

Microsoft FastTrack

Microsoft and Microsoft Partner User Guide

Updated July, 2017



Step-by-step instructions to help Microsoft and Microsoft partner users navigate and perform tasks on the FastTrack site.

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Introduction to FastTrack

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This guide is designed to be a resource to Microsoft and partner users for navigating the [FastTrack site](#) and performing activities to assist customers. Microsoft FastTrack is our customer success service to help customers realize business value faster with Microsoft cloud services. The goal is for customers to achieve their objectives by taking advantage of the help and resources available through FastTrack.

When assisting a customer, your main activities within FastTrack will likely consist of building Success Plans that are specific to your customer’s organizational needs, redeeming applicable offers, and providing readiness resources or templates for the customer.

In completing these activities, keep in mind that the objective is to help the customer get the most out of their chosen solution.

FastTrack roles

The FastTrack site enables Microsoft, partner, and customer teams to drive adoption in a shared environment while protecting user privacy with audience-level permissions.

FastTrack requires a work or school account, often referred to as an **Organizational ID (Org ID)**. This means that all partners and customers require a work or school account to access the site. Any partners or customers without an Org ID can sign up for a trial tenant [available here](#). Partners can take advantage of the tenant available by using their Microsoft Partner Network (MPN) ID. For more information about using your Org ID to sign in to the FastTrack site, go to the [Sign in](#) section of this guide.

Windows 10 does not require an organization to have a tenant. For organizations who are using FastTrack for Windows 10 only, you will still need an Org ID. [TechNet](#) has additional guidance to help you get started.

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There are three distinct site profiles that FastTrack assigns at the organizational level based on user Org ID:

Microsoft | @Microsoft.com

Partner | Org ID + MPN

Customer | Org ID

Microsoft users can view and edit any customer record. Any changes made to a customer profile are visible to users associated with that customer. To actively engage customers, partners must request access to a customer record in FastTrack. However, partners can view a customer's eligibility for offers before obtaining access.

If you need to determine whether you already have an Org ID, check with your administrator. Members receive Org IDs once a cloud service tenant (such as Office 365 or Microsoft Azure) has been provisioned. You can find current Org IDs under the Users tab in the Office 365 Admin Center or Azure Active Directory.

Assistance with the site

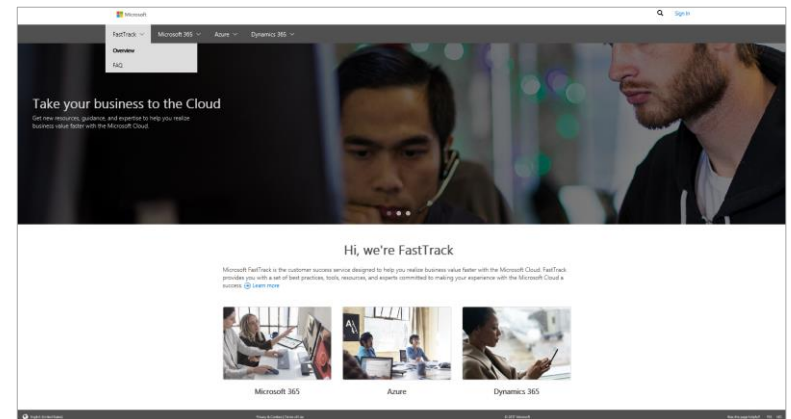
If you need help with FastTrack, use the [support option](#) in the site to open a support ticket request with the FastTrack team. If you cannot sign in, initiate a request via email: support@fasttrack.office.com.

FastTrack site overview

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When you first go to fasttrack.microsoft.com, you can:

- Learn more about FastTrack, including answers to frequently asked questions.
- Choose from the products in the top navigation bar to view available resources to support building your deployment and adoption plans.
- Sign in to begin building your Success Plan.



Microsoft 365

Microsoft 365 is a complete, intelligent solution comprised of Office 365, Enterprise Mobility + Security, and Windows 10. The purpose of Microsoft 365 is to provide customers with secure solutions that foster collaboration and creativity.

Read case studies that describe how these solutions have helped a variety of our customers.

You can also access additional information about the Microsoft 365 powered devices, as well as the home page for Office 365, EMS, and Windows 10.

Microsoft 365 is a complete, intelligent solution, including Office 365, Windows 10 and Enterprise Mobility + Security that empowers employees to be creative and work together, securely. [Learn more about Microsoft 365.](#)

FastTrack helps you move to Microsoft 365 at your own pace. We work closely with both your internal teams and Microsoft partners who may be assisting you. FastTrack ensures that you have a full suite of best practices, tools, remote assistance and resources at your disposal during your digital transformation. FastTrack can help you begin your digital transformation with the solutions or begin with a "Microsoft 365 powered device".

Start FastTrack for Microsoft 365

Office 365 Windows 10 EMS

Who we've helped

Explore a few of the customers the FastTrack team has helped to move to the Microsoft cloud achieving successful, stress-free rollouts and data migration.

CSC We tackled data sovereignty issues, put security wraps around infrastructure and our identity management, deployed auditability tools to demonstrate compliance, and maintained hybrid scenarios. Now we can show clients that we did everything with our internal Client Zero deployment. CSC together with FastTrack is ready to go worldwide with Office 365.

— Maria Paslier, Vice President and General Manager, Workplace and Enterprise Service Management at CSC

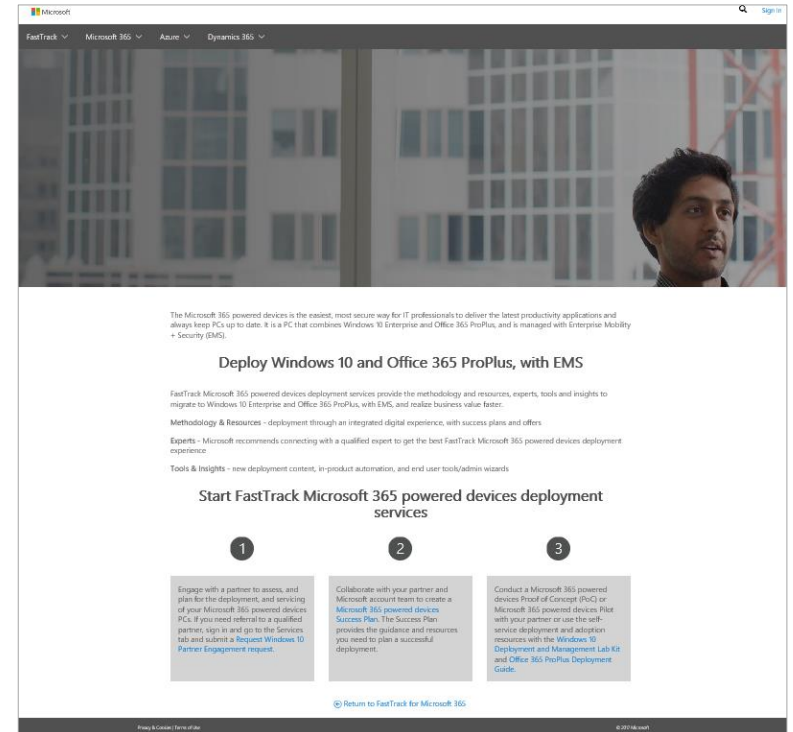
[Learn More](#)

Logos: Madsys, Carlsberg, Polycorn, NGA Human Resources, Linnova

Microsoft 365 powered devices

Microsoft 365 powered devices are the easiest, most secure way for IT professionals to provide their users with the latest productivity applications and always keep PCs up to date. Microsoft 365 powered devices are PCs that combine Windows 10 Enterprise and Office 365 ProPlus, and managed with Enterprise Mobility + Security (EMS).

You can read about deployment services, as well as access a user guide to help with the creation of a Microsoft 365 powered device Success Plan. You can also access Windows 10 and Office 365 ProPlus deployment and adoption resources.



The screenshot shows a web browser displaying the Microsoft FastTrack page for Microsoft 365 powered devices. The page features a navigation bar with 'FastTrack', 'Microsoft 365', 'Azure', and 'Dynamics 365'. Below the navigation is a hero image of a man looking out a window. The main content area includes a sub-header 'Deploy Windows 10 and Office 365 ProPlus, with EMS', followed by a paragraph describing the services. Below this are sections for 'Methodology & Resources', 'Experts', and 'Tools & Insights'. The central focus is a section titled 'Start FastTrack Microsoft 365 powered devices deployment services' which contains a three-step process:

- 1** Engage with a partner to assess, and plan for the deployment, and servicing of your Microsoft 365 powered devices PCs. If you need referral to a qualified partner, sign in and go to the Services tab and submit a Request Windows 10 Partner Engagement request.
- 2** Collaborate with your partner and Microsoft account team to create a Microsoft 365 powered device Success Plan. The Success Plan provides the guidance and resources you need to plan a successful deployment.
- 3** Conduct a Microsoft 365 powered devices Proof of Concept (PoC) or Microsoft 365 powered devices Pilot with your partner or use the self-service deployment and adoption resources with the Windows 10 Deployment and Management Lab Kit and Office 365 ProPlus Deployment Guide.

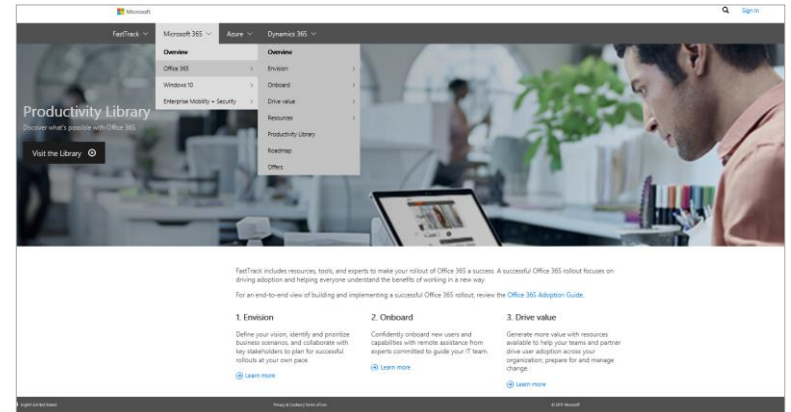
At the bottom of the page, there is a link 'Return to FastTrack for Microsoft 365' and a footer with 'Privacy & Cookies' and 'Terms of Use'.

Office 365

Accelerate your rollout of Office 365 by utilizing resources and tools to drive deployment and adoption.

From the top navigation bar, the Office 365 section opens with an overview page and then introduces the three key phases of an Office 365 deployment: **Envision**, **Onboard**, and **Drive value**. From the main menu, you can directly access Office 365 resources, the Productivity Library, the Office 365 Roadmap, and information about relevant offers.

The table on the following page has more detail about each of these sections.



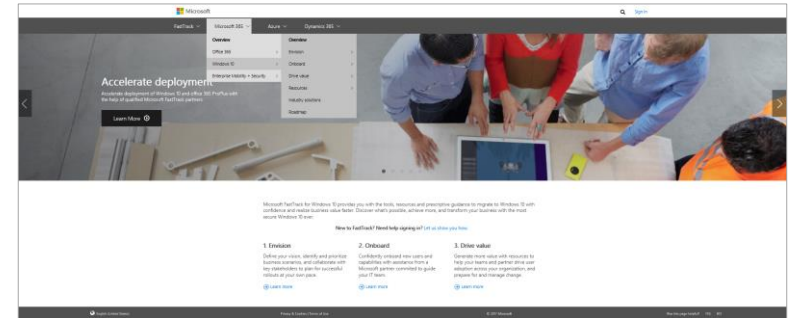
Section	Description
Overview	Read descriptions of Envision , Onboard , and Drive value . Review the Office 365 Adoption Guide , as well as the FastTrack Product Guide.
Envision	Identify scenarios that map Office 365 capabilities to your business goals. Identify key stakeholders to be part of a team to drive change in your organization. Use this information to plan a phased rollout approach.
Onboard	Review deployment options based on the size of the customer’s organization. Customers can access resources, request assistance from qualified partners, and take advantage of onboarding and adoption services based on eligibility.
Drive value	Use key FastTrack scenarios to raise awareness about the value of Office 365. Use the success guide and satisfaction survey tools to measure Office 365 success and explore new ways to add business value. Access interactive tools from the Office 365 service management learning center to manage the subscription, including change management and service incidents.
Resources	Find scenarios, guides, templates, videos, and other resources from the Envision , Onboard , and Drive value tools collected in one place.
Productivity Library	Support adoption activities with productivity resources designed for different customer segments and industries. To use this feature, select an industry, organizational role, and/or product to view productivity use cases and associated resources and case studies to get started.
Roadmap	See a snapshot of what Office 365 features are available or in development. This enables users to plan for upcoming changes or improvements.
Offers	FastTrack provides offers to help customers realize value from Office 365. Read about the offers to see what is available to help you accelerate your Office 365 adoption.

Windows 10

Microsoft FastTrack for Windows 10 is designed to help you accelerate the deployment of Microsoft's desktop platform. The goal is to enable employees to be successful by utilizing Windows 10, and to get Office when needed, while keeping company data protected.

From the top navigation bar, the FastTrack for Windows 10 section opens with an overview page and then introduces the three key phases of a Windows 10 deployment: **Envision**, **Onboard**, and **Drive value**. Additionally, you can directly access all Windows 10 resources, industry solutions, and product roadmap from the main menu.

The table on the following page has additional details about each of these sections.



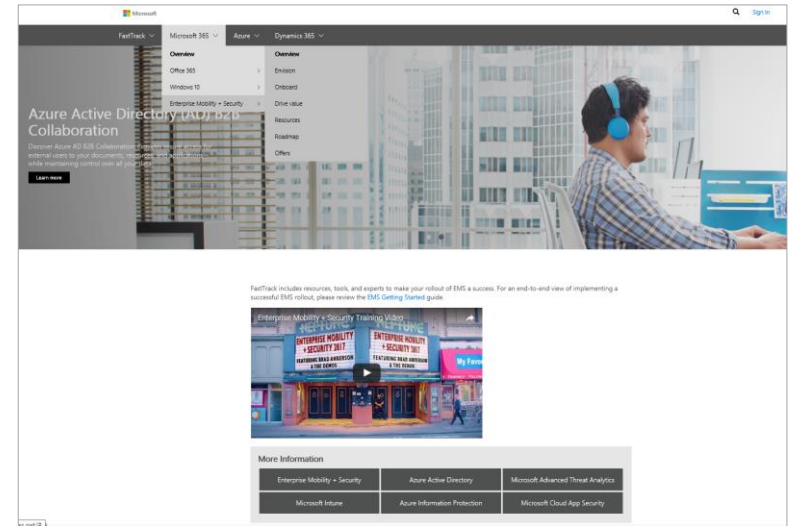
Section	Description
Overview	Read descriptions of Envision , Onboard , and Drive value .
Envision	The resources in Envision will help you to assess your needs and prepare for a successful rollout at your own pace. You will find content about Windows 10 deployment scenarios, infrastructure requirements, application compatibility, and more. This section outlines the benefits of Windows 10 to IT Pros and the organization, as well as the business and technical value.
Onboard	Create a Success Plan with help from partner experts to migrate smoothly and with confidence. Read more about the different deployment options, plus the offers that are currently available to assist your progress.
Drive value	Deliver more value for your business by increasing user adoption and helping your employees make the most of Windows 10. There are communications, resources, training, and links to a variety of relevant sites to help you execute your adoption plan, as well as measure success and get community support.
Resources	Find guides, templates, videos, use cases, and other resources from the Envision , Onboard , and Drive value tools collected in one place, and easily download all of them at once.
Industry solutions	Learn how Windows 10 can benefit businesses, watch videos, read case studies, and more.
Roadmap	Learn about the latest developments for Windows 10, including what is now available for use.

Enterprise Mobility + Security

Get started with Enterprise Mobility + Security (EMS) with the help of resources, tools, and experts from FastTrack.

From the top navigation bar, the EMS section opens with an overview page and then introduces the three key phases of an EMS rollout: **Envision**, **Onboard**, and **Drive value**. From the main menu, you can also go directly to EMS Resources, the Cloud Platform roadmap, and information about relevant offers.

The table on the following page describes each section in detail.



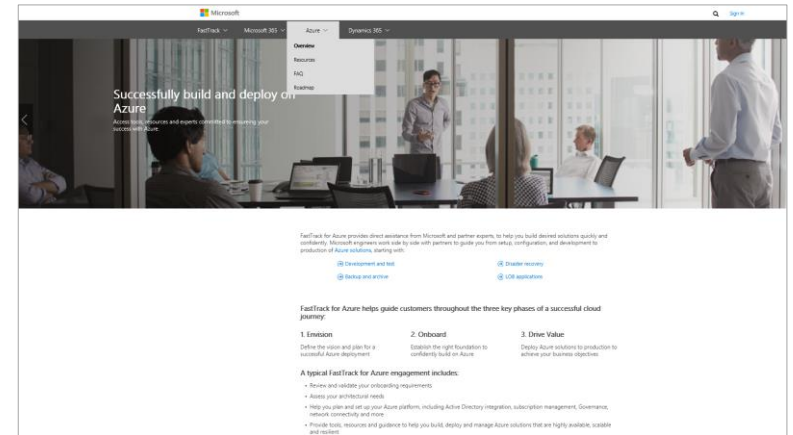
Section	Description
Overview	Read descriptions of Envision , Onboard , and Drive value . Find more information about EMS, Microsoft Intune, Azure Active Directory, Azure Information Protection, Microsoft Advanced Threat Analytics, and Microsoft Cloud App Security.
Envision	Explore relevant scenarios to inspire users to work in new ways using EMS. FastTrack offers resources on scenarios, such as <i>Managing mobile productivity</i> , <i>Identity and access management</i> , <i>Identity driven security</i> , and <i>Information protection</i> .
Onboard	Create a Success Plan, explore Getting Started guides for EMS components, dive into Microsoft Hands-on Labs, and find additional support materials.
Drive value	Help customers get the most out of their investment by taking advantage of training, videos, and resources.
Resources	Access best practices, tools, and expertise for Azure Active Directory, Microsoft Intune, Azure Information Protection, Microsoft Cloud App Security, and Microsoft Advanced Threat Analytics.
Roadmap	Learn about the latest developments for the Microsoft Cloud, including what is now available for use.
Offers	Read about eligibility for the FY16 EMS Adoption Offer.

Azure

FastTrack for Azure provides guidance from both Microsoft and partner experts to help you build solutions quickly and with confidence using Azure.

From the top navigation bar, the Azure section opens with an overview page, then introduces the Azure journey and what a typical FastTrack for Azure preview engagement looks like. From the main menu, you can also go to a page with all Azure resources, an FAQ, and the product roadmap.

The table on the following page describes each section in detail.



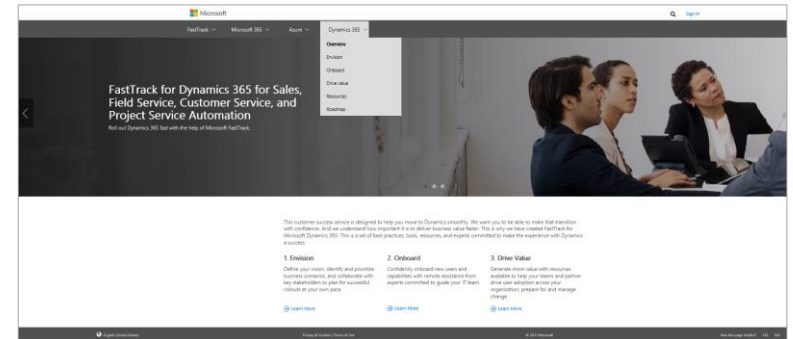
Section	Description
Overview	Read about how FastTrack for Azure helps guide customers throughout the three key phases of a successful cloud journey, and a description of a typical engagement.
Resources	Find all Azure resources, including online training, white papers, and more, in one location.
FAQ	Read the frequently asked questions about FastTrack for Azure.
Roadmap	As Azure continues to grow, go to the roadmap that will keep you informed and help you plan for the future. Find out what's new and what's coming next.

Dynamics 365

FastTrack for Microsoft Dynamics 365 is a set of best practices, tools, resources, and experts committed to making your experience with Dynamics a success.

From the top navigation bar, the Dynamics section opens with an overview page and then introduces the three key phases of a rollout: **Envision**, **Onboard**, and **Drive value**. From the main menu, you can also go directly to a page with all Dynamics 365 resources and the product roadmap.

The table on the following page describes each section in detail.



Section	Description
Overview	Read descriptions of the Envision , Onboard , and Drive value sections.
Envision	Read about how to define a clear, concise, and comprehensive Success Plan and outline your desired business scenarios. The plan should list specific business objectives and will guide you throughout your launch and rollout planning, and help gain agreement and support from key stakeholders.
Onboard	Learn more about FastTrack for Dynamics 365, specifically about eligibility criteria, including the apps/plans and SKUs covered, and minimum number of seats required.
Drive value	Realize your intended business value sooner with links to resources—including templates and training—available to help your team and partner drive user adoption across your organization.
Resources	Find all Dynamics 365 resources for Envision , Onboard , and Drive value in one location.
Roadmap	Conveniently access the Microsoft Dynamics 365 Roadmap, which provides a snapshot of what is currently available, as well as what is in development for the future.

Step-by-step guide to FastTrack

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Below are step-by-step instructions for performing many different tasks within FastTrack.

How to sign in to FastTrack

Signing in to FastTrack enables Microsoft and partners to collaborate with customers on technical implementation and user adoption strategies across Office 365, Windows 10, Enterprise Mobility + Security, Dynamics 365, and Azure.

1. Go to the FastTrack site:<http://fasttrack.microsoft.com/>
2. Select **Sign In** in the top right corner.
3. For users new to FastTrack, please follow the instructions for registration. If you have an account, select **Sign in now** on the right-hand side of the login page.

Ready to get started?

Browse through our product-specific content to explore resources available to help you plan for a successful rollout. Sign in with your work or school account to start the registration process or pick up where you left off.

[Sign in now](#)

4. Enter your **Org ID** and **password**.

Microsoft employees use their @microsoft.com account. All partners and customers will need a company tenant to access the site. Any partners or customers without an Org ID can sign up for a trial tenant on most [Microsoft](#) product pages.

FastTrack

Work or school, or personal Microsoft account

AnneW@COM265358.onmicrosoft.com

.....

Keep me signed in

Sign in

[Can't access your account?](#)

[Other sign in options](#)

[Get a new account](#)

5. On first sign-in, you must grant the site access to read your profile. Select **Accept**.

Note: Your first name, last name, and email address will be filled in automatically after they are matched with your user record. The company name you enter will be overwritten later with the name from your paid subscription.

FastTrack

FastTrack - QA needs permission to:

- View your basic profile
- Sign in as you

You're signed in as: annew@com265358.onmicrosoft.com

[Show details](#)

Accept Cancel

6. Specify whether you are a Microsoft partner or a Microsoft customer. Partners can use their Microsoft Partner Network (MPN) ID to log in and proceed to the next steps.
7. Select **Save** to continue to the site.

The screenshot shows a registration form titled "REGISTRATION" with a light blue header. Below the header is a section titled "Edit your profile" with the subtext "All fields are required". The form contains several input fields: "First Name" with the value "Rob", "Last Name" with "Young", and "Company Name" with "J-Toon Klitchen Supplies". Below these is a note: "Company name may be overwritten later to match the actual company name associated with this tenant". The "User Type" section has two radio button options: "Microsoft Customer - An organization or individual engaging with Microsoft or its Partners to implement Microsoft services." (which is selected) and "Microsoft Partner - An organization that consults and deploys, manages, hosts, resells, or distributes Microsoft solutions". Below this is a "Country" dropdown menu and an "Email" field with the value "Rob1@MCO999962.onmicrosoft.com".

Terms of Use for FastTrack
FastTrack allows you to create success plans to prepare for your Microsoft Cloud projects. Company team members in FastTrack can view all published success plans to make coordination easy. Partners can view success plans when they are approved by the customer to the specific success plan. Microsoft user can view success plans. Team members can be reviewed at any time in the team members view. FastTrack will send transactional emails to you as required to enable the activities offered by FastTrack. FastTrack may also, on occasion, send you requests to provide feedback about your FastTrack experience. Customer feedback is used to help improve the services Microsoft provides. Providing feedback, although highly encouraged, is optional.

By continuing, you agree that Microsoft can share your ongoing contact and subscription information, including aggregated information about your organization's usage of the service, with this partner. For more information, please review the [privacy statement](#).

By clicking "Save", I agree to the terms and conditions and privacy statement.

At the bottom of the form are two buttons: "Cancel" and "Save".

How to navigate the Microsoft 365 dashboard

When you first sign in to FastTrack, you arrive at the new Microsoft 365 Dashboard which includes Office, Windows, and EMS in a single view. You can also see pre and post-sales data, as well as usage highlights.

1. At the top of the **Dashboard**, there is a summary view across your customers, including potential risks and a rotating banner for sales and usage of Office 365, EMS, and Windows.
2. Your customer list includes any customers you've added in the Business Value Program (BVP) or FastTrack. If you select anything under the **Sales** header, you will go to BVP. If you select anything under **Usage**, you will go to FastTrack. There are also shortcuts to BVP and FastTrack at the top and bottom of the Dashboard.

The screenshot displays the Microsoft 365 Dashboard interface. At the top, it shows the Microsoft logo, navigation tabs for 'Business Value Program' and 'FastTrack', and the user's name 'Anne Weiler'. The main content area is divided into several sections:

- Sales Highlights:** A section with a 'Risk' indicator showing 'Currently, there is no risk data to display.'
- Usage Highlights: Office 365:** A section with a message 'No recommended actions are available at this time for your customers.'
- Engaged Accounts:** A donut chart showing account engagement levels: Customer Engaged (1), Partner Engaged (1), and No Engagement (0).
- Status:** A legend for account status: No Intent (0), Blocked (0), In Progress (0), and Unknown (0).
- My Customers (1):** A search bar and tabs for 'My Customer List' and 'All Customers'.
- Customer Details:** A card for 'XPERIENTIAL LLC (xperientialstaffing.onmicrosoft.com)' with fields for Name, Sales, and Usage. The Usage section includes metrics for Office 365, EMS, MDM, and CoQ.

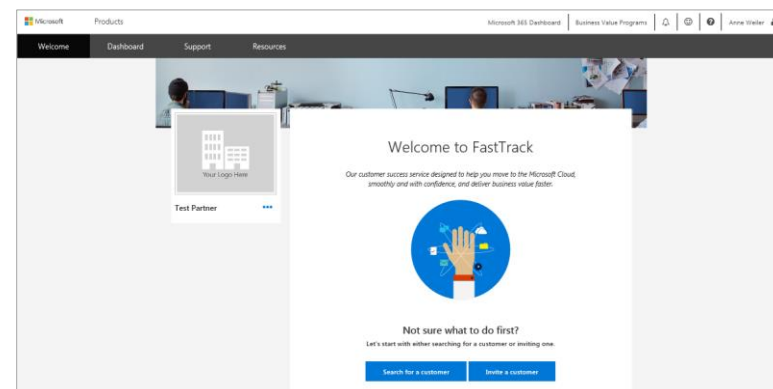
At the bottom of the dashboard, there are two buttons: 'Go to Business Value Program' and 'Go to FastTrack'.

How to navigate the FastTrack site

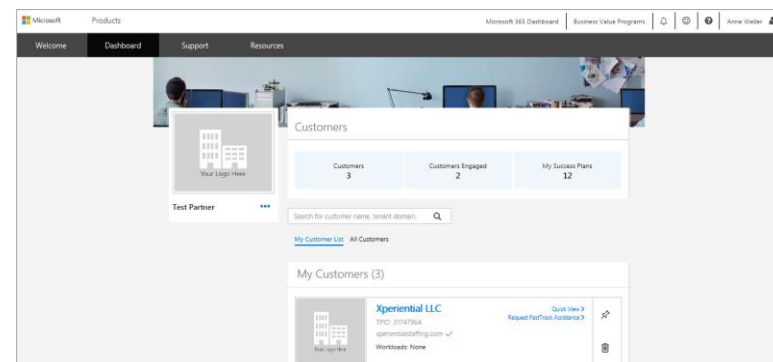
Once signed in, you can manage individual customer accounts, complete Success Plans, and redeem offers. Note that the site supports building Success Plans for Office 365, Windows 10, Enterprise Mobility + Security, Dynamics 365, and Azure.

Upon sign-in to FastTrack, users will come to the Welcome page:

1. The **Welcome** page introduces FastTrack to new users, showcases important announcements, and has recommended actions, such as searching for or inviting a customer to the site.



2. Click **Dashboard** in the top level navigation (dark gray bar) to [search for customers](#), [view customer records](#), [access your Success Plans](#), and [begin new Success Plans](#).



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3. Select **Support** in the top level navigation (dark gray bar). Submit and manage FastTrack [customer support tickets](#), and refer to FAQs for learning and troubleshooting.

Ticket #	Title	Ticket Type	Date Created	Status
30082-40779	test	Website Usability	Sep 23, 2016	Closed

4. Select **Resources** in the top level navigation (dark gray bar) to find a link to this user guide, as well as a link to the FAQ page.

FastTrack Guides

- [FastTrack User Guide](#)

How to navigate the Dashboard

From the Dashboard, partners can update their details, Microsoft and partner users can go to a customer profile, then view company details, including all Success Plans that the customer has granted you access to.

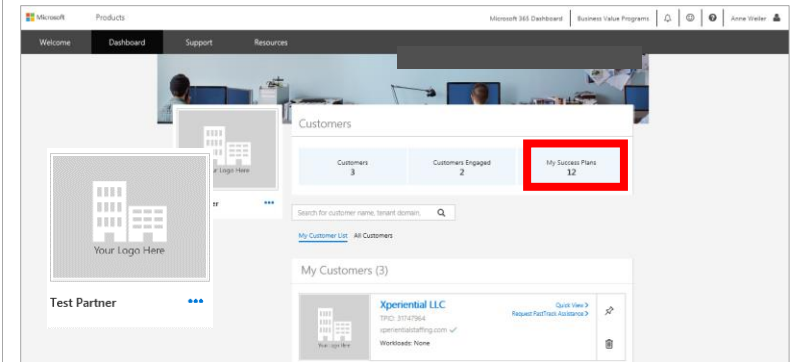
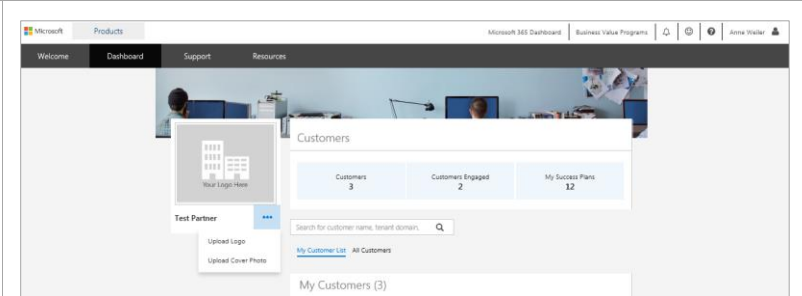
1. Partners can view or update their details by selecting the ... navigation option to the right of their name.

Select **Upload Logo** to browse and choose a picture to add or change the logo for their Dashboard.

Select **Upload Cover Photo** to browse and choose a picture to add or change the cover photo for their Dashboard.

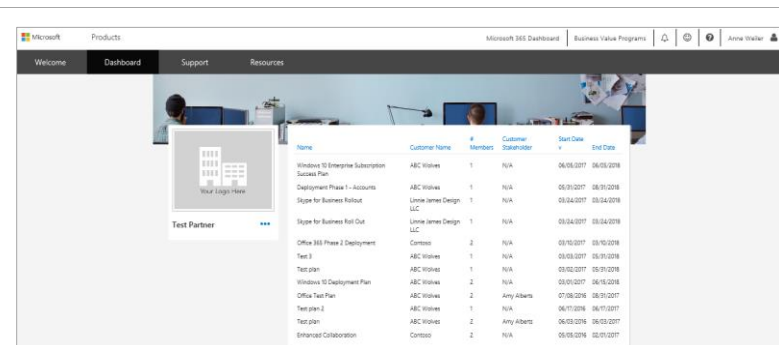
Be aware that company logos and cover images are seen by all users connected to the company profile, including all company users and any Microsoft or partners.

2. From the **Dashboard**, see how many customers you have, how many of them are engaged customers, and the number of Success Plans. Below this is a list of your customers and their workloads.
3. Select **My Success Plans** to view a list of all Success Plans for all of your customers.

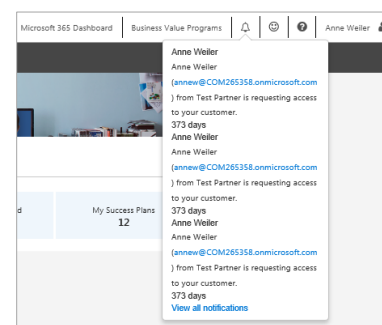


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4. You will see a list of all Success Plans for all of your customers.
5. Select **Dashboard** in the top level navigation (dark gray bar) to return to your **Dashboard**.



6. To view any notification reminders, select the **bell icon** in the upper right corner above the dark gray nav bar.
7. Select **View all notifications**.



Customer details

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FastTrack includes details for every customer. Customers can add an optional logo and cover photo, as well as a list of their team members and a timeline for all of their Success Plans. Once you have selected a customer, several more options related to that customer are available on your Dashboard, including Success Plans, Offers, Services, Getting Started, and Insight & Guidance (Insight & Guidance is applicable only to Office 365 plans).

How to search for a customer

If you have not yet engaged with a customer on FastTrack, you may not see the customer you are looking for on your Dashboard. In FastTrack, you have the ability to search for customers as detailed on the following page.

1. From your **Dashboard**, use the **search box** to find customers by company name (recommended), tenant domain, or TPID. Select the **magnifying glass icon** to begin the search.
2. If there are multiple results, in order of preference, select the customer:
 - a. With a tenant ID with a green check mark after it. This means the customer is engaged.
 - b. With a tenant ID displayed, which means they are unverified. There is a tenant, but they haven't logged in with their tenant.
 - c. That says **Cloud tenant not found**, which means the customer record was created manually.

FastTrack will automatically merge unverified customers with the verified customers after they have been invited and can be associated with the actual customer tenant.

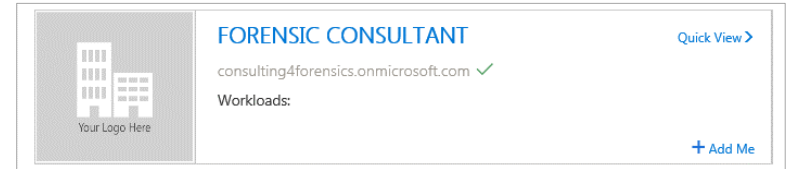
The screenshot displays the 'Customers' section of a Microsoft FastTrack interface. At the top, there is a search bar containing the text 'consulting' and a magnifying glass icon. Below the search bar, there is a link for 'All Customers' and a message indicating '3 Search Results: consulting'. The results are listed in a table-like format with three entries:

Customer Name	TPID	Tenant Domain	Workloads	Action
DAVID W. JONES, INC.	19078464	DavidWJonesInc.onmicrosoft.com ✓	None	+ Request for Access
CONSULTING4IT GMBH	8543943	c4it365.onmicrosoft.com ✓	None	+ Request for Access
FORENSIC CONSULTANT	36170963	consulting4forensics.onmicrosoft.com ✓	None	+ Request for Access

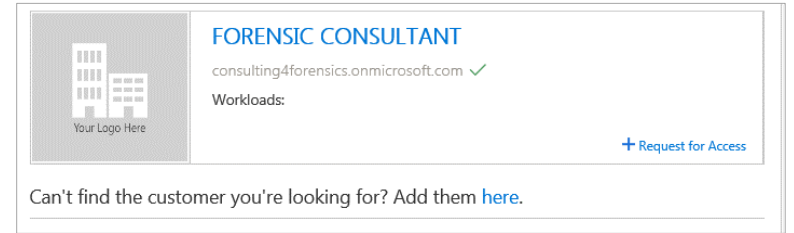
At the bottom of the results section, there is a link: 'Can't find the customer you're looking for? Add them [here](#).'

3. If the search returns the customer you are looking for, Microsoft users select **Add Me**.

Partners select **Request for Access** and a textbox appears to enter the customer's email address, then the partner selects **Submit**. The customer selects [Notifications](#) for the notice and then will approve or deny the request.



This screenshot shows a customer card for 'FORENSIC CONSULTANT'. On the left is a placeholder for a logo labeled 'Your Logo Here'. To the right, the company name is displayed in blue, followed by the email address 'consulting4forensics.onmicrosoft.com' with a green checkmark. Below this, the word 'Workloads:' is shown. In the top right corner, there is a 'Quick View >' link. In the bottom right corner, there is a '+ Add Me' button.



This screenshot shows a customer card for 'FORENSIC CONSULTANT', identical to the one above. However, the '+ Add Me' button in the bottom right corner is replaced by a '+ Request for Access' button. Below the card, there is a text prompt: 'Can't find the customer you're looking for? Add them [here](#).'

4. If you can't find the customer you're looking for, [create a new customer](#) and invite that customer to join.




Customers

[← Back to My Customers](#)
3 Search Results: *consulting*

consulting

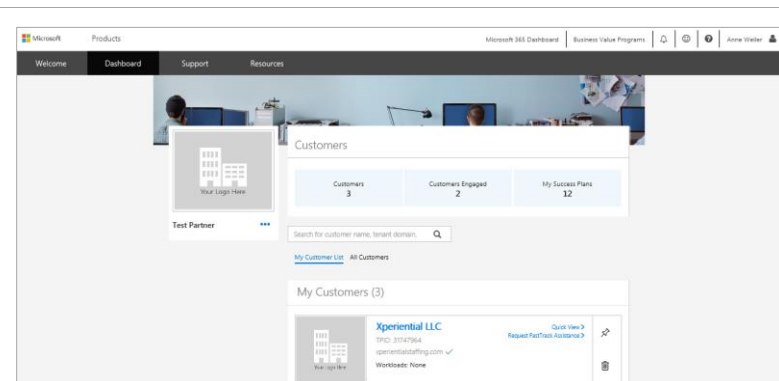
[All Customers](#)

All Customers

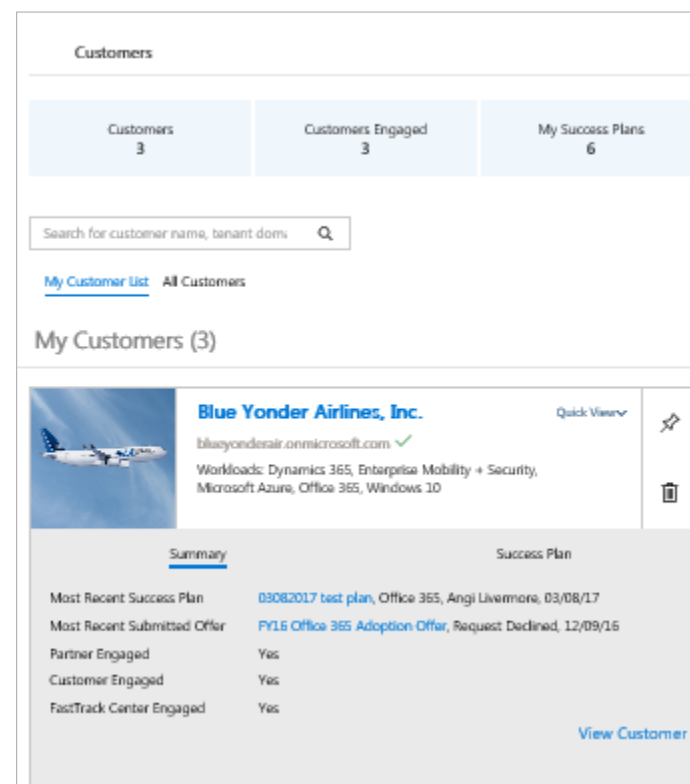
 Your Logo Here	DAVID W. JONES, INC. TPID: 19078464 DavidWJonesInc.onmicrosoft.com ✓ Workloads: None	+ Request for Access
 Your Logo Here	CONSULTING4IT GMBH TPID: 8543943 c4it365.onmicrosoft.com ✓ Workloads: None	+ Request for Access
 Your Logo Here	FORENSIC CONSULTANT TPID: 36170963 consulting4forensics.onmicrosoft.com ✓ Workloads: None	+ Request for Access

Can't find the customer you're looking for? Add them [here](#).

5. Select the **pin icon** to bring a customer to the top of your list. This is useful when you have multiple customers and want to pin the ones you are working with most frequently.
6. Select the **trash icon** to delete this customer card from your view (note that the customer will remain in the FastTrack database, they just won't be in your view anymore).
7. Select the customer's name to go to the **Summary Success Plan** page.



8. Select **Quick View** to display a summary of the customer's information. You will see:
 - a. **Most Recent Success Plan:** Displays the name of the most recent Success Plan which you can follow to the **Success Plan Summary**. It also shows the most recent date that the Success Plan was edited.
 - b. **Most Recent Submitted Offer:** Displays the name of the most recent offer which you can follow to the offer details. It also shows the status of the offer and the date that the status changed.
 - c. **Partner Engaged:** If field says **yes**, a partner is attached to the Success Plan.
 - d. **Customer Engaged:** If field says **yes**, the customer has a green check mark next to their tenant ID.
 - e. **FastTrack Center Engaged:** If field says **yes**, a FastTrack Architect, Engineer, or Manager is assigned to the customer.
9. Select **Success Plan** to the right of Summary to get additional information about the customer's Success Plans, including name of the plan, the date it was last updated, the plan owner, and who it has been shared with.



How to create a new customer

If you have searched for a customer in FastTrack and do not see them displayed in your Dashboard, you can create a new customer and invite them to FastTrack.

1. Select "here" in the line "Add them here".

The screenshot displays the 'Customers' section of the FastTrack interface. At the top, there is a search bar containing the text 'consulting' and a magnifying glass icon. Below the search bar, there is a link for 'All Customers' and a heading for 'All Customers'. Three customer cards are listed, each with a placeholder logo, the company name, TPID, email address, and workload status. At the bottom of the page, there is a message: 'Can't find the customer you're looking for? Add them [here](#).' The text 'Add them here.' is enclosed in a red rectangular box.

Customers

[← Back to My Customers](#)
3 Search Results: *consulting*

consulting

[All Customers](#)

All Customers

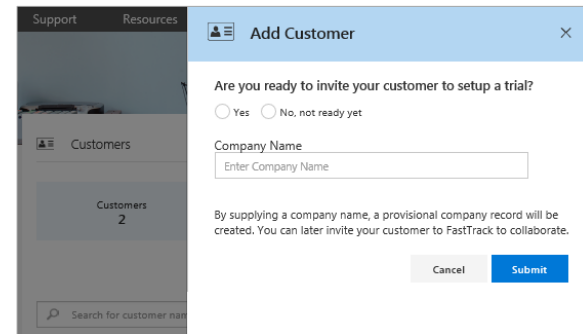
	DAVID W. JONES, INC. TPID: 19078464 DavidWJonesInc.onmicrosoft.com ✓ Workloads: None	+ Request for Access
	CONSULTING4IT GMBH TPID: 8543943 c4it365.onmicrosoft.com ✓ Workloads: None	+ Request for Access
	FORENSIC CONSULTANT TPID: 36170963 consulting4forensics.onmicrosoft.com ✓ Workloads: None	+ Request for Access

Can't find the customer you're looking for? Add them [here](#).

2. If the customer is ready to set up a trial, choose **Yes** and select the appropriate trial. This is the recommended action.

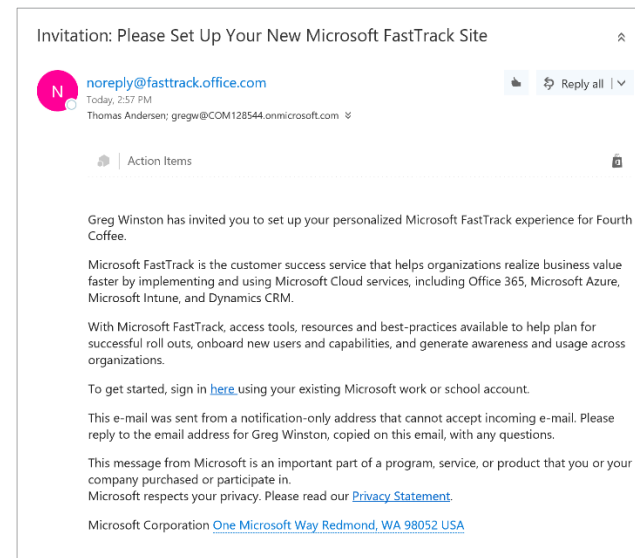
You may want to create a customer without inviting them (as a placeholder, for example, or to expedite the Success Plan creation process). In this case, select **No, not ready yet**. This will create an unverified customer record and may create a duplicate customer with the same name. You can invite your customer to collaborate in FastTrack at a later time.

3. Enter the **Company Name** and select **Submit**.



4. If you indicated that the customer is ready to set up a trial, they will receive an email notification that encourages them to sign in to FastTrack and complete their registration. This creates a “verified customer”.

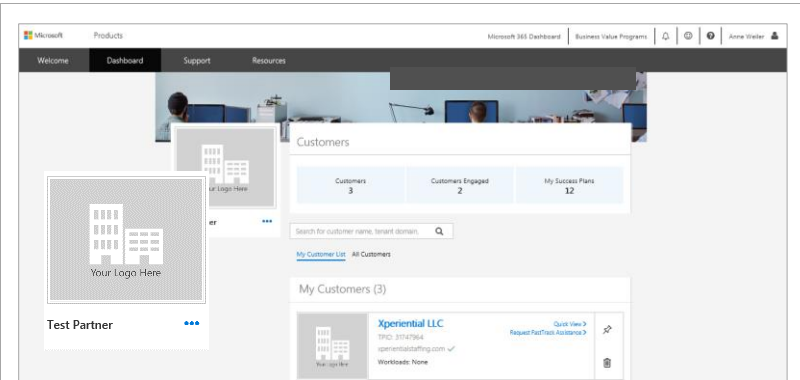
Note that the person who invited the customer is also copied on the email.



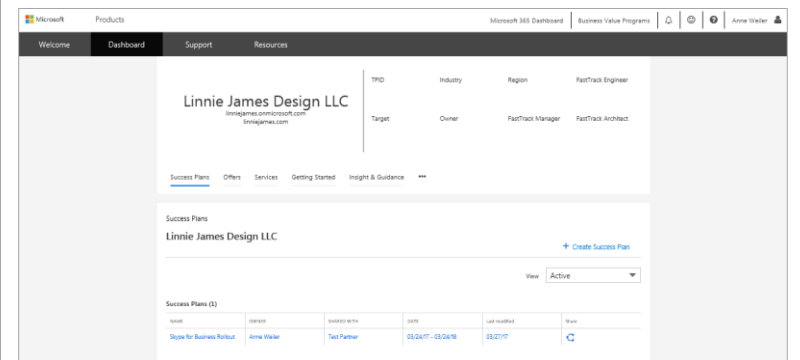
How to select a customer

Microsoft and partners may be working with multiple customers in FastTrack. Only Microsoft and partners have the ability to search for and create a new customer (customers do not have this ability).

1. From your **Dashboard**, move through the page to see a full list of customers your organization has worked with in FastTrack. If you have more than a single page, you will see page navigation options.
2. When you find the customer you want, choose the customer name.

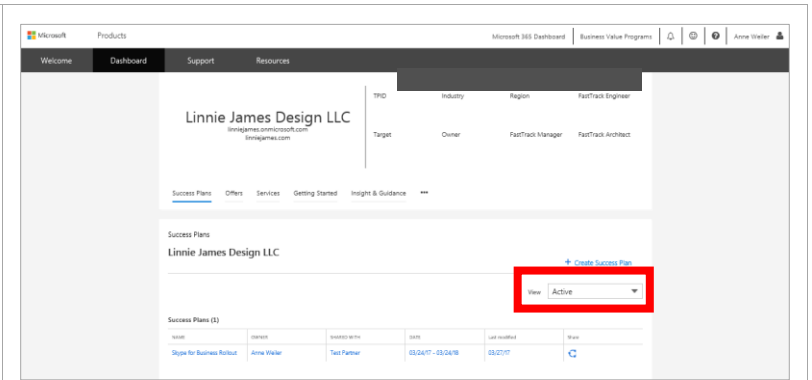


3. You will see the customer's Dashboard, including data such as, their industry, region, and names of people associated with the customer, as well as a list of their Success Plans.



5. Also on the customer **Dashboard**, change your view by selecting the down arrow to the right of the **View** field. You can choose to see all Success Plans, or selected plans:

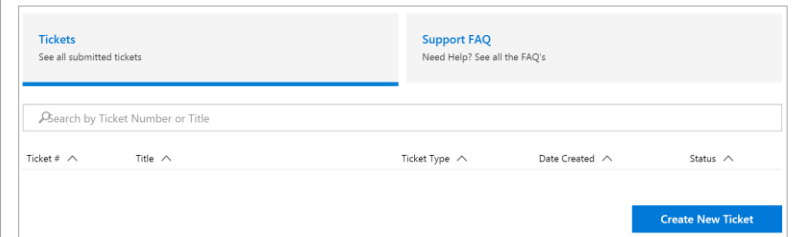
- **Active:** Success Plans that are currently being worked on
- **Archived Plans:** Success Plans that have been completed and are no longer active
- **Legacy:** Success Plans that are in the previous format and have not been updated
- **All:** All of the above types of Success Plan



How to change the customer administrator

The first customer user to sign in to the site is designated as the customer administrator . That person has the ability to manage customer user access levels, including assigning project ownership to individuals and granting partners access so they can collaborate through the site. To change the customer administrator , the customer, partner, or Microsoft user can [submit a support ticket](#), however, Microsoft will confirm with the customer before making a change.

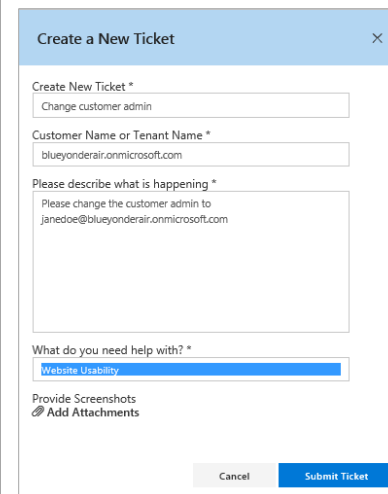
1. Select **Support** in the top level navigation (dark gray bar).
2. To create a new request, select **Create New Ticket**.



The screenshot shows the top navigation bar with 'Tickets' and 'Support FAQ' tabs. Below the tabs is a search bar labeled 'Search by Ticket Number or Title'. Underneath is a table header with columns: 'Ticket #', 'Title', 'Ticket Type', 'Date Created', and 'Status'. A 'Create New Ticket' button is located at the bottom right of the table area.

3. Complete the form, including the name and email address of the person who is the new customer administrator, and select **Submit Ticket**.

If you can't sign in to FastTrack, send an email to support at support@fasttrack.office.com and a customer support representative will get back to you promptly. You will receive a confirmation email with specific response details.



The screenshot shows a 'Create a New Ticket' modal form. It has a title bar with a close button. The form contains the following fields:

- 'Create New Ticket *' with a dropdown menu showing 'Change customer admin'.
- 'Customer Name or Tenant Name *' with a text input field containing 'blueyonderair.onmicrosoft.com'.
- 'Please describe what is happening *' with a text area containing 'Please change the customer admin to janedoe@blueyonderair.onmicrosoft.com'.
- 'What do you need help with? *' with a dropdown menu showing 'Website Usability'.

At the bottom, there are 'Provide Screenshots' and 'Add Attachments' options, and 'Cancel' and 'Submit Ticket' buttons.

Success Plans

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How to add someone as a Success Plan owner or member	48

Success Plans capture the intent of the customer project and can be initiated and completed by the customer themselves, or a partner or Microsoft employee on the customer’s behalf. Planned activities and workloads for the project are scoped through a series of questions about the customer’s organization and environment. The plan provides recommended planning, remediation activities, and resources based on the specific details of your plan.

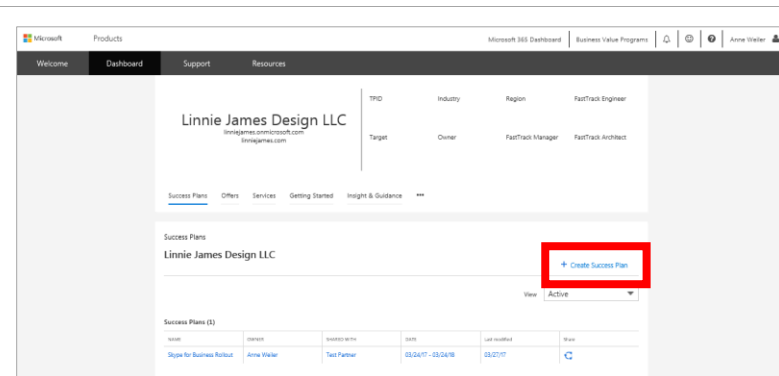
How to create a new Success Plan

To get started, make sure you are signed in to the FastTrack site. You can create and modify Success Plans from within the customer record, under **Success Plans**.

1. From your **Dashboard**, select the customer you want to create the Success Plan for.

2. Select **+Create Success Plan**.

Note: Partners can view and edit Success Plans that they have initiated for a customer. Partners can also view and edit Success Plans to which they have been invited by Microsoft or the customer. Customers can only view their own Success Plans.



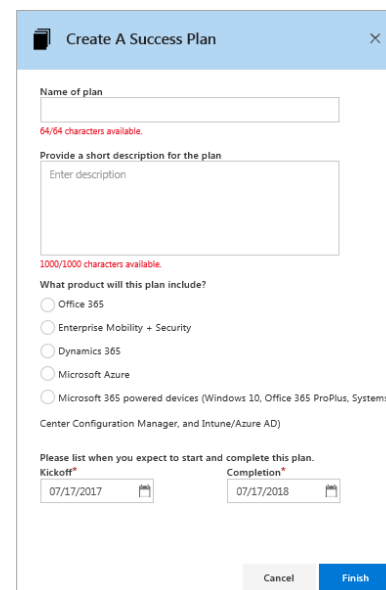
3. Enter the name of the plan.

4. Provide a short description.

5. Choose the product(s) that this plan will include.

6. Enter the timeframe. The launch date defaults to today's date and the completion date defaults to one year from now. You can change these later, if needed.

7. Select **Finish** to save and close the Create a Success Plan box.

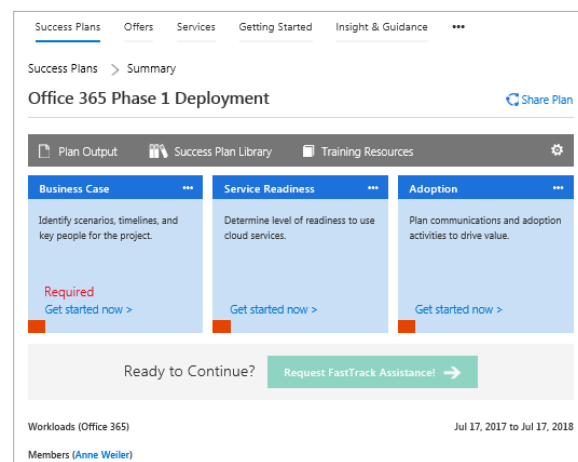
A screenshot of the 'Create A Success Plan' dialog box. It has a title bar with a close button. The form includes: a text input for 'Name of plan' with a 64/64 character limit; a text area for 'Provide a short description for the plan' with a 1000/1000 character limit; a section 'What product will this plan include?' with radio buttons for Office 365, Enterprise Mobility + Security, Dynamics 365, Microsoft Azure, and Microsoft 365 powered devices (Windows 10, Office 365 ProPlus, Systems Center Configuration Manager, and Intune/Azure AD); and date pickers for 'Kickoff*' (07/17/2017) and 'Completion*' (07/17/2018). At the bottom are 'Cancel' and 'Finish' buttons.

8. You will see the default Success Plan template that contains three sections: **Business Case**, **Service Readiness**, and **Adoption**.

There is an optional **Onboarding** section. Some partners may have their own onboarding programs, and for that reason, may want to exclude Onboarding from the Success Plan.

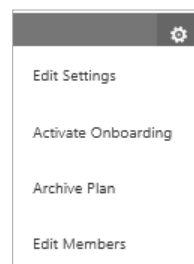
For Enterprise customers working with Microsoft FastTrack Architects, FastTrack Center, or both, the Onboarding section is needed.

If you do not need the Onboarding section, skip the following step.



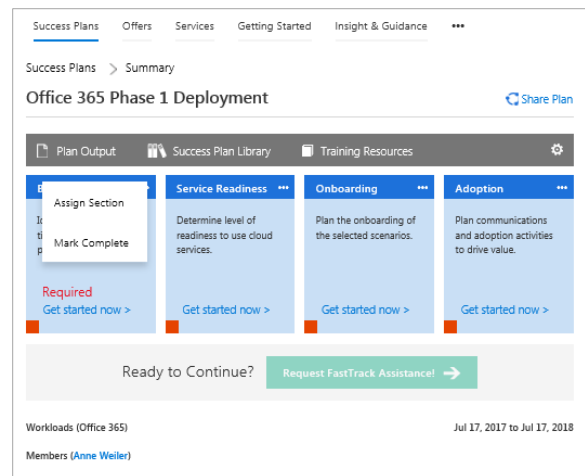
9. To add the Onboarding section into the Success Plan, select the **gear icon** and then select **Activate Onboarding**.

Note that depending on how you are logged in (Microsoft or partner) the choices available from the gear icon may vary.



10. Select the ellipsis to the right of each section title to either assign that section to a team member or mark that section as complete.
11. Working with the customer and Success Plan team, complete each section of the Success Plan. The content in these sections varies by product and workload. From the Success Plan Summary, select the blue **Business Case** block to view and complete the section.

For Office 365 Success Plans only, users will see a link to **Training Resources**. Selecting this will lead to resources to support your Office 365 engagement.



The **Business Case** section helps you identify scenarios, timelines, and key project personnel. It guides you by asking you to identify:

- Product capabilities to meet desired outcomes and use cases you will implement for your plan.
- Benefits you expect to see.
- An implementation timeline for each scenario.
- Business and technical owners for each scenario.
- Risks and corresponding mitigation plans.
- In the case of Office 365, the results of the customer’s Value Discovery Workshop (VDW), to help define implementation priorities.

12. Complete each sub-section (these will vary by product, and may include Business Scenarios, Capabilities, Benefits, Timelines, Team, and Risk) and select **Save & Continue**.

The **Service Readiness** section reviews the current service environment and experience within the customer’s organization. Key considerations include:

- Microsoft cloud services currently used by the customer.
- Plans for engaging the FastTrack Center in onboarding, migration, or adoption assistance for Microsoft services.
- Projected workloads for deployment within the Success Plan.
- Number of users within the organization and scoped within the Success Plan.
- Total number of devices per type within the organization.

13. Answer all the questions and select **Save & Continue**.

The **Onboarding** section contains a set of questions regarding the customer’s current infrastructure and environment along with technical questions regarding the customer’s requirements for implementing the specified workloads.

14. Answer all the questions in each sub-section and select **Save & Continue**.

The screenshot shows the 'Onboarding' section of the Office 365 Phase 1 Deployment setup. The breadcrumb trail is 'Success Plans > Summary > Onboarding'. The title is 'Office 365 Phase 1 Deployment' with a sub-section 'Overview'. Under the 'Foundation' heading, there are three questions, each with radio button options for Yes, No, and Unknown:

- Do you currently have any other IT Projects underway with outside assistance from MCS or a partner?
 Yes
 No
 Unknown
- Are you working with a Microsoft Partner or Microsoft Services (MCS) on this project?
 Yes
 No
 Unknown
- Do you currently have a pre-existing Azure or Office 365 tenant?
 Yes
 No
 Unknown

The **Adoption** section includes questions about the customer’s deployment environment, personnel, and actions to support the launch and ongoing adoption activities. Key considerations include:

- Personnel responsible for launch communications and training plans
- Training plan elements
- Adoption activities before, during, and after the launch

In Office 365 plans, you can also find resources to help deliver scenarios to users in your project.

15. Answer all the questions and select **Save & Continue**.

The screenshot shows the 'Adoption' section of the Office 365 Phase 1 Deployment setup. The breadcrumb trail is 'Success Plans > Summary > Adoption'. The title is 'Office 365 Phase 1 Deployment'. There are two main sections of questions:

Communications Plan:

- Do you have a person or team responsible for driving awareness through a communications plan?
 Yes No
- Does your awareness plan include the following elements?
 Email Communications
 Posters in offices
 Awareness days or events where people can see and use the product
 Skype meeting broadcast virtual events
 Regular (i.e. weekly) scenario spotlights or contents
 Other (Please describe)

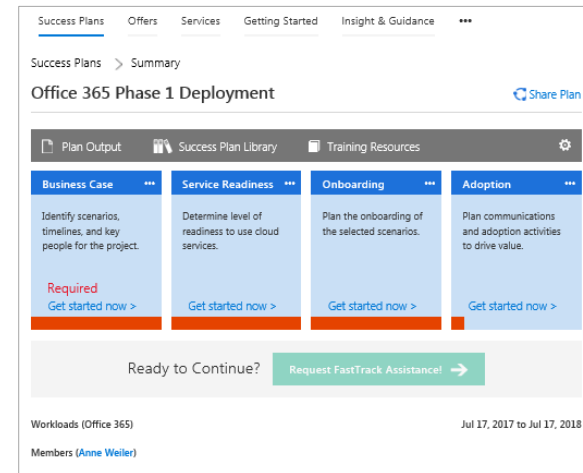
Training Plan:

- Do you have a person or team responsible for a training plan?
 Yes No
- Does your training plan include the following elements?
 Classroom training
 Online real time training
 Online learning videos or training (recorded)
 Champions program
 Help desk training
 Third party service

◀ [Table of contents](#)

The Success Plan is intended to be a working document. After you create the initial draft, you can come back at any time to add additional information or change your answers.

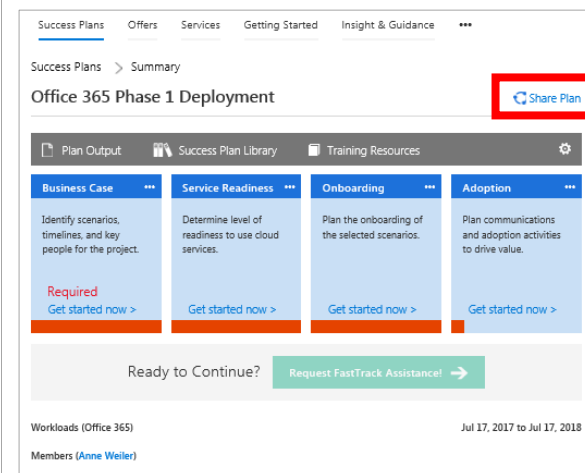
Note that the engagement option (Request FastTrack Assistance) activates once the required sections are completed.



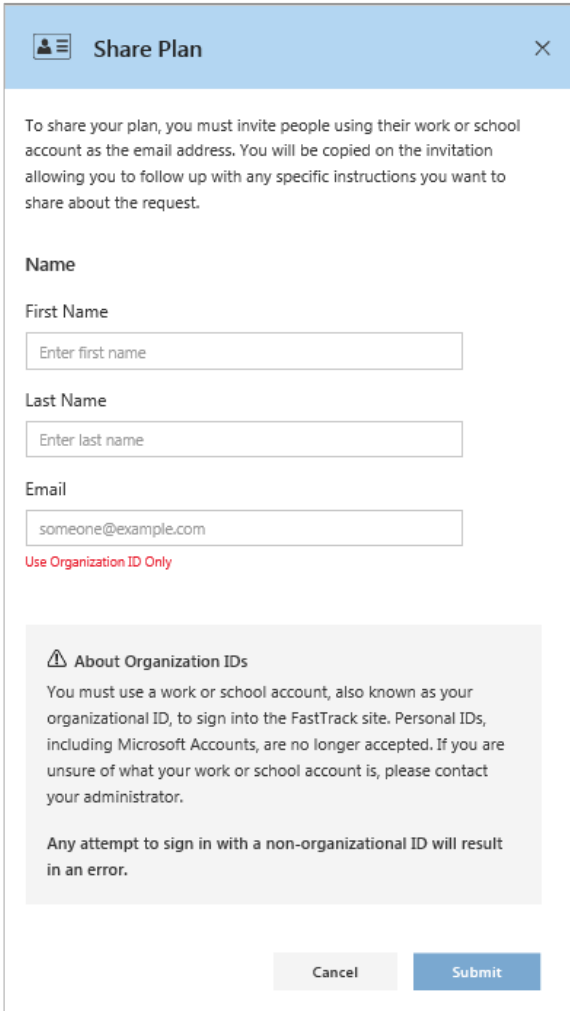
How to share a Success Plan

One of the keys to a successful deployment is working together with the project team (Microsoft, partner, and customer). You can easily share the Success Plan with any team member.

1. Once you have completed a Success Plan and are ready to share, select **Share Plan** from the Summary view.



2. Enter the first name, last name, and email address for the contact.
3. Select **Submit**. This will send the email invitation to the address you entered, with a copy of the email also sent to you.

A dialog box titled "Share Plan" with a close button (X) in the top right corner. The dialog contains instructions for sharing a plan, input fields for Name (First Name, Last Name), and Email. Below the email field is a red warning message: "Use Organization ID Only". At the bottom, there is a grey "Cancel" button and a blue "Submit" button.

Share Plan ×

To share your plan, you must invite people using their work or school account as the email address. You will be copied on the invitation allowing you to follow up with any specific instructions you want to share about the request.


Name

First Name

Last Name

Email

Use Organization ID Only

 **About Organization IDs**

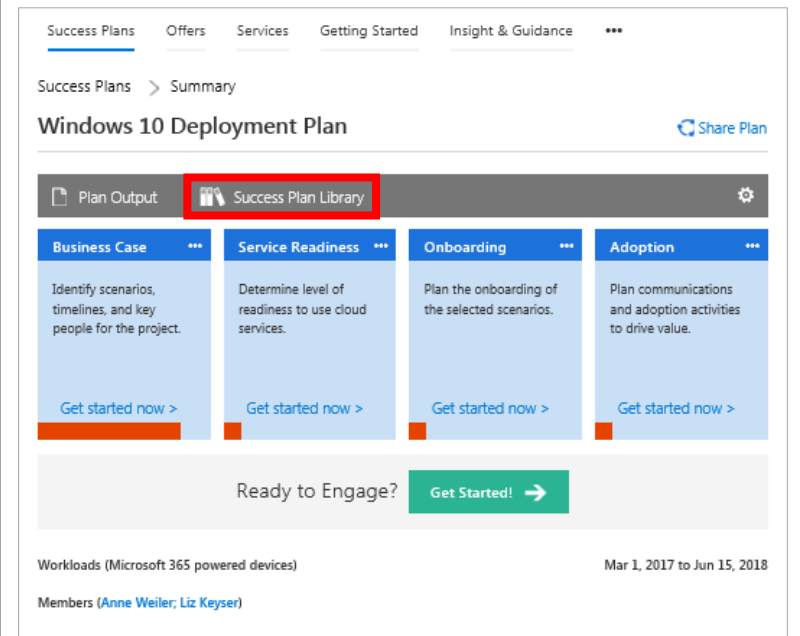
You must use a work or school account, also known as your organizational ID, to sign into the FastTrack site. Personal IDs, including Microsoft Accounts, are no longer accepted. If you are unsure of what your work or school account is, please contact your administrator.

Any attempt to sign in with a non-organizational ID will result in an error.

How to upload documents to the Success Plan Library

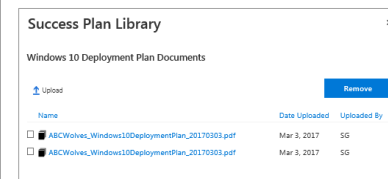
Users can upload documents that support the deployment to this library. This is also where saved copies (refer to the [Plan Output](#) section) of the Success Plans are located.

1. Click **Success Plan Library**.



2. To add a document to the Library, select **Upload**. A dialog box opens and you can browse your documents to find the correct one to upload.

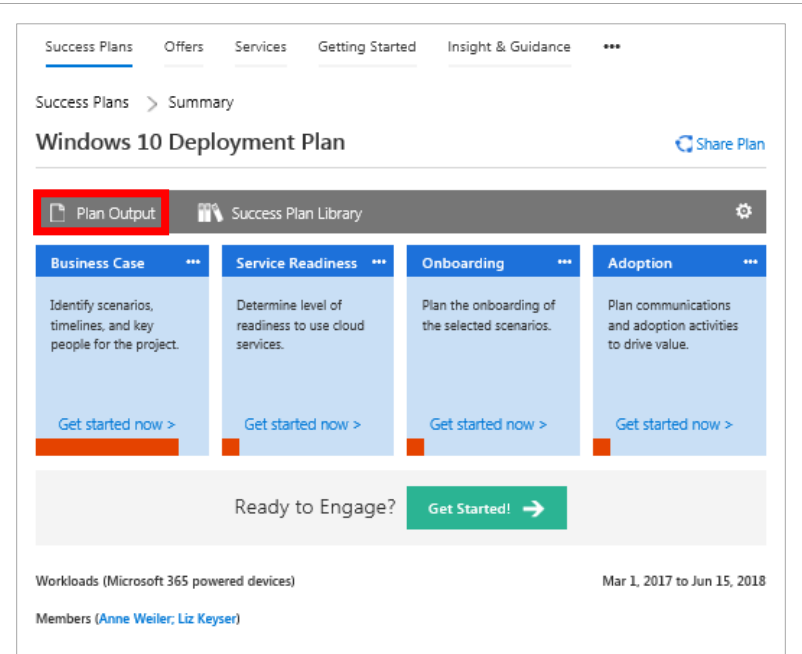
To delete a document, check the box to the left of the document and select **Remove**.



How to generate Success Plan output

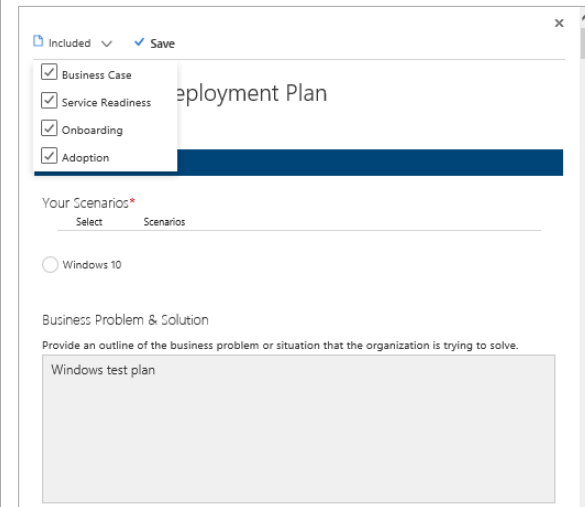
This tool enables you to output an HTML version of the Success Plan at your convenience and share with others. This output shows where you are in the plan at that moment. You can use this output in the redemption of offers, as required.

1. From the Success Plan Summary, select **Plan Output**.



◀ [Table of contents](#)

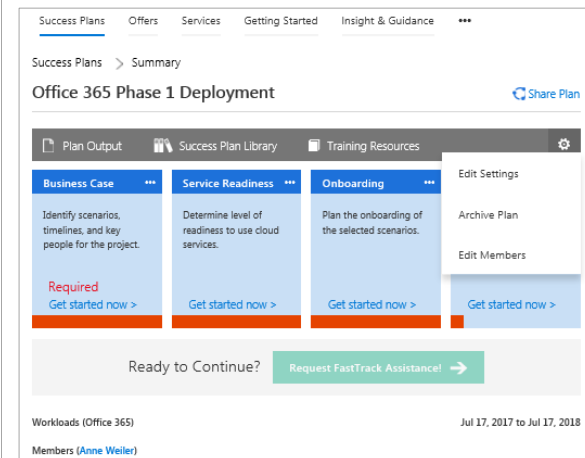
2. Within Plan Output, select **Included** to choose which Success Plan sections you want to include.
3. After selecting **Included**, you can choose which sections (Business Case, Service Readiness, Onboarding, and/or Adoption) you want to include.
4. Once you are done, select **Save**, and a PDF copy of the plan is saved to the **Success Plan Library**.



How to edit Success Plan settings

In the [How to create a new Success Plan](#) section, you got started by naming your plan and entering a description, product focus, timeline, etc. You can change that initial information by following these steps.

1. From the Success Plan overview, select the **gear icon**. Note that depending on how you signed in (as a Microsoft or partner user) the choices available from the gear icon may vary.
2. Select **Edit Settings**.



3. Select the field(s) you want to change, make the desired changes, and select **Finish** when you are done.

Create A Success Plan

Name of plan
Office 365 Phase 1 Deployment
35/64 characters available

Provide a short description for the plan
Initial roll out to deliver collaboration and communication tool updates.
927/1000 characters available

What product will this plan include?

- Office 365
- Enterprise Mobility + Security
- Dynamics 365
- Microsoft Azure
- Microsoft 365 powered devices (Windows 10, Office 365 ProPlus, Systems Center Configuration Manager, and Intune/Azure AD)

Please list when you expect to start and complete this plan.

Kickoff* 07/17/2017 Completion* 07/17/2018

Cancel Finish

How to add yourself to a Success Plan

Microsoft and partners can request to be added to a customer's Success Plan.

1. From the Success Plan overview, select the **gear icon**. Note that depending on how you signed in (as a Microsoft or partner user) the choices available from the gear icon may vary.
2. Select **Add Me**.
3. The customer will receive a [Notification](#) requesting that you be added to the Success Plan.

Edit Settings

Add Me

Activate Onboarding

Unarchive

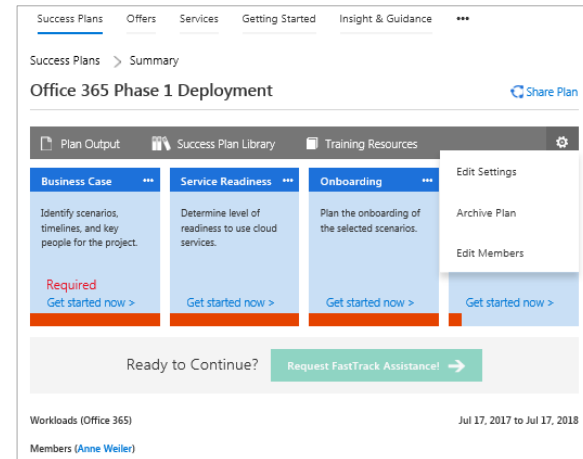
Account Profile

Edit Members

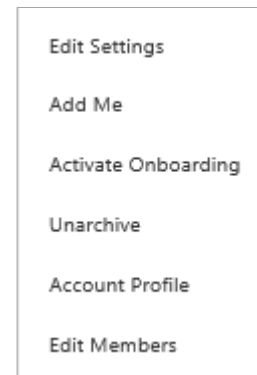
How to archive and unarchive a Success Plan

Microsoft or partner users can archive a Success Plan that is no longer considered active. This is useful if the user has multiple Success Plans and wants only the most current plans in their **Customer Dashboard** view.

1. From the Success Plan overview, select the **gear icon**. Note that depending on how you signed in (as a Microsoft or partner user) the choices available from the gear icon may vary.
2. Select **Archive Plan**.
3. The Success Plan will now show in the Archived and All views only.



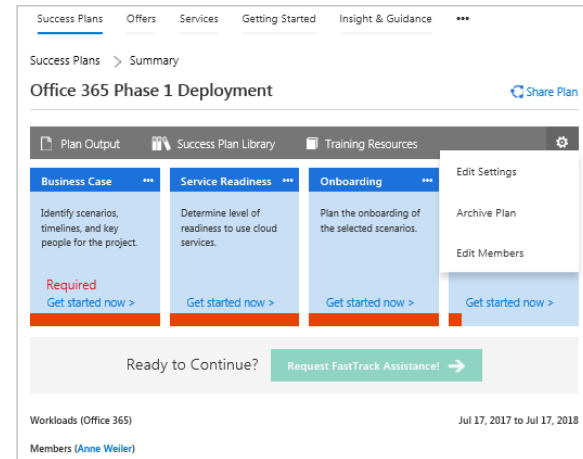
4. From the Success Plan overview, select the **gear icon**.
5. Select **Unarchive**.
6. The Success Plan will now show in the Active and All views only.



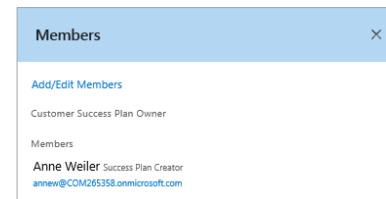
How to add someone as a Success Plan owner or member

The person (customer, partner, or Microsoft user) who creates the plan is the owner, by default. The owner is the primary point of contact for anything related to the plan, specifically for approvals pertaining to offers and requests for services. The owner can also modify permissions, such as change the plan owner and add members. Members may contribute to the plan.

1. From the Success Plan overview, select the **gear icon**. Note that depending on how you signed in (as a Microsoft or partner user) the choices available from the gear icon may vary.
2. Select **Edit Members**.

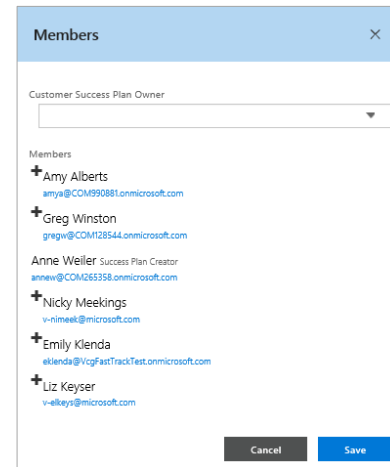


3. Select **Add/Edit Members**.



◀ [Table of contents](#)

4. Select the + sign by a name to add this person to the team. If you do not see the person's name that you want to add, [share the plan](#) with them first.
5. Select the + sign, then the **trash icon** by a name to remove this person from the team.
6. Select the drop-down menu to select a different Customer Success Plan Owner.
7. Select **Save**.



Offers

How to redeem an offer	51
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How to troubleshoot the offer process	55
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Offers available for both eligible customers and their eligible partners are managed through the FastTrack site. Offers provide partners with funding based on the number of eligible seats purchased by the customer, purchase date, and current active seat usage on the tenant. Be sure to check funding expiration date and eligibility requirements as stated in the offer Terms and Conditions documents posted in FastTrack.

Note that you can view available offers and eligibility requirements on the Offers tab. Also, note that it may take time for the partner to receive an approved Microsoft PO, based on local procurement regulations.

How to redeem an offer

1. Once a customer has approved the partner requesting funds to provide services within FastTrack, most aspects of offer redemption are managed by the eligible.

Before submitting your request, make sure you are a **Microsoft Approved End Customer Investment Funds (ECIF) Supplier with Supplier ID** and that you meet the specific offer competency requirements.

From your **Dashboard**, choose the customer for which you want to request offer funds.

2. Within a customer record, select **Offers**.
3. On the **Redeem** tab, you can see all available offers for this customer, as well as the redemption status of each offer. To read a detailed description of the offer you are interested in, select **Learn More** and review the eligibility requirements.

The screenshot displays the 'Offers' page for a customer named 'ABC Wolves' (COM990881.onmicrosoft.com). The interface includes a header with navigation tabs: Success Plans, Offers (selected), Services, Getting Started, Insight & Guidance, and a menu icon. A table lists customer details: TPID, Industry, Region, FastTrack Engineer, Target, Owner, FastTrack Manager, and FastTrack Architect. Below the navigation is a 'Current Offers' section with two tabs: 'Redeem' (selected) and 'View Offer History'. Three offers are listed, each with an 'Available' status and a 'Learn More' link:

- SharePoint 2013 Migration Offer: This offer is closed to new requests as of March 31, 2017. Only 0 days remaining!
- Customer Key for Exchange
- Customer Key for SharePoint and OneDrive for Business
- Windows 10 Enterprise Security Integration Workshop

4. Select **Create Request** at the bottom of the page. Your customer must make their purchase before you submit your offer request. Once submitted, customer and partner eligibility is reviewed by Microsoft within 15 business days of purchase.

Microsoft 365 powered device Proof of Concept (PoC)



🔒 To be eligible for this offer you need to be a member of the company team and obtain the [Windows and Devices Competency](#)

To be eligible for this offer, you must have a Success Plan that includes either a Microsoft 365 powered devices or a Windows 10 only workload. Please confirm you have the following elements completed in your Success Plan in order to be able to submit the offer:

1. The requestor must be a member of the Success Plan team.
2. The timeline must be completed under the Business Case/Timeline tab
3. There must be at least one customer contact under the Business Case/Teams tab
4. Within the Service readiness tab, need to identify the total number of users and the number of users in scope

Please review item(s): 1, 3, 4 from the list above in your most recently updated success plan, Blue Yonder Microsoft 365 powered devices

The Microsoft 365 powered devices Proof of Concept (PoC) is designed to facilitate the deployment of Windows 10 Enterprise and Office 365 ProPlus together.

Scope

- Showcase the value of Windows 10 Enterprise and Office 365 ProPlus
- Hands on experience of deployment in a lab environment
- Educates customers towards Current Branch for Business (CBB)
- Option to add Browser Migration PoC

Investment

- Funding should not exceed \$10,000 (C\$) unless specific justification is given and approved (dependent on funding availability and local guidance).
- Success Plan must be 100% complete prior to funding payment. The FastTrack for Microsoft 365 powered device Service Desk will review and confirm the associated Success Plan is complete prior to processing any invoice.

After a partner creates the offer request, the customer is notified by email to validate the partner's request. After the customer verifies the partner submission, Microsoft is notified and will begin eligibility verification. If verified, Microsoft will send the statement of work (SOW) to the partner for signature. Once the partner and Microsoft sign the SOW, a purchase order is generated and the partner may begin work.

How to check offer history

There can be multiple offers associated with a customer, so you can view all of their offer history.

1. From your **Dashboard**, select the customer with which the offer is associated.
2. Within a customer record, select **Offers**.
3. Select **View Offer History** to view a recap of all offer requests made for the customer.

These are the seven most common types of offer status:

- **Available:** The offer is available for the partner to request.
- **Pending Funding Verification by Customer:** The partner has submitted a request for the offer and the request is pending customer verification in FastTrack.
- **Funding Verified by Customer:** Customer has confirmed they want the partner to request funds and provide services to drive active seat usage.
- **Funding Rejected by Customer:** Customer has rejected partner request. Request will be declined.
- **Customer qualifies / PO in progress:** Offer team has approved request. Microsoft Finance and Procurement are working on Purchase Order.
- **Funding / PO Approved – work may commence:** PO was sent to partner and partner can begin work with customer.
- **Request Declined:** Microsoft has declined the offer request.

The appendix has a [complete list of the status values for offers](#).

4. For additional information about a specific offer, select the Offer Name.

Current Offers

Redeem [View Offer History](#)

Need help or have questions? [Submit a ticket](#)

Date Submitted	Submitted By	Offer Name	Status
12/09/2016	Status Update Job	FY16 Office 365 Adoption Offer	Request Declined
12/09/2016	Mich Earl	FY16 Office 365 Adoption Offer	Available
11/23/2016	Susan Lanphier	FY16 Office 365 Adoption Offer	Available

5. Details about the status of the offer will display, so you can see what the next step is. This information may vary based on geography.

FY16 Office 365 Adoption Offer ×

Current

Status Request Complete/Pending Formal Funding

Name Steve Joyce

Date 11/15/2016

Pending Action By

Status Detail

- Pending Offer Team Review
- Request Complete/Pending Formal Funding
- MS Finance Formal Funding Approval
- Pending Purchase Order
- Additional Procurement Documents Required
- Purchase Order Processing
- Funding/PO Approved
- Invoice Approved
- Invoice Not Approved
- Funded Project Complete

History

11/15/2016	Request Complete/Pending Formal Funding	▼
11/14/2016	On Hold Pending Requestor Response	▼
11/09/2016	Customer Funding Verified	▼
11/09/2016	Pending Customer Funding Verification	▼

Documentation

Uploaded Files Submitted

[Close](#)

How to troubleshoot the offer process

Generally, for questions or problems with the offer process, go to the [FAQs](#) in FastTrack (sign in, select **Support** in the top navigation, then select the **Support FAQ** tab). You can also refer to the Terms & Conditions for the specific offer you are interested in.

Here are the four main questions partner users ask about the offer process:

Q: How do I get my customer into FastTrack to approve my offer request?

A: From the customer Dashboard, go to the Support tab, select **Create New Ticket**, choose **Website Usability** from the drop-down menu, and complete the rest of the form.

Q: I am having trouble completing the offer form. What do I do?

A: From the customer Dashboard, go to the Support tab, select **Create New Ticket**, and select **Offers** from the drop-down menu, then use the follow-up drop-down menu to choose the **Offer type** you have a question about.

Q: What is the status of my offer and what do I need to do to move it through to the next step?

A: Go to the Offers tab and select **View Offer History**. For additional information about a specific offer, select the Offer Name. You can also contact the appropriate Offer Management team:

Windows 10: ftwin10@microsoft.com

The following table illustrates several status types and the action necessary for the offer request to progress:

Offer Status	Required Action	By Whom
Available	Submit a request for the offer	Partner
Pending Offer Team Review	None, Microsoft is reviewing customer eligibility	Microsoft
Pending Funding Verification by Customer	Approve partner's request	Customer
Funding Verified by Customer	Sign SOW	Partner and then Microsoft
Funding Rejected by Customer	None	N/A
Customer qualifies / PO in progress	Verify customer funding is available and open PO	Microsoft
Request Declined	None	N/A
Funding/PO Approved – work may commence	Begin driving Active Seat Usage on approved workload	Partner

Partner requirements

To take advantage of offers, partners must satisfy the following requirements:

- Partner must hold specific Microsoft competencies, as detailed in the offer terms and conditions and FAQs at fasttrack.microsoft.com.
- Partner must be an active Microsoft Supplier in good standing.
- Partner must be a ECIF approved Microsoft Supplier through local Microsoft Procurement team. If partner needs assistance with this, please email the Partner Procurement Enablement help desk at svcppe@microsoft.com.

Visit the Offers section of FastTrack for eligibility and availability requirements for specific offers.

Microsoft Supplier and Microsoft Supplier ECIF-enabled status

Inquiry	Answer	Action
Are you currently an MS Supplier?	Yes	Ensure you have correct Microsoft Supplier ID to include in your funding request form. Questions? Email the Partner Procurement Enablement Help Desk (svcppe@microsoft.com).
	No	Do you have a Microsoft Partner Sales Executive (PSE) or Partner Account Manager (PAM)? <ul style="list-style-type: none"> • If so, please work with your Microsoft PSE to initiate the Microsoft Supplier process found at the following Microsoft internal link http://globalvmf/Default.aspx • If not, please email the Partner Procurement Enablement Help Desk (svcppe@microsoft.com) and the team will initiate the Microsoft Supplier process.
Are you currently a ECIF-enabled MS Supplier?	Yes	Ensure you have the correct Microsoft Supplier ID to include in your funding request form. Questions? Email the Partner Procurement Enablement Help Desk (svcppe@microsoft.com).
	No	Do you have a Microsoft Partner Sales Executive (PSE) or Partner Account Manager (PAM)? <ul style="list-style-type: none"> • If so, please work with your Microsoft PSE to initiate the Request for Proposals (RFP) ECIF Category process found at the following Microsoft internal link: https://microsoft.sharepoint.com/teams/External_BIF/SitePages/Steady%20State%20Instructions.aspx. • If not, please email the Partner Procurement Enablement Help Desk (svcppe@microsoft.com) and the team will initiate the RFP ECIF Category process.
	Do not know	Email the Partner Procurement Enablement Help Desk at svcppe@microsoft.com and they can advise on status.
Looking for additional resources on MS Suppliers?	Yes	Read more about program requirements and benefits https://www.microsoft.com/en-us/procurement/msp-requirements.aspx

Services

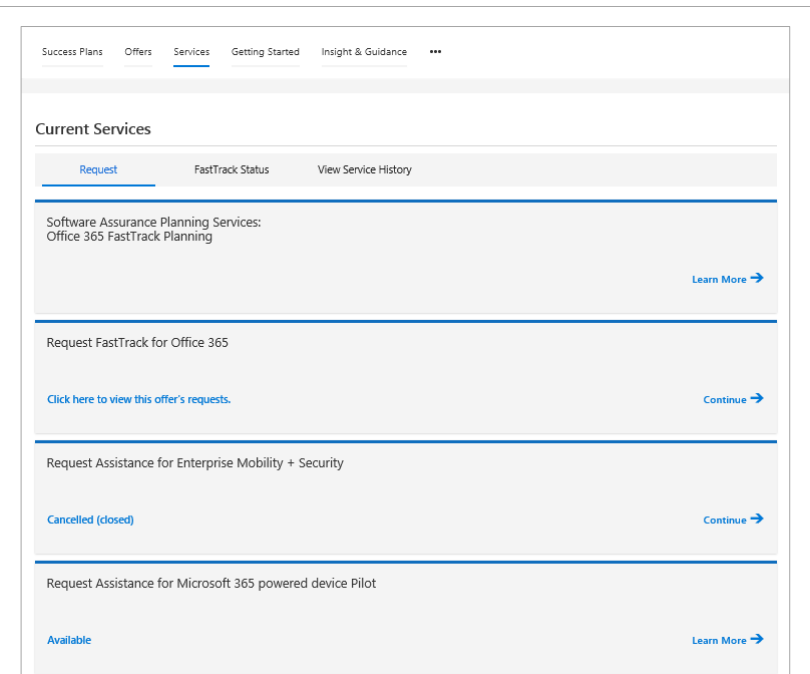
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Within Services, you can request assistance (such as planning services and expert consultation) and resources from the FastTrack Center, as well as view the customer's service history.

How to request customer services

To request services, follow the steps below.

1. From your **Dashboard**, choose the customer that you want to request services for.
2. Select **Services** and the default view is **Request**.
3. Select **Learn More** on the desired service.



4. Review further information about the service on the screen that follows.
5. If you would like to proceed, select **Create Request**.
6. Complete the form and select **Submit**.

Success Plans Offers **Services** Getting Started Insight & Guidance

Request FastTrack for Office 365

Offer Details → Complete Form → Available

For customers who purchased Office 365, you can request assistance from FastTrack if you are ready to deploy these services for your organization.

For technical support questions, please visit the [Admin Center](#) and click "Need Help?"

If you have already completed an optional Success Plan you can import your information by selecting your plan from the drop down below to import. If you have not completed an optional Success Plan, you can do so by clicking [here](#).

None

Cancel Create Request

How to check FastTrack status and view service history

Only Microsoft and partners are able to access the FastTrack status. All users, including customers, are able to access the service history.

1. From your **Dashboard**, choose the desired customer.
2. Select **Services**, then **FastTrack Status**.
3. For each product and workload this customer has, see data on number of users, their L1 status, L2 status, and the assigned FTC Manager or Engineer (after he or she has been assigned).
4. If you need definitions of L1 and L2 status, select **Learn about L1/L2 Status** to learn more. This information can also be found in the [Appendix](#) of this guide.

Current Services

Request FastTrack Status View Service History

[Learn about L1/L2 Status](#)

EMS Days in FastTrack: 782

AADP				
Count	L1 Status	Average Day(s)	L2 Status	Guidance
250	In Progress	266	UnKnown	
MANAGER: Jim Cassidy		ENGINEER: Kevin Moody		


AzRMS				
Count	L1 Status	Average Day(s)	L2 Status	Guidance
250	In Progress	132	UnKnown	
MANAGER: Jim Cassidy		ENGINEER: Kevin Moody		

- Under **Guidance**, select **View Details** to see recommendations on who to engage with, the type of conversation you should have, and available tools to guide you.

OfficeProPlus

Count	L1 Status	Average Day(s)	L2 Status	Guidance
250	No Intent	132	Total cost of ownership	View Details ▼

Engage with



[Executive Sponsor](#)

Have this conversation

Highlight business value and ROI of Office 365

Use these tools

The [Modern Workplace](#) pitch deck
[Business Value Programs](#) (including Value Discovery Workshop, Customer Immersion Experience, Value of Office)

MANAGER:
[Jim Cassidy](#)

ENGINEER:
[Kevin Moody](#)

- Select **View Service History** to view the complete service request history for the customer. If you have additional questions about a service item, select **Submit a ticket**.

Success Plans Offers **Services** Getting Started Insight & Guidance ⋮

Current Services

Request	FastTrack Status	View Service History	
			Need help or have questions? Submit a ticket
Date Submitted	Submitted By	Service Name	Status
04/17/2017	Erin Saville	Request Assistance for Enterprise Mobility + Security	Cancelled (closed)
03/16/2017	Erin Saville	Request Assistance for Enterprise Mobility + Security	On Hold Pending Requestor Response
03/08/2017	Anne Weller	Request Assistance for Enterprise Mobility + Security	Submitted
06/01/2017	Marco Sobral	Request FastTrack for Office 365	Cancelled (closed)
05/04/2017	Marco Sobral	Request FastTrack for Office 365	On Hold Pending Requestor Response
05/03/2017	Anne Weller	Request FastTrack for Office 365	Submitted
07/14/2017	Erin Saville	Request Onboarding Assistance for Office 365 for Education, Microsoft Intune for Education & School Data Sync	Cancelled (closed)
07/10/2017	Greg Winston	Request Onboarding Assistance for Office 365 for Education, Microsoft Intune for Education & School Data Sync	Submitted

Getting Started

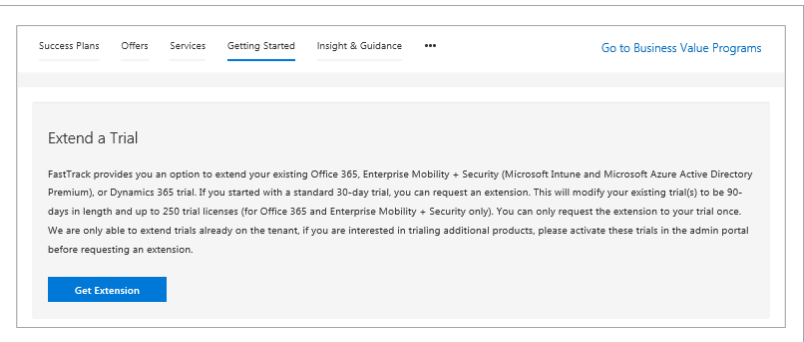
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The Getting Started section is available for all users and currently includes two options—extend an existing trial tenant and get a sandbox environment.

How to extend a trial

If a customer started with a standard 30-day trial, the customer production pilot trial can be extended. This feature is currently available for Office 365, Enterprise Mobility + Security, and Dynamics 365.

1. From your **Dashboard**, choose the customer that you want to extend a trial for.
2. Select **Getting Started**.
3. Select **Get Extension** to extend a trial.



4. Complete the form with your name, email, associated domain, reason for extension, and the type of trial. Select **Finish** when you are ready to submit.

Trial Extension ×

Name
Anne Weiler

Email
anne@COM265358.onmicrosoft.com

Tenant Initial Domain
COM990881.onmicrosoft.com

Reason for Extension Request*
▼

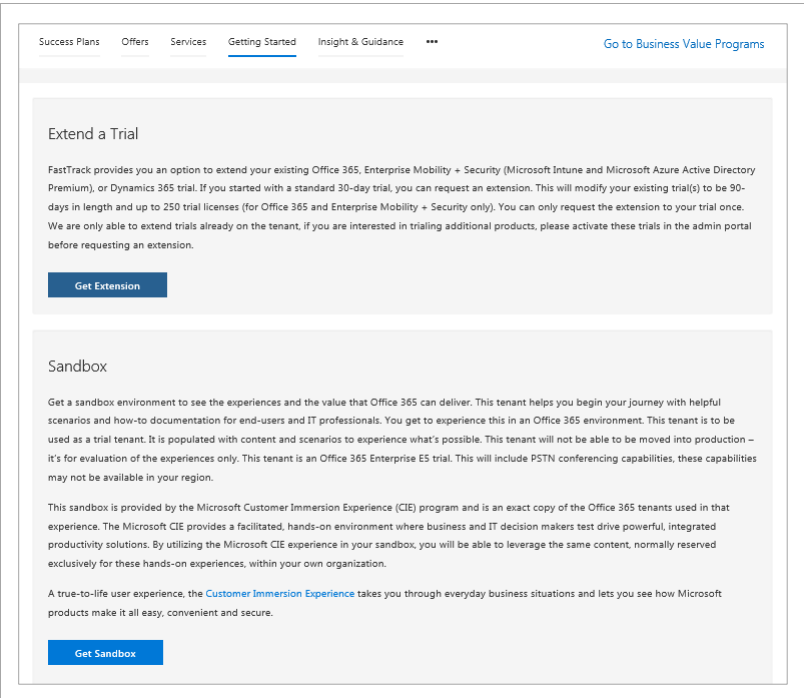
Trial Type*
 Office 365
 EMS
 Dynamics 365

Cancel Finish

How to get a sandbox environment

The sandbox tenant helps customers get to know Office 365 with helpful scenarios and how-to documentation for users and IT professionals. This tenant is an Office 365 Enterprise E5 trial only.

1. From your **Dashboard**, choose the customer that you want to get a sandbox environment for.
2. Select **Getting Started**.
3. Select **Get Sandbox** to get started.



The screenshot shows a web interface with a navigation bar at the top containing 'Success Plans', 'Offers', 'Services', 'Getting Started' (which is highlighted), 'Insight & Guidance', and a menu icon. A link 'Go to Business Value Programs' is located in the top right corner. Below the navigation bar, there are two main sections. The first section is titled 'Extend a Trial' and contains text explaining that FastTrack provides an option to extend an existing Office 365 trial. Below this text is a blue button labeled 'Get Extension'. The second section is titled 'Sandbox' and contains text explaining that a sandbox environment is provided to help users experience Office 365. Below this text is a blue button labeled 'Get Sandbox'.

4. You will see a confirmation notice stating that the Sandbox tenant has started and showing how many days you have remaining.

Sandbox

Get a sandbox environment to see the experiences and the value that Office 365 can deliver. This tenant helps you begin your journey with helpful scenarios and how-to documentation for end-users and IT professionals. You get to experience this in an Office 365 environment. This tenant is to be used as a trial tenant. It is populated with content and scenarios to experience what's possible. This tenant will not be able to be moved into production – it's for evaluation of the experiences only. This tenant is an Office 365 Enterprise E5 trial. This will include PSTN conferencing capabilities, these capabilities may not be available in your region.

This sandbox is provided by the Microsoft Customer Immersion Experience (CIE) program and is an exact copy of the Office 365 tenants used in that experience. The Microsoft CIE provides a facilitated, hands-on environment where business and IT decision makers test drive powerful, integrated productivity solutions. By utilizing the Microsoft CIE experience in your sandbox, you will be able to leverage the same content, normally reserved exclusively for these hands-on experiences, within your own organization.

A true-to-life user experience, the [Customer Immersion Experience](#) takes you through everyday business situations and lets you see how Microsoft products make it all easy, convenient and secure.

Tenant Name	Requested by	Requested date	Days Remaining
			NaN

The trial information has been emailed to the user who requested the trial.

How to connect

Get the tenant details from the email sent to the requestor of the trial.

Open an InPrivate browsing session and visit <https://portal.office.com> to sign in with details in the email.

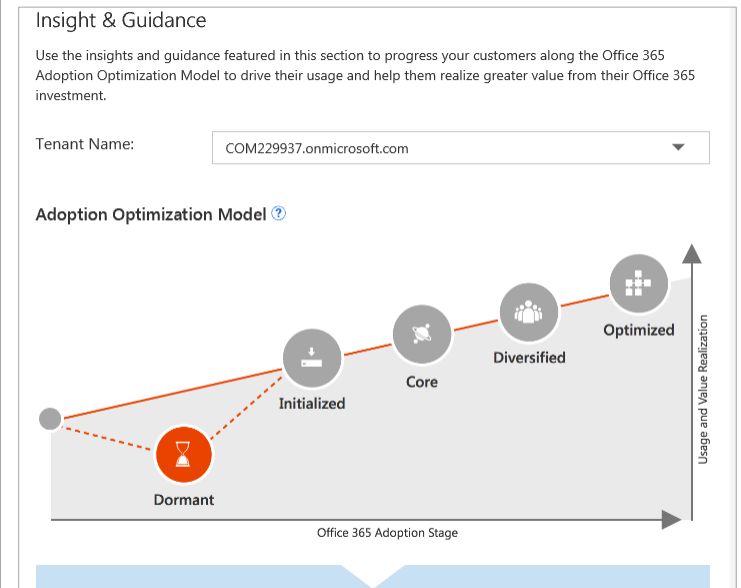
Insight & Guidance (Office 365 only)

The Insight & Guidance section is only available to Microsoft and partners and it provides information about a given customer's Office 365 usage.

How to use Insight & Guidance

For customers with an active, paid Office 365 tenant, Microsoft and partners can see their customer's usage information and recommended actions to help the customer gain more value from the service.

1. From your **Dashboard**, choose the customer you are looking for.
2. Select **Insight & Guidance**.
3. Select the **Tenant Name** from the drop-down menu to display the desired Adoption Optimization Model.



4. Select **Show success play guidance** to learn more about actions and resources to help the customer onboard their primary workloads.

Dormant
0-1% active users across all workloads
*An upper cap of 10 active users is applied

ABC Aardvark is currently in the **Dormant** stage of Office 365 adoption.

Follow the below success play guidance to learn how to move this high risk customer to a more steady state by onboarding them to their primary workload(s) of interest.

Show success play guidance

5. Here is an example of Success Play Guidance for an Office 365 customer who is in the dormant stage. There are steps such as Unblock Customer, Onboard customer to primary workloads of interest, and so on. Each of these steps can be expanded for additional guidance.

For example, under Unblock Customer, choose the blockers you are currently facing and select the link(s) to additional resources that are available.

Hide success play guidance

Success Play Guidance

- 1 Unblock Customer
- 2 Onboard customer to primary workload(s) of interest
- 3 Implement the key success factors for Office 365 adoption in your account
- 4 Leverage partner, services and/or available offers

What is blocking your customer from using Office 365?
Select all that apply to view guidance and resources to help overcome blocker(s):

- Lack intent to adopt
- Concerns over data privacy and security
- No stakeholder/executive sponsorship
- Technical/Implementation issue blocking customer from progressing
- Gap(s) in technical product features/capabilities
- Other

[Overcoming data privacy and security objections](#)

6. Scroll down to the the **Workload Adoption Level** section. This provides insight into the levels of use your customer has achieved for each workload.
7. Select **Details & Actions** below the name of each workload.

Workload Adoption Level ?

	Not Entitled	Not Active	< 20% Active	20% - 40%	40% +
Exchange Online Details & Actions	0	1	2	3	4
SharePoint Online Details & Actions	0	1	2	3	4
Skype for Business Details & Actions	0	1	2	3	4
Yammer Details & Actions	0	1	2	3	4
Office 365 ProPlus Details & Actions	0	1	2	3	4

8. In the pop-up window, you'll see the Workload Details for that product, including the number of active seats, actions you can take to further adoption, and links to additional resources.

Workload Details

Deploy Exchange Online

Status

0 of 1200 seats active

Action

Progress Blue Yonder Airlines, Inc. to level 2 of Exchange Online by helping them get Exchange Online deployed

[Deploy Exchange Online Action](#)

Team members

You can view, add, or remove team members for a given customer.

How to add and edit team members

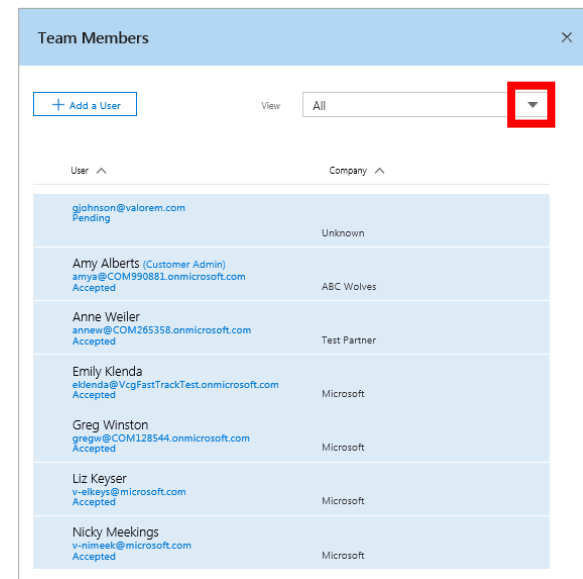
In addition to viewing Success Plans, Offers, Services, Getting Started, and Insight & Guidance for your customers, you can also add or remove team members.

1. From your **Dashboard**, choose the customer you are looking for.
2. Select the elipsis to the right of **Insight & Guidance**, then select **Team Members**.

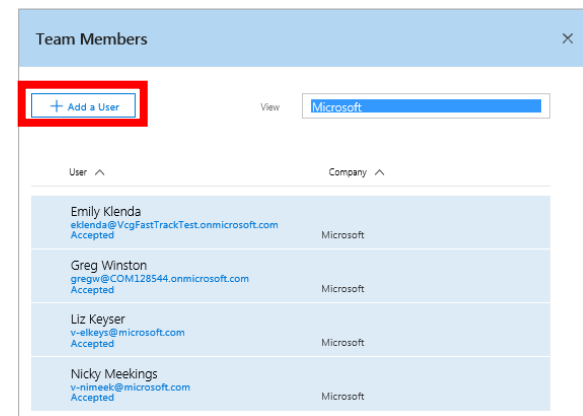
NAME	OWNER	SHARED WITH	DATE	Last modified	Share
Deployment Phase 1 - Accounts	Anne Weller	Test Partner	05/31/17 - 08/31/18	05/08/17	🔄
Office 365 Phase 1 Deployment	Anne Weller	Test Partner	07/17/17 - 07/17/18	07/17/17	🔄
Office Test Plan	Amy Alberts	Test Partner	07/08/16 - 08/31/17	06/09/17	🔄
Test 3	Anne Weller	Test Partner	03/03/17 - 05/31/18	03/03/17	🔄
Test plan	Amy Alberts	Test Partner	06/03/16 - 06/03/17	09/20/16	🔄
Test plan	Anne Weller	Test Partner	03/02/17 - 05/31/18	03/03/17	🔄
Test plan 2	Anne Weller	Test Partner	06/17/16 - 06/17/17	09/20/16	🔄
Windows 10 Deployment Plan	Anne Weller	Microsoft, Test Partner	03/01/17 - 06/15/18	05/08/17	🔄
Windows 10 Enterprise Subscription Success Plan	Anne Weller	Test Partner	06/05/17 - 06/05/18	06/06/17	🔄

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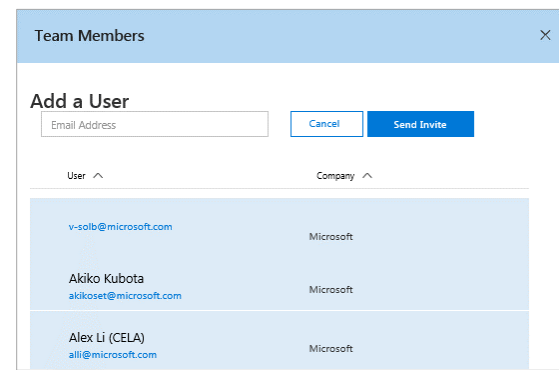
3. You will see a list of Microsoft, partner, and customer FastTrack users that have been invited or approved by the customer to participate in the customer team.
4. Select the arrow to the right of the **View** field to select the view you want: see all team members, or just those from Microsoft, the partner, or the customer.



5. In this example, just the team members from Microsoft are displayed.
6. Select **+Add a User** to add a team member.



7. Type the email address of the user you want to add and select **Send Invite**.



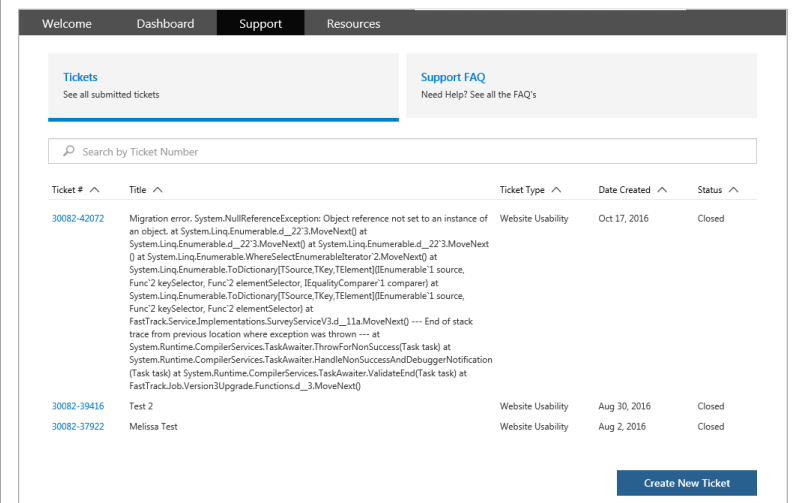
Support

You can request FastTrack customer support tickets and reference FAQs for learning and troubleshooting. If you cannot sign in, you can initiate a request by emailing support@fasttrack.office.com, and a customer support representative will get back to you promptly. You will receive a confirmation email with specific response details.

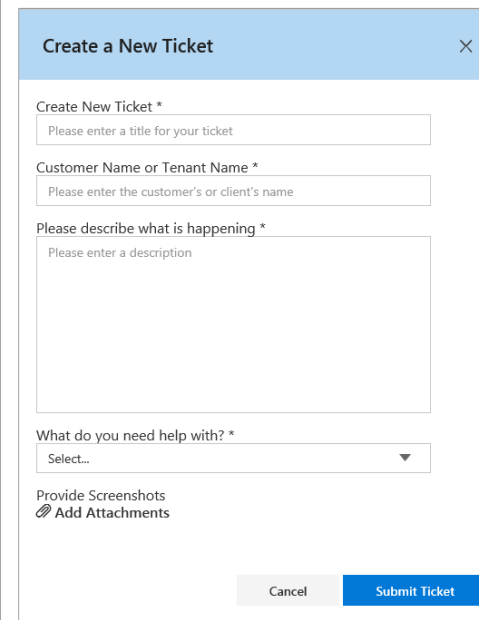
How to submit a support ticket

Support tickets are not specifically tied to a customer, so you do not need to start within a specific customer record.

1. Select **Support** in the top level navigation (dark gray bar).
2. Here you can see a history of your support tickets, including ticket number, title, type, date created, and status.
3. To create a new request, select **Create New Ticket**.



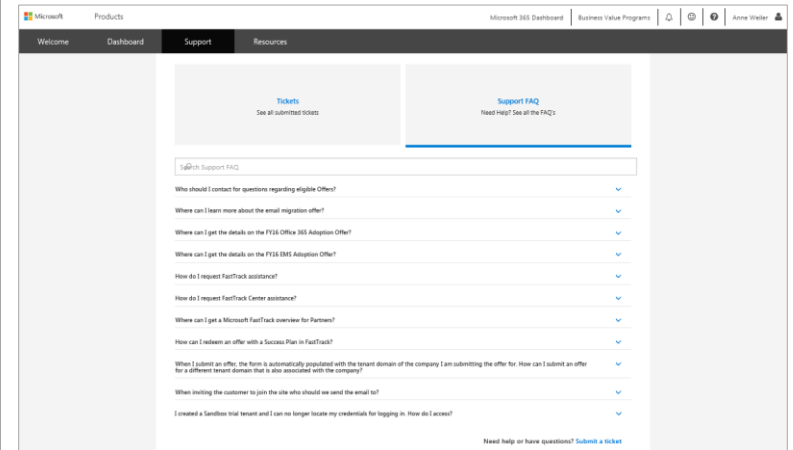
4. Fill out details about your issue, attach screenshots, and select **Submit Ticket**.



The screenshot shows a 'Create a New Ticket' modal window. It has a blue header with the title and a close button. The form contains several required fields: 'Create New Ticket *' with a text input, 'Customer Name or Tenant Name *' with a text input, 'Please describe what is happening *' with a large text area, and 'What do you need help with? *' with a dropdown menu. Below the form are links for 'Provide Screenshots' and 'Add Attachments'. At the bottom right are 'Cancel' and 'Submit Ticket' buttons.

5. Select **Support FAQ** to review common concerns and get access to any additional materials you might need.

For example, learn how to redeem an offer using your Success Plan or request specific assistance from a FastTrack Center representative. You can also **Submit a Ticket** here.



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FastTrack products

The FastTrack site supports the following products:

- Office 365
- Enterprise Mobility + Security
- Dynamics 365
- Microsoft Azure
- Microsoft 365 powered devices (Windows 10, Office 365 ProPlus, Systems Center Configuration Manager, and Intune/Azure AD)

Languages

The FastTrack site is available in the following languages:

- Chinese (Simplified)
- Chinese (Traditional)
- Czech
- Danish
- Dutch
- English
- Finnish
- French
- German
- Greek
- Hungarian
- Indonesian
- Italian
- Japanese
- Korean
- Malay
- Norwegian
- Polish
- Portuguese (Brazilian)
- Portuguese (European)
- Romanian
- Russian
- Spanish
- Swedish
- Thai
- Turkish
- Vietnamese

Note that some new FastTrack features may be introduced in English and then be localized in a following release.

Offer status

The following is a complete list of the offer statuses.

- Available
- Pending Verification by Eligibility Team
- Eligible
- Not Eligible
- Pending Funding Verification by Customer
- Funding Verified by Customer
- Funding Rejected by Customer

- Pending Offer Team Review
- On Hold Pending Requestor response
- Request Declined
- Preparing Statement of Work (SOW)
- Pending SOW Signature
- Additional Documentation Required
- Customer qualifies / PO in progress
- Funding /PO Approved - work may commence

- Success Plan Verified by Customer
- Success Plan Rejected by Customer
- Partner Invoice Approved
- Partner Invoice Not Approved






- Offer may be requested
- Eligibility team is reviewing customer and partner criteria
- Customer and partner are eligible for offer
- Neither the partner or customer or both are not eligible for offer
- Customer needs to validate partner funding request in FastTrack
- Customer has validated partner funding request in FastTrack
- Customer has not validated partner funding request in FastTrack and request is declined

- Offer team is reviewing all criteria based on date of customer validation
- Offer team is requesting information from partner
- Offer team has declined request
- Offer team is preparing SOW
- Partner needs to sign SOW
- Offer team is requesting additional partner information
- Offer team has confirmed eligibility and is working on PO for partner
- Offer team has sent approved PO to partner so they can begin driving active seat usage

- Customer has verified Success Plan
- Customer has rejected Success Plan
- Microsoft has approved partner invoice
- Microsoft has denied partner invoice as at least one POE element is not complete

L1/L2 status definitions

The following are the available status values for a customer. L2 status is only available for select L1 status levels. Additionally, there is an L1 status called "Not Assigned" which means the intent of entitlements is unknown.

L1 Status	 Unknown	 No Intent	 Blocked	 In Progress	 Active
Definition	Unknown status for customer.	Customer has no intent to deploy some number of entitlements for the near future.	Customer has intent but implementation or usage is blocked.	Customer has intent and deployment or usage of entitlements is proceeding smoothly.	Entitlements are in active use per sub scorecard definitions.
L2 Status	N/A	<ol style="list-style-type: none"> 1. Total Cost of Ownership 2. Executive Sponsorship 3. Billing, Licensing, & Subscription 4. Cloud Trust (Security/ Compliance) 	<ol style="list-style-type: none"> 1. Product Feature/ Capability 2. Service Reliability 3. App Compatibility 4. Customer IT Infrastructure & Remediation 5. IT Change Management 6. Partner Engagement 7. Organizational Change Management 	N/A	N/A

L2 status definitions are on the following page:

Status	Definition	Recommended Owner
Total Cost of Ownership	Business case around ongoing cloud costs and subsequent ROI is not compelling to the customer. Selling of business value and ROI workshops is needed.	Opportunity Owner (SSP)
Executive Sponsorship	Lack of awareness, conviction, or sponsorship at the decision-making levels in the company to move to the cloud, or to prioritize implementation and usage. Selling of business value is needed.	SSP has to reengage
Billing, Licensing, & Subscription	Implementation is blocked until subscription issues are resolved, (e.g., application of licenses, transfer of licenses, incorrect SKU, or subtraction of seats). Requires Seller, LSS, and/or LSA to engage.	Opportunity Owner (SSP)
Cloud Trust (Security / Compliance)	Lack of trust in storing data in the cloud; specifically, a lack of conviction on the security/privacy or legal compliance capabilities of the cloud.	Opportunity Owner (SSP)
Product Feature/Capability	Core Product/Service features and functionality (including security/privacy settings, features, and certifications) are missing or contain bugs. Resolved primarily through GetHelp or OneList.	TAM
Service Reliability	Diminished customer confidence due to service performance including latency and/or unplanned service incidents (outages).	TAM
App Compatibility	Customer Line of Business Applications are not compatible or certified compatible with Cloud Services and holding up deployment or usage.	TAM
Customer IT Infrastructure and Remediation	Dependencies with surrounding IT infrastructure components in a customer's environment (e.g., VPN devices not compatible, AD complexities, Hybrid Scenarios, Client, and Browser) block adoption.	TAM
IT Change Management	Service maintenance or updates causing existing Customer IT processes (e.g., IT process, monitoring, incident handling, issue discovery, etc.) to break, blocking adoption. Requires process redesign to manage the change.	TAM
Partner Engagement	Incorrect mapping of partner capability to the technical deployment or adoption needs of the Customer leading to implementation or usage blocks.	ATS
Organizational Change Management	Lack of organizational/business process change management or end-user readiness are blocking adoption of the cloud service.	ATS