

Heartland Business Systems

Microsoft Licensing Self-Service Portal

Instructional Guide

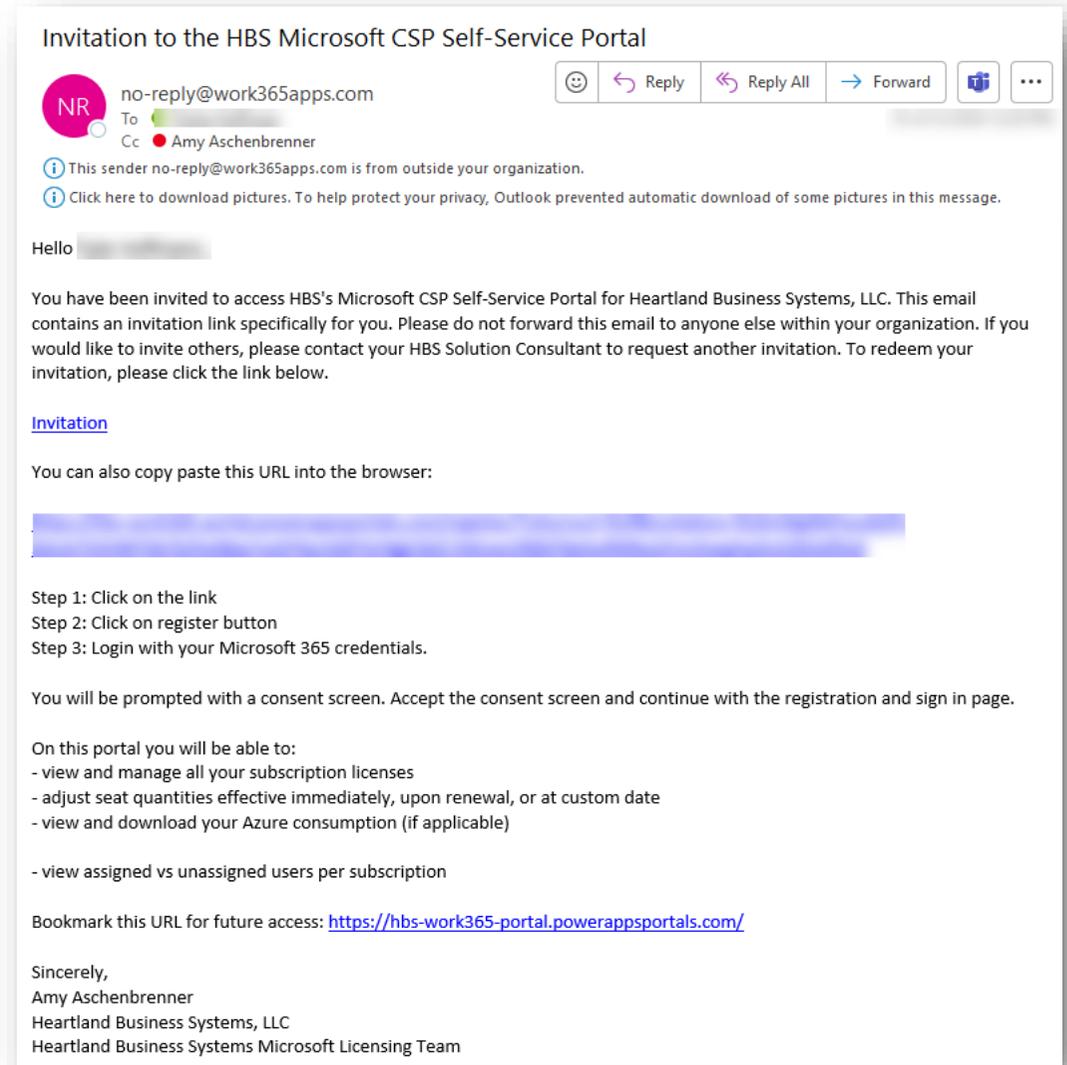


Agenda

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Invitation & Access

- Request individual access via [HBS Microsoft CSP Self-Service Portal Request](#). *(Repeat to grant access to more individuals within your organization.)*
- Within 2-3 business days, you will receive a plain text email invitation unique to you.
- Redeem the invitation using your Azure Active Directory/Entra ID credentials.
- Contact your HBS Solution Consultant Team for assistance.



Sample email invitation

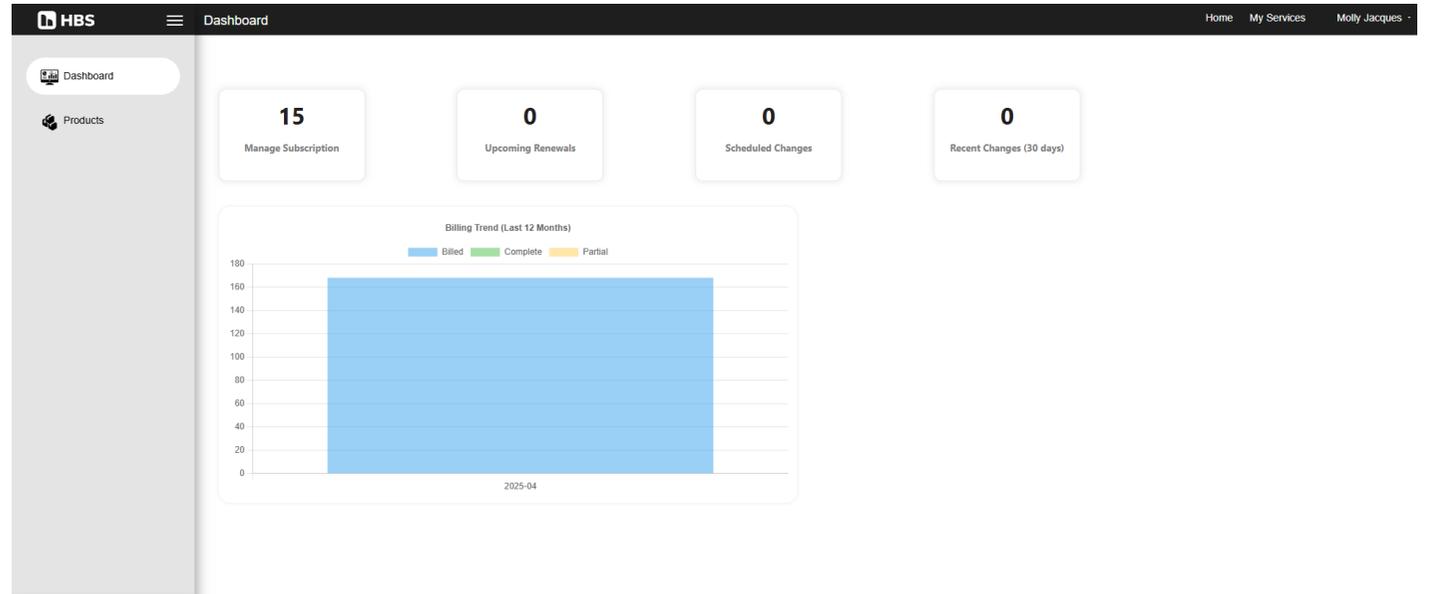
Landing Page

Location:

- <https://hbs-work365.powerappsportals.com/>

Access:

- Request access via your HBS Solution Consultant Team or Microsoft Licensing Team
- Redeem invitation using Azure Active Directory/Entra credentials
- Bookmark and access 24/7 using Azure Active Directory/Entra credentials



“Products”: Viewing Subscriptions

- View all subscriptions managed by HBS
- Use the filter on the side to adjust
 - Type of licensing
 - Licensing Term
 - Billing Contract
- Shows the quantity and time until renewal

The screenshot shows the 'Products' page in HBS. On the left, there is a filter sidebar with the following sections:

- Type**
 - Usage-Based
 - Subscription
 - One Time Purchases
- Term**
 - Monthly
 - Yearly
 - Quarterly
 - Triennial
- Billing Contracts**
 - All
 - Microsoft CSP - Monthly - RYNO Strate

The main table displays the following data:

Product Name	Quantity	Next Renewal	Changes	Action
Enterprise Mobility + Security E3	488	in 245 days		
Exchange Online (Plan 1)	23	in 245 days		
Exchange Online (Plan 2)	8	in 245 days		
Exchange Online Archiving for Exchange Online	2	in 245 days		
Microsoft Defender for Office 365 (Plan 2)	1	in 245 days		
Microsoft Entra ID P2	2	in 245 days		
Microsoft Teams Audio Conferencing includes dial-out to USA/CAN only	458	in 245 days		
Microsoft Teams Premium	3	in 245 days		
Office 365 E1 (no Teams)	119	in 245 days		
Office 365 E3	514	in 245 days		
Power Automate per user plan	2	in 245 days		
Power BI Pro	2	in 245 days		
Universal Print	18	in 245 days		
Visio Plan 1	1	in 245 days		
Visio Plan 2	3	in 245 days		

“Products”: Editing Subscriptions

- Select the pencil from the previous view
- In the “Quantity” field, type the amount of licensing you'd like to add
 - Quantity reductions can only take place the first seven (7) calendar days at the start of the subscription term
- Modifications can go into effect:
 - Immediately
 - Upon Commitment End Date
 - Custom Effective Date
- Click “Save” and the change will be immediately made.

Changes	Action
	 
Adjust Quantity Count by	<input type="text" value="0"/>
Resulting Quantity	488
Changes are effective	<input type="text" value="Immediate"/>
Effective Date	<input type="text" value="month/day/year"/> 
Should this Subscription Auto Renew?	<input type="text" value="No Change"/>
Order Ref (Optional)	<input type="text"/>
	<input type="button" value="Cancel"/> <input type="button" value="Save"/>

“Products”: Subscription & Contract Details

- View your subscription end dates, commitment term, and price per term.
- Ability to see contract terms

Product Name	Quantity	Next Renewal	Cha
 Enterprise Mobility + Security E3	488	in 245 days	
Subscription Details Edit		Purchase and Contract Details	
Start Date 1/14/2025	Commitment Term Annual-Monthly	Billing Contract Microsoft CSP - Monthly - RYNO Strategic Solutions	
Commitment End Date 1/13/2026	Unit Price Per Term \$127.20	Contract Start Date 1/31/2025	Next Invoice Date 6/1/2025
Change log View		Billing Frequency Monthly	Renewal Date 12/30/2099
		Contract Term 12 months	

Portal Support Path

Situation	Contact info	Info to include in request
Unable to access portal; need invitation/re-invitation	Request access here:	N/A
Unable to modify seat count	HBS Microsoft Licensing Team at msnav@hbs.net	Name of product and desired seat count. Team will adjust the licensing first then troubleshoot the issue second.
Portal down, technical bugs preventing use of portal	HBS Microsoft Licensing Team at msnav@hbs.net	Screenshots and description of error
Need to purchase a net new subscription	Your HBS Solution Consultant Team	Name of product and quantity needed
Break/fix support for Microsoft-caused outage or technical problem	Your HBS Solution Consultant Team, Your HBS Field Engineer, the HBS CSP Help Desk at cspsupport@hbs.net	Screenshots, description of error, best contact method



Thank you for choosing HBS as your
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