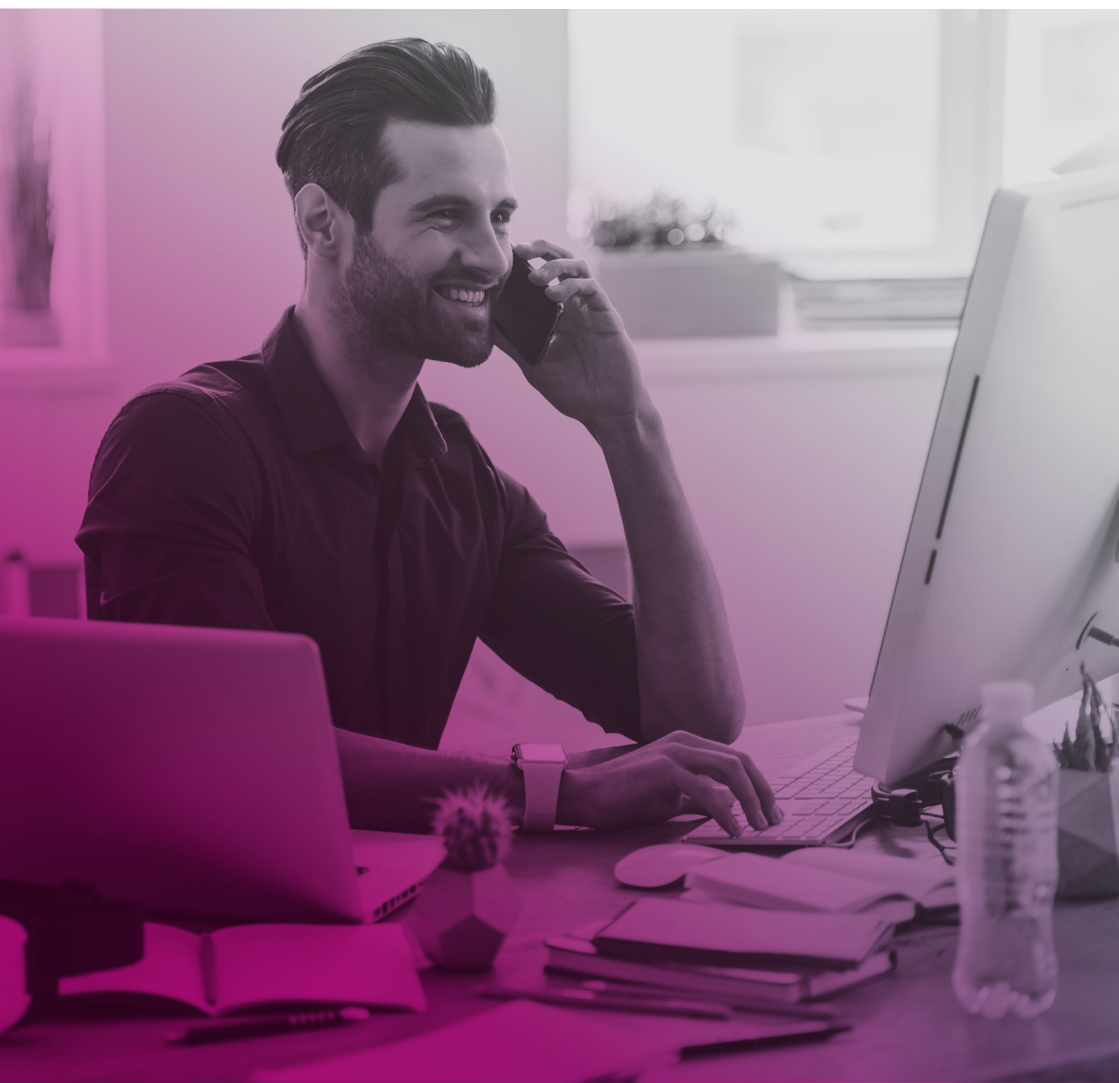


Insight Cloud Management Platform User-Guide



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

Statements

Products

Employees

Invoices

Account

Dashboard

Display per page: 10 results

Search

Created from

Created to

Select status

Search

| 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:

1.800.INSIGHT

Back to insight.com

Log out - i21174026 last

Tools

Language

Insight

Insight cloud solutions

Dashboard

Statements

Products

Employees

Invoices

Account

Dashboard / Statements

Customer Statements

Display per page: 10 results

Search

Date From

Date To

Search

| Customer ID | Customer | Statement ID | Statement date | Bill amount | Status |
|-------------|-------------|--------------|----------------|-------------|--------|
| R00000099C | May Company | 0000000DWD | May 3, 2020 | GBP £6.60 | Paid |
| R000000000 | Test 2TC | 0000000CCG | Apr 27, 2020 | GBP £21.00 | Paid |

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

1.800.INSIGHT

Back to insight.com

Log out - i21174026 last

Tools

Language

Insight

Insight cloud solutions

Dashboard

Statements

Products

Employees

Invoices

Account

Dashboard / Products

Products

All Cloud Products

| Product ID | Product Name | Current Cost | Custom price | Default price | Bill period | Published |
|----------------------|--------------------------------------------------------------------------------------------------|--------------|--------------|---------------|-------------|-----------|
| 0006661613 | Dynamics 365 Customer Engagement Plan Enterprise Edition From 5A for CRM Basic (Qualified Offer) | | | | 1 Month | |
| Customer | | | | | | |
| Add default pricing | | | | | | |
| Add customer pricing | | | | | | |

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

1.800.INSIGHT

Back to insight.com

Log out - i21174026 last

Tools

Language

Insight

Insight cloud solutions

Dashboard

Statements

Products

Employees

Invoices

Account

Dashboard / Employees

Employees



Bulk import

Add Employee

Display per page: 10 results

insight

Status: All

| Name | E-mail | Role | Status |
|-----------------------------------------------------------------------------------------------|-------------------------|-------|--------|
|  dan lavrich | dan.lavrich@insight.com | Admin | Active |
|  Sharif Aly | sharif.aly@insight.com | Admin | Active |

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

1.800.INSIGHT

Back to insight.com

Log out - i21174026 last

Tools

Language

Insight

Insight cloud solutions

Dashboard

Statements

Products

Employees

Invoices

Account

Dashboard / Invoices

Invoices

Display per page: 10 results

Search

Date From

Date To

Search

| ID | Invoice date | Due date | Bill amount | Status | |
|---------|--------------|--------------|-------------|--------|--------------|
| 4810885 | Apr 14, 2020 | May 14, 2020 | GBP £27.45 | Unpaid | Download PDF |

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

1.800.INSIGHT

Back to insight.com

Log out - i21174026 last

Tools

Language

Insight

Insight cloud solutions

Dashboard

Statements

Products

Employees

Invoices

Account

Dashboard / Account

Account information

BEVAN KIDWELL

Company ID
1120232467

Created date
Aug 7, 2019

Line of business
Corporate

Customer class
All Resellers

Username
emeacs@mailinator.com

Password

Default billing address
113-117 FARRINGTON ROAD
LONDON, GB
EC1R 3BX

Default shipping address
113-117 FARRINGTON ROAD
LONDON, GB
EC1R 3BX

PayPal
Connected

Sign in

Modify Product Pricing

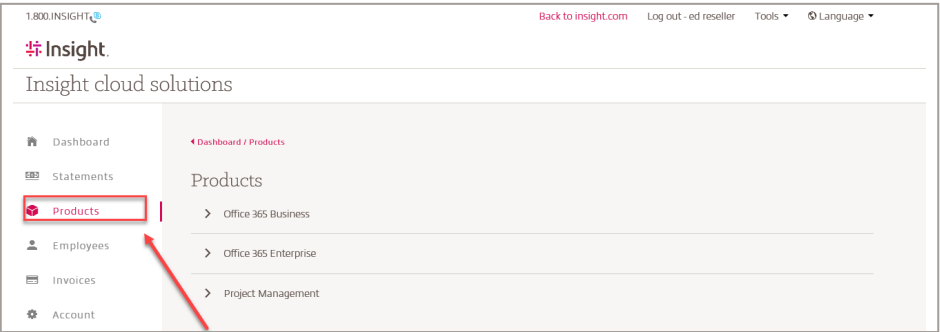
The Global Product catalogue is updated monthly to reflect publisher adds, changes, deletes, and pricing. The catalogue provided to you as a Reseller includes end customer pricing at MSRP (Manufacturers Suggested Retail Price). Customer specific prices can be modified, as noted below in the Set Custom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

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

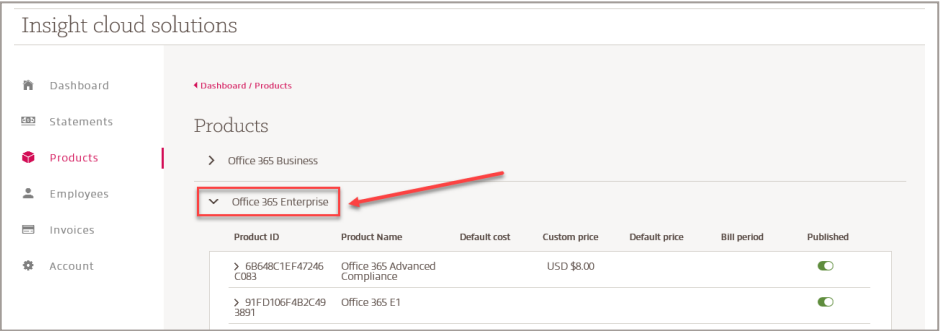
- 1. Review Products by category
- 2. Review default & custom cost, price, and effective dates
- 3. Publish, or remove products from the catalogue view of your customers
- 4. Create & Edit cost, price, and effective dates

Review Product by category:

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



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) –



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 indicate 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 | Published |
| > 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 eDiscover y 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 applied 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 product list with columns for product ID, name, and price. The third product, 'Advanced eDiscover y Storage', is selected. Below the product list is a table for custom pricing with columns: Customer, Custom cost, Custom Price, Effective from, and Effective to. The table has one row for 'All' customers with a custom cost of USD \$80.00 and a custom price of USD \$100.00. At the bottom, there is a red button labeled 'Add customer pricing' with a red arrow pointing to it.

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

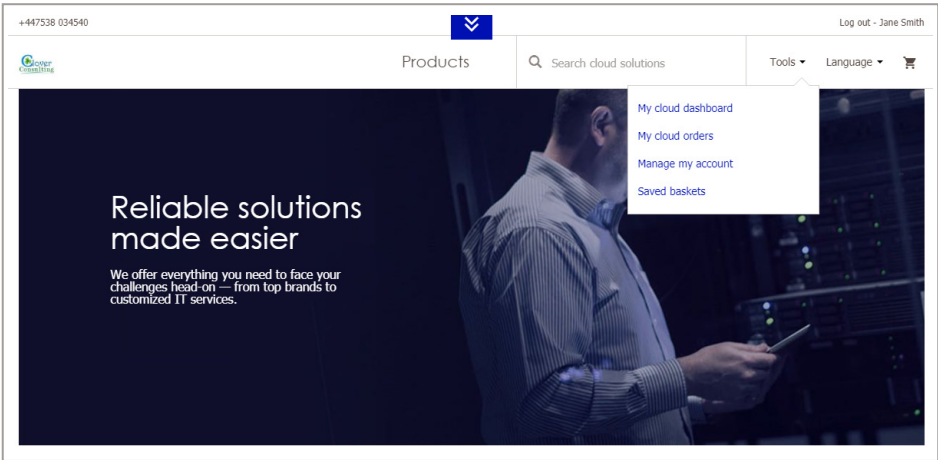
1. Add, or search for the customer to which the custom pricing is to be applied
2. Enter the cost
3. Enter to custom price
4. Enter the effective date
5. Enter the end date
6. Click on the check mark to save and apply

The screenshot shows the custom pricing form with numbered steps 1 through 6 indicating the sequence of actions. Step 1 is the customer search field, step 2 is the custom cost input, step 3 is the custom price input, step 4 is the effective from date input, step 5 is the effective to date input, and step 6 is the save button (check mark).

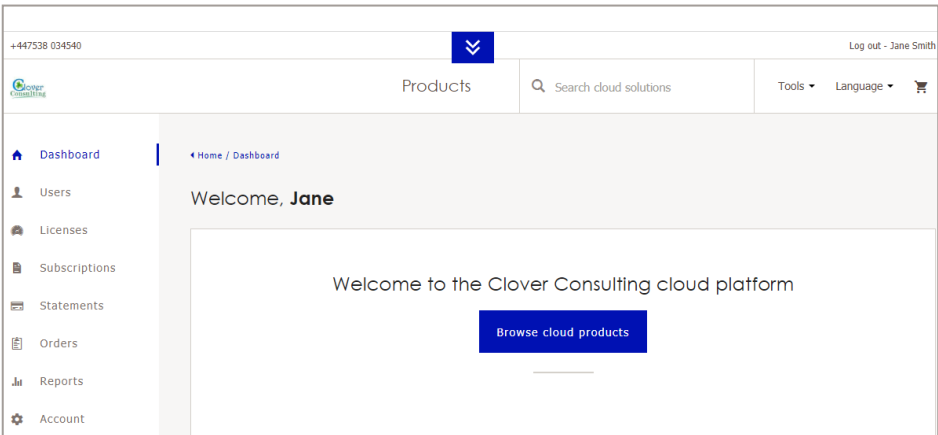
| Customer | Custom cost | Custom Price | Effective from | Effective to |
|----------|-------------|--------------|----------------|--------------|
| All | USD \$80.00 | USD \$100.00 | Nov 13, 2019 | |

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. On the left is a sidebar with navigation links: Dashboard, Users (selected), Licenses, Subscriptions, Statements, Orders, Reports, and Account. The main header area includes 'Dashboard / Users', 'Bulk user import', and an 'Add user' button. Below the header, there's a 'Display per page: 10 results' dropdown, a search bar, and a 'User status: All' dropdown. The main content is a table with columns: Name, E-mail, Role, and Status.

| Name | E-mail | Role | Status |
|---------------|---------------------------------------------|-------|--------|
| Jane Smith | janesmith123@etonbaycompany.onmicrosoft.com | Admin | Active |
| Sally Sampson | SallySampson@etonbaycompany.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. The sidebar is the same as in the previous screenshot, with 'Licenses' selected. The main header area shows 'Dashboard / Licenses' and a 'Sync license assignment' button. Below the header, there's a 'Subdomain' section with a 'Sync in progress' indicator. The main content area shows 'Exchange Online (Plan 2)' with an 'Assign licenses' button. Below this, there's a summary: 'Assigned 0' and 'Available 2' licenses, with a total of '2 Licenses'.

4. Subscriptions: This 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. The sidebar is the same as in the previous screenshots, with 'Subscriptions' selected. The main header area shows 'Dashboard / Subscriptions' and a 'Vendor information' link. Below the header, there's a 'Display per page: 10 results' dropdown, a search bar, and two dropdowns for 'Subscriptions from' and 'Subscriptions to', followed by a 'Search' button. The main content is a table with columns: Subscription Id, Subscription, Status, Licenses, Creation date, and PO Number.

| Subscription Id | Subscription | Status | Licenses | Creation date | PO Number |
|-----------------|-----------------------------------|-----------|----------|---------------|-----------|
| 00000222P | Office 365 E3 | Cancelled | 0 | May 9, 2020 | |
| 00000125A | Microsoft 365 Business Basic | Active | 1 | May 5, 2020 | 212121 |
| 0000012RS | Enterprise Mobility + Security E3 | Active | 1 | May 3, 2020 | 1234 |

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

Dashboard

Users

Licenses

Subscriptions

Statements

Orders

Reports

Account

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 |
|--------------|------------|--------------|-------------|-------------|-----------|
| 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:

Dashboard

Users

Licenses

Subscriptions

Statements

Orders

Reports

Account

Dashboard / Reports

Reports

Billable Items Report

Invoice Details

Invoice #

ALL

Bill End Date

01/07/201801/07/2021


Subscription


ALL


Last Update 29-Apr-20


| Invoice # | Account # | Company Name | Vendor Subscription ID | Subscription ID | Product Name | Product # | Bill ID | Bill Start Date | Bill End Date | Charge Start Date | Charge End Date | Qty | Price | Currency | |
|-----------|-----------|--------------|------------------------|-----------------|--------------|------------|---------|-----------------|---------------|-------------------|-----------------|-----|-------|----------|--|
| R0000001 | Karin Inc | SAASDEV LLC | SAASDEV-0001 | 000001-0001 | CPMA Web 01 | 0000010001 | 00001 | 01 Jan 20 | 01 Jan 20 | 01 Jan 20 | 01 Jan 20 | 1 | 21.00 | GBP | |
| R0000001 | Karin Inc | SAASDEV LLC | SAASDEV-0001 | 000001-0002 | CPMA Web 02 | 0000010002 | 00002 | 01 Jan 20 | 01 Jan 20 | 01 Jan 20 | 01 Jan 20 | 1 | 14.00 | GBP | |
| R0000001 | Karin Inc | SAASDEV LLC | SAASDEV-0001 | 000001-0003 | CPMA Web 03 | 0000010003 | 00003 | 01 Jan 20 | 01 Jan 20 | 01 Jan 20 | 01 Jan 20 | 1 | 21.00 | GBP | |
| R0000001 | Karin Inc | SAASDEV LLC | SAASDEV-0001 | 000001-0004 | CPMA Web 04 | 0000010004 | 00004 | 01 Jan 20 | 01 Jan 20 | 01 Jan 20 | 01 Jan 20 | 1 | 14.00 | GBP | |
| R0000001 | Karin Inc | SAASDEV LLC | SAASDEV-0001 | 000001-0005 | CPMA Web 05 | 0000010005 | 00005 | 01 Jan 20 | 01 Jan 20 | 01 Jan 20 | 01 Jan 20 | 1 | 21.00 | GBP | |
| R0000001 | Karin Inc | SAASDEV LLC | SAASDEV-0001 | 000001-0006 | CPMA Web 06 | 0000010006 | 00006 | 01 Jan 20 | 01 Jan 20 | 01 Jan 20 | 01 Jan 20 | 1 | 14.00 | GBP | |
| R0000001 | Karin Inc | SAASDEV LLC | SAASDEV-0001 | 000001-0007 | CPMA Web 07 | 0000010007 | 00007 | 01 Jan 20 | 01 Jan 20 | 01 Jan 20 | 01 Jan 20 | 1 | 21.00 | GBP | |
| R0000001 | Karin Inc | SAASDEV LLC | SAASDEV-0001 | 000001-0008 | CPMA Web 08 | 0000010008 | 00008 | 01 Jan 20 | 01 Jan 20 | 01 Jan 20 | 01 Jan 20 | 1 | 14.00 | GBP | |
| R0000001 | Karin Inc | SAASDEV LLC | SAASDEV-0001 | 000001-0009 | CPMA Web 09 | 0000010009 | 00009 | 01 Jan 20 | 01 Jan 20 | 01 Jan 20 | 01 Jan 20 | 1 | 21.00 | GBP | |
| R0000001 | Karin Inc | SAASDEV LLC | SAASDEV-0001 | 000001-0010 | CPMA Web 10 | 0000010010 | 00010 | 01 Jan 20 | 01 Jan 20 | 01 Jan 20 | 01 Jan 20 | 1 | 14.00 | GBP | |
| R0000001 | Karin Inc | SAASDEV LLC | SAASDEV-0001 | 000001-0011 | CPMA Web 11 | 0000010011 | 00011 | 01 Jan 20 | 01 Jan 20 | 01 Jan 20 | 01 Jan 20 | 1 | 21.00 | GBP | |
| R0000001 | Karin Inc | SAASDEV LLC | SAASDEV-0001 | 000001-0012 | CPMA Web 12 | 0000010012 | 00012 | 01 Jan 20 | 01 Jan 20 | 01 Jan 20 | 01 Jan 20 | 1 | 14.00 | GBP | |
| R0000001 | Karin Inc | SAASDEV LLC | SAASDEV-0001 | 000001-0013 | CPMA Web 13 | 0000010013 | 00013 | 01 Jan 20 | 01 Jan 20 | 01 Jan 20 | 01 Jan 20 | 1 | 21.00 | GBP | |
| R0000001 | Karin Inc | SAASDEV LLC | SAASDEV-0001 | 000001-0014 | CPMA Web 14 | 0000010014 | 00014 | 01 Jan 20 | 01 Jan 20 | 01 Jan 20 | 01 Jan 20 | 1 | 14.00 | GBP | |
| R0000001 | Karin Inc | SAASDEV LLC | SAASDEV-0001 | 000001-0015 | CPMA Web 15 | 0000010015 | 00015 | 01 Jan 20 | 01 Jan 20 | 01 Jan 20 | 01 Jan 20 | 1 | 21.00 | GBP | |
| R0000001 | Karin Inc | SAASDEV LLC | SAASDEV-0001 | 000001-0016 | CPMA Web 16 | 0000010016 | 00016 | 01 Jan 20 | 01 Jan 20 | 01 Jan 20 | 01 Jan 20 | 1 | 14.00 | GBP | |
| R0000001 | Karin Inc | SAASDEV LLC | SAASDEV-0001 | 000001-0017 | CPMA Web 17 | 0000010017 | 00017 | 01 Jan 20 | 01 Jan 20 | 01 Jan 20 | 01 Jan 20 | 1 | 21.00 | GBP | |
| R0000001 | Karin Inc | SAASDEV LLC | SAASDEV-0001 | 000001-0018 | CPMA Web 18 | 0000010018 | 00018 | 01 Jan 20 | 01 Jan 20 | 01 Jan 20 | 01 Jan 20 | 1 | 14.00 | GBP | |
| R0000001 | Karin Inc | SAASDEV LLC | SAASDEV-0001 | 000001-0019 | CPMA Web 19 | 0000010019 | 00019 | 01 Jan 20 | 01 Jan 20 | 01 Jan 20 | 01 Jan 20 | 1 | 21.00 | GBP | |
| R0000001 | Karin Inc | SAASDEV LLC | SAASDEV-0001 | 000001-0020 | CPMA Web 20 | 0000010020 | 00020 | 01 Jan 20 | 01 Jan 20 | 01 Jan 20 | 01 Jan 20 | 1 | 14.00 | GBP | |
| Total | | | | | | | | | | | | | 17 | 280.40 | |


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


 Dashboard


 Users


 Licenses

 Subscriptions

 Statements

 Orders

 Reports

 Account

Dashboard / Account

Account information

Eton Bay Company

Company ID
R000000A14

Created date
May 9, 2020

Line of business
Corporate

Customer class
All 2T Customers

Username
janessmith123@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.

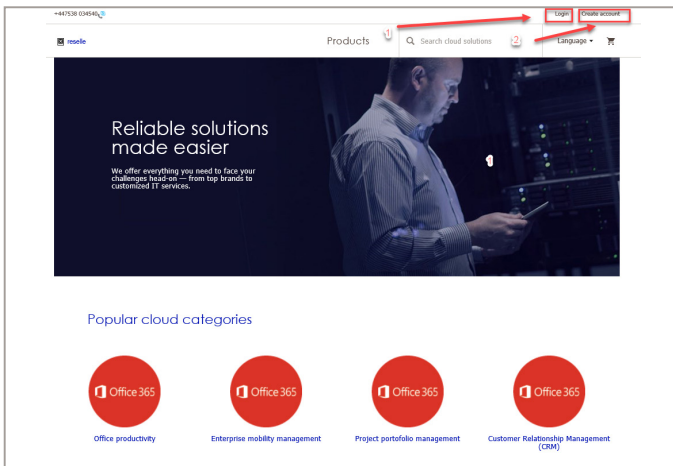
- In the Pilot phase Insight will need to provide this link, which is unique to you as a Reseller
- The link will be available on the Reseller Admin Portal in an upcoming release

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.
 - a. 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.

The image shows a registration form titled "Registration". It contains several input fields, each with a red asterisk indicating it is required. The fields are numbered 1 through 7 with red circles and arrows pointing to them: 1. Email Address*, 2. Password*, 3. Confirm Password*, 4. First Name*, 5. Last Name*, 6. Company Name*, and 7. Line of Business*. The Line of Business field is a dropdown menu with "Corporate" selected, and a list of options (Corporate, Government, Education, Non-Profit) is visible below it.

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

The image shows the same registration form, now filled out with sample data. The fields are: Email Address* (john.doe@gmail.com), Password* (*****), Confirm Password* (*****), First Name* (John), Last Name* (Doe), Company Name* (Best Customer), and Line of Business* (Corporate). A red arrow points from the "Back to Login" link to a blue "Create account" button, which is highlighted with a red rectangle.

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.

1.800.INSIGHT

Back to insight.com

Log out - 121174026 last

Tools

Language

ET Test Reseller

Insight

Insight cloud solutions

Dashboard

Statements

Products

Employees

Invoices

Account

Dashboard

Display per page: 10 results

Search

Created from

Created to

Select status

Search

| Customer ID | Customer | Credit limit | Balance | Created date | Status | Login as |
|-------------|---------------------------|--------------|-------------|--------------|--------|----------|
| R0000005EH | Simon MC Test | GBP £200.00 | GBP £0.00 | Mar 23, 2020 | Active | |
| R0000005EG | Shelleys 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 | |
| R0000004MD | 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.

Dashboard / Customer information

Company information

McGregor Consulting

Customer ID
R0000004MP

Created date
Mar 24, 2020

Line of business
Corporate

Customer class

Credit limit
GBP £200.00

Outstanding balance
GBP £0.00

Default billing address

Default shipping address

Adjust the credit limit

Select the check mark to update ✓

Select the X to cancel ✗

Dashboard / Customer information

Company information

McGregor Consulting

Customer ID
R000004MP

Created date
Mar 24, 2020

Line of business
Corporate

Customer class

Credit limit ✗

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.

1.800.INSIGHT® Back to insight.com Log out - 121174026 last Tools ▾ Language ▾

ET Test Reseller

Insight

Insight cloud solutions

Dashboard

Statements

Products

Employees

Invoices

Account

Dashboard

Display per page: 10 results Search Created from Created to Select status Search

| Customer ID ▾ | Customer | Credit limit | Balance | Created date | Status | Login as |
|---------------|---------------------------|--------------|-------------|--------------|--------|----------|
| R0000005EH | Simon MC Test | GBP £200.00 | GBP £0.00 | Mar 23, 2020 | Active | ↕ |
| R0000005EG | Shelleys 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 | ↕ |
| R0000004MD | 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 | ↕ |
| R0000000RS | Test Today | GBP £200.00 | GBP £0.00 | Nov 23, 2019 | Active | ↕ |
| R000000000 | 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).

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

Assisted Service Mode

CUSTOMER VIEW

Ed McGregor

Reliable solutions made easier

Popular cloud categories

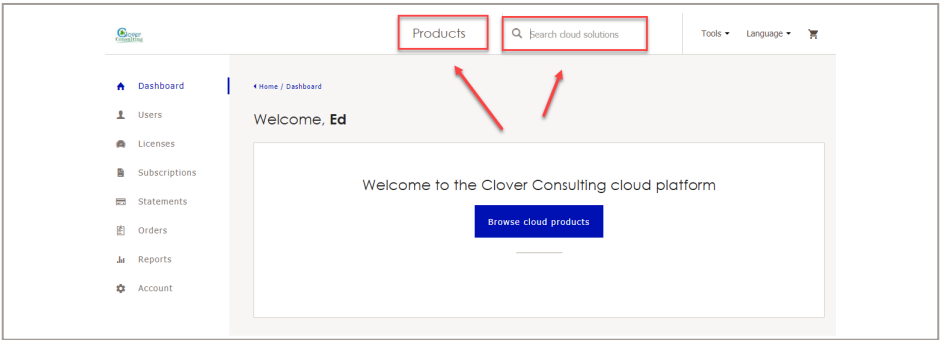
Office 365 Office 365 Office 365 Office 365

Office productivity Enterprise mobility management Project portfolio management Customer Relationship Management (CRM)

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.

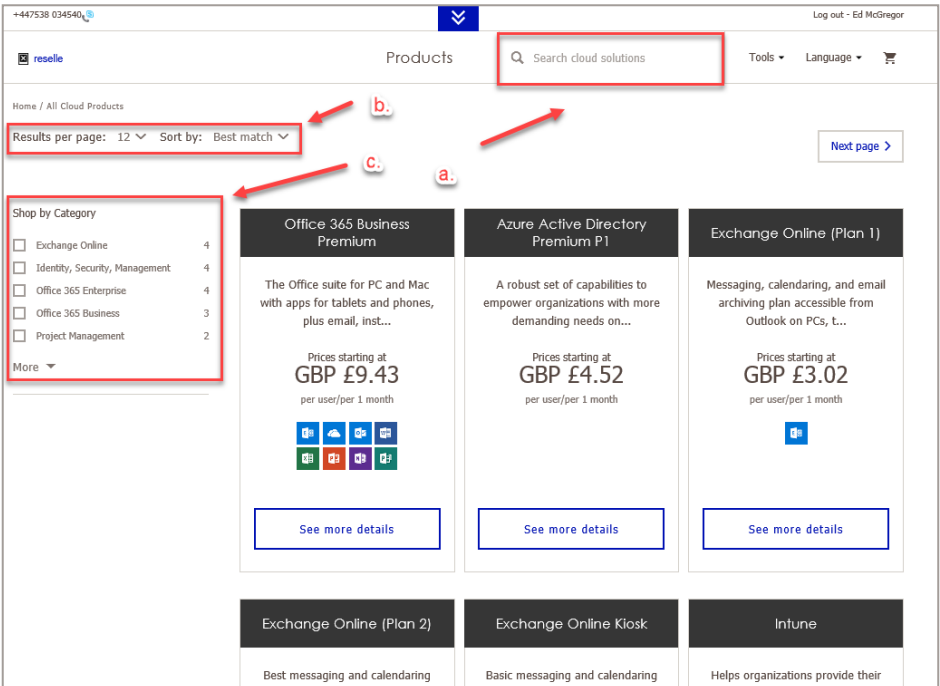
Order Process

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

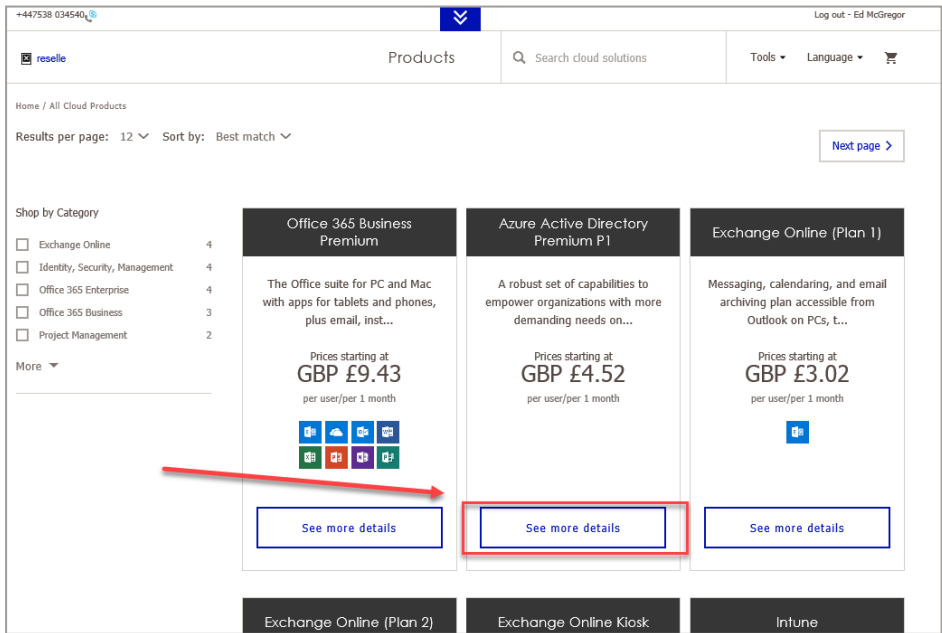


2. From the products page, you can:

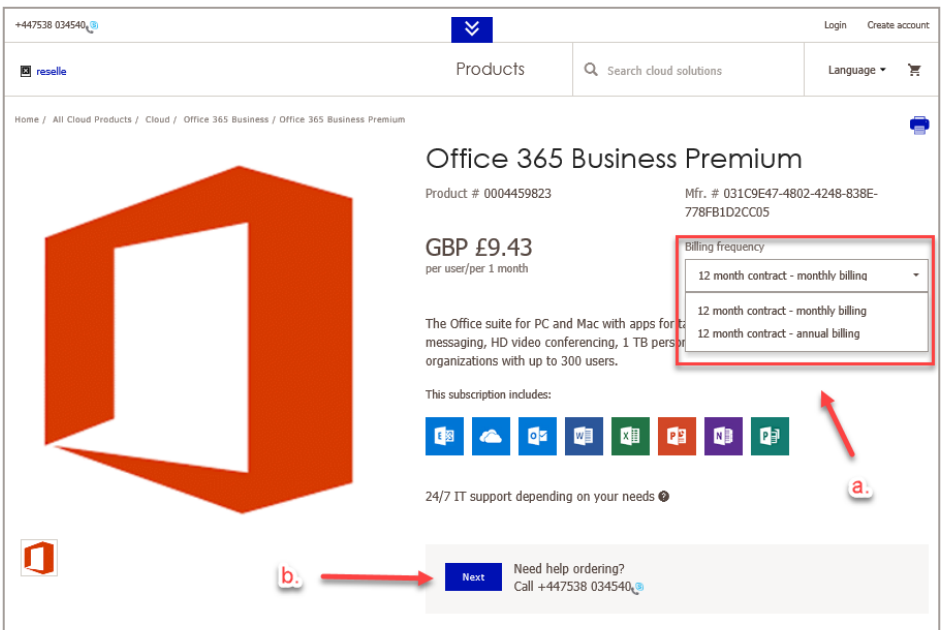
- a. Search product by name, part number, manufacturers number
- b. Adjust the number of results per page
- c. Navigate specific product categories



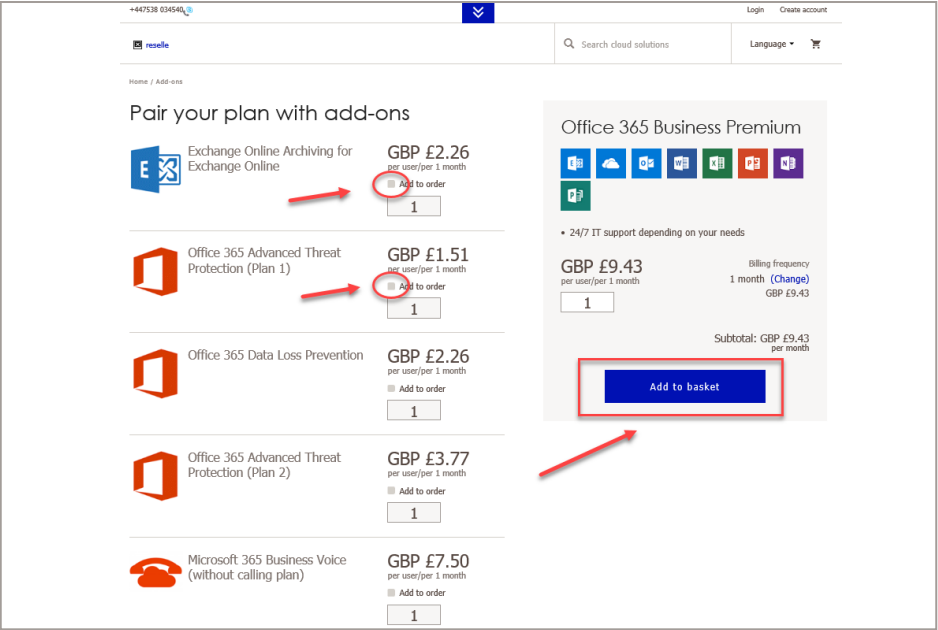
3. Click on “See More Details” to select a given product



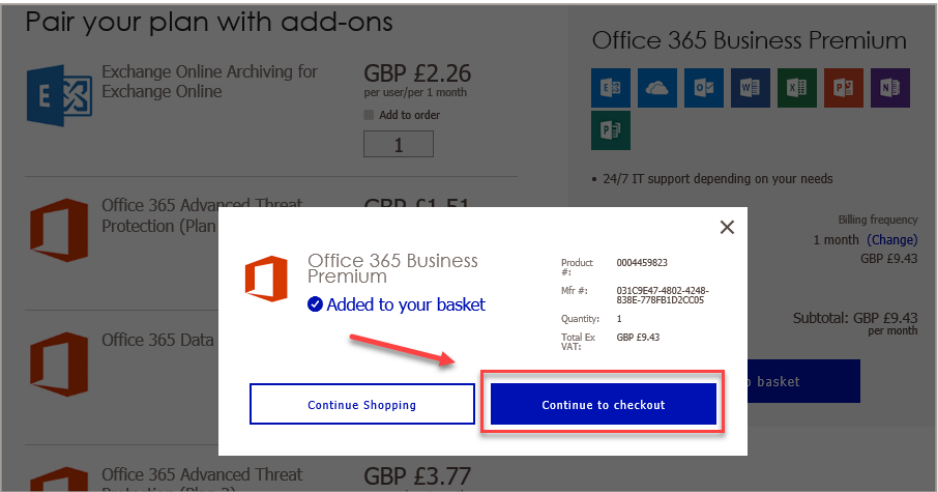
4. Select billing frequency (a) and click next (b):



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



6. Click on continue to checkout



7. Review your order and proceed to checkout


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 |
|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------|-----------------------------|----------------------|
|  Office 365 Business Premium Product: #0004459823 Mfr: #031C9E47-4802-4248-838E-778FB1D2CC05 | GBP £9.43 per user/per 1 month | 1 Update | GBP £9.43 1 month |

Recently viewed items



Office 365 Business Premium

Summary

Recurring fees
1 month GBP £9.43

Subtotal: GBP £9.43

Total Ex VAT GBP £9.43

[Proceed to checkout](#)

[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

Microsoft account

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.

☒ Create your free Subdomain ☐ Enter existing account information

[Check Availability](#)

 The specified subdomain is available. You can now continue purchasing the Office 365 subscription.

The subdomain name can only contain Latin letters and digits. It should be no more than 25 characters long.

[Continue](#)

Summary

Recurring fees
1 month GBP £7.90

Subtotal: GBP £7.90

Total Ex VAT GBP £7.90

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 | Recurring fees |
| Select a payment type * | 1 month GBP £9.43 |
| PO number | Subtotal: GBP £9.43 |
| 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:

Insight.

Insight cloud solutions

Dashboard

Statements

Products

Employees

Invoices

Account

Dashboard

Display per page: 10 results

Search

Created from

Created to

Select status

Search

| 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 | |

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

+447538 034540

Log out - John test

Products

Search cloud solutions

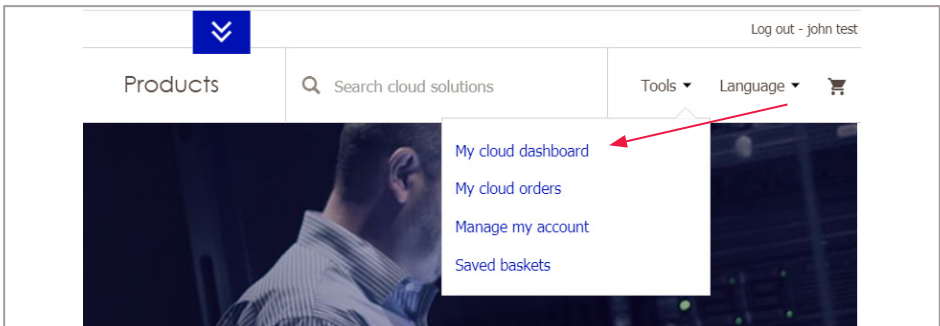
Tools

Language

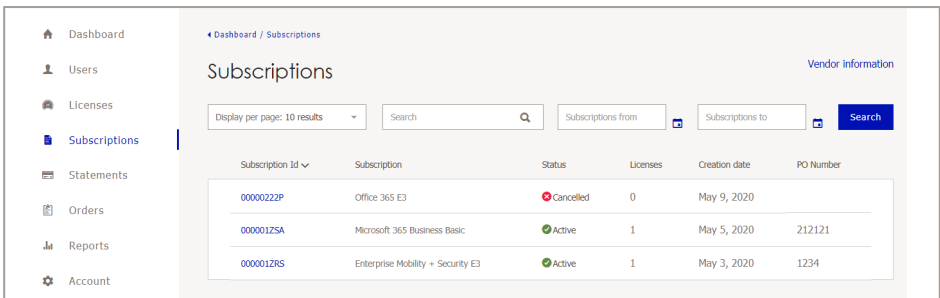
Reliable solutions made easier

We offer everything you need to face your challenges head-on — from top brands to customized IT services.

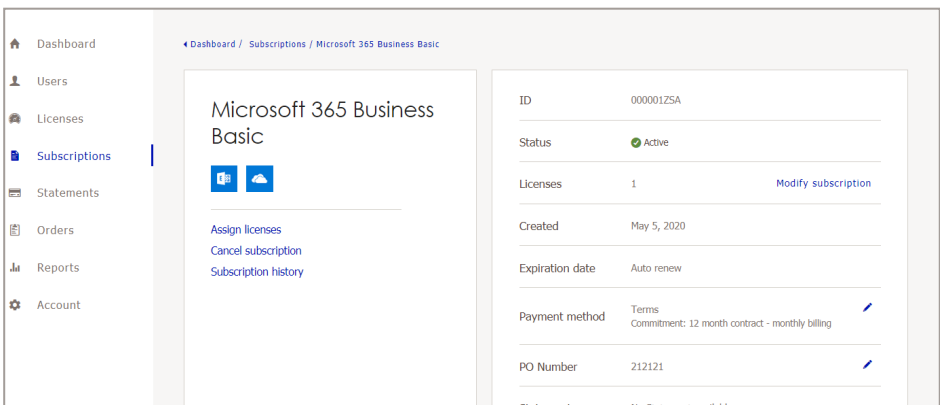
3. Click on the double carrot toward the top of the screen. Click on “Tools” and then “My Cloud Dashboard:



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




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



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


[Dashboard](#) / [Subscriptions](#) / [Modify subscription](#)

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 |
| Subtotal | | | GBP £33.00 |
| Tax estimate | | | GBP £6.60 |
| Total | | | GBP £39.60 |

☒ 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.

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:

Dashboard
 Users
 Licenses
 Subscriptions
 Statements
 Orders

[← Dashboard / Reports](#)

Reports

Billable Items Report

Invoice Details

Invoice #

Bill End Date

Subscription

Last Update 3-May-20

| Invoice # | Account # | Company Name | Header Subscription ID | Subscription ID | Product Name | Product # | Bill ID | Bill Start Date | Bill End Date | Charge Start Date | Charge End Date | Qty | Price | Currency |
|------------|-------------|--------------|------------------------|-----------------|--------------|------------|---------|-----------------|---------------|-------------------|-----------------|-----|-------|----------|
| 0000000000 | Mkt Company | 001000000 | 0001 | 0000000000 | Security | 0000000000 | 000001 | 01 May 2018 | 01 Jun 2018 | 01 May 2018 | 01 Jun 2018 | 1 | 6.00 | USD |

