Software Assurance Planning Services FAQ

Contents

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:

Tasks	**SAVB Roles**	
	Partner Program Admin*	**Partner User**
Perform Voucher Search	X	X
Perform Payment Request Search	X	X
Create and submit payment request	X	X
Add / edit / update users to SAVB roles	X	
Map payment profile to locations	X	
Register Program	X	view only

*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).

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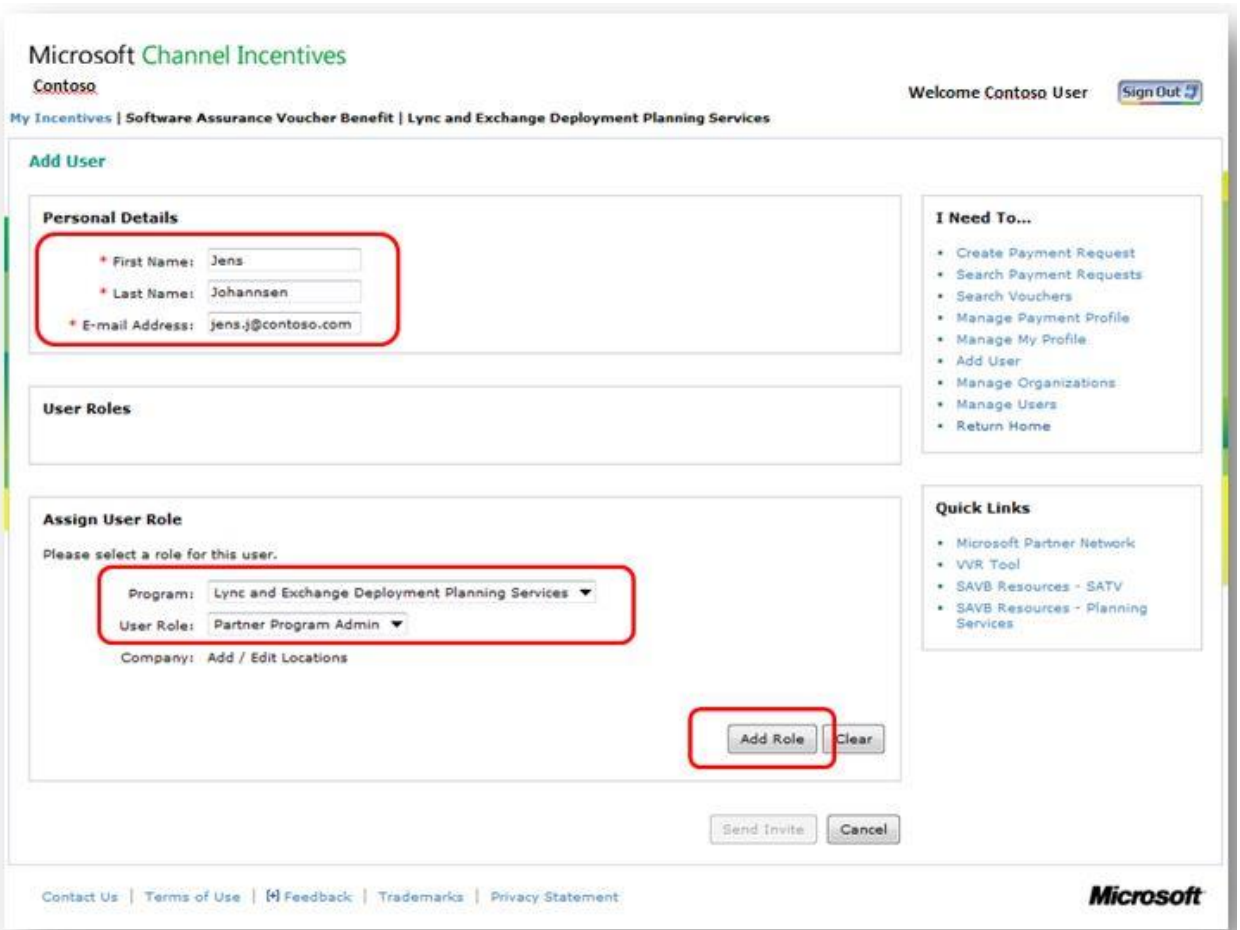
3. In the Assign User Role pane, select the role based on the tasks they must perform: **Partner User** or **Partner Program Administrator**.
   - **Partner User**: can view only the voucher and payment request information for the location with which he or she is associated as a Partner User.
   - **PPA**: 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.

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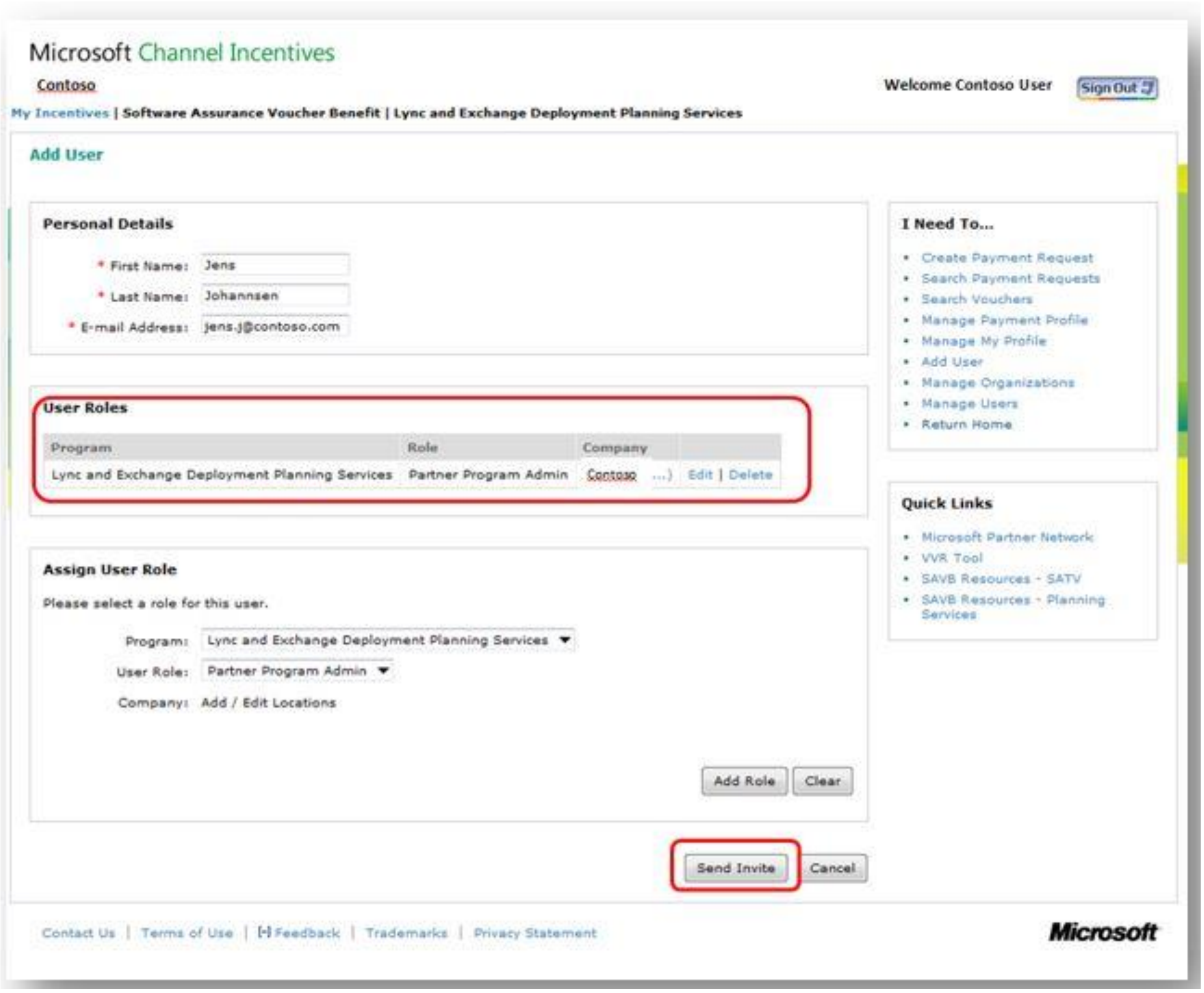

6. When the new user receives the email invitation, he or she must activate their user account in SAVB by clicking on the link in the email.

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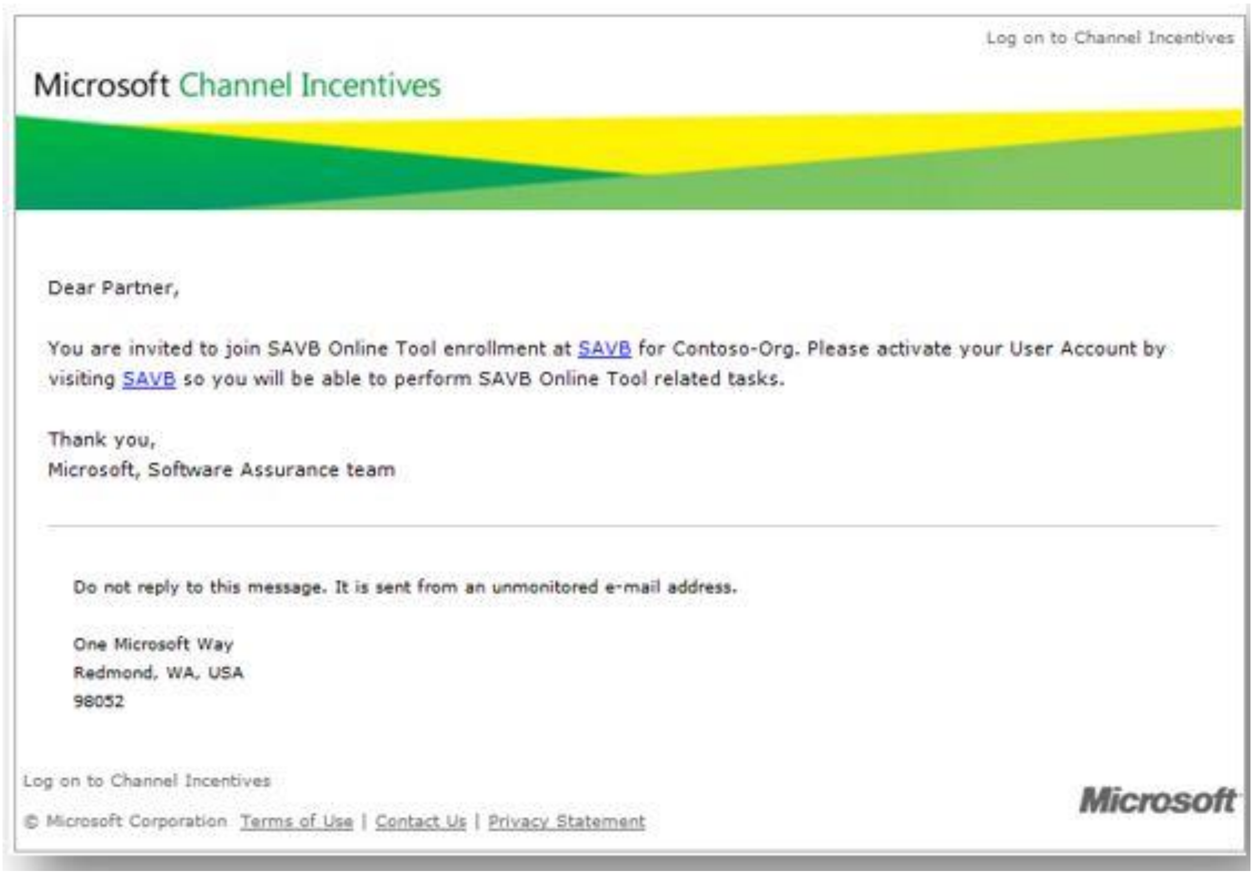
Log on to Channel Incentives

Microsoft Channel Incentives

Dear Partner,

You are invited to join SAVB Online Tool enrollment at SAVB for Contoso-Org. Please activate your User Account by visiting SAVB so you will be able to perform SAVB Online Tool related tasks.

Thank you,
Microsoft, Software Assurance team

Do not reply to this message. It is sent from an unmonitored e-mail address.

One Microsoft Way
Redmond, WA, USA
98052

Log on to Channel Incentives

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Microsoft

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.

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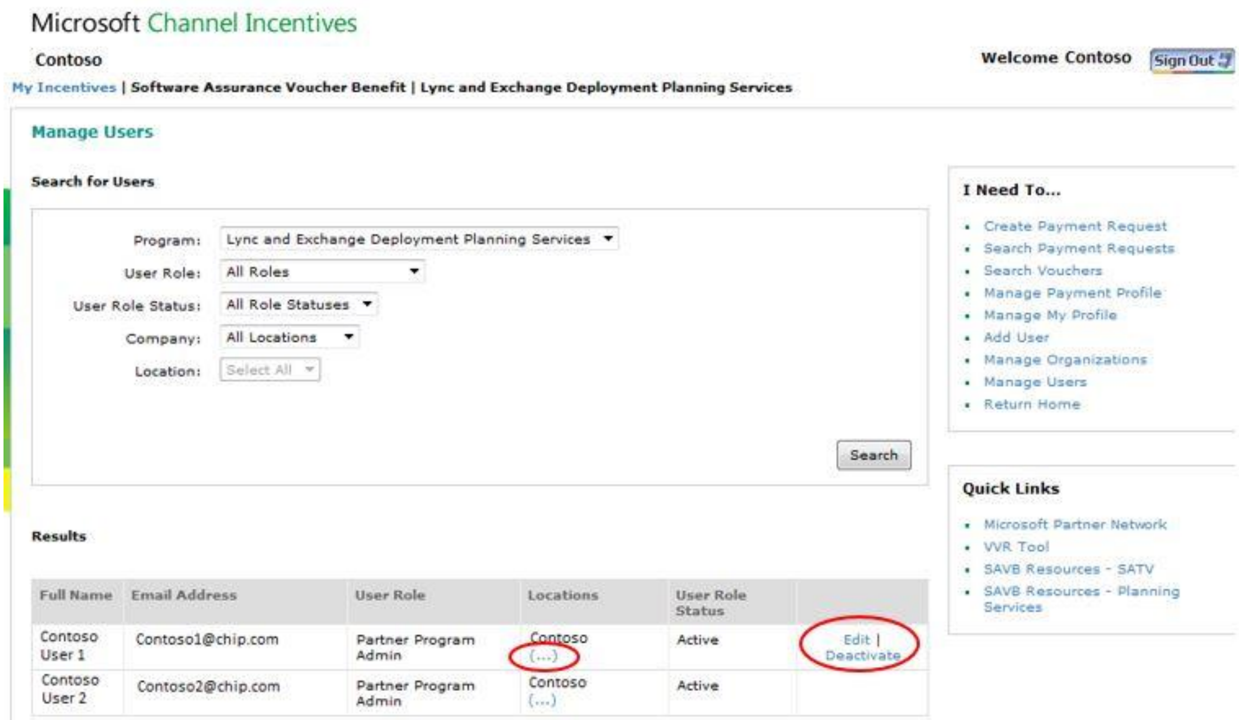

4. To review the locations associated with a user, select "**...**". The screenshot below illustrates the **View Locations**window with the list of locations associated with the user.

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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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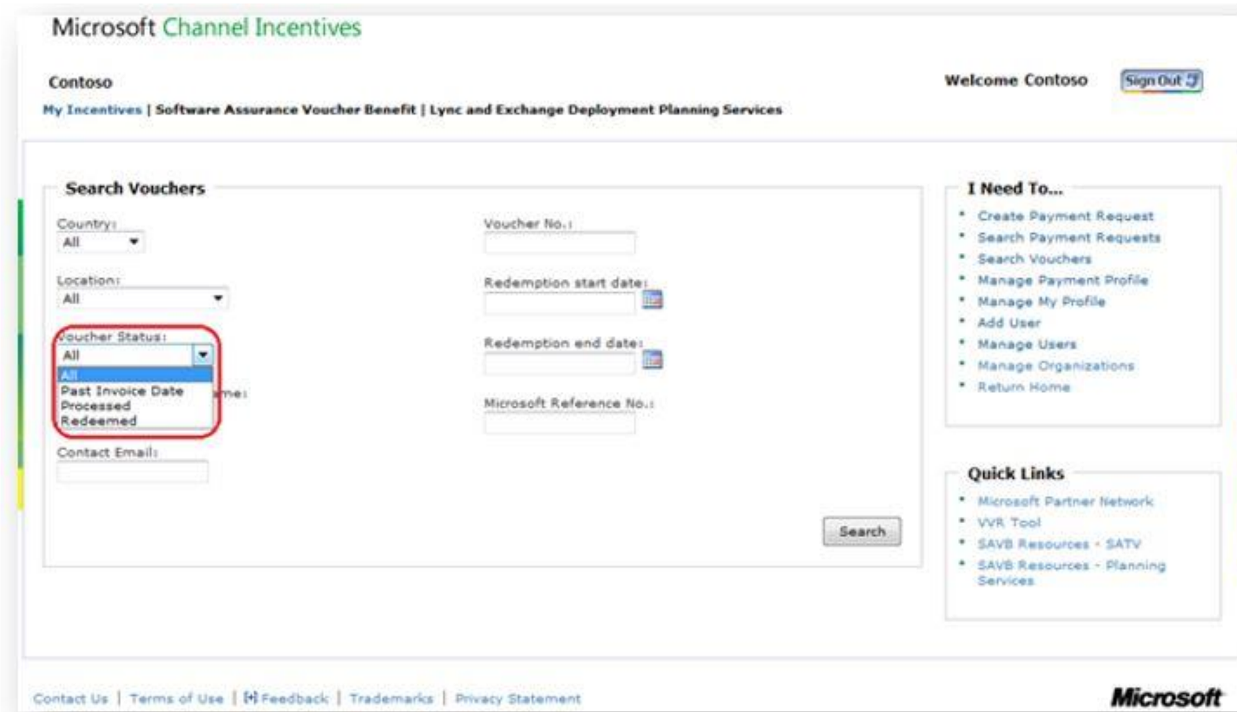

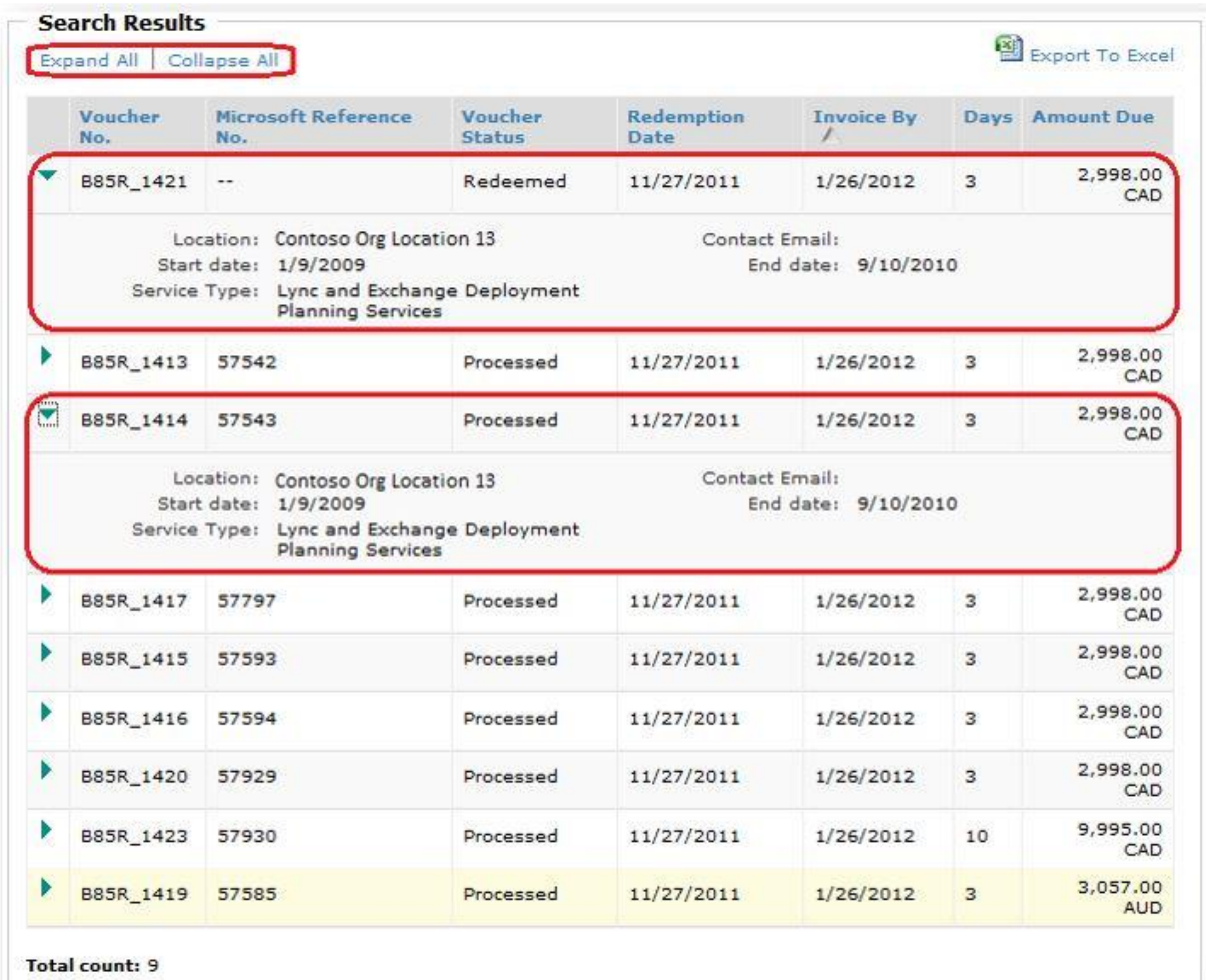

Search Results

Expand All | Collapse All

Export To Excel

	Voucher No.	Microsoft Reference No.	Voucher Status	Redemption Date	Invoice By	Days	Amount Due
	B85R_1421	--	Redeemed	11/27/2011	1/26/2012	3	2,998.00 CAD
	Location: Contoso Org Location 13 Start date: 1/9/2009 Service Type: Lync and Exchange Deployment Planning Services			Contact Email: End date: 9/10/2010			
	B85R_1413	57542	Processed	11/27/2011	1/26/2012	3	2,998.00 CAD
	B85R_1414	57543	Processed	11/27/2011	1/26/2012	3	2,998.00 CAD
	Location: Contoso Org Location 13 Start date: 1/9/2009 Service Type: Lync and Exchange Deployment Planning Services			Contact Email: End date: 9/10/2010			
	B85R_1417	57797	Processed	11/27/2011	1/26/2012	3	2,998.00 CAD
	B85R_1415	57593	Processed	11/27/2011	1/26/2012	3	2,998.00 CAD
	B85R_1416	57594	Processed	11/27/2011	1/26/2012	3	2,998.00 CAD
	B85R_1420	57929	Processed	11/27/2011	1/26/2012	3	2,998.00 CAD
	B85R_1423	57930	Processed	11/27/2011	1/26/2012	10	9,995.00 CAD
	B85R_1419	57585	Processed	11/27/2011	1/26/2012	3	3,057.00 AUD

Total count: 9

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:

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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

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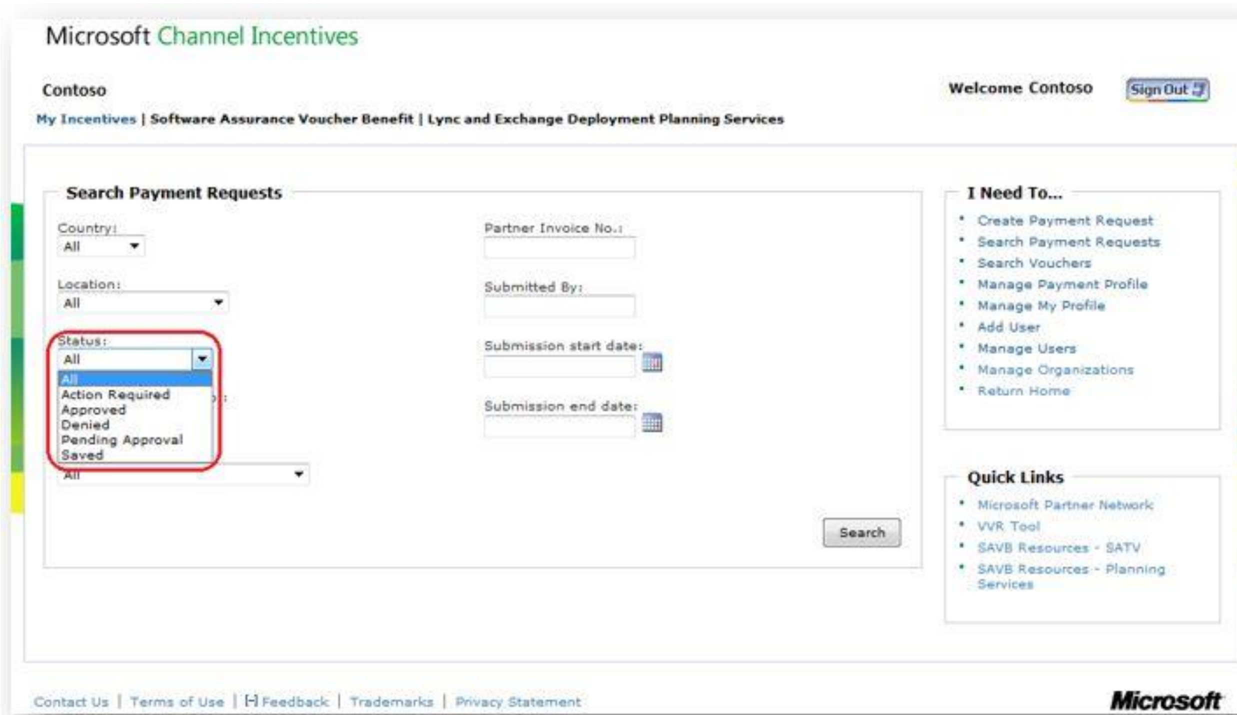

3. Select **Search** to see results.

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.

    - **Invoice Number**: the partner's own company invoice number
    - **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
    - **Age**: the number of days elapsed since the payment request was submitted

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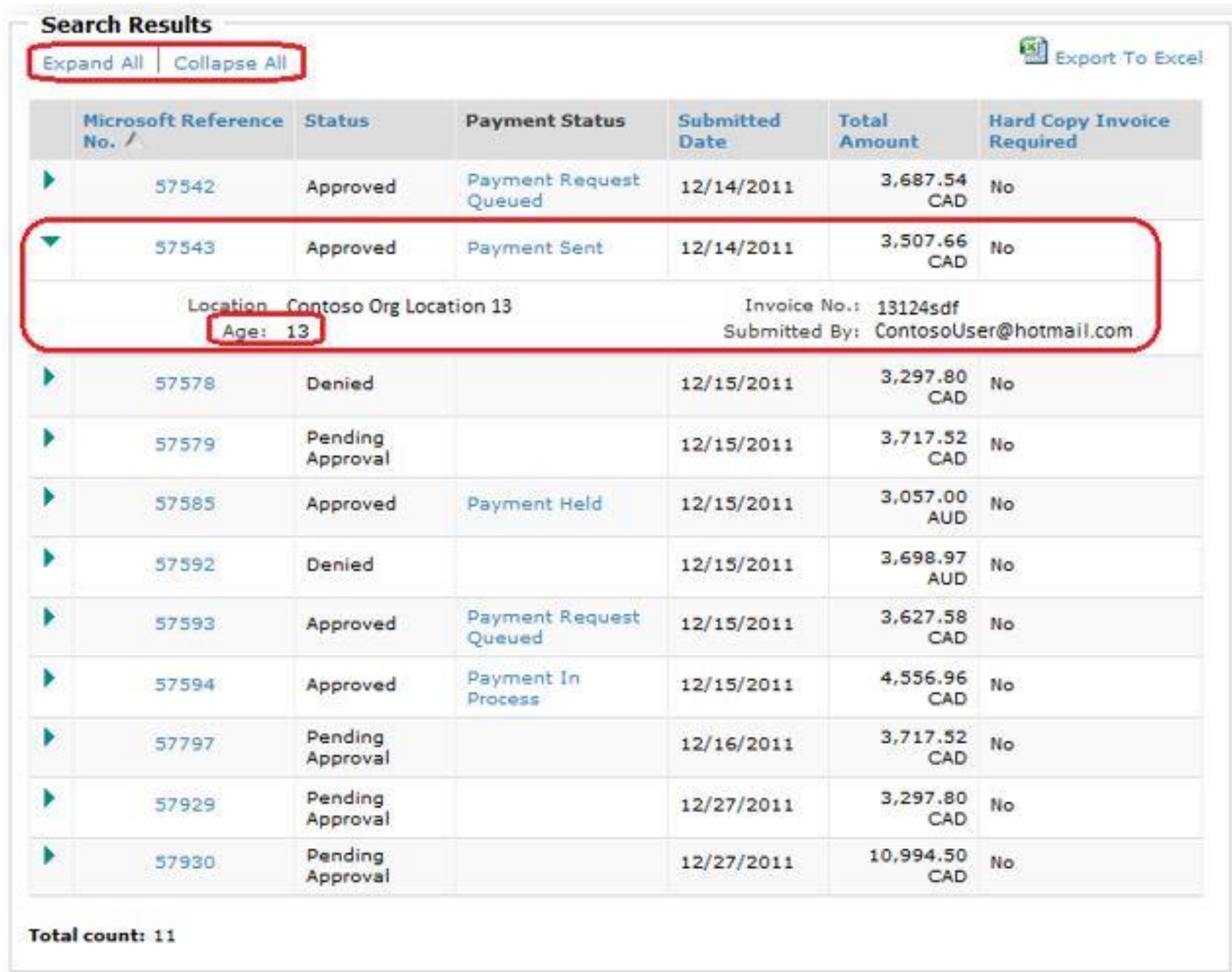

	Microsoft Reference No.	Status	Payment Status	Submitted Date	Total Amount	Hard Copy Invoice Required
	57542	Approved	Payment Request Queued	12/14/2011	3,687.54 CAD	No
	57543	Approved	Payment Sent	12/14/2011	3,507.66 CAD	No
	Location Contoso Org Location 13 Age: 13			Invoice No.: 13124sdf Submitted By: ContosoUser@hotmail.com		
	57578	Denied		12/15/2011	3,297.80 CAD	No
	57579	Pending Approval		12/15/2011	3,717.52 CAD	No
	57585	Approved	Payment Held	12/15/2011	3,057.00 AUD	No
	57592	Denied		12/15/2011	3,698.97 AUD	No
	57593	Approved	Payment Request Queued	12/15/2011	3,627.58 CAD	No
	57594	Approved	Payment In Process	12/15/2011	4,556.96 CAD	No
	57797	Pending Approval		12/16/2011	3,717.52 CAD	No
	57929	Pending Approval		12/27/2011	3,297.80 CAD	No
	57930	Pending Approval		12/27/2011	10,994.50 CAD	No

Total count: 11

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*.

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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 has been retired.