



# HBS Microsoft CSP Self-Service Portal Engen

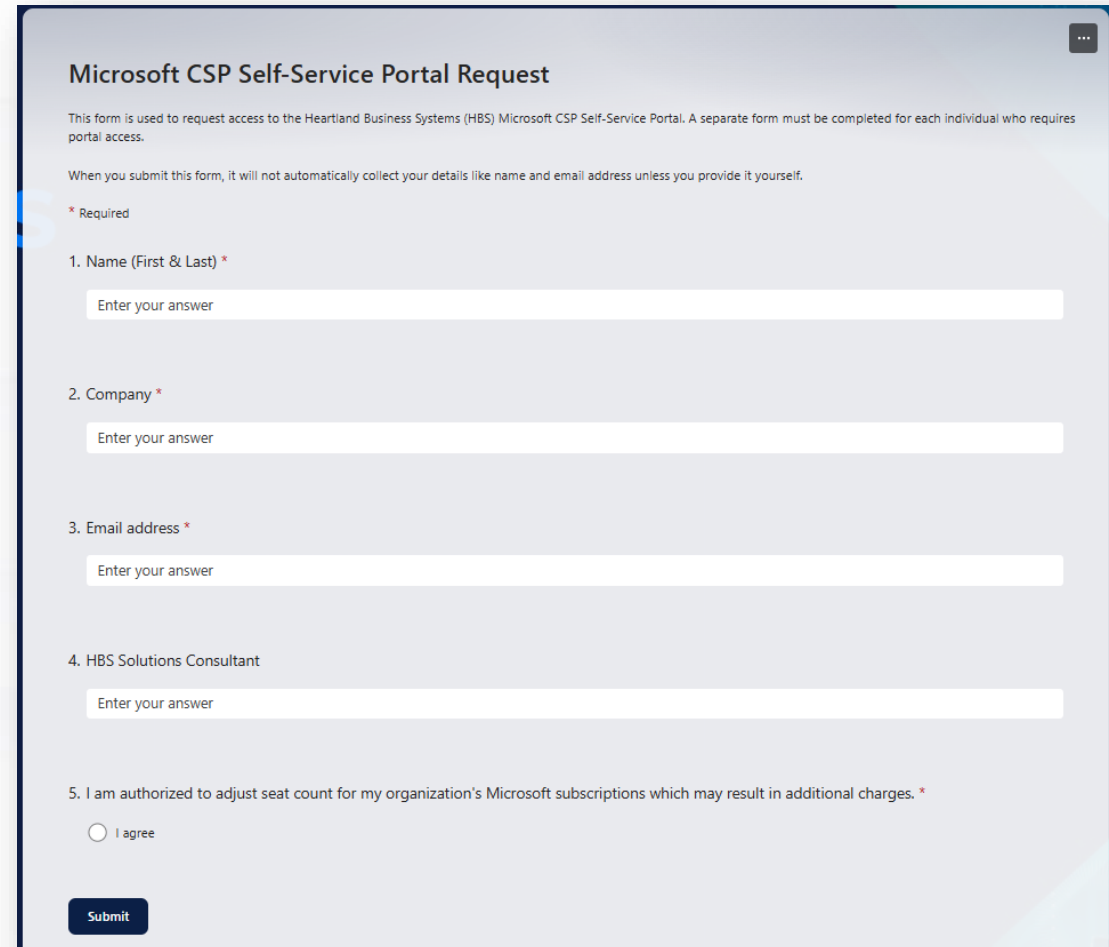
Instructional Guide – Client Users

# Access Request

Portal is not organization-based but individual user-based access

Request individual access 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 CSP Self-Service Portal Request". The form includes a header with a three-dot menu icon. Below the title, there is a paragraph explaining the form's purpose: "This form is used to request access to the Heartland Business Systems (HBS) Microsoft CSP Self-Service Portal. A separate form must be completed for each individual who requires portal access." followed by a note: "When you submit this form, it will not automatically collect your details like name and email address unless you provide it yourself." The form contains five numbered sections, each with a text input field: 1. Name (First & Last) \*, 2. Company \*, 3. Email address \*, 4. HBS Solutions Consultant, and 5. I am authorized to adjust seat count for my organization's Microsoft subscriptions which may result in additional charges. \*. The fifth section includes a radio button labeled "I agree". At the bottom left, there is a dark blue "Submit" button.

**Microsoft CSP Self-Service Portal Request**

This form is used to request access to the Heartland Business Systems (HBS) Microsoft CSP Self-Service Portal. A separate form must be completed for each individual who requires portal access.

When you submit this form, it will not automatically collect your details like name and email address unless you provide it yourself.

\* Required

1. Name (First & Last) \*

Enter your answer

2. Company \*

Enter your answer

3. Email address \*

Enter your answer

4. HBS Solutions Consultant

Enter your answer

5. I am authorized to adjust seat count for my organization's Microsoft subscriptions which may result in additional charges. \*

☐ I agree

Submit

# Receive Invitation

Within 2-3 business days of requesting access, you will receive an email from a member of the HBS Microsoft Licensing Team.



## Welcome to the HBS Microsoft CSP Self-Service Portal!

Access your HBS-managed Microsoft cloud subscriptions with ease. The self-service portal allows you to view and adjust subscription quantities whenever your business needs change.

### Access the Portal:

Visit and bookmark the portal: <https://ms-csp-portal.hbs.net/>

### What You Can Do:

- View and manage all Microsoft subscriptions administered by HBS
- Increase or decrease (subject to Microsoft's 7-day policy) license quantities immediately, upon renewal, or at a custom date
- Download Azure usage details for invoiced consumption (if applicable)
- View Azure Reservations and their associated details (Reservation changes must be requested through HBS and cannot be performed in the portal)

### Logging in for the first time:

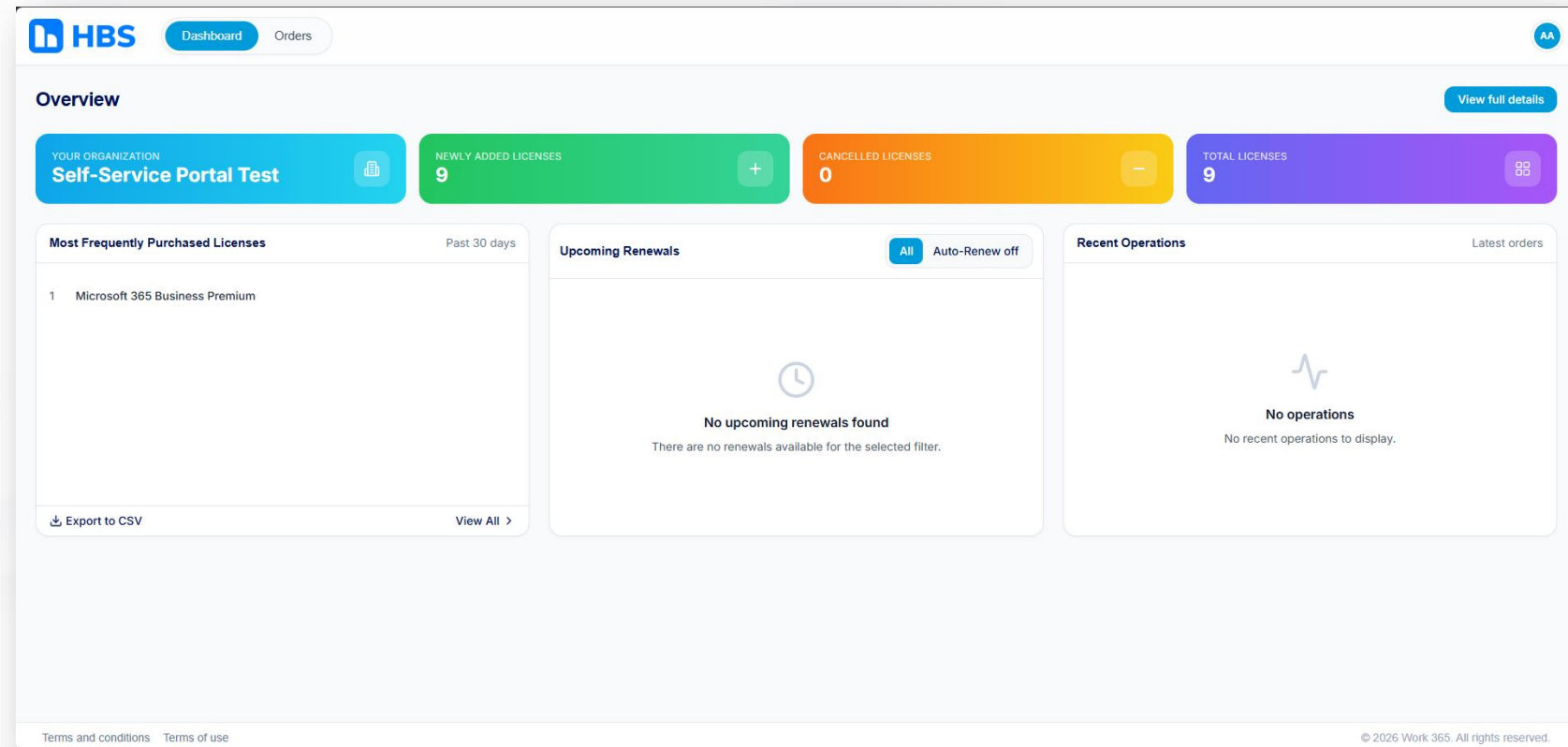
If this is your organization's first time accessing the portal, Microsoft may prompt you to request approval for the Microsoft Entra enterprise application. This is a standard security requirement. After submitting the request, your Global Administrator can review and approve the requested permission, allowing you to complete access.

# Successful Access

The landing page with load on the Overview.

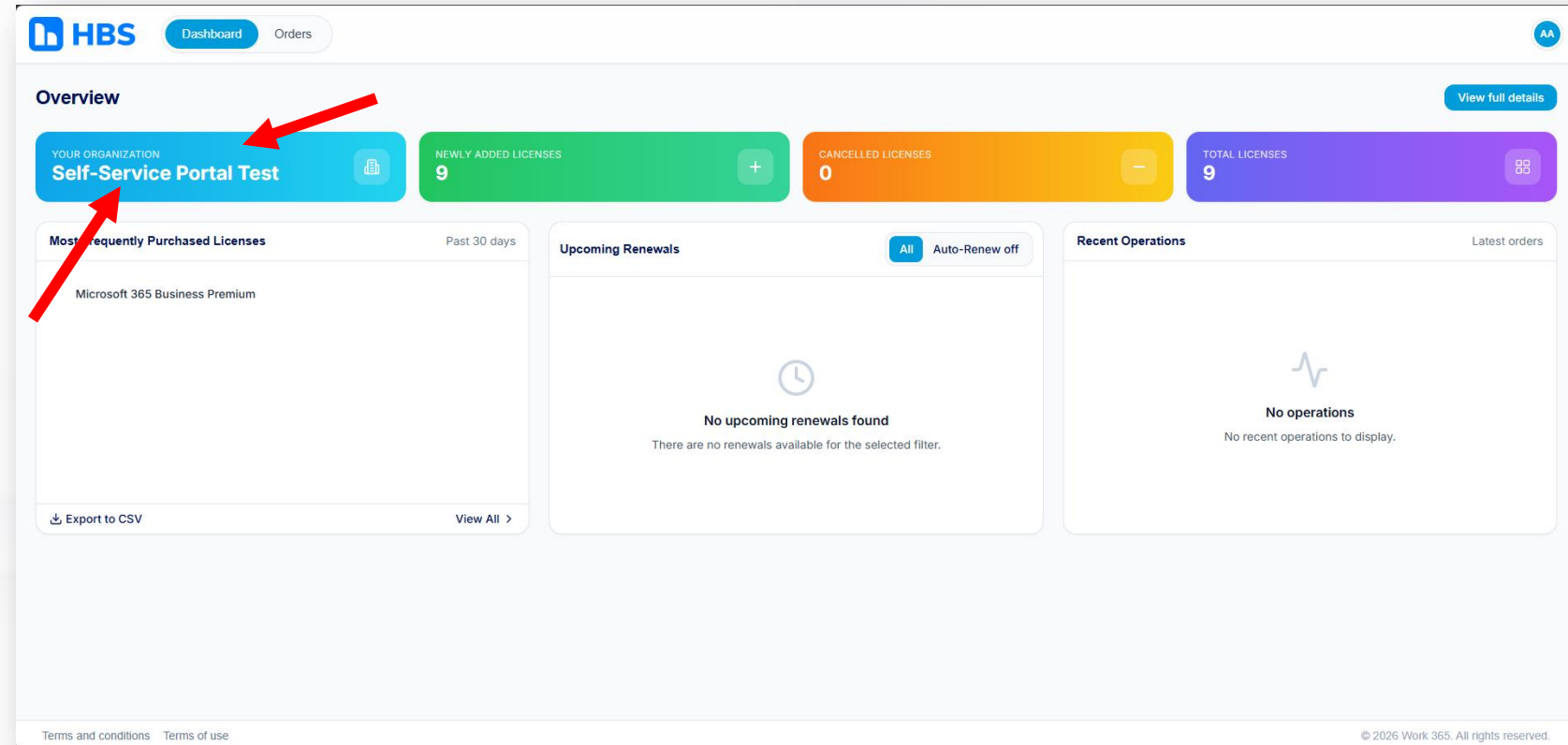
Bookmark and access 24/7:  
at <https://ms-csp-portal.hbs.net/>

Contact  
[microsoftlicensing@hbs.net](mailto:microsoftlicensing@hbs.net)  
for support throughout your experience



# Navigate to Licensing View

Click on your company name in the blue box to open your subscription management page, where you can view and update subscription quantities.



# Navigate the Licensing Page

Confirm your company details:

CUSTOMER NAME

<- Billing Company  
(Entity that HBS invoices)

MICROSOFT CUSTOMER NAME

<- Tenant Name  
(Multiple results when two or more records are mapped to the same billing entity)

MICROSOFT CUSTOMER NUMBER

N/A

MICROSOFT TENANT ID

<- Tenant ID  
(Multiple results when two or more records are mapped to the same billing entity)

MICROSOFT DOMAIN

<- Tenant ID Domain(s) w/ or w/o Vanity Domain  
(Multiple results when two or more records are mapped to the same billing entity)

Sales Summary

TOTAL REVENUE

\$631.5

Current period

TOTAL LICENSES

49

Active licenses

NEW LICENSES

0

This period

License Growth

12 Months

6 Months

30 Days

7 Days

NCE:OFFICE365

| Month | License Count |
|-------|---------------|
| Aug   | 40            |
| Sep   | 40            |
| Oct   | 40            |
| Nov   | 40            |
| Dec   | 40            |
| Jan   | 40            |
| Feb   | 40            |
| Mar   | 42            |
| Apr   | 44            |
| May   | 46            |
| Jun   | 47            |
| Jul   | 47            |

# Licensing Inventory

View all subscriptions managed by HBS. Editable items contain a pencil icon.

License Inventory

Items per page: 10 (Showing 11 licenses subscriptions) Refresh

Licenses (11)Reservations (0)Azure (0)

| Product Name                                                                                                    | Unit Price | Quantity | Next Renewal | Change History             | Actions                                                                  |
|-----------------------------------------------------------------------------------------------------------------|------------|----------|--------------|----------------------------|--------------------------------------------------------------------------|
| <div><div>Exchange Online (Plan 1) - Exchange Online (Plan 1) - Mosaic 360</div><div>Auto-Renew</div></div>     | \$4.8      | 5        | 09/02/2026   |                            | <div>Click Pencil Icon to Modify</div> <div><div></div><div></div></div> |
| <div><div>Exchange Online (Plan 1) - Exchange Online (Plan 1) - FS2 Group</div><div>Auto-Renew</div></div>      | \$48       | 1        | 03/23/2027   |                            | <div></div> <div></div>                                                  |
| <div><div>Microsoft 365 Business Premium - Microsoft 365 Business Premium -...</div><div>Auto-Renew</div></div> | \$26.4     | 1        | 09/02/2026   |                            | <div></div> <div></div>                                                  |
| <div><div>Microsoft 365 Business Premium - Microsoft 365 Business Premium -...</div><div>Auto-Renew</div></div> | \$277.2    | 10       | 08/14/2027   | Last changed on 07/20/2026 | <div></div> <div></div>                                                  |
| <div><div>Microsoft 365 Business Premium - Microsoft 365 Business Premium -...</div><div>Auto-Renew</div></div> | \$264      | 5        | 03/23/2027   | Last changed on 06/24/2026 | <div></div> <div></div>                                                  |
| <div><div>Microsoft 365 Business Standard - Microsoft 365 Business Standard...</div><div>Auto-Renew</div></div> | \$16.8     | 1        | 09/02/2026   |                            | <div></div> <div></div>                                                  |
| <div><div>Microsoft 365 Business Standard - Microsoft 365 Business Standard...</div><div>Auto-Renew</div></div> | \$176.4    | 5        | 08/14/2027   |                            | <div></div> <div></div>                                                  |
| <div><div>Microsoft 365 Copilot - Microsoft 365 Copilot - Mosaic 360</div><div>Auto-Renew</div></div>           | \$360      | 3        | 08/14/2027   |                            | <div></div> <div></div>                                                  |
| <div><div>Microsoft 365 Copilot Business - Microsoft 365 Copilot Business -...</div><div>Auto-Renew</div></div> | \$226.79   | 2        | 03/23/2027   |                            | <div></div> <div></div>                                                  |
| <div><div>Microsoft Teams Audio Conferencing includes dial-out to USA/CAN o...</div><div>Auto-Renew</div></div> | —          | 15       | 08/14/2027   |                            | <div></div> <div></div>                                                  |

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# Modifying the Subscriptions

**Manage Subscription**  
Exchange Online (Plan 1) (Annual, Annual)

**Quantity** Renew Policy

Changes are effective

Immediately Custom date On renewal

Quantity

— 2 + 1 → 3

Cancel Save Changes

Adjust Quantity Immediately  
Upon "Save Changes", request will go directly to Partner Center to implement the change and will be visible within the Microsoft 365 Admin Center within 10 minutes (typically less)

**Manage Subscription**  
Exchange Online (Plan 1) (Annual, Annual)

**Quantity** Renew Policy

Changes are effective

Immediately Custom date On renewal

Quantity

— 1 + 1 → 3

Cancel Save Changes

**Manage Subscription**  
Exchange Online (Plan 1) (Annual, Annual)

**Quantity** Renew Policy

Changes are effective

Immediately Custom date On renewal

Quantity

— 1 + 1 → 3

Cancel Save Changes

**Manage Subscription**  
Exchange Online (Plan 1) (Annual, Annual)

**Quantity** Renew Policy

Renewal policy

☒ Renew  
Auto-renews at end of term

☐ Cancel at end of term  
Expires on last day of term

☐ Renew to Extended Service Term  
Moves to month-to-month after term

Cancel Save Changes

Adjust Quantity Later & Renewal Policy  
We recommend partnering with the [microsoftlicensing@hbs.net](mailto:microsoftlicensing@hbs.net) team to adjust quantities on a "Custom date" or "On-renewal", and/or to adjust 'Renewal Policy'.

# Confirm the Modification

Click the “Change History” entry next to the recently modified subscription to confirm successful increase. Visit your Microsoft 365 admin center to see the available licenses within 10 minutes of modification.

| License Change History                  |                  |          |                        |                 |              |           | × |
|-----------------------------------------|------------------|----------|------------------------|-----------------|--------------|-----------|---|
| Name                                    | Effective Date   | Quantity | Order By               | Order Reference | Order Source | Status    |   |
| Update Quantity, AutoRenew              | 09/11/2026 13:56 | 1        | aaschenbrenner@hbs.net | —               | Engen        | ✓ Success |   |
| Update Quantity, AutoRenew              | 09/11/2026 13:52 | 2        | aaschenbrenner@hbs.net | —               | Engen        | ✓ Success |   |
| Update Quantity, AutoRenew              | 09/11/2026 13:48 | 1        | aaschenbrenner@hbs.net | —               | Engen        | ✓ Success |   |
| Create 'Microsoft 365 Business Premium' | 09/03/2026 12:37 | 5        | —                      | —               | —            | N/A       |   |

# Troubleshooting & Questions

- For application consent
  - First time access may require you to “request approval” for the enterprise application. Upon doing so, follow up with your IT department and/or Global Administrator to complete the process of approving the application. Exit then revisit the site.
- For immediate increases
  - In the event of access issues, email [microsoftlicensing@hbs.net](mailto:microsoftlicensing@hbs.net) with the full subscription name and desired quantity, to implement the quantity increase.
  - The team will then align you with a specialist to troubleshoot access.

