

Heartland Business Systems

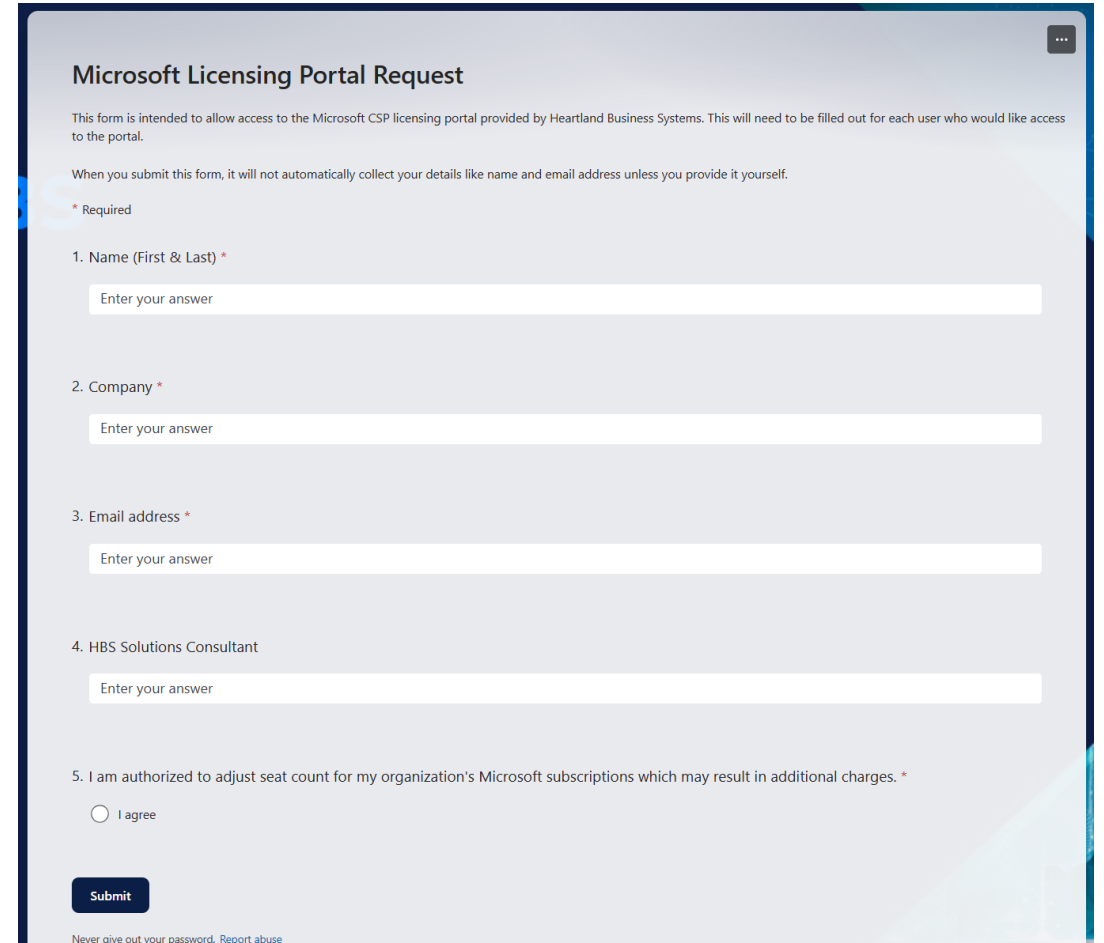
Microsoft Licensing Self-Service Portal



Instructional Guide

Access Request

- Portal access is not organization-based but individual user-based.
- Request individual here: [HBS Microsoft CSP Self-Service Portal Request](#).
- *Repeat to grant access to more individuals within your organization.*



The screenshot shows a web form titled "Microsoft Licensing Portal Request". The form is intended to allow access to the Microsoft CSP licensing portal provided by Heartland Business Systems. It includes a disclaimer stating that the form will not automatically collect details like name and email address unless provided by the user. The form contains five numbered sections, each with a text input field labeled "Enter your answer":

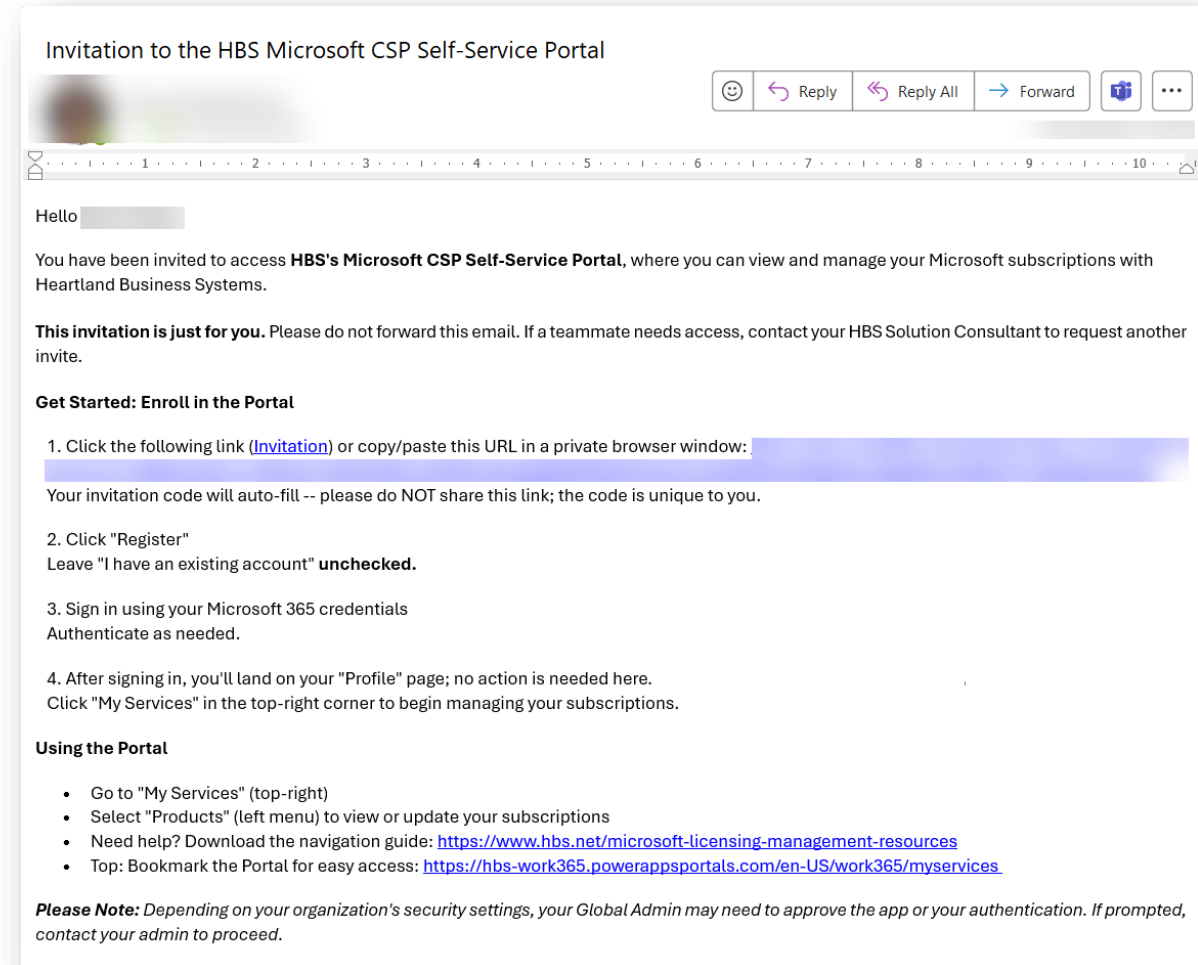
1. Name (First & Last) *
2. Company *
3. Email address *
4. HBS Solutions Consultant
5. I am authorized to adjust seat count for my organization's Microsoft subscriptions which may result in additional charges. *

Section 5 includes a radio button labeled "I agree". At the bottom of the form is a "Submit" button. A footer note states: "Never give out your password. [Report abuse](#)".

Self-Service Portal Request Form

Receive Invitation

- Within 2-3 business days of requesting access, look for a **plain text** email invitation unique to you.
 - Subject Line: Invitation to the HBS Microsoft Self-Service Portal
 - Sender: no-reply@work365apps.com
 - CC: A member of the HBS Microsoft Licensing Team (Amy, Jennie, Lili, Molly)



Redeem Invitation

- For the best experience, copy and paste the invitation URL into a private browser
- An invitation code will auto-populate

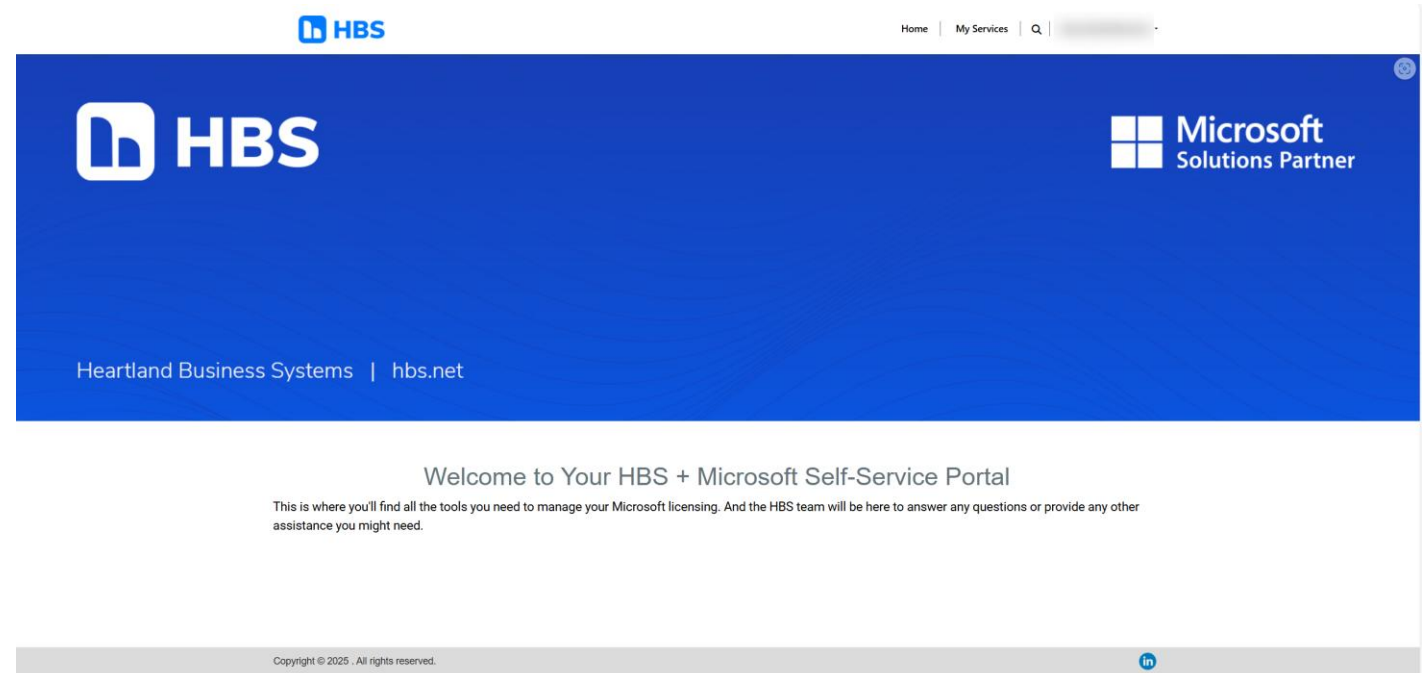


The screenshot shows the HBS website's 'Redeem Invitation' page. At the top, there is a navigation bar with the HBS logo on the left and 'Home | Q |' followed by a search input field on the right. Below the navigation bar, there are two tabs: 'Sign in' (with a right arrow) and 'Redeem Invitation' (which is selected). The main heading is 'Sign up with an invitation code'. Below this, there is a label '* Invitation code' followed by a text input field containing the long alphanumeric string 'YD0bh4cUyT4WH6mYcYM2kpucijCfOmgPZ7QZmGfAhDc3jBZDGLJsJtnMlgzhRNmIM0TghSAXcWXv1Nh3uQ=='. Below the input field, there is a checkbox labeled 'I have an existing account' which is unchecked. At the bottom of the form is a blue 'Register' button.

- Do not check “I have an existing account”.
- From there, you will be prompted to sign in with your Microsoft Azure Active Directory/Entra ID credentials.

Successful Access

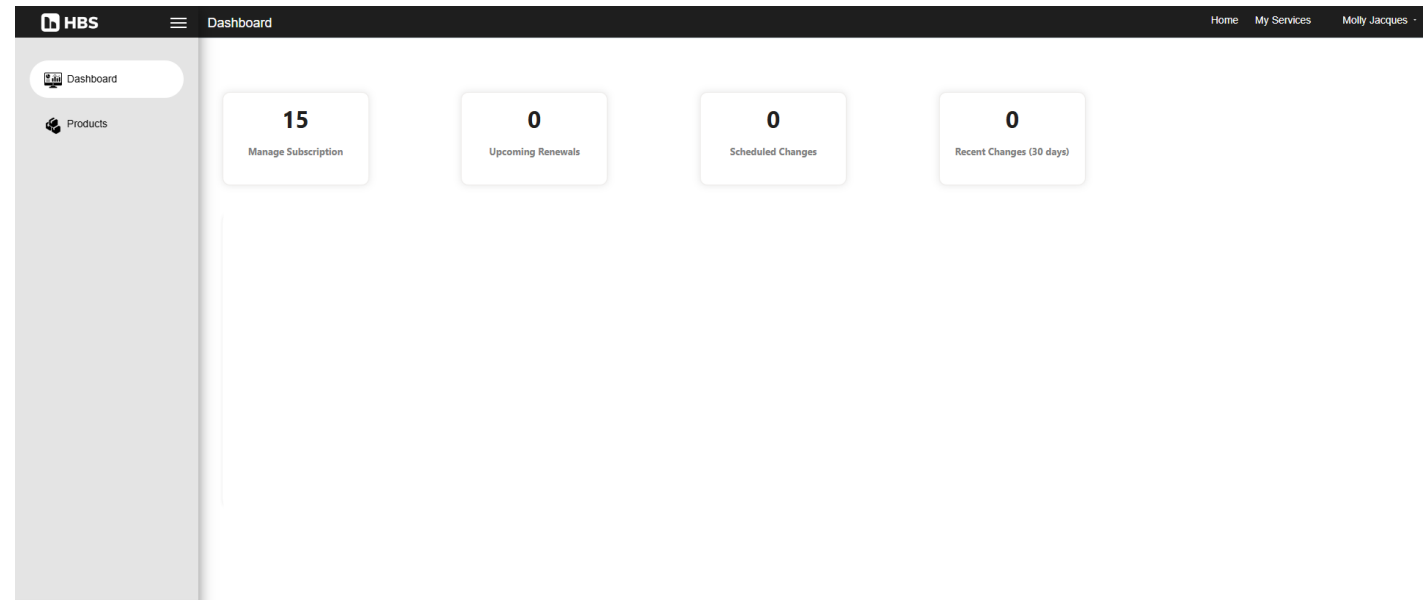
- Landing page will load with “My Services” at the top right
- Bookmark and access 24/7:
<https://hbs-work365.powerappsportals.com/>
- Contact Amy Aschenbrenner at microsoftlicensing@hbs.net for support throughout your experience.



“Dashboard” Tab

Click “My Services” at the top right to get to the Dashboard

- “Manage Subscriptions”: Total number of currently subscriptions managed by HBS
- “Upcoming Renewals”: Subscriptions nearing expiration
- “Scheduled Changes”: Modifications to subscriptions planned for future dates (made within self-service portal, not made by HBS Microsoft Licensing Team)
- “Recent Changes”: Updates or changes made in the last 30 days.



“Products” Tab

Shows all active, visible, and billable subscriptions managed by HBS. (Some Marketplace subscriptions may not be visible in the portal.)

HBS

Products

Dashboard

Products

Type

Usage-Based

Subscription

One Time Purchases

Term

Monthly

Yearly

Quarterly

Triennial

















































Billing Contracts

All




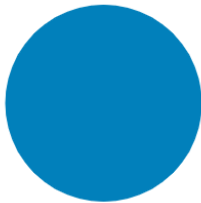



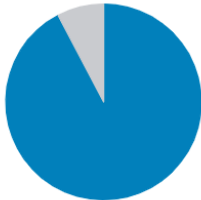
Microsoft CSP - Azure -

Microsoft CSP - Monthly -

Microsoft CSP - Annual -

Product Name	Quantity	Next Renewal	Changes	Action
 Copilot for Microsoft 365	12	in 128 days	Last changed on 2025-02-03	 
 Exchange Online (Plan 1):	13	in 128 days		 
 Exchange Online (Plan 2)	4	in 128 days	Last changed on 2025-01-29	 
 Microsoft 365 Business Basic	140	in 128 days	Last changed on 2025-01-03	 
 Microsoft 365 Business Basic:	1	in 5 days	Last changed on 2024-10-21	 
 Microsoft 365 Business Premium	205	in 128 days	Last changed on 2025-06-18	 
 Microsoft 365 Business Premium	1	in 5 days	Last changed on 2024-10-21	 
 Microsoft 365 Business Standard	1	in 128 days		 
 Microsoft Teams Audio Conferencing with dial-out to US...	300	in 128 days		 
 Power Automate Premium	1	in 5 days		 
 Power Automate Process	1	in 128 days		 
 Visio Plan 2	12	in 128 days	Last changed on 2025-01-06	 
 Windows Server CAL 2022	50	in 274 days		 
 Windows Server CAL 2022	5	in 253 days		 
 Windows Server Standard Core 2022	4	in 274 days		 
 Windows Server Standard Core 2022	4	in 253 days		 

Products > Subscription Insights

Product Name	Quantity	Next Renewal	Changes	Action
 Copilot for Microsoft 365	12	in 128 days	Last changed on 2025-02-03	 
<div><div>License Assignment</div><div><div>Assigned</div><div>Available</div></div></div>	<div><div>Subscription Details</div><div><div>Start Date</div>8/18/2024<div>Commitment End Date</div>11/20/2025<div>Change log</div>View</div><div><div>Commitment Term</div>Annual-Annual<div>Unit Price Per Term</div>\$360.00</div></div> <div>Edit</div>	<div><div>Purchase and Contract Details</div><div><div>Billing Contract</div>Microsoft CSP - Annual - :<div><div>Contract Start Date</div>12/31/2024<div>Next Invoice Date</div></div><div><div>Billing Frequency</div>Annually<div>Renewal Date</div></div><div><div>Contract Term</div>12 months</div></div></div>		
 Exchange Online (Plan 1): admin@s3SafetyGroupLLC.onmicrosoft.com	13	in 128 days		 
<div><div>License Assignment</div><div><div>Assigned</div><div>Available</div></div></div>	<div><div>Subscription Details</div><div><div>Start Date</div>11/21/2023<div>Commitment End Date</div>11/20/2025<div>Change log</div>View</div><div><div>Commitment Term</div>Annual-Monthly<div>Unit Price Per Term</div>\$48.00</div></div> <div>Edit</div>	<div><div>Purchase and Contract Details</div><div><div>Billing Contract</div>Microsoft CSP - Monthly - :<div><div>Contract Start Date</div>10/31/2023<div>Next Invoice Date</div>8/1/2025</div><div><div>Billing Frequency</div>Monthly<div>Renewal Date</div>12/30/2099</div><div><div>Contract Term</div></div></div></div>		

Subscription Detail Fields

Start Date: Original date of purchase

Commitment Term:

- “Annual-Annual” = Annual term, billed annually
- “Annual-Monthly” = Annual term, billed monthly
- “Triennial-Monthly” = Triennial term, billed monthly
- “Monthly” = Monthly term, billed monthly
- “Non-recurring” = No term/one-time

Commitment End Date: upcoming renewal





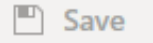
Unit Price Per Term: Retail price of the subscription for the duration of the term, not per invoice

Purchase & Contract Details Fields:

Data used by HBS invoicing purposes; not always reflective subscription details.

“Products”: Editing Subscriptions

- Select the pencil from the previous view
- **“Adjust Quantity Count by”**: Enter the quantity you'd like to add
 - Quantity reductions can only take place the first seven (7) calendar days at the start of the subscription term
- **“Changes are effective”**: Dictates when you want the changes to take place
 - Immediately (Typical)
 - Upon Renewal
 - Custom
- **“Should this Subscription Auto Renew”**: **Keep as “No Change”**. Modifying this field may result in a subscription turning off upon renewal.
- **“Order Ref”**: Optional field where you can make notes. HBS Managed Services team will use this field to reflect the HBS ticket number containing the change request.
- Click “Save” and the change will be immediately submitted to Microsoft and reflected in your admin center within 15 minutes (max).

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"/>
<div> </div>	

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 microsoftlicensing@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 microsoftlicensing@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
Microsoft licensing partner.