Software Assurance Planning Services FAQ

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Enrollment
Where do I find details about my legal agreement and rates?
To read your organization’s legal agreement, follow the steps below:

• Sign-in to your Partner Center Dashboard.

• Click MPN on the navigation pane to expand the section.

• Expand Programs and select Software Assurance Enrollment.

• Near the top of the page, select Software Assurance Planning Services.

• Under Step 2. Agreement, select Microsoft Planning Services Program Provider Agreement.

Rate information may be found in the appendix of the legal agreement.
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Payment

How do I add users in SAVB?

Multiple users from the same organization may access the Software Assurance Voucher Benefit (SAVB) Online Payment Tool concurrently to perform tasks. There are two user roles in SAVB: Partner Program Administrator (PPA) and Partner User. An organization can have no more than twelve PPAs; there is no limit on the number of Partner Users in an organization. The table below outlines their respective permissions in SAVB:

<table>
<thead>
<tr>
<th>Tasks</th>
<th>SAVB Roles</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Partner Program Admin*</td>
</tr>
<tr>
<td>Perform Voucher Search</td>
<td>X</td>
</tr>
<tr>
<td>Perform Payment Request Search</td>
<td>X</td>
</tr>
<tr>
<td>Create and submit payment request</td>
<td>X</td>
</tr>
<tr>
<td>Add / edit / update users to SAVB roles</td>
<td>X</td>
</tr>
<tr>
<td>Map payment profile to locations</td>
<td>X</td>
</tr>
<tr>
<td>Register Program</td>
<td>X</td>
</tr>
</tbody>
</table>

*Limit 12 PPAs per organization.

Follow the steps below to add users:

1. From your home page, select Add New Users from the I Need To... menu.
2. Enter the individual’s contact details, including first and last name, and company email address (which should be a Microsoft account associated to your company’s partner profile in MPN).
3. In the Assign User Role pane, select the role based on the tasks they must perform: **Partner User** or **Partner Program Administrator**.
   - **Partner User**: can view only the voucher and payment request information for the location with which he or she is associated as a Partner User.
   - **PPA**: can view all vouchers and payment requests for all locations in the organization.

4. Select **Add Role**. You will see the role and the location it applies to in the list of User Roles.

5. Select **Send Invite** to send an email invitation from SAVB to the added user.
6. When the new user receives the email invitation, he or she must activate their user account in SAVB by clicking on the link in the email.
How do I manage users in SAVB?

1. From your home page, select **Manage Users** from the **I Need To...** menu.

2. Look up users in your organization by using the available filters to narrow your search, then select **Search**. The results will display in the lower pane, including full name, email address, current user role, location, and current status.

3. To edit a user’s status or location, select **Edit/Deactivate**, which takes you to the **New User** page where you can edit user details, role, and location.
4. To review the locations associated with a user, select “...”. The screenshot below illustrates the View Locations window with the list of locations associated with the user.
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How do I search for vouchers in SAVB?
The Software Assurance Voucher Benefit (SAVB) Online Payment Tool allows users to filter and search for vouchers to facilitate verification or reporting needs. Follow these steps to search for vouchers:

1. From your program home page, select Search Vouchers from the I Need To... menu.

2. Search for a voucher by selecting your criteria. Filters may include:
   - **Country**: displays all vouchers within a specific country in which the partner has locations
   - **Partner Location**: displays all of the partner’s locations in the program
   - **Voucher Status**: displays partner’s vouchers in all or one of the following statuses:
     - **Redeemed**: vouchers that have been redeemed in VVR and are now eligible for attaching to a payment request
     - **Processed**: vouchers that have already been attached to a payment request and submitted
     - **Past Invoice Date**: vouchers that have never been attached to a payment request, and have passed the 60 days from end date of engagement or training
   - **Customer Name**: displays partner’s vouchers by their customer company name
   - **Customer Email**: displays partner’s vouchers by the customer email address assigned to the voucher
   - **Voucher Number**: displays partner’s vouchers sorted by their unique voucher numbers
   - **Start/End Date**: displays partner’s vouchers, inclusive of all statuses, within a date range
   - **Microsoft Reference No.**: displays partner’s vouchers that have already been invoiced, sorted by the Microsoft Reference No. assigned at time of payment request

3. Select Search to see results in the table below.
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4. To view the **Voucher Details** of a voucher listed in the table, select the arrow next to the voucher record, or use **Expand All/Collapse All** to see all details for all vouchers.

   - **Days** in this view indicates the total number of days included in the voucher.

To create a report from a voucher search based on the selected criteria and search results, select **Export To Excel** at the top of the **Search Results** table.

**How do I search for payment requests in SAVB?**

The Software Assurance Voucher Benefit (SAVB) Online Payment Tool allows users to quickly find payment requests which have been created and saved or have been submitted for payment processing. Follow these steps to search for payment requests:

...
1. From your program home page, select **Search Payment Requests** from the **I Need To...** menu.

2. Search payment requests by selecting your criteria. Filters may include:

   - **Country**: displays all payment requests saved or submitted within a specific country in which the partner has locations
   - **Partner Location**: displays all payment requests submitted or saved for all or one of the partner’s locations in the program
   - **Status**: displays partner’s payment requests based upon the following statuses:
     - **Saved**: payment requests created by the partner and saved for later submission
     - **Pending Approval**: submitted payment requests awaiting approval by Microsoft due to requirement for partner to submit a hardcopy of their own company invoice, or validation of softcopy upload of the partner’s own company invoice. (This may be required to comply with tax regulations.)
     - **Approved**: submitted payment requests that have been approved and are now in payment processing
     - **Denied**: submitted payment requests deemed ineligible for payment
     - **Action Required**: submitted payment requests that have been reviewed by the RSC and require partner’s action in order to be approved for payment processing (detailed on your home page)
   - **Invoice Number**: displays partner’s submitted or saved payment requests sorted by the partner’s own company invoice number
   - **Microsoft Reference Number**: displays partner’s submitted or saved payment requests sorted by the unique reference number assigned by SAVB when the payment request is created and then saved or submitted
   - **Submitted By**: displays partner’s submitted or saved payment requests sorted by the email address of the user who created the payment request in SAVB
   - **Start/End Date**: displays partner’s submitted or saved payment requests within a particular date range
3. Select **Search** to see results.

4. To view the **Invoice Details** of a payment request listed in the table, select the arrow to the left of the Microsoft Reference Number, or use **Expand All/Collapse All** to see all details for all listed payment requests.

   o **Invoice Number**: the partner’s own company invoice number

   o **Invoice Hardcopy Required**: notation by SAVB to indicate to the partner if a hardcopy of the partner’s own company invoice must be submitted to the RSC for payment processing approval

   o **Age**: the number of days elapsed since the payment request was submitted
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To create a report from a payment request search based on the selected criteria and search results, select **Export To Excel** at the top of the **Search Results** table.

**Required deliverables**

Where is the customer deliverable template?

The outcome of any engagement should always result in a *customer planning deliverable* (vision and scope plan or findings and recommendations document) that prescribes a deployment, upgrade, or migration project as the next step. This proposal should focus primarily on the logistics for *how* to deploy and less on *why*. 
Resources and training

Whom should I contact for specific Planning Services questions or issues?

Planning Services program first-level support

- All EMEA partner organizations
  - Contact EMEA Planning Services Help.
- All other partner organizations
  - Contact your Regional Service Center (RSC) team via Microsoft Partner Network Support. Note: use the following drop-down options.
    - Area: Programs and Membership
    - Category: Software Assurance
    - Topic: Software Assurance Planning Services

Payment Central access or payment issues

For assistance with Payment Central access or payment issues, contact Microsoft Accounts Payable (AP) through the AP Help Desk or using the email addresses below.

- NA/LATAM: chipfin@microsoft.com
- EMEA: apie@microsoft.com
- APAC: apsg@microsoft.com
- Japan: apjp@microsoft.com
- India: apinsms@microsoft.com
Where do I find the required Planning Services compliance training course on Partner University?
The Planning Services Compliance Training Course on Partner University is required for all partners enrolled in the Planning Services program to maintain their active status. Find links to the course by language below.

Online Planning Services Compliance Training Courses by language:

- English (US): https://aka.ms/ps_compliance_training_en-us
- Spanish (LatAm): https://aka.ms/ps_compliance_training_es-mx
- Chinese (Simplified): https://aka.ms/ps_compliance_training_zh-cn
- Portuguese (Brazil): https://aka.ms/ps_compliance_training_pt-br
- Japanese: https://aka.ms/ps_compliance_training ja-jp
- German: https://aka.ms/ps_compliance_training de-de
- French (France): https://aka.ms/ps_compliance_training fr-fr