

#### Heartland Business Systems

## Microsoft Licensing Self-Service Portal

**Instructional Guide** 



## Agenda

- Invitation & Access
- Landing Page
- <u>"My Services": Viewing Subscriptions</u>
- <u>"My Services": Editing Subscriptions</u>
- <u>"My Services": Change Log & Scheduled Changes</u>
- <u>"My Usage Data": Azure Consumption</u>
- <u>"My Licenses": Tenant-wide Subscriptions</u>
- Support Path

## **Invitation & Access**

- Request individual access via <u>HBS</u> <u>Microsoft CSP Self-Service Portal</u> <u>Request.</u> (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.

#### Invitation to the HBS Microsoft CSP Self-Service Portal



← Reply ← Reply All → Forward

(i) This sender no-reply@work365apps.com is from outside your organization.

(i) Click here to download pictures. To help protect your privacy, Outlook prevented automatic download of some pictures in this message.

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Hello

You have been invited to access HBS's Microsoft CSP Self-Service Portal for Heartland Business Systems, LLC. This email contains an invitation link specifically for you. Please do not forward this email to anyone else within your organization. If you would like to invite others, please contact your HBS Solution Consultant to request another invitation. To redeem your invitation, please click the link below.

#### Invitation

You can also copy paste this URL into the browser:

Step 1: Click on the link Step 2: Click on register button Step 3: Login with your Microsoft 365 credentials.

You will be prompted with a consent screen. Accept the consent screen and continue with the registration and sign in page.

On this portal you will be able to: - view and manage all your subscription licenses - adjust seat quantities effective immediately, upon renewal, or at custom date - view and download your Azure consumption (if applicable)

- view assigned vs unassigned users per subscription

Bookmark this URL for future access: https://hbs-work365-portal.powerappsportals.com/

Sincerely, Amy Aschenbrenner Heartland Business Systems, LLC Heartland Business Systems Microsoft Licensing Team

Sample email invitation

## Landing Page

#### Location:

 https://hbswork365.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

oducts					Home My Services	Molly Jacque
Type	Product Name	▼ Quantity ▼	ı	Next Renewal	Changes	Action
<ul> <li>yue</li> <li>Yusage-Based</li> <li>Subscription</li> <li>One Time Purchases</li> <li>Term</li> <li>Monthly</li> <li>Yearly</li> <li>Quarterly</li> <li>Quarterly</li> <li>Triennial</li> <li>Billing Contracts</li> <li>All</li> <li>Microsoft CSP - Monthly - RYNO Strate</li> </ul>	Enterprise Mobility + Security E3	48	88	in 245 days		<i>i</i> ~
	C Exchange Online (Plan 1)	2	23	in 245 days		<i>i</i> ~
	🕵 Exchange Online (Plan 2)		8	in 245 days		<i>i</i> ~
	🕵 Exchange Online Archiving for Exchange Online		2	in 245 days		<i>•</i> ~
	Microsoft Defender for Office 365 (Plan 2)		1	in 245 days		<i>i</i> ~
	Microsoft Entra ID P2		2	in 245 days		<i>i</i> ~
	Microsoft Teams Audio Conferencing includes dial-out to USA/CAN or	nly 45	58	in 245 days		<i>•</i> ~
	📫 Microsoft Teams Premium		3	in 245 days		<i>i</i> ~
	Office 365 E1 (no Teams)	11	19	in 245 days		<i>•</i> ~
	Office 365 E3	51	14	in 245 days		<i>i</i> ~
	>> Power Automate per user plan		2	in 245 days		/~~
	Power BI Pro		2	in 245 days		<i>i</i> ~
	1 Universal Print	1	18	in 245 days		<i>i</i> ~
	🏟 Visio Plan 1		1	in 245 days		/~~
	🔹 Visio Plan 2		3	in 245 days		<i>i</i> ~

## "Products": Editing Subscriptions

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made.

Select the pencil from the previous view Changes Action In the "Quantity" field, type the amount of 1 ^ licensing you'd like to add Ouantity reductions can only take place the first . Adjust Quantity Count by 0 seven (7) calendar days at the start of the • subscription term 488 **Resulting Quantity** Modifications can go into effect: Changes are effective Immediate • Immediately Upon Commitment End Date Effective Date month/day/year Custom Effective Date Should this Subscription Auto No Change • Click "Save" and the change will be immediately Renew? Order Ref (Optional) Save O Cancel

## "Products": Subscription & Contract Details

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

Product Name			T	Quantity	T	Next Renewal	T	Cha
Enterprise Mobility + Security E3			488 in 245 days					
Subscription Details		Edit	Purchase	and Contract	Details	i		_
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 S 1/31/2025	Start Date		Next Invoice Date 6/1/2025		
Change log View			Billing Fre Monthly	quency		Renewal Date 12/30/2099		
			Contract T 12 months	ērm				

## **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 <u>msnav@hbs.net</u>	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 <u>msnav@hbs.net</u>	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 <u>cspsupport@hbs.net</u>	Screenshots, description of error, best contact method



# **HBS**

Thank you for choosing HBS as your Microsoft licensing partner.



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