

ALEF CSP platform manual



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1 Accessing the CSP platform

The platform is accessed through the URL created at the setup of the partner portal when the company is registered as an ALEF CSP partner. The URL will be created as <https://reseller.alef.cloud/>.

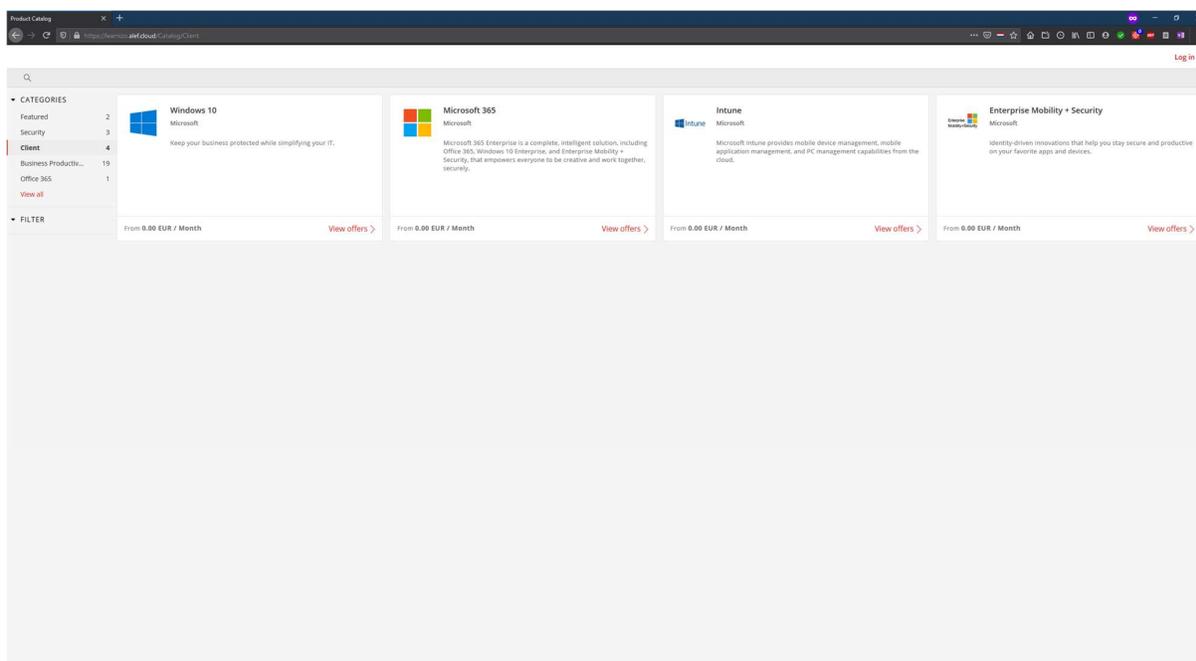
From the primary platform page, the user may either:

- **View the catalog for the available CSP offers and products, as a visitor / nonregistered user** - this view allows the user to access all the products and services available on the ALEF CSP platform and view their characteristics and related information, except for the price. For the products that do have the price shown in this view, it will be the vendor end user recommended price.
- **Log in in his user account, if such an account has been created for him, or register for a user account.** By logging in his account, the user will have access to the partner prices for the products and services sold through the ALEF CSP platform, as well as other partner benefits.

1.1 Product catalog

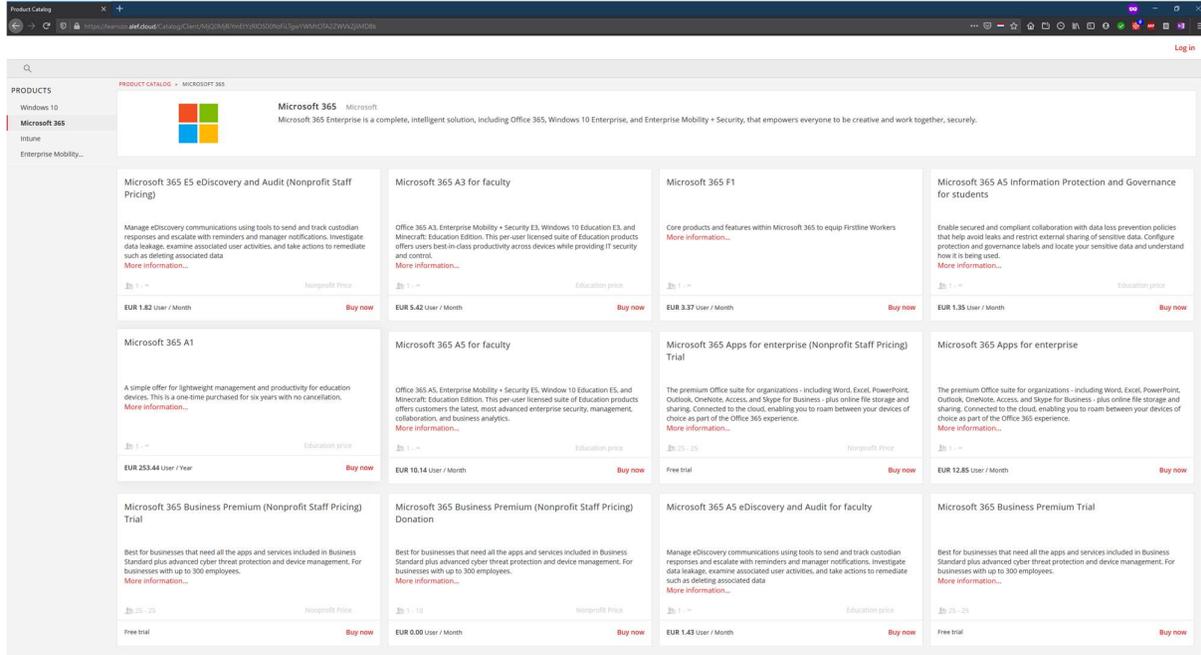
The Product catalog is the first page that is visible as the partners access their portal on the CSP platform, even before logging in.

This way the partners, **if they wish**, can provide their customers with the link towards their portal on the ALEF CSP platform so the customers can document themselves about the characteristics of the available products.



By selecting one of the categories from the left, the partners will be able to see what products are included in that category and access the detailed information page for those products.

For example, if we would choose the **Client** category and then we would select the Microsoft 365 product group, we would be able to see the details for all of the Microsoft 365 offerings that Microsoft has made available, for all the customer categories, with their ERP (Microsoft End-user Recommended Price).



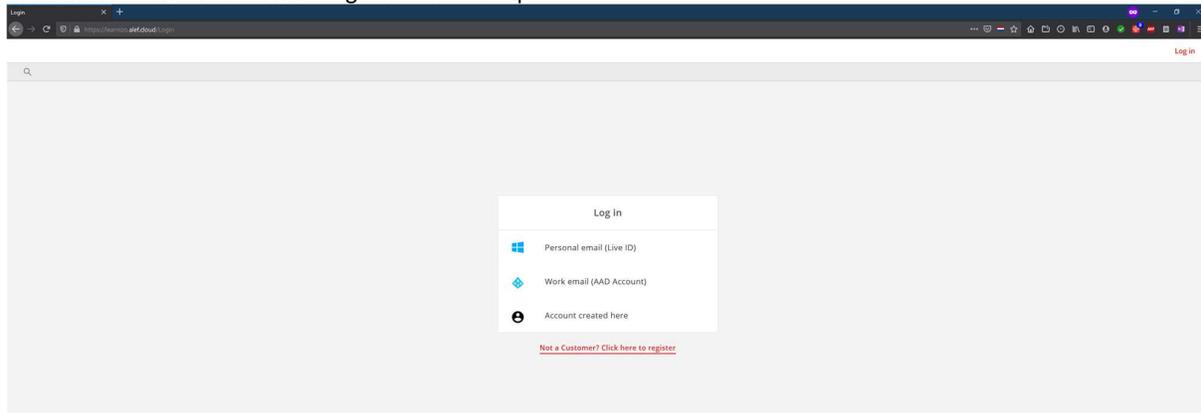
1.2 Accessing the reseller account

The partners have the possibility to access their reseller account, on the CSP platform, from any page of the platform by pressing the **Log in** button from the upper right-hand side of the webpage.

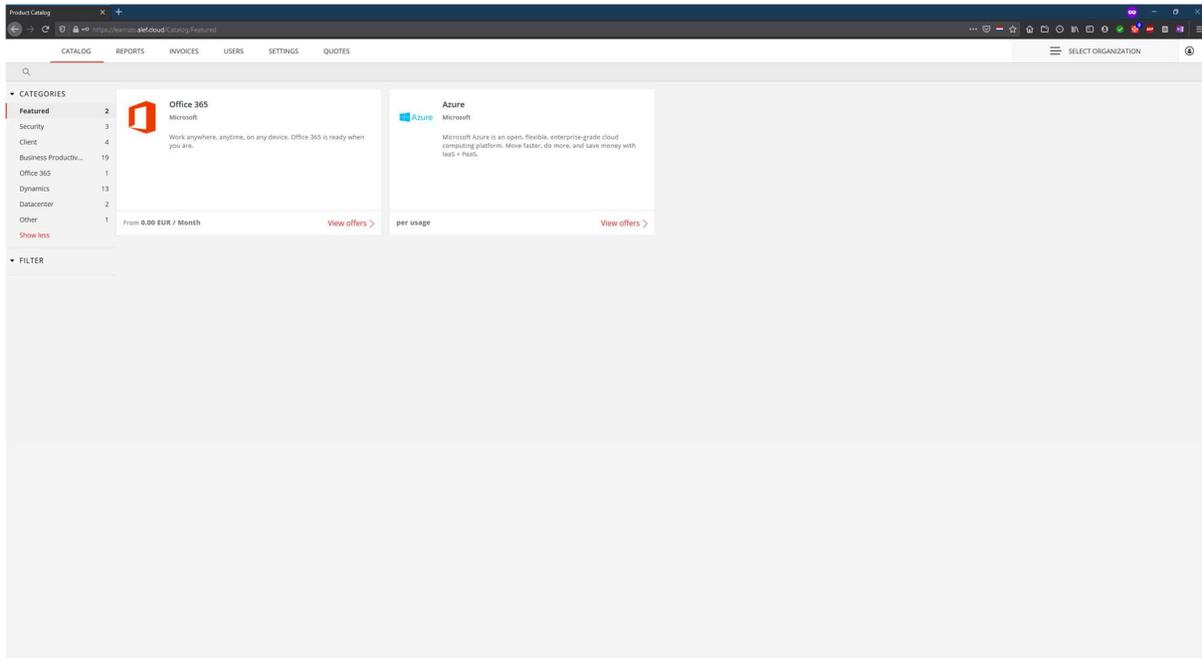
On the Log in page, you will notice that there are 3 authentication methods available. You will have to select the one that has been set for your user by the account administrator, which is also the primary user.

- **Personal email (Live ID)** – this option is based on the Microsoft Account login method
- **Work email (AAD Account)** – you may use this option if you have a Microsoft Online Services account or even Partner Center account for MPN
- **Account created here** – an email and password login method, that does not depend on any other authentication systems

Note: The Primary Contact, which is the first user that gets created on the reseller account from the platform, will always have the **Account created here** login method set up



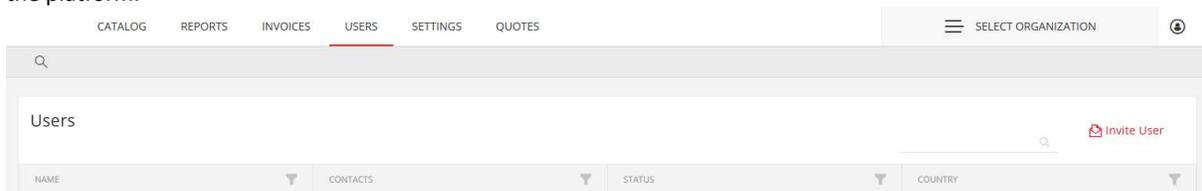
Once logged in the user will now have full access (depends on the assigned rights) to the reseller portal, which allows him to access all the platform functionalities.



1.3 Adding new users

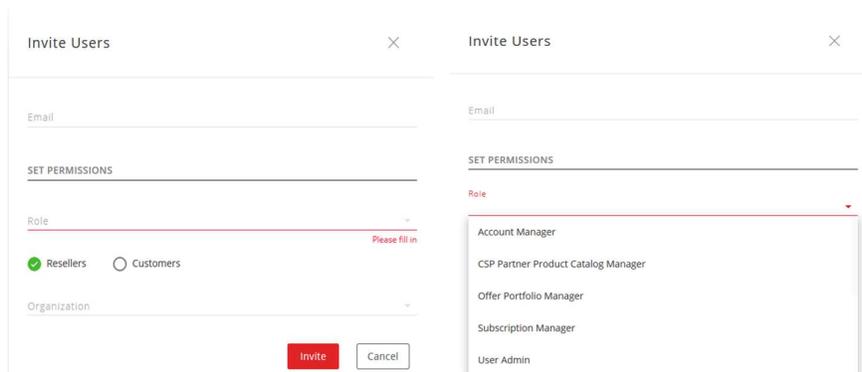
The platform allows the reseller to create additional users, within the reseller portal, and assign them different roles depending on the tasks that they will be required to perform.

To create the additional users, the partner will have to access the **Users** menu and invite the user to join to access the platform.

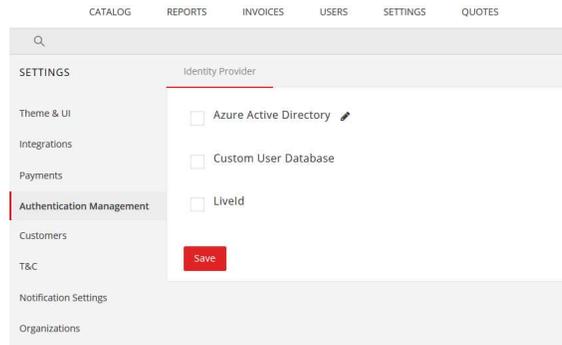


On the invite user form, the inviting user, will be required to fill in the following mandatory information:

- The email address where the invitation will be sent
- Assign a role to the user – the Account manager role will give the user full control over the account that he is invited to
- Select the organization (account) that the user is invited to access.



By going to the **Settings** menu, **Authentication Management**, the Primary Contact or Account Manager can set which authentication methods will be available for the user to access the platform, by selecting the appropriate Identity Providers.



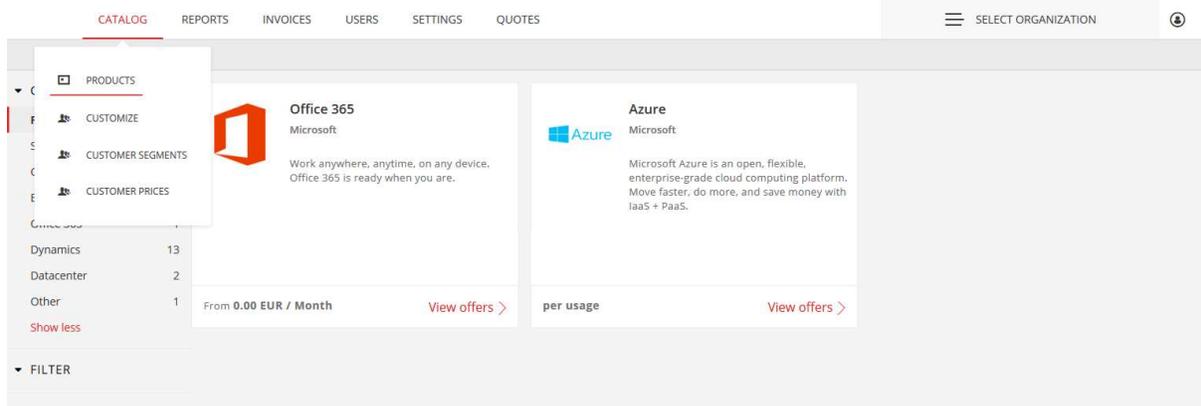
1.4 Structure of the reseller portal

The reseller portal is divided into several sections, each section providing the reseller with information that allows him to better control his CSP business.

1.4.1 Catalog

The main function of the catalog section is to provide the reseller's users and customers access to the products that the partner sells through CSP.

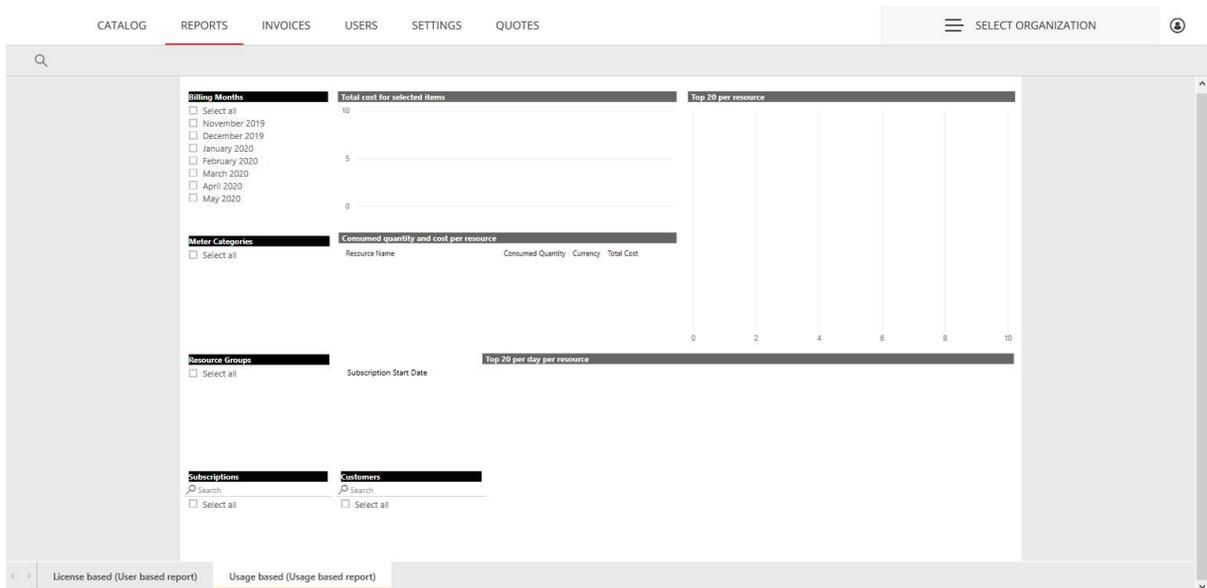
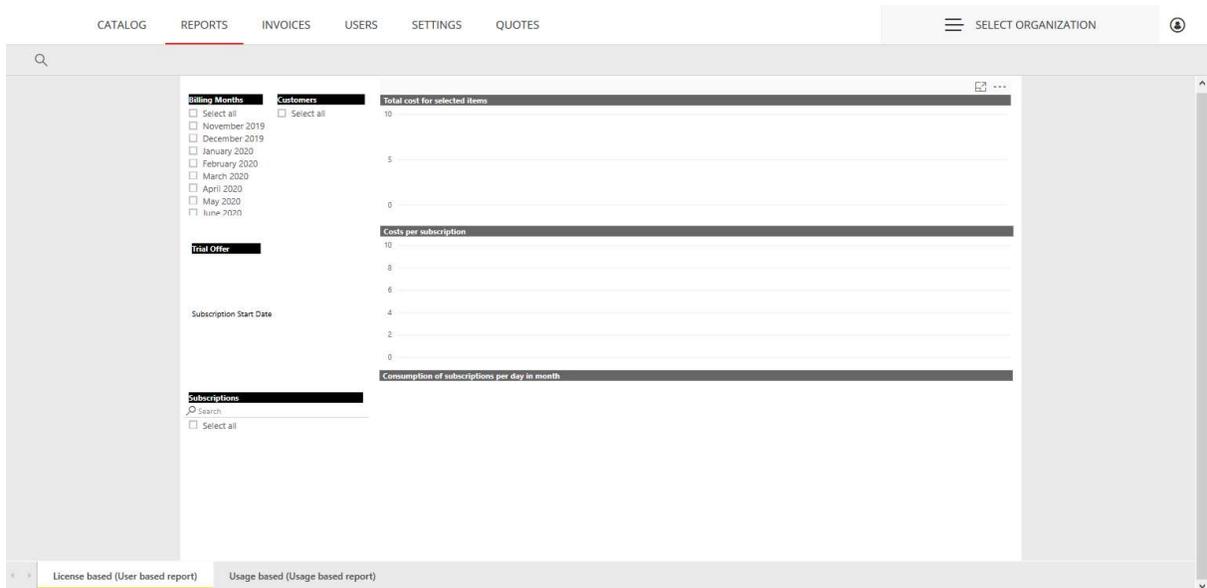
Through its sub-menus: **Customize**, **Customer Segments** and **Customer Prices** the Catalog menu also provides the reseller to ability to adjust the offers available to his customers, create multiple customer segments and assign products to these segments or even control what prices the customers see when they access the reseller's CSP portal.



1.4.2 Reports

The **Reports** section, of the reseller portal, provides the partners with a series of information regarding their customers, subscriptions, number of licenses for the license based subscriptions (Office 365, Microsoft 365, EMS, Dynamics 365, etc.) and also information regarding the consumption for the Azure subscriptions.

All this information is presented under the form of Power BI reports, that allow the partners to adjust the view to their interest and even export the data.



1.4.3 Invoices

In the **Invoices** section the reseller will find a history of his purchases through the platform.

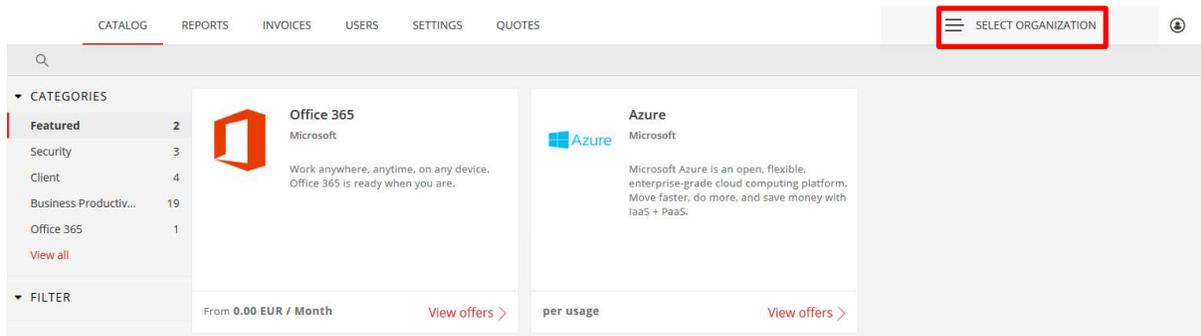
1.4.4 Settings

The **Settings** menu it is the section where the partner can control most of the aspects regarding his reseller portal, from allowing the customers to register to the platform for them to place orders for themselves, to what Authentication methods are allowed or if the new users that are being added to the platform have to accept specific Terms and conditions.

2 Customer and subscription management

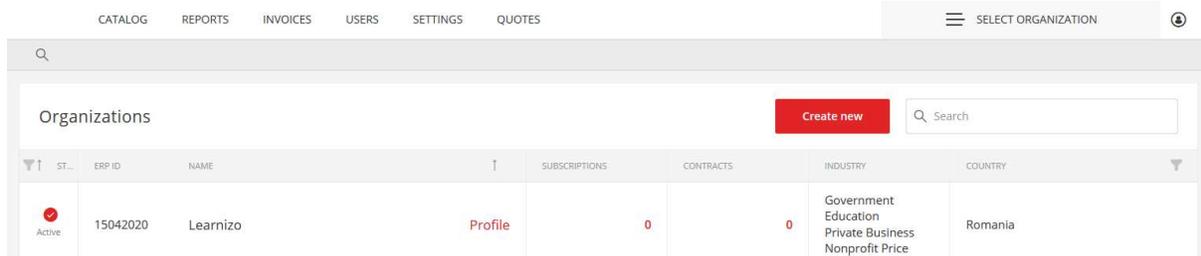
2.1 Customer management

The reseller can manage his customers to which he sold CSP licenses through ALEF Distribution RO CSP program, or that have established a delegated admin connection with ALEF Distribution RO, by clicking to the **Select Organization** button on the upper right-hand corner of the reseller portal.

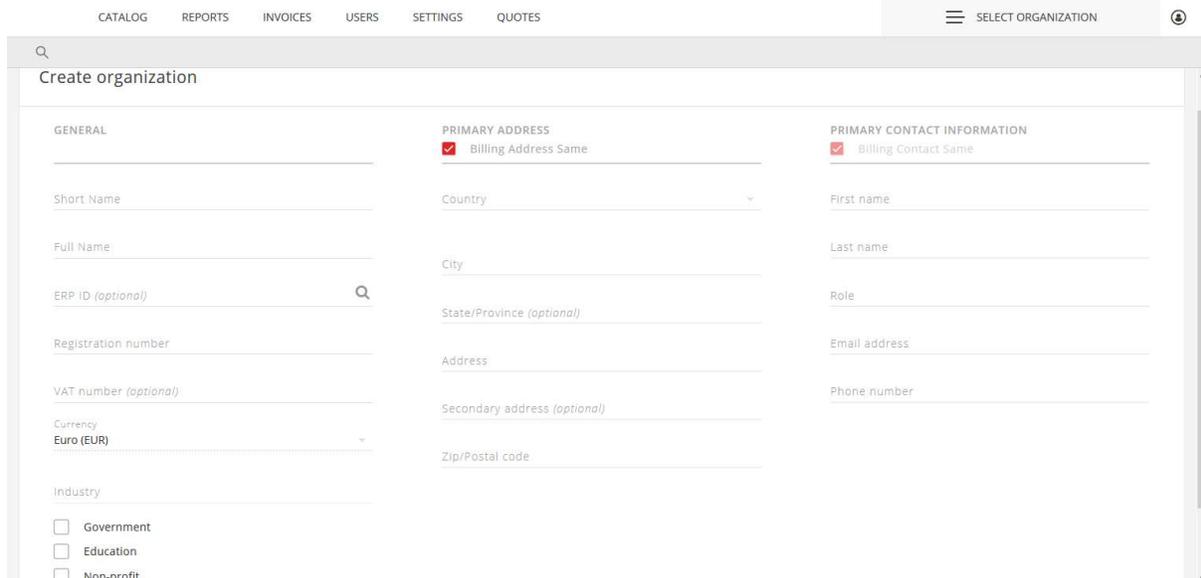


Once the Organizations section of the portal accessed, the reseller will be able to view the list of customers to which he already sold licenses through the CSP program or create a new customer.

In the organizations list you will notice that an account for the reseller is also created, that provides you with the information on what types of offers you, as the reseller, are entitled to access.

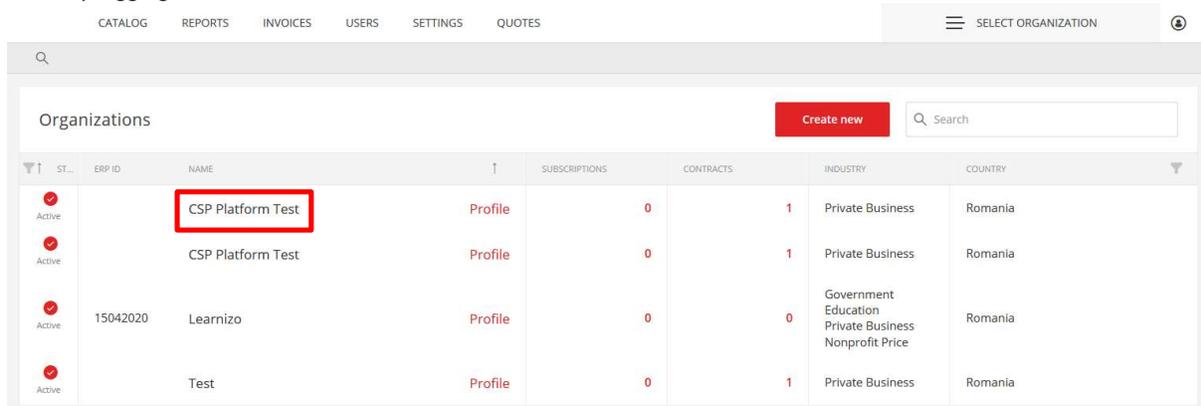


When creating a new organization, there is a series of information that is required, and special attention needs to be given to the Industry field as depending on what is selected here influences what offers will be made available for this customer, and how the order is processed by the vendor.

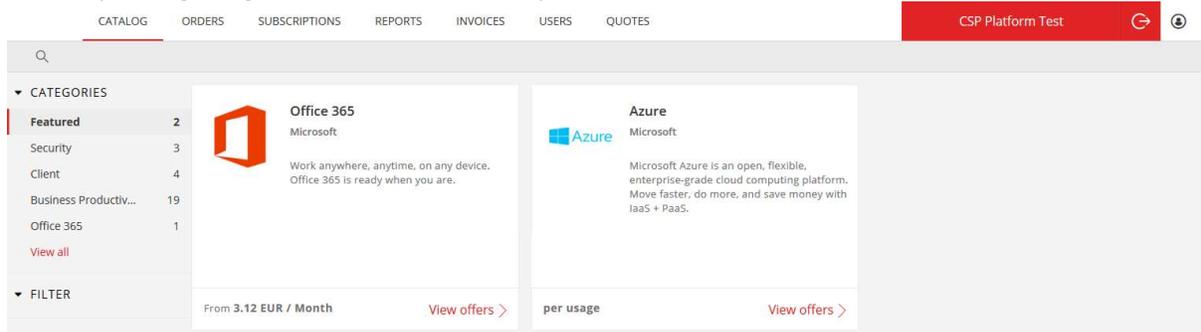


2.2 Placing orders for your customers

In order to place an order, either for opening a new subscription or for modifying the number of licenses for an already existing subscription, you will need to access the customer account from the Organization Management view, this way logging in the account in the name of the customer.



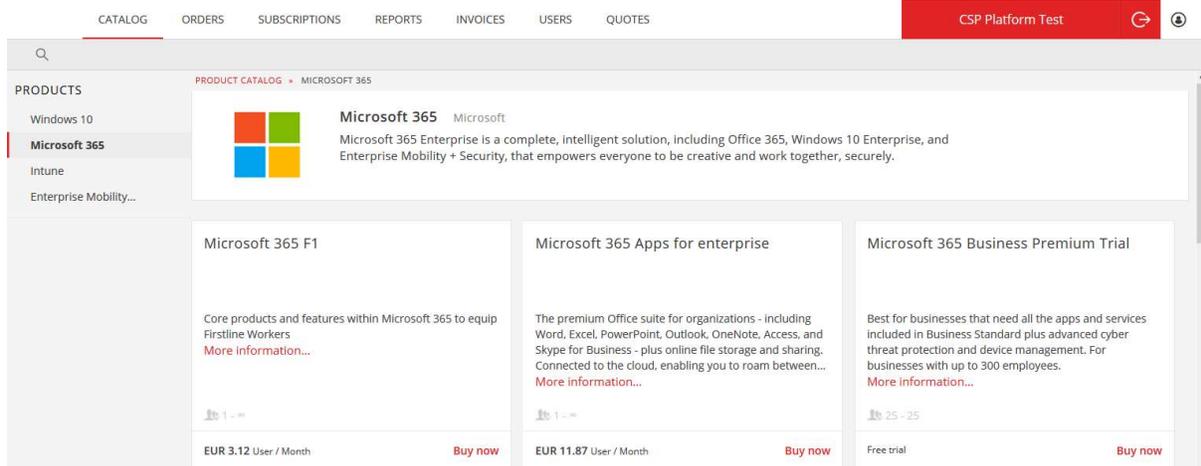
This allows you to access a portal similar to the reseller portal, where you can see information about the available offers, reports regarding the evolution of the subscription on the account, or what users have access to this account.



To place the order, you will need to navigate to the corresponding product that you want to order - from the **Catalog** page, select the **Category** and the desired product subcategory. In the page that opens you will have access to all the offers corresponding to the product subcategory that you selected, that the customer has access to.

Note: The customer access to different offers, such as Academic, Governmental, or non-Profit depends on whatever the corresponding checkboxes have been selected on the customer's profile page.

By clicking the product name, the user will be taken to the product page that details the product functionalities and characteristics, while clicking the **Buy now** button will take the user directly to the ordering page.



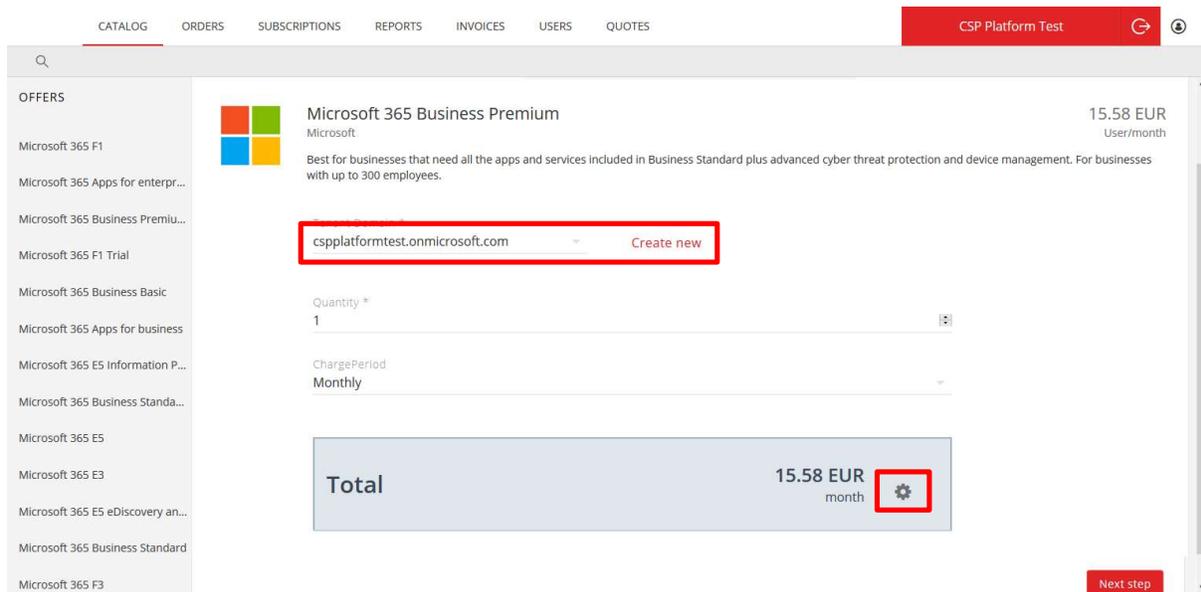
As you click the **Buy now** button the order page will open, requiring you to fill in the required information for the order processing:

- The tenant (Online Services account) where the licenses will be provisioned.
- Number of licenses
- Billing period – monthly or yearly

If the customer already has an existing tenant, and he has given ALEF access to that tenant via the delegated admin rights link, then that tenant will be available for selection on the Tenant Domain field dropdown list.

If such an account does not exist, or the customer wishes to use a different one than the existing account, than a new tenant must be created by using the **Create new** option. The domain name entered in this step, must be unique in the whole Microsoft Online Services database, therefore the verification of the domain name will take several minutes and the new domain won't be available for orders till the this check is done.

Once the verification is done and the tenant is created, the reseller will receive via email the tenant details and he can proceed with the order



By selecting the **Price Options** button, near total amount, you as the reseller have the possibility to control the price that will be visible for that specific order / subscription in the customer account.

This option is, especially, useful when the partner decides to give access to the customer directly so it can place orders by himself depending on the requirements.

Note: By default, all customer prices have a 5% markup applied from the partner's In Price. Any markup set here will add or subtract to / from that 5% markup. Default markup can be adjusted.

Total

15.58 EUR

month

Edit price for this offer
Apply positive or negative markup on top of Vendor Price to edit price on this order.

Markup %

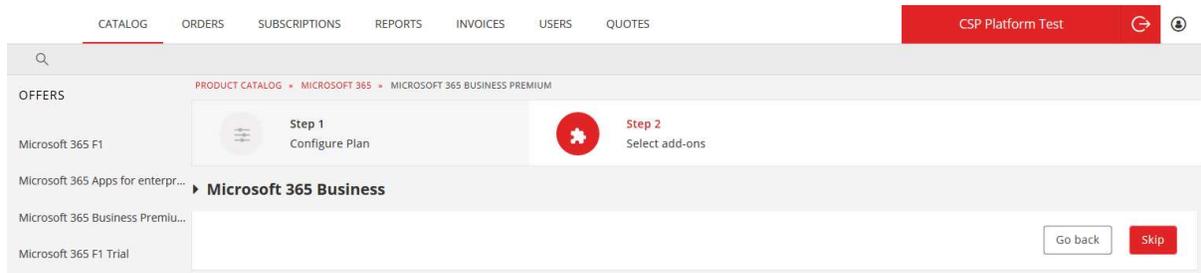
Target customer price

Summary table

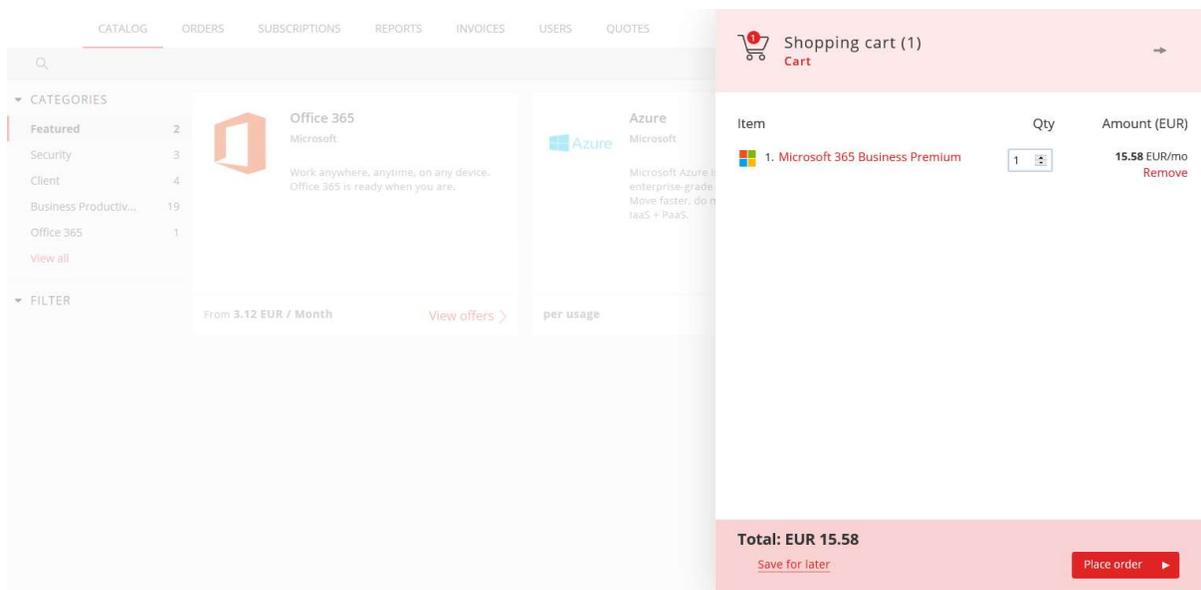
Quantity	Partner Price	Suggested Retail Price	Customer price	Your margin
1	14.16	16.87	15.58	1.42
1	14.16	16.87	15.58	1.42

For the products that allow add-ons to be added to the subscription, the **Next step** button will take the user to the page that allows him to select the addons to be added and confirm their adding to the order, or to skip the adding of addons and proceed to the order placement.

For the products that do not allow for addons to be added, there will be no **Step 2**, and the **Skip** button will be replaced by the **Add to cart** button.

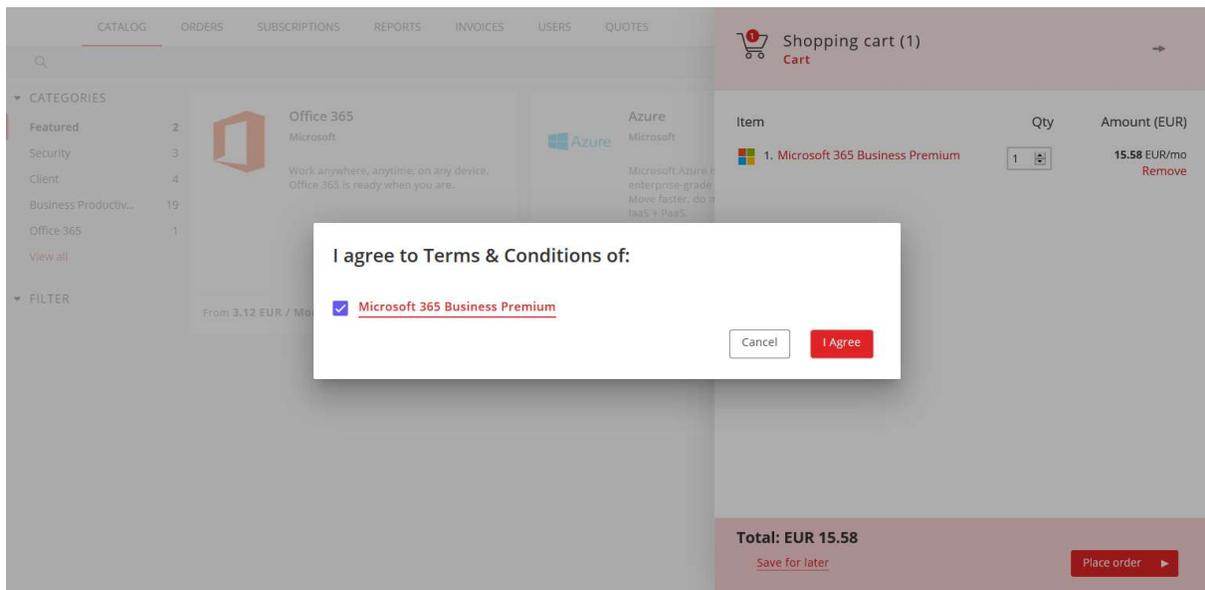


Once the **Add to cart** button (or **Skip / Confirm** for addons) is pressed the selected products will be added to cart, allowing the reseller to place the order for the customer, or even, save it for later, the order being saved as pending.



If the reseller decides to place the order immediately, before the order is actually sent to Microsoft, the reseller will have to confirm that he agrees with the Product Terms / Online Services Terms for the product that he orders.

Once the Product Terms are agreed with, the order is placed, and the licenses are being provisioned on the customer's Online Services tenant. The reseller is notified via email for both the order placement and the license being provisioned.



2.3 Orders and subscription management

Same as for the order placement, in order to view and manage the orders and subscriptions for a specific customer, the reseller will need to access the customer's account by clicking on the customer name in the *Organizations Management* screen.

The orders can be managed in the **Orders** menu, where the reseller will be able to see all the orders that he placed for that customer, including the orders that he *Saved for later*, this way being able to have a global view of the orders and their status.

Selecting, by clicking on, an order that has the **Draft** status, the reseller can resume the ordering process and provision the licenses for the end customer.

The screenshot shows the 'Orders' management interface. A table lists historical orders with the following data:

ORDER ID / # OF ITEMS	REQUESTED CHANGE	CREATED BY	DATE	STATUS
Order #05-05-2020 27131 (1 offer)		CSP Platform Test	05.05.2020	Provision started
Microsoft 365 Business Premium	+1 Users		05.05.2020	
Order #04-05-2020 27074 (1 offer)		CSP Platform Test	04.05.2020	Draft
Office 365 E5	+1 Users		04.05.2020	
Order #04-05-2020 27071 (1 offer)		CSP Platform Test	04.05.2020	Provision finished
Microsoft 365 Business Premium	+25 Users		04.05.2020	

In the **Subscriptions** menu, the reseller will see all the subscriptions that he opened for the respective customer, and have immediate info regarding the number of licenses purchased and how many of them are assigned to users and also the monthly and yearly costs of the subscription.

CATALOG ORDERS **SUBSCRIPTIONS** REPORTS INVOICES USERS QUOTES CSP Platform Test

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SUBSCRIPTIONS
CSP Platform Test

ACTIVE	SUBSCRIPTION / DOMAIN	LEFT	ASSIGNE...	PURCHAS...	ADDONS	VE...	TYPE	UNIT COST	MONTHLY C	YEARLY CO	MONTHLY F	YEARLY RES
	Microsoft 365			51	0							
	cspplatformtest.onmicrosoft.com			51	0							
🛑	Microsoft 365 Business Premium Trial	4-June-2020 ↻	0 *	25	Addon products	Microsoft	Licence	Trial	Trial	Trial	Trial	Trial
🛑	Microsoft 365 F1 Trial	4-June-2020 ↻	0	25	Addon products	Microsoft	Licence	Trial	Trial	Trial	Trial	Trial
🛑	Microsoft 365 Business	5-May-2021	0 *	1	Addon products	Microsoft	Licence	15,58	15,58	0,00	14,16	0,00

By clicking on the subscription name, the reseller will access the subscription management screen, that allows him to change the billing cycle, from monthly to yearly, and back, to suspend or reactivate the subscription or even convert the subscription to a paid subscription if we are talking about a trial.

CATALOG ORDERS **SUBSCRIPTIONS** REPORTS INVOICES USERS QUOTES CSP Platform Test

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SUBSCRIPTIONS + MICROSOFT 365 BUSINESS PREMIUM

EDIT SUBSCRIPTION 🟢 Enabled

Microsoft 365 Business Amount (EUR)
15.58

Quantity 1 <input type="text"/>	Unit price 15.58 Edit Price
Start Date 05.05.2020	End date 05.05.2021
Billing Cycle Monthly	Assigned Licenses 0
Domain cspplatformtest.onmicrosoft.com	Offer name Microsoft 365 Business Premium

Cancel Save changes

Also, by clicking the *Addon products* button for a specific subscription, if the associated product of that subscription, allows the ordering of addons, the reseller will be able to add or remove any added addons.

