LONDON, GB EC1R 3BX), and 'Default shipping address' (113-117 FARRINGDON ROAD, LONDON, GB EC1R 3BX). The second row is for 'Corporate' with fields: 'Line of business' (Corporate), 'Customer class' (All Resellers), and a 'PayPal' logo with 'Connected' and a green checkmark. There is a 'Sign in' button at the bottom right.

Modify Product Pricing

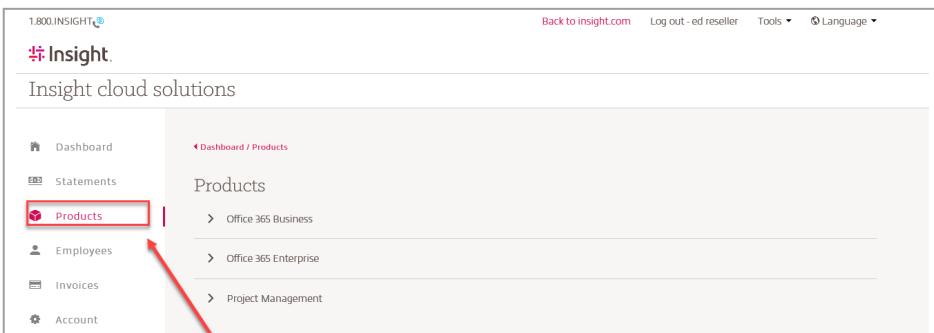
The Global Product catalogue is updated monthly to reflect publisher adds, changes, deletes, and pricing. The catalogue provided to you as a Reseller includes end customer pricing at MSRP (Manufacturers Suggested Retail Price). Customer specific prices can be modified, as noted below in the Set Custom Pricing section.

The Products section of the Reseller Admin Portal (RAP) offer the ability to:

1. Review Products by category
2. Review default & custom cost, price, and effective dates
3. Publish, or remove products from the catalogue view of your customers
4. Create & Edit cost, price, and effective dates

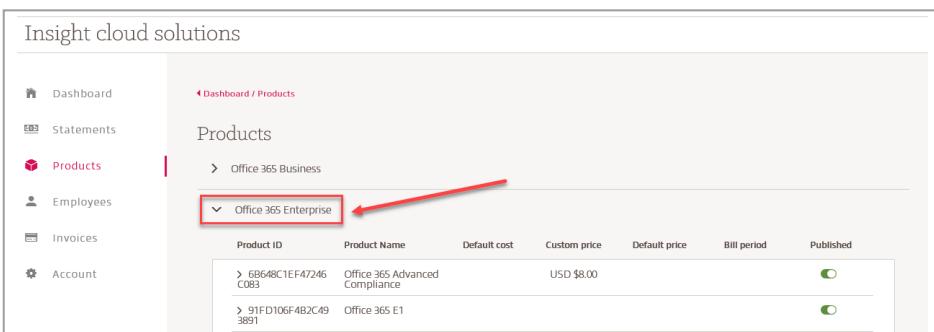
Review Product by category:

From the Dashboard, select "Products" from the navigation bar on the left -



The screenshot shows the RAP dashboard. On the left, there is a navigation bar with icons for Dashboard, Statements, Products (which is highlighted with a red box and has a red arrow pointing to it), Employees, Invoices, and Account. The main content area is titled 'Dashboard / Products' and shows a 'Products' section with three categories: 'Office 365 Business', 'Office 365 Enterprise', and 'Project Management'.

Click on the product categories listed under "Products" to view all products within a given category (The illustration below is sample data, where your view should be more comprehensive) –



The screenshot shows the RAP dashboard with the 'Products' menu item selected. The 'Products' section is expanded, showing the 'Office 365 Enterprise' category. A red box highlights the 'Office 365 Enterprise' category name, and a red arrow points to it. Below the category, a table displays product details:

Product ID	Product Name	Default cost	Custom price	Default price	Bill period	Published
6B648C1EF47246C083	Office 365 Advanced Compliance		USD \$8.00			<input checked="" type="checkbox"/>
3891	Office 365 E1					<input checked="" type="checkbox"/>

This view offers the ability to review:

Product ID

Product Name

Default cost (your cost)

Custom Price (if applied)

Default price

Bill Period

Published (Green = yes)

Published

This toggle button is used to determine whether products are published to the end customer catalogue, with the default being Published, as indicated by the green light on the button associated with the given product. 



Products					
Office 365 Business					
Office 365 Enterprise					
Product ID	Product Name	Default cost	Custom price	Default price	Bill period
> 6B648C1EF47246C083	Office 365 Advanced Compliance		USD \$8.00		
> 91FD106F4B2C493891	Office 365 E1				
> 796B6B5F613C4E24A2	Office 365 E3	USD \$20.00	USD \$19.40	USD \$23.33	
> 1C410588DA3B4F88B3	Advanced eDiscovery Storage		USD \$100.00		

Click on the toggle button to unpublish a product from your customer catalogue.

Note: Unpublishing a product will not impact customers with existing purchases of the product in question. They will continue to have the ability to manage existing subscriptions for this product until it expires. The unpublish function will remove the product from the catalogue, and not allow for any new, or additional purchases of the product.

Current Cost

The current cost is populated based on the current months vendor price files which have been uploaded to the portal. This does not reflect any price lock which you may have for previously purchased subscriptions. The current cost value will change based on changes to vendor products and services. As a Reseller, you can adjust this cost, should the need

exist to add services, or support you may have bundled with the offering. Changes to this value will not impact the price you pay to Insight but does offer the ability to incorporate any Reseller cost you may need to associate with the product.

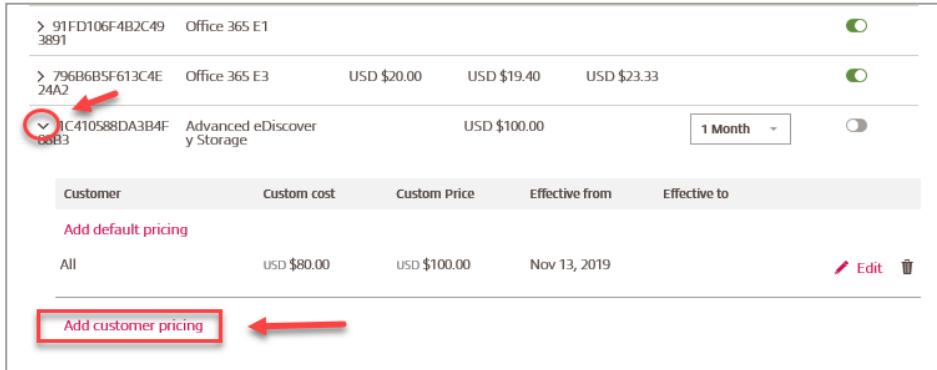
Default Price

The default price will set to Microsoft's MSRP (Manufacturers Suggested Retail Price). Changes to the default price will apply to the entire customer catalogue for all customers, unless a custom price has been defined for a given customer.

Set Custom Pricing

Custom prices are assigned at the customer level, and can be established by expanding the product detail, and selecting "Add Customer pricing"

Once Add customer pricing has been selected, you will need to:



The screenshot shows a list of products with their respective prices and a 'Customer' section. A red box highlights the 'Add customer pricing' button in the 'Customer' section, and a red arrow points to it from the bottom left.

Customer	Custom cost	Custom Price	Effective from	Effective to
All	USD \$80.00	USD \$100.00	Nov 13, 2019	 

1. Add, or search for the customer to which the custom pricing is to be applied
2. Enter the cost
3. Enter to custom price
4. Enter the effective date
5. Enter the end date
6. Click on the check mark to save and apply

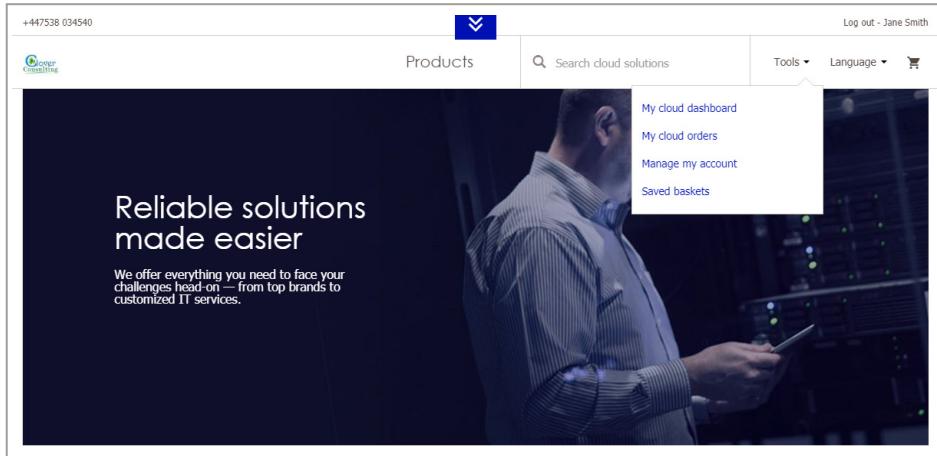


The screenshot shows a table for setting custom pricing. Numbered steps 1 through 6 are overlaid on the table cells to show the sequence of actions: 1. Customer, 2. Custom cost, 3. Custom Price, 4. Effective from, 5. Effective to, and 6. Save/Apply. The table also includes a 'Customer' section with 'Add default pricing' and a row for 'All'.

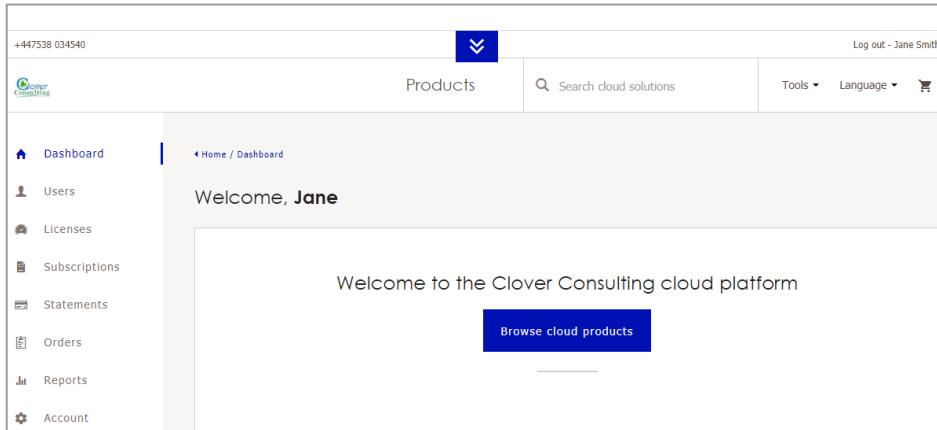
Customer	Custom cost	Custom Price	Effective from	Effective to
All	USD \$80.00	USD \$100.00	Nov 13, 2019	 

Navigation Overview – Customer Portal

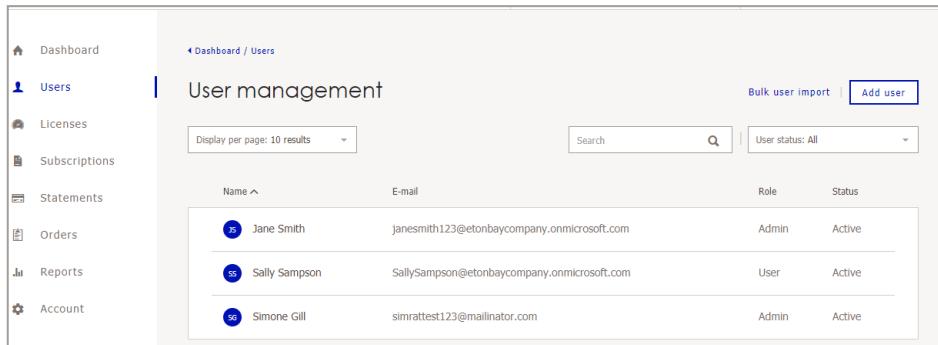
Once logged into your customer's Cloud Management Platform, click on "Tools" and you'll see the following options:



1. Dashboard: This will navigate you to the end-customers Cloud Management Portal Dashboard where you will have the ability to manage your customers purchases, and their subscription management:



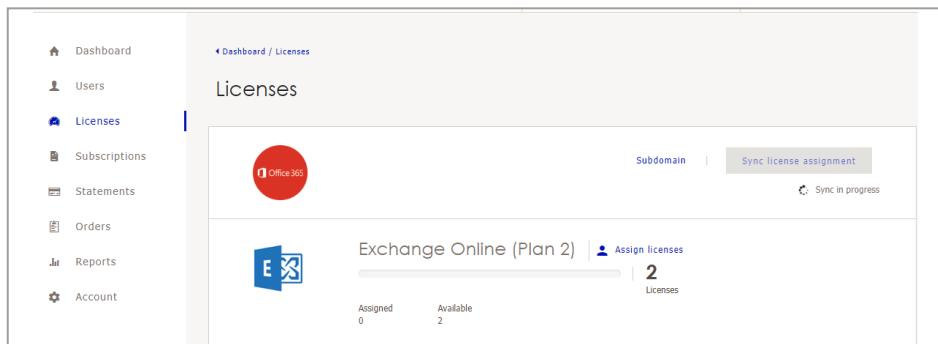
2. Users: This is where you'll find all the users currently associated with this account:



The screenshot shows the 'User management' page with a sidebar containing links for Dashboard, Users (selected), Licenses, Subscriptions, Statements, Orders, Reports, and Account. The main area displays a table with columns for Name, E-mail, Role, and Status. The users listed are Jane Smith (Admin, Active), Sally Sampson (User, Active), and Simone Gill (Admin, Active). There are buttons for 'Bulk user import' and 'Add user' at the top right.

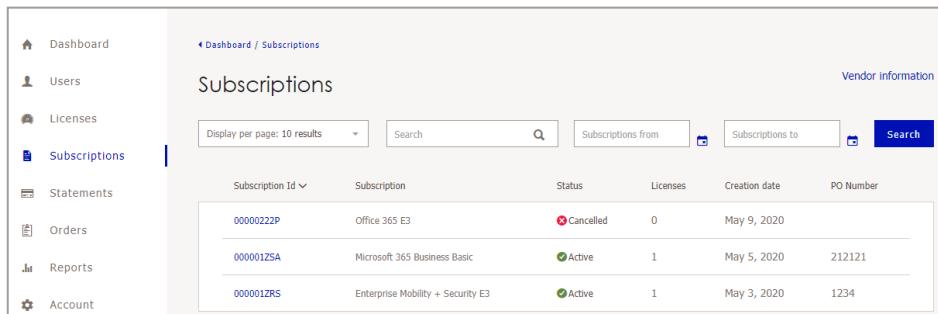
Name	E-mail	Role	Status
Jane Smith	janesmith123@etombaycompany.onmicrosoft.com	Admin	Active
Sally Sampson	SallySampson@etombaycompany.onmicrosoft.com	User	Active
Simone Gill	simrattest123@mailinator.com	Admin	Active

3. Licenses: This page will allow you to see the “subdomain” associated with this account; sync license assignment; assign licenses to end users; and see an overview of all licensing currently associated with this account:



The screenshot shows the 'Licenses' page with a sidebar containing links for Dashboard, Users, Licenses (selected), Subscriptions, Statements, Orders, Reports, and Account. The main area displays a summary for Office 365 and Exchange Online (Plan 2). For Office 365, there is a 'Sync license assignment' button and a 'Sync in progress' message. For Exchange Online (Plan 2), it shows 2 Assigned and 2 Available licenses. There is a 'Assign licenses' button next to the Exchange Online summary.

4. Subscriptions: This is where you can find all subscriptions associated with the account, click on the Subscription ID and see the details:



The screenshot shows the 'Subscriptions' page with a sidebar containing links for Dashboard, Users, Licenses, Subscriptions (selected), Statements, Orders, Reports, and Account. The main area displays a table with columns for Subscription Id, Subscription, Status, Licenses, Creation date, and PO Number. The subscriptions listed are: 00000222P (Office 365 E3, Cancelled, 0, May 9, 2020, PO 212121); 0000012SA (Microsoft 365 Business Basic, Active, 1, May 5, 2020, PO 212121); and 0000012RS (Enterprise Mobility + Security E3, Active, 1, May 3, 2020, PO 1234). There are buttons for 'Vendor information' and 'Search' at the top right.

Subscription Id	Subscription	Status	Licenses	Creation date	PO Number
00000222P	Office 365 E3	Cancelled	0	May 9, 2020	
0000012SA	Microsoft 365 Business Basic	Active	1	May 5, 2020	212121
0000012RS	Enterprise Mobility + Security E3	Active	1	May 3, 2020	1234

5. Statements: This is where you'll find your customer's statements:

6. Orders: Here is where you'll find all orders associated with this customer:

Dashboard / Orders

Orders

Order number	Order Type	Order status	Order date	Amount	PO number
04466239	CHANGE	Approved	May 9, 2020	GBP £126.00	
04466152	INITIAL	Approved	May 9, 2020	GBP £42.00	
04395655	INITIAL	Approved	May 5, 2020	GBP £3.77	212121
04384925	INITIAL	Approved	May 3, 2020	GBP £6.60	1234

7. Reports: This is where you'll find reports associated with your customer.

8. Account: This section provides details on your end customer's account.

Dashboard / Account

Account information

Username	janesmith123@etonbaycompany.onmicrosoft.com
Password	*****
No default payment method found	
Default billing address	
Default shipping address	

Adding a New Customer

New customers can be added by:

1. Sending the customer the link to your White Label Storefront, offering them the ability to self-register.

- In the Pilot phase Insight will need to provide this link, which is unique to you as a Reseller

- The link will be available on the Reseller Admin Portal in an upcoming release

Note: This link will be a generic Insight provided domain, unless you opted to host the storefront on your own domain when completing the Insight Reseller Migration form.

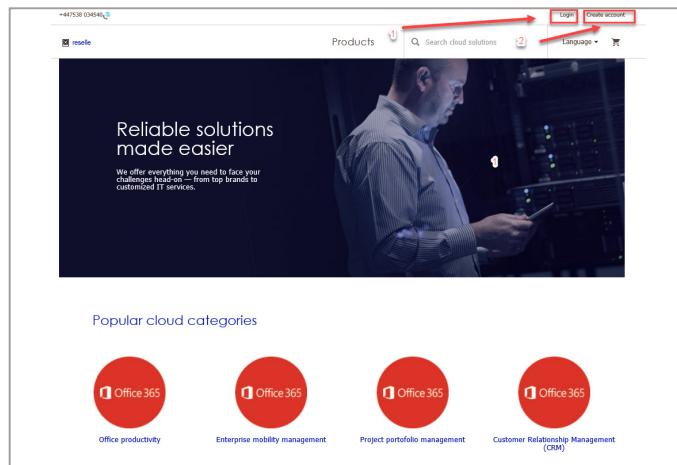
2. As the Reseller, you can create new customer as well, using the aforementioned link.

The illustration below demonstrates the view when accessing the White label Storefront:

1. Returning customers select Login

2. Select Create account to add new.

- Once created, the customer will be visible in your RAP (Reseller Admin Portal)



All fields are required:

1. Email Address
2. Password
3. Confirm Password
4. First Name
5. Last Name
6. Company Name
7. Line of Business
 - a. Corporate
 - b. Government
 - c. Education
 - d. Non-Profit

Note: All customers will have access to Corporate products; however, the specific line of business (Government, Education, and Non-Profit) must be selected in order to provide customers with access to related products. Microsoft Terms & Conditions apply.

Registration

Email Address*	1	Password*	2
First Name*	4	Last Name*	5
Company Name*	6	Line of Business*	7
<input type="radio"/> Corporate <input type="radio"/> Government <input type="radio"/> Education <input type="radio"/> Non-Profit			

Once the form is complete, select “Create Account”, and the new customer has been created.

Home / Create Account

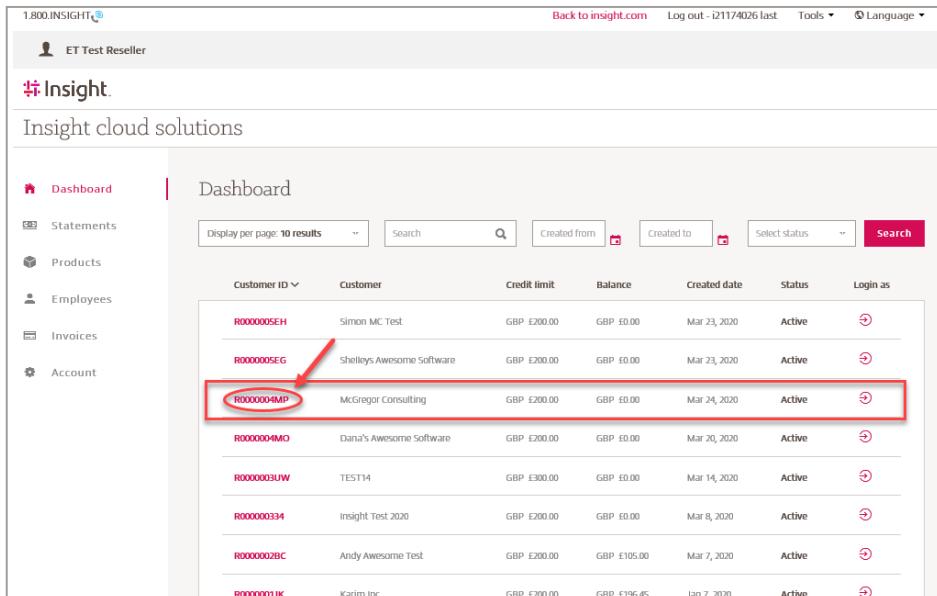
Registration

Email Address*	john.doe@gmail.com	Password*	*****
First Name*	John	Last Name*	Doe
Company Name*	Best Customer	Line of Business*	Corporate
Back to Login Create account			

Customer Credit Limits

Note: At this time end customer credit limits are not used to control purchase amounts. This will be addressed in an upcoming release, whereas the Service Provider you will have the ability to apply credit limits to customers. This credit limit will allow for you to control spending, and limit liability as need to manage your business.

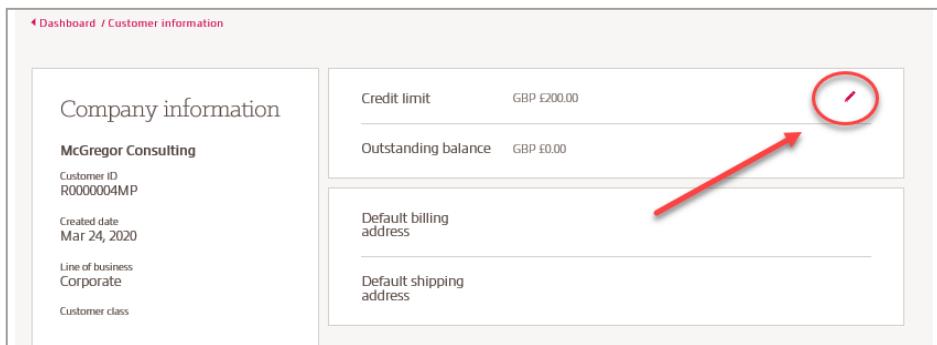
Once a new customer has been added, the credit limit for the customer can be updated from the RAP (Reseller Admin Portal). From the Dashboard, click on the "Customer ID" of the customer to be adjusted.



The screenshot shows the Insight RAP Dashboard. On the left, there is a sidebar with links for Dashboard, Statements, Products, Employees, Invoices, and Account. The main area is titled 'Dashboard' and shows a table of customer data. The columns are: Customer ID, Customer, Credit limit, Balance, Created date, Status, and Login as. The table contains the following data:

Customer ID	Customer	Credit limit	Balance	Created date	Status	Login as
R0000005EH	Simoni MC Test	GBP £200.00	GBP £0.00	Mar 23, 2020	Active	⊕
R0000005EG	Shelley's Awesome Software	GBP £200.00	GBP £0.00	Mar 23, 2020	Active	⊕
R0000004MP	McGregor Consulting	GBP £200.00	GBP £0.00	Mar 24, 2020	Active	⊕
R0000004MO	Dana's Awesome Software	GBP £200.00	GBP £0.00	Mar 20, 2020	Active	⊕
R0000003UW	TEST14	GBP £300.00	GBP £0.00	Mar 14, 2020	Active	⊕
R000000334	Insight Test 2020	GBP £200.00	GBP £0.00	Mar 8, 2020	Active	⊕
R0000002BC	Andy Awesome Test	GBP £200.00	GBP £105.00	Mar 7, 2020	Active	⊕
R0000001JK	Karim Inc.	GBP £200.00	GBP £196.45	Jan 7, 2020	Active	⊕

Click on the pencil icon  to the right of the credit limit information.

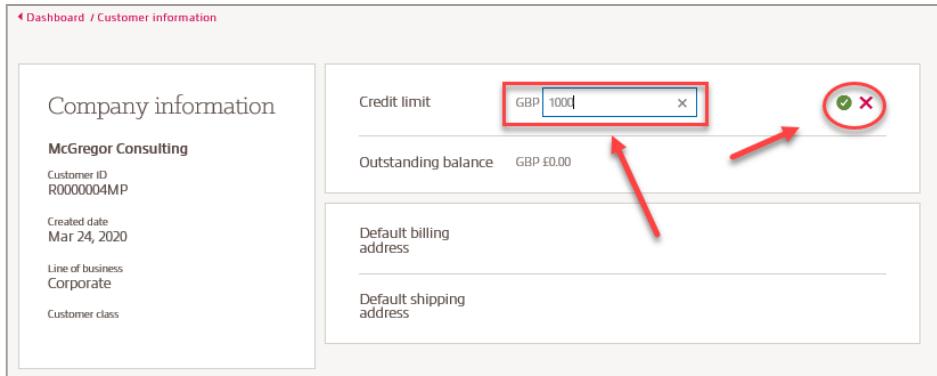


The screenshot shows the 'Customer information' page for McGregor Consulting. On the left, there is a sidebar with 'Company information' and details: Customer ID R0000004MP, Created date Mar 24, 2020, Line of business Corporate, and Customer class. On the right, there are two sections: 'Credit limit' (GBP £200.00) and 'Outstanding balance' (GBP £0.00). A red arrow points to the edit icon (pencil icon) next to the credit limit value. Below these sections are 'Default billing address' and 'Default shipping address' fields.

Adjust the credit limit

Select the check mark to update 

Select the X to cancel 



Company information

McGregor Consulting

Customer ID R0000004MP

Created date Mar 24, 2020

Line of business Corporate

Customer class

Credit limit GBP 1000

Outstanding balance GBP £0.00

Default billing address

Default shipping address

The new credit limit will now be reflected in the Dashboard.

Placing an Order

Orders can be placed directly by the end use customer on the White Label Storefront, or on their behalf as the Service Provider.

Insight is currently working to develop Service Provider videos that can be shared with your end customer on how to place an navigate your White Label Storefront. These videos will be unbranded when complete and can be shared to enable self-serve capabilities for your end customers if you have opted to use the White Label Storefront.

Sample: Here's the link to the Insight Branded videos on:

https://ca.insight.com/en_CA/help/cmp/demonstration-videos.html

Accessing an using the cloud dashboard

Working with current subscriptions

New subscriptions

Adding users & license agreements

Invoices, credit limit & order history

To place an order on the customer behalf, login as the customer from the RAP (Reseller Admin Portal), by clicking the "Login as" button  to the right of the respective customer name.

ET Test Reseller



Insight cloud solutions

[Dashboard](#)[Statements](#)[Products](#)[Employees](#)[Invoices](#)[Account](#)

Dashboard

Display per page: 10 results

search

Created from

Created to

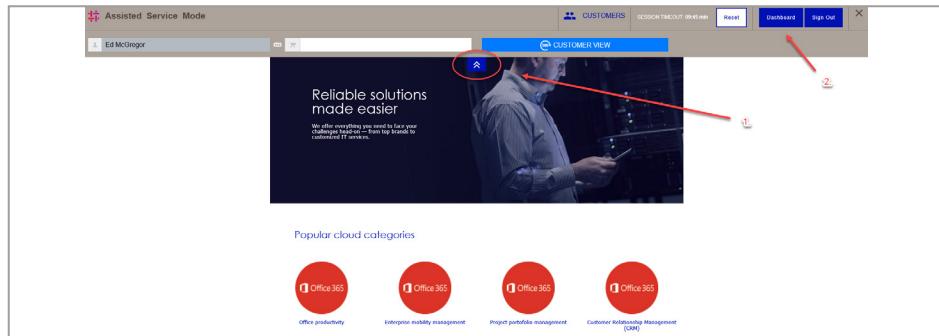
Selected status

Search

Customer ID	Customer	Credit limit	Balance	Created date	Status	Login as
R00000005EH	Simon MC Test	GBP £200.00	GBP £0.00	Mar 23, 2020	Active	
R00000005EG	Shelleys Awesome Software	GBP £200.00	GBP £0.00	Mar 23, 2020	Active	
R00000004MP	McGregor Consulting	GBP £200.00	GBP £0.00	Mar 24, 2020	Active	
R00000004MO	Daina's Awesome Software	GBP £200.00	GBP £0.00	Mar 20, 2020	Active	
R00000003UW	TEST14	GBP £300.00	GBP £0.00	Mar 14, 2020	Active	
R0000000334	Insight Test 2020	GBP £200.00	GBP £0.00	Mar 8, 2020	Active	
R00000002BC	Andy Awesome Test	GBP £200.00	GBP £105.00	Mar 7, 2020	Active	
R00000001UK	Karim Inc	GBP £200.00	GBP £196.45	Jan 7, 2020	Active	
R00000000RS	Test Today	GBP £200.00	GBP £0.00	NOV 23, 2019	Active	
R0000000000	Test ZTC	GBP £200.00	GBP £187.60	NOV 23, 2019	Active	

This will log you into the customer's account on the White label via ASM (Assisted Service Mode).

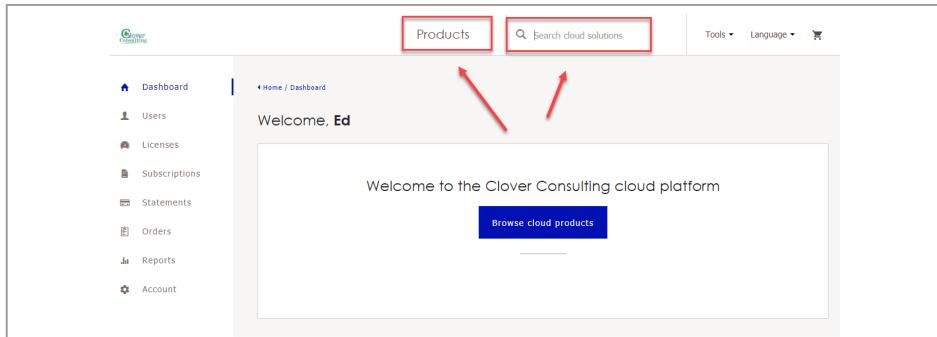
1. Click on the double arrows in the centre of the screen to hide the ASM menu.
 - a. Click then again to view the ASM menu
2. Click on the Dashboard to return to the Reseller RAP (Reseller Admin Portal)



Note: Whether logged into the White Label Storefront by the Customer, or as the customer via the ASM (Assisted Service Mode), the ordering process is the same.

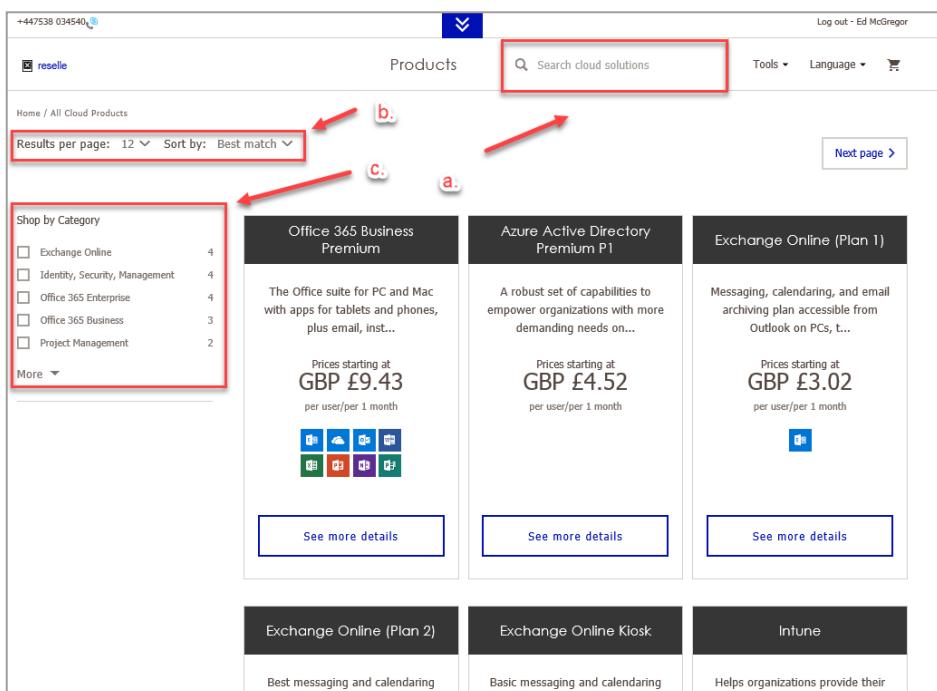
Order Process

1. Click on “Products” to browse cloud solutions or enter search criteria to Search cloud products.



The screenshot shows the Clover Consulting cloud platform homepage. On the left is a sidebar with links to Dashboard, Users, Licenses, Subscriptions, Statements, Orders, Reports, and Account. The main content area has a 'Welcome, Ed' message and a 'Welcome to the Clover Consulting cloud platform' message. Below these are a 'Browse cloud products' button and a search bar. Red arrows point from the 'Products' button and the search bar to the respective red boxes.

2. From the products page, you can:
 - a. Search product by name, part number, manufacturers number
 - b. Adjust the number of results per page
 - c. Navigate specific product categories



The screenshot shows the products page of the Clover Consulting cloud platform. At the top, there is a search bar and a 'Products' button. Below the search bar, there are dropdowns for 'Results per page' (set to 12) and 'Sort by' (set to 'Best match'). A sidebar on the left is titled 'Shop by Category' and lists several options with counts: Exchange Online (4), Identity, Security, Management (4), Office 365 Enterprise (4), Office 365 Business (3), and Project Management (2). Red arrows point from the search bar, the results per page dropdown, and the category sidebar to the respective red boxes. The main content area displays three product cards: 'Office 365 Business Premium' (with a price of GBP £9.43), 'Azure Active Directory Premium P1' (with a price of GBP £4.52), and 'Exchange Online (Plan 1)' (with a price of GBP £3.02). Each card has a 'See more details' button at the bottom.

3. Click on “See More Details” to select a given product

Home / All Cloud Products

Results per page: 12 Sort by: Best match

Shop by Category

<input type="checkbox"/> Exchange Online	4
<input type="checkbox"/> Identity, Security, Management	4
<input type="checkbox"/> Office 365 Enterprise	4
<input type="checkbox"/> Office 365 Business	3
<input type="checkbox"/> Project Management	2

More ▾

Office 365 Business Premium

The Office suite for PC and Mac with apps for tablets and phones, plus email, inst...

Prices starting at **GBP £9.43**
per user/per 1 month

[See more details](#)

Azure Active Directory Premium P1

A robust set of capabilities to empower organizations with more demanding needs on...

Prices starting at **GBP £4.52**
per user/per 1 month

[See more details](#)

Exchange Online (Plan 1)

Messaging, calendaring, and email archiving plan accessible from Outlook on PCs, t...

Prices starting at **GBP £3.02**
per user/per 1 month

[See more details](#)

Exchange Online (Plan 2) Exchange Online Kiosk Intune

4. Select billing frequency (a) and click next (b):

Home / All Cloud Products / Cloud / Office 365 Business / Office 365 Business Premium

Office 365 Business Premium

Product # 0004459823

Mr. # 031C9E47-4802-4248-838E-778FB1D2CC05

GBP £9.43
per user/per 1 month

The Office suite for PC and Mac with apps for messaging, HD video conferencing, 1 TB personal storage, and up to 300 users.

This subscription includes:

24/7 IT support depending on your needs ⓘ

Billing frequency

- 12 month contract - monthly billing
- 12 month contract - monthly billing
- 12 month contract - annual billing

[Next](#) Need help ordering?
Call +447538 034540 ⓘ

a. b.

5. Pair the parent subscription with add-ons according to need and click to add to basket:

Pair your plan with add-ons

Exchange Online Archiving for Exchange Online **GBP £2.26** per user/per 1 month 1

Office 365 Advanced Threat Protection (Plan 1) **GBP £1.51** per user/per 1 month 1

Office 365 Data Loss Prevention **GBP £2.26** per user/per 1 month 1

Office 365 Advanced Threat Protection (Plan 2) **GBP £3.77** per user/per 1 month 1

Microsoft 365 Business Voice (without calling plan) **GBP £7.50** per user/per 1 month 1

Office 365 Business Premium

24/7 IT support depending on your needs

GBP £9.43 per user/per 1 month 1 month **GBP £9.43**

Subtotal: **GBP £9.43** per month

6. Click on continue to checkout

Pair your plan with add-ons

Exchange Online Archiving for Exchange Online **GBP £2.26** per user/per 1 month 1

Office 365 Advanced Threat Protection (Plan 1) **GBP £1.51** per user/per 1 month 1

Office 365 Data Loss Prevention **GBP £2.26** per user/per 1 month 1

Office 365 Advanced Threat Protection (Plan 2) **GBP £3.77** per user/per 1 month 1

Microsoft 365 Business Voice (without calling plan) **GBP £7.50** per user/per 1 month 1

Office 365 Business Premium

24/7 IT support depending on your needs

Billing frequency 1 month **(Change)** GBP £9.43

Subtotal: **GBP £9.43** per month

Office 365 Business Premium

Product #: 0004459823
Mfr #: 031C9E47-4802-4248-838E-770FB1D2C005
Quantity: 1
Total Ex VAT: GBP £9.43

7. Review your order and proceed to checkout

Home / Basket

Basket

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		Summary		
Item	Unit price	Qty	Total	
 Office 365 Business Premium Product #0004459823 Mfr #031C9E47-4802-4248-838E-778FB1D2CC05	GBP £9.43 per user per 1 month	1	GBP £9.43 1 month	

Recently viewed items


Office 365 Business Premium
--- £0.43

[Save for later](#)

[Proceed to checkout](#) (boxed in red)

[Continue Shopping](#)

8. Upon placement of the first order, Customers, or you as a Service Provider on the customers behalf will need to:

- Enter the existing Subdomain for the customer (example.onmicrosoft.com)
- Or create a new Subdomain (example.onmicrosoft.com)
 - This will be validated with Microsoft
 - Select "Continue" once validated

Place order [Return to basket](#)

Fields denoted with * are required to process your order.

Order configuration	Summary
<p>Microsoft account</p> <p>Every new Office 365 is provided with a free subdomain similar to example.onmicrosoft.com. If you have already used Office 365 sign up using your email.</p> <p><input checked="" type="radio"/> Create your free Subdomain <input type="radio"/> Enter existing account information</p> <p><input type="text" value="esmInsight1"/> Check Availability The specified subdomain is available. You can now continue purchasing the Office 365 subscription.</p> <p><i>The subdomain name can only contain Latin letters and digits. It should be no more than 25 characters long.</i></p>	<p>Recurring fees</p> <p>1 month GBP £7.90</p> <p>Subtotal: GBP £7.90</p> <p>Total Ex VAT GBP £7.90</p>
Continue (boxed in red)	
Payment type	
Shipping address	
Payment info	
Review order	

9. Select:

a. Payment Type = Terms

i. Additional payment options will be offered in a future release.

b. Enter a PO# if applicable

Press "Continue"

c. Enter Shipping address

i. Must be a valid address

d. Enter Payment info / address

Press "Continue" to review order

Home / Checkout / Payment Type

Place order Return to basket: 

Fields denoted with * are required to process your order.

Order configuration	Summary
Payment type	
Select a payment type *	Recurring fees
<input type="text" value="Select a payment type"/>	1 month GBP £9.43
PO number	Subtotal: GBP £9.43
<input type="text" value="1234567890"/>	Total Ex VAT GBP £9.43
	Continue
Shipping address	
Payment info	
Review order	

10. Review the order

11. Accept the Terms & Conditions

12. Place Order

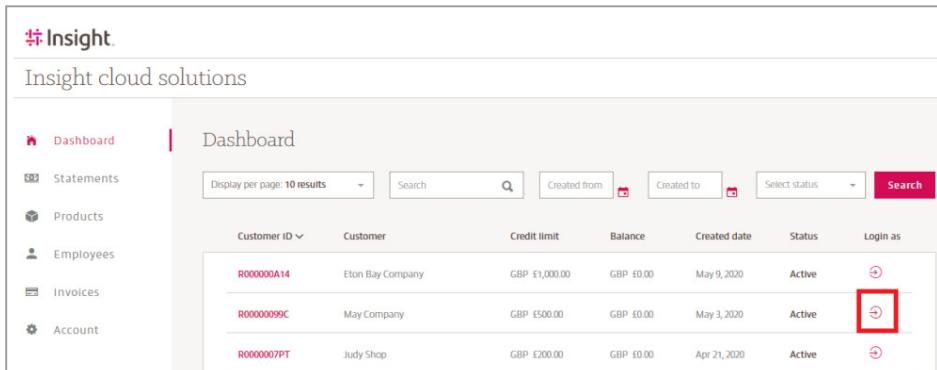
Change Existing Subscriptions

1. Log into the end customer's dashboard
2. Click on Subscriptions
3. Click on Subscription ID
4. Click on Modify Subscription
5. Type the quantity
6. Accept terms and conditions and click on 'Modify subscription'
7. The subscription will now show as "change requested"

Change Seat Counts

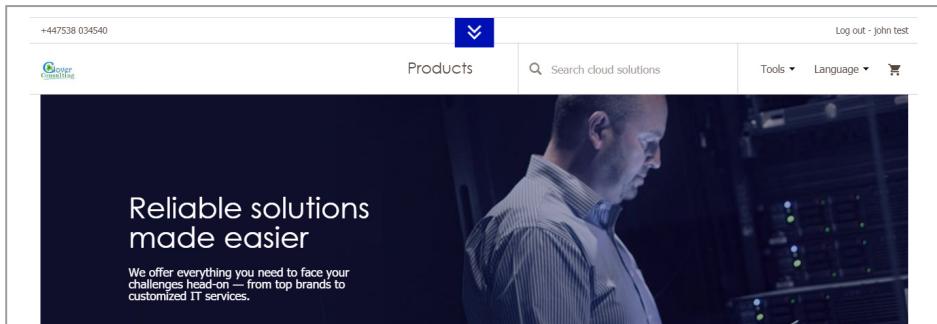
Changing Seat Counts

1. In the dashboard choose the customer you want to make the changes to and then click the "Login as" button to the right:



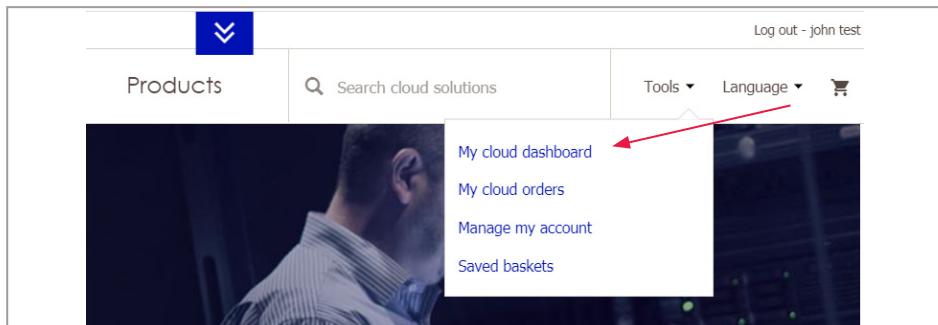
The screenshot shows the Insight cloud solutions dashboard. On the left, there is a sidebar with links for Dashboard, Statements, Products, Employees, Invoices, and Account. The main area is titled 'Dashboard' and shows a table of customers. The table has columns for Customer ID, Customer, Credit limit, Balance, Created date, Status, and Login as. Three rows are listed: R000000A14 (Eton Bay Company), R00000099C (May Company), and R0000007PT (Judy Shop). The 'Login as' button for the May Company row is highlighted with a red box. The top of the page has a search bar and filters for 'Display per page: 10 results', 'Search', 'Created from', 'Created to', 'Select status', and a 'Search' button.

2. This will take you to your customer's account:



The screenshot shows a customer account page. At the top, there is a header with a phone number '+447538 034540', a dropdown menu, and a 'Log out - John test' link. Below the header, there is a navigation bar with 'Products' and a search bar 'Search cloud solutions'. A 'Tools' dropdown and a language selection are also in the navigation bar. The main content area features a dark banner with the text 'Reliable solutions made easier' and a subtext 'We offer everything you need to face your challenges head-on — from top brands to customized IT services.' To the right of the banner, there is a photograph of a man in a server room. The bottom of the page has a footer with the 'Insight' logo and a page number '25' in a purple circle.

3. Click on the double arrow toward the top of the screen. Click on “Tools” and then “My Cloud Dashboard:



4. Click on “Subscriptions” on the left-hand side of the screen:

A screenshot of the 'Subscriptions' page. On the left, there is a sidebar with links: Dashboard, Users, Licenses, Subscriptions (which is selected and highlighted in blue), Statements, Orders, Reports, and Account. The main content area shows a table of subscriptions. The table has columns: Subscription Id, Subscription, Status, Licenses, Creation date, and PO Number. There are three rows: 1. Subscription Id: 00000222P, Subscription: Office 365 E3, Status: Cancelled, Licenses: 0, Creation date: May 9, 2020, PO Number: 212121. 2. Subscription Id: 000001ZSA, Subscription: Microsoft 365 Business Basic, Status: Active, Licenses: 1, Creation date: May 5, 2020, PO Number: 212121. 3. Subscription Id: 000001ZRS, Subscription: Enterprise Mobility + Security E3, Status: Active, Licenses: 1, Creation date: May 3, 2020, PO Number: 1234.

5. Choose the subscription you want to make the adjustment to. Then click on “Modify Subscription” on the right-hand side of the screen:

A screenshot of the 'Microsoft 365 Business Basic' subscription details page. On the left, there is a sidebar with links: Dashboard, Users, Licenses, Subscriptions (selected), Statements, Orders, Reports, and Account. The main content area shows the subscription name 'Microsoft 365 Business Basic' and three buttons: 'Assign licenses', 'Cancel subscription', and 'Subscription history'. On the right, there is a table of subscription details. The table has columns: ID, Status, Licenses, Created, Expiration date, Payment method, PO Number, and Statement. The table shows: ID: 000001ZSA, Status: Active, Licenses: 1, Created: May 5, 2020, Expiration date: Auto renew, Payment method: Terms (Commitment: 12 month contract - monthly billing), PO Number: 212121, Statement: No Statement available. The 'Modify subscription' link in the 'Status' row is highlighted with a blue box.

6. Type in new quantity under "New license qty" and then click "Update":

Modify subscription			
	Current license qty	New license qty	Total Ex VAT
 Enterprise Mobility + Security E3	1	<input type="text" value="5"/> Update	GBP £6.60 1 month

7. Click the box to accept the Terms and Conditions and then click the "Modify Subscription" button:

Modify subscription

	Current license qty	New license qty	Total Ex VAT						
 Enterprise Mobility + Security E3	1	<input type="text" value="5"/>	GBP £33.00 1 month						
<hr/> <table> <tr> <td>Subtotal</td> <td>GBP £33.00</td> </tr> <tr> <td>Tax estimate</td> <td>GBP £6.60</td> </tr> <tr> <td>Total</td> <td>GBP £39.60</td> </tr> </table>				Subtotal	GBP £33.00	Tax estimate	GBP £6.60	Total	GBP £39.60
Subtotal	GBP £33.00								
Tax estimate	GBP £6.60								
Total	GBP £39.60								
<p><input checked="" type="checkbox"/> By clicking this box, you hereby agree with the terms and conditions for all products in your basket.</p> <p>You must accept the terms and conditions to continue.</p>									
<input type="button" value="Modify subscription"/>									

Reporting

General Reporting

Once you're in the customer's portal click on "Reports" on the left-hand side of the screen. Here is where you'll find reports related to your end customer:

