TRANSPARITY SELF-SERVE LICENSING PORTAL USER GUIDE

transparity

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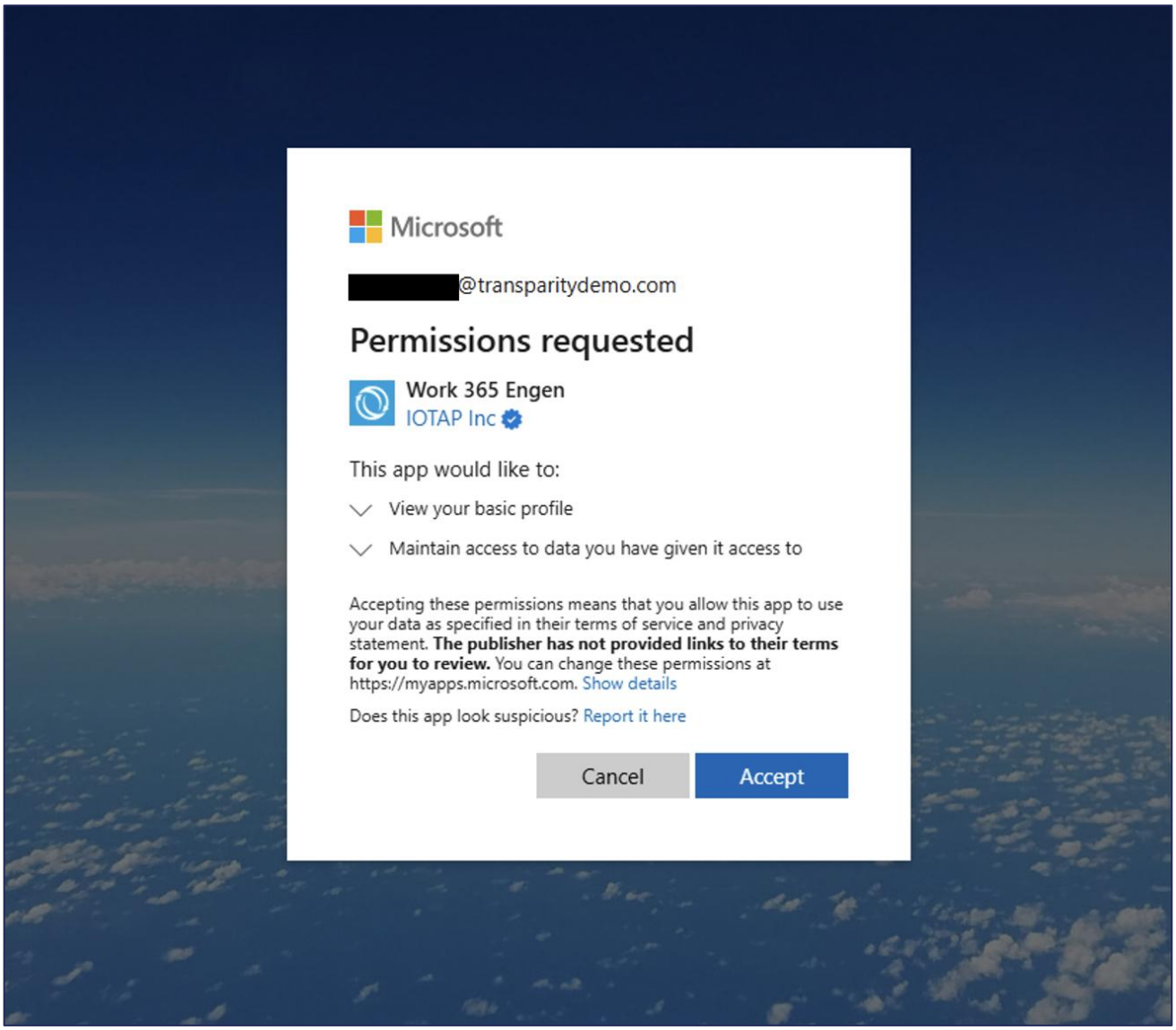
Getting Started

Once Transparity confirm your account has been setup, you can access the licensing portal by navigating to **https://licensing.transparity.com** in your browser.

If other users in your organisation require access to the portal, please contact the support team to get their accounts setup.

You will be asked to sign in with your Microsoft 365 credentials and complete multi-factor authentication (MFA).

On first sign in, you will be asked to allow the portal to read basic information from your Microsoft 365 account, including your name and email address, as shown below.



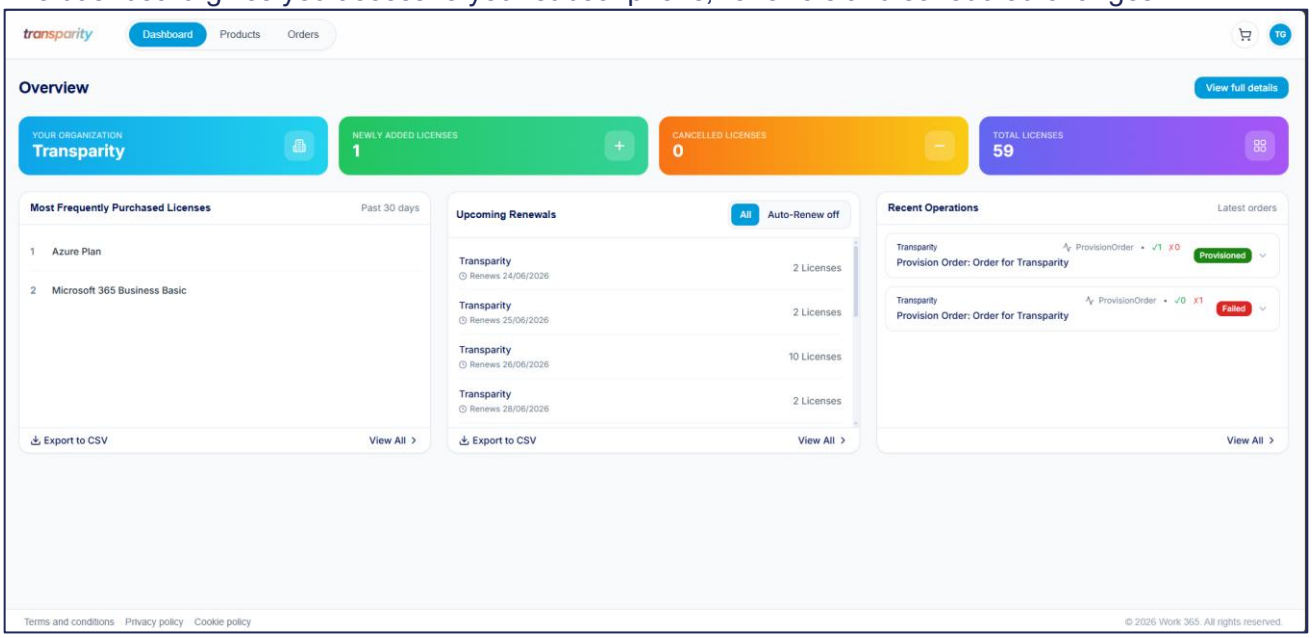
Select "Accept", then follow the administrator consent guidance below if applicable.

Administrator consent:

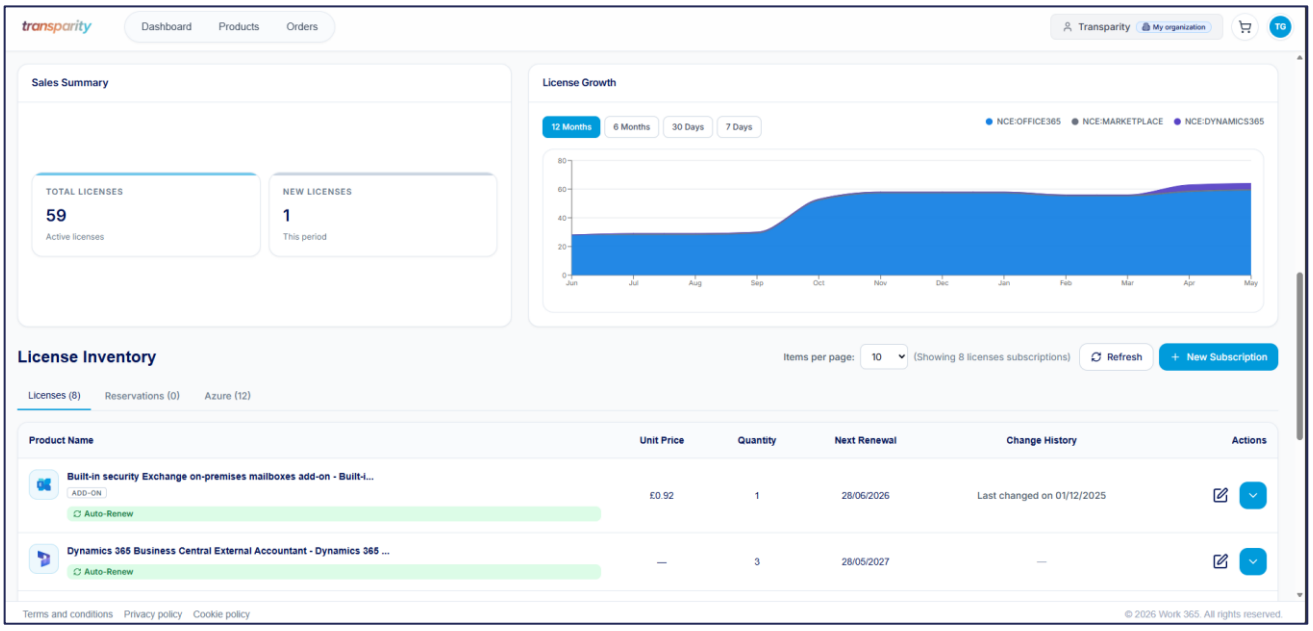
- If the "Consent on behalf of your organisation" option is available and you have the required permissions, select it to approve the application for all other users in your tenant.

Portal Navigation

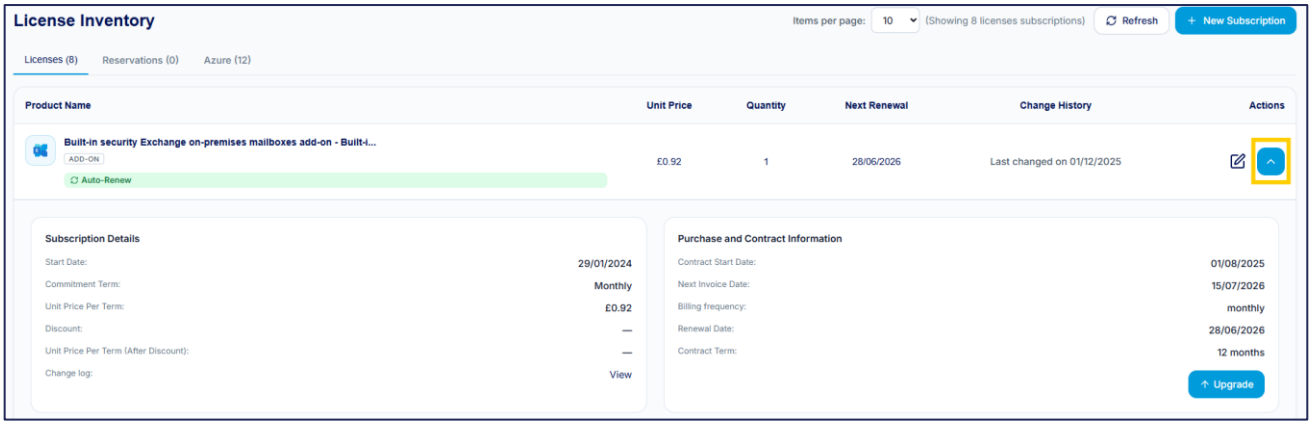
The dashboard gives you access to your subscriptions, renewals and scheduled changes.



Select “View Full Details” in the top left of the page to view your current licences and organisation details.



To view a license's summary, select the corresponding drop-down arrow on the right-hand side.



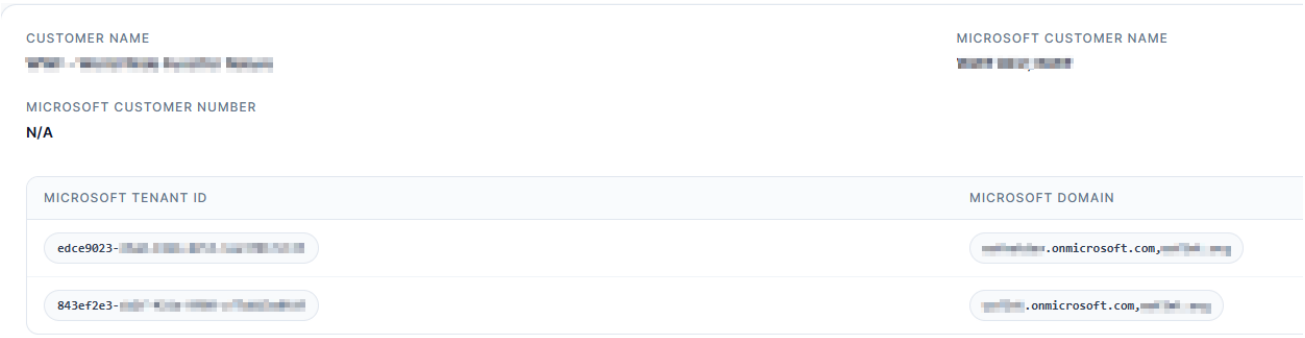
Customers with Multiple Tenants

If your organisation has more than one Microsoft 365 tenant with licenses and/or Azure, purchased through Transparity, the portal will display all your licenses across all tenants in a single view. Please familiarise yourself with the steps below to ensure that when you are making license changes or placing an order you are doing so against the desired tenant.

How to Identify if you Have Multiple Tenants in the Portal

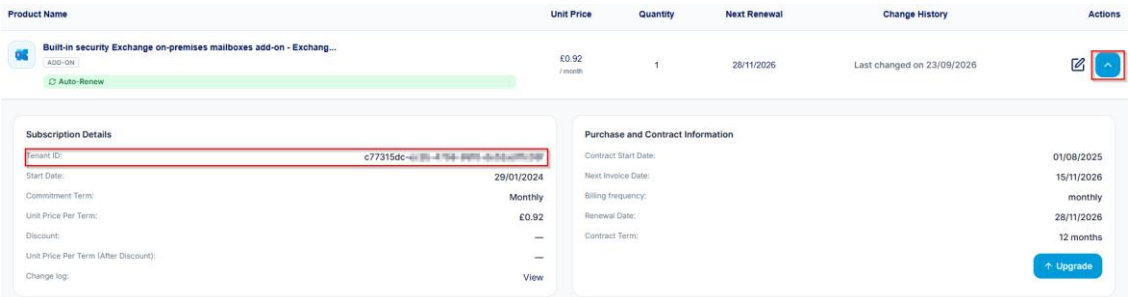
To check if you have access to multiple tenants in the portal, login to the portal as a full user. From the home dashboard select "View Full Details" in the top left of the page and on the overview page look for the table near the top of the page. If there are more than one entry in the table under Microsoft Tenant ID, then you have access to multiple tenants.

An example of a customer with multiple tenants can be found below:

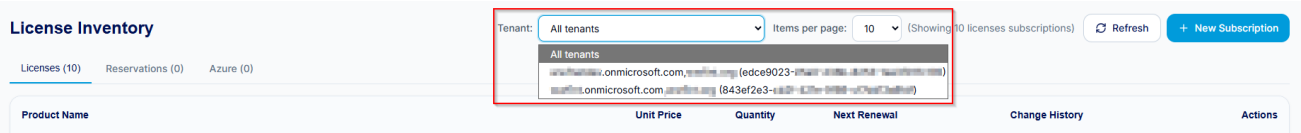


How to tell which Tenant an Existing License Belongs to

When looking at an existing license you can expand the license information by clicking the blue arrow to the right of the license name. The tenant ID the license belongs to is then displayed.



You can also filter your view of existing licenses by tenant from the drop down menu at the top of the section.

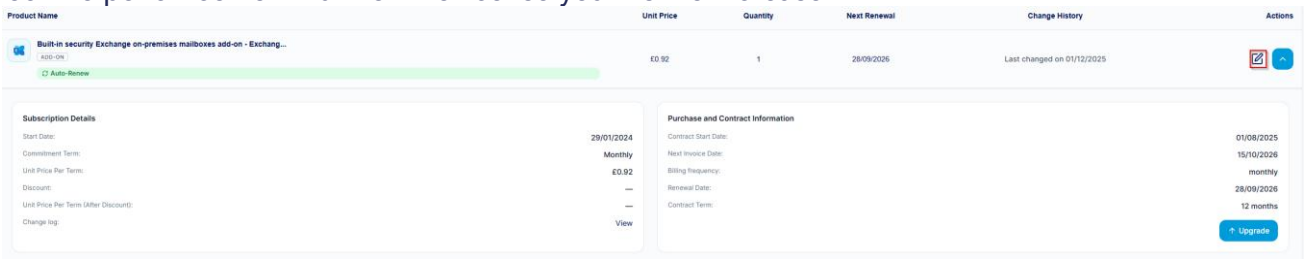


How to Specify Which Tenant a New Licese is Ordered for

Increase an Existing License Count

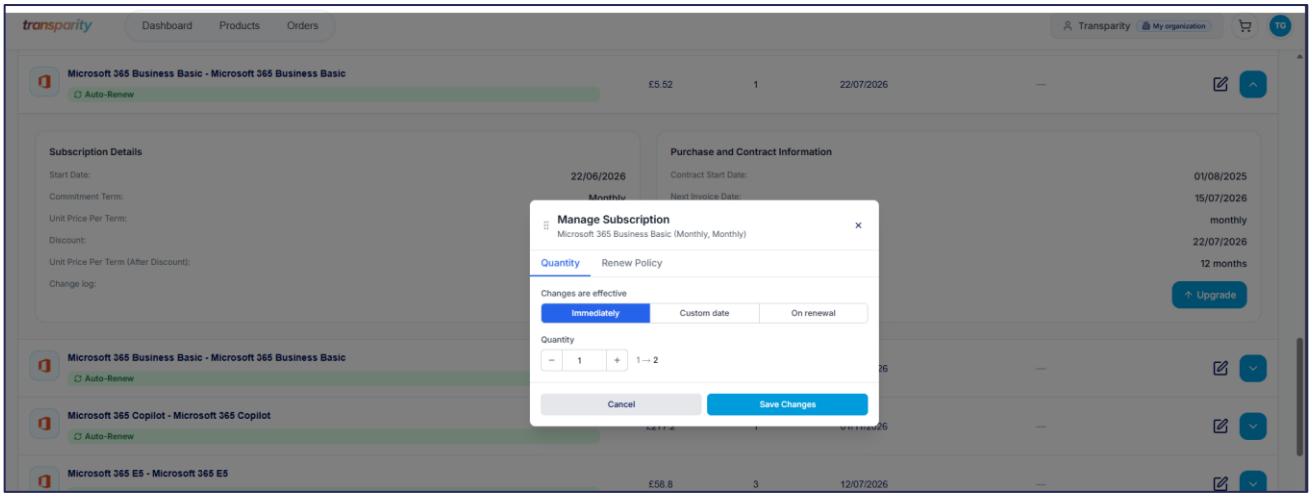
To increase the licence quantity:

Select the pencil icon or “Edit” on the license you wish to increase.



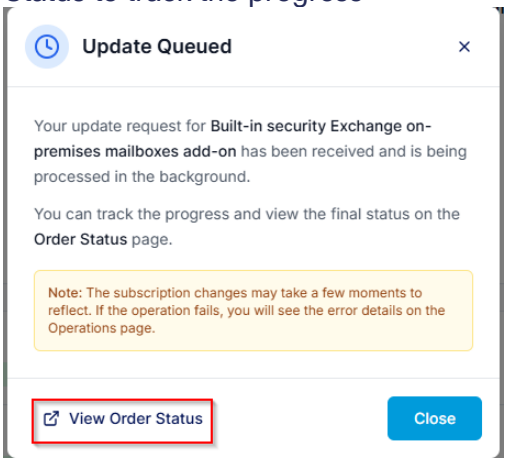
Enter the number of licences to add in the “Quantity” field. Please note that the quantity entered in this box should be the amount you wish to increase the license count by, not the total license count.

Choose when the adjustment should take effect (immediately, on a custom date or on the license’s renewal date).

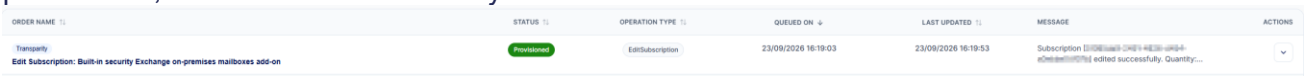


Click Save Changes

A pop up will then confirm that your license increase has been queued, you can click View Order Status to track the progress

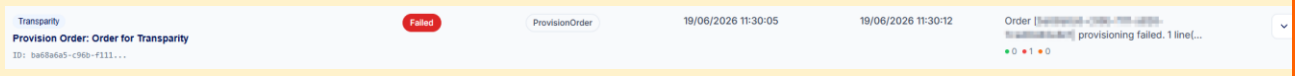


If the license increase was set to be immediate, after a few minutes the order status will change to provisioned, for scheduled orders they will show a status of Scheduled until the defined order date.



If an order fails:

- It will show a red “Failed” status
- Review the error message.
- Confirm that you selected the correct product and term.
- Record the order number and error message and provide this information to the support team.

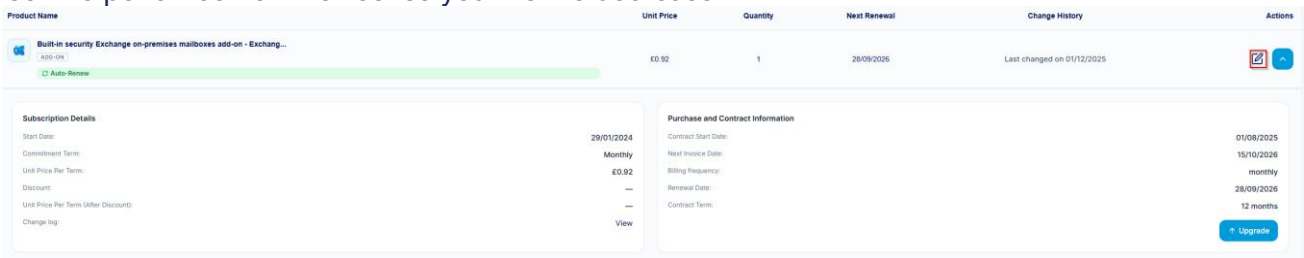


Reduce an Existing License Count Within Renewal Window

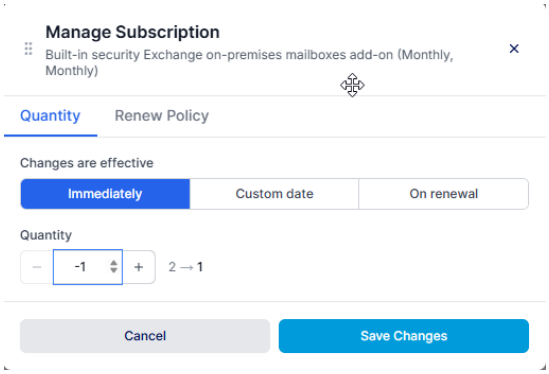
Please note: Licence reductions can only be completed during the seven-day grace period that begins on the subscription renewal date. Outside this window, the reduction cannot be processed and must be scheduled for the next renewal date.

To reduce the licence quantity:

Select the pencil icon on the license you wish to decrease.

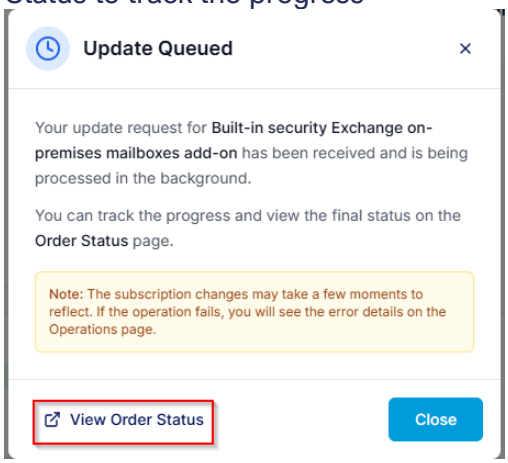


Enter the number of licences to reduce by (including the minus symbol – at the beginning) in the “Quantity” field. Please note that the quantity entered in this box should be the amount you wish to decrease the license count by, not the total license count.

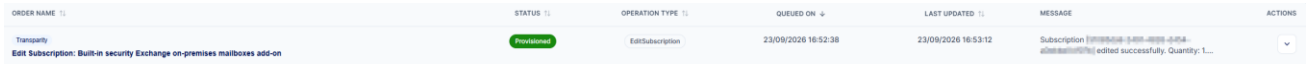


Click Save Changes

A pop up will then confirm that your license decrease has been queued, you can click View Order Status to track the progress



After a few minutes the order status will change to provisioned



If an order fails:

- It will show a red “Failed” status
- Review the error message.
- Confirm that you selected the correct product and term.
- Record the order number and error message and provide this information to the support team.

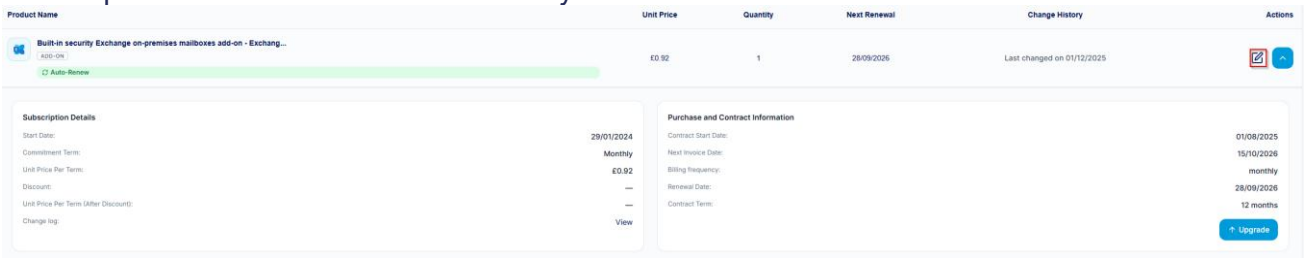


Reduce an Existing License Count Outside Renewal Window

Please note: Licence reductions can only be completed during the seven-day grace period that begins on the subscription purchase or renewal date. Outside this window, the reduction cannot be processed and must be scheduled for the next renewal date.

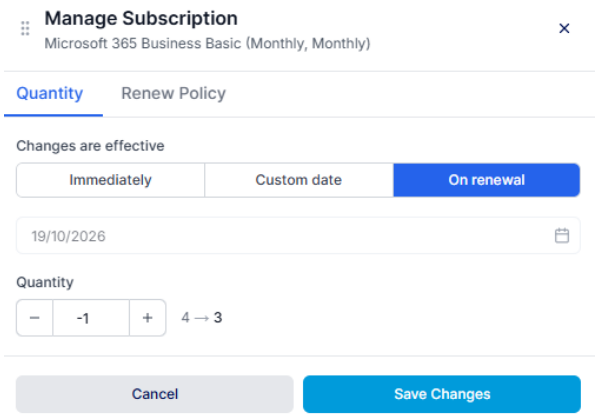
To reduce the licence quantity:

Select the pencil icon or “Edit” on the license you wish to decrease.



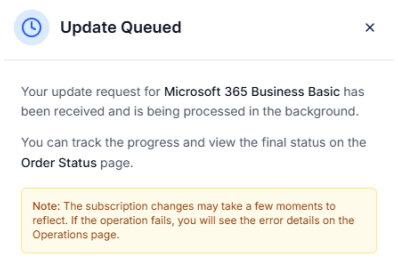
Change the “Changes are effective” selection from “Immediately” to “On Renewal”

Enter the number of licences to reduce by (including the minus symbol – at the beginning) in the “Quantity” field. Please note that the quantity entered in this box should be the amount you wish to increase the license count by, not the total license count.



Click Save Changes

A pop up will then confirm that your license decrease has been queued, you can click View Order Status to track the progress



After a few minutes the license with a scheduled reduction will show in the license list with the below symbol to indicate that it has scheduled changes pending

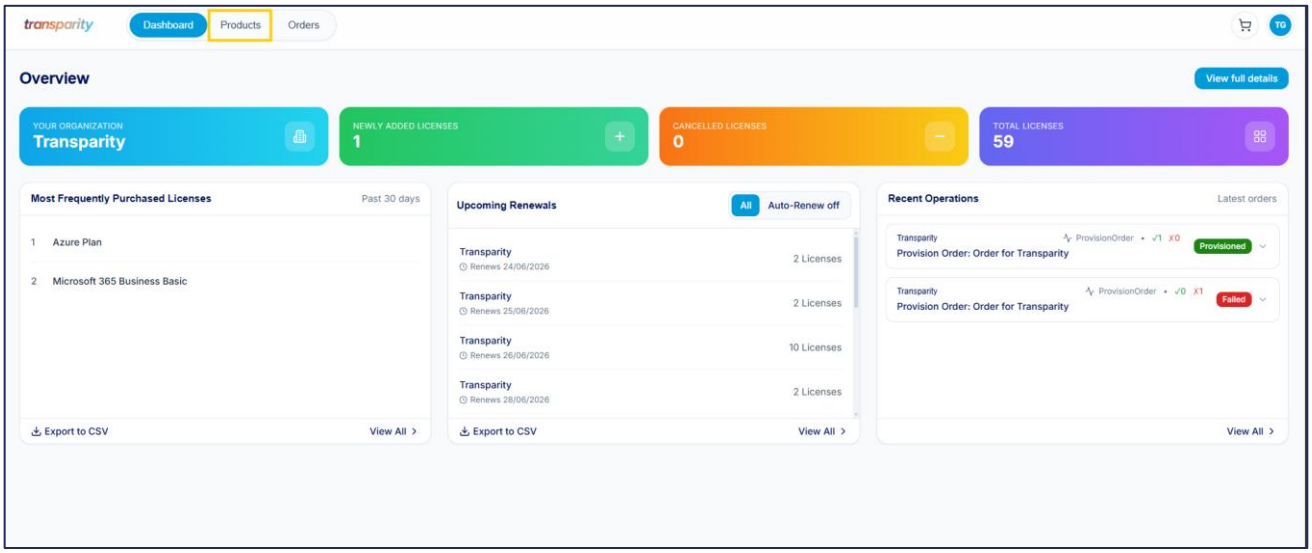


Cancel an Existing License

Subscriptions cannot be cancelled or reduced to 0, through the self-service portal. To request a cancellation, contact the support team.

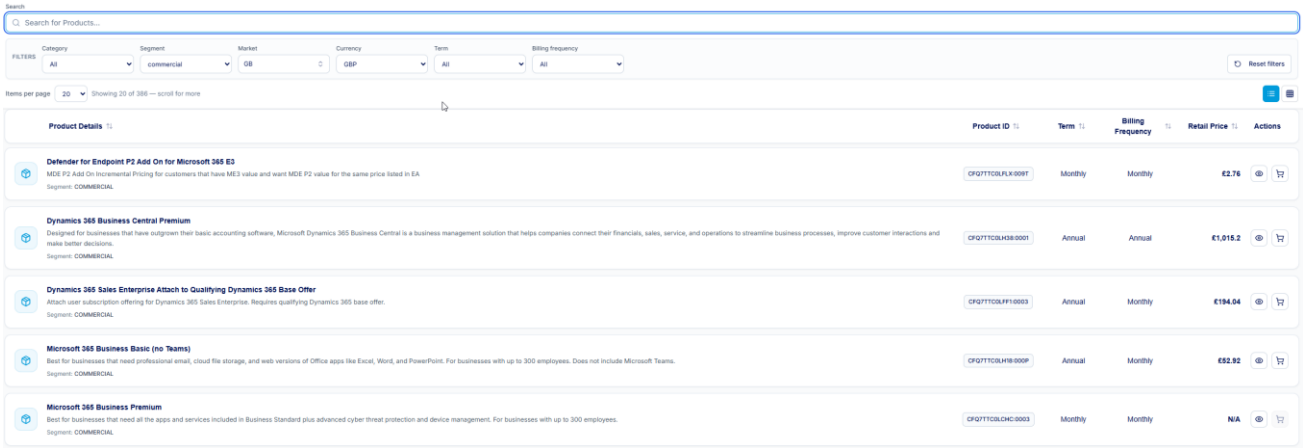
Purchase New Licences

To purchase new licences, select “Products” from the dashboard.



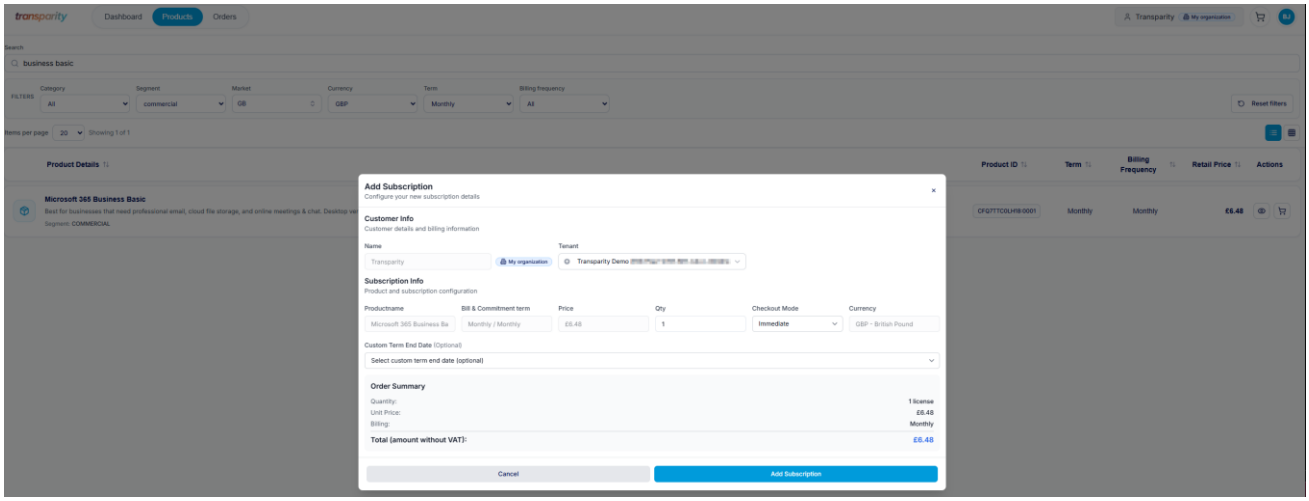
Check before ordering:

- Search by product name and filter by term and billing frequency.
- Ensure the Segment, Market, and Currency filters are set correctly for your business. Incorrect filter selections may prevent the required products or pricing from being displayed and could cause the order submission to fail.
- For UK tenants, select GB in the Market field.
- If you are unsure of your segment or market, contact the support team.

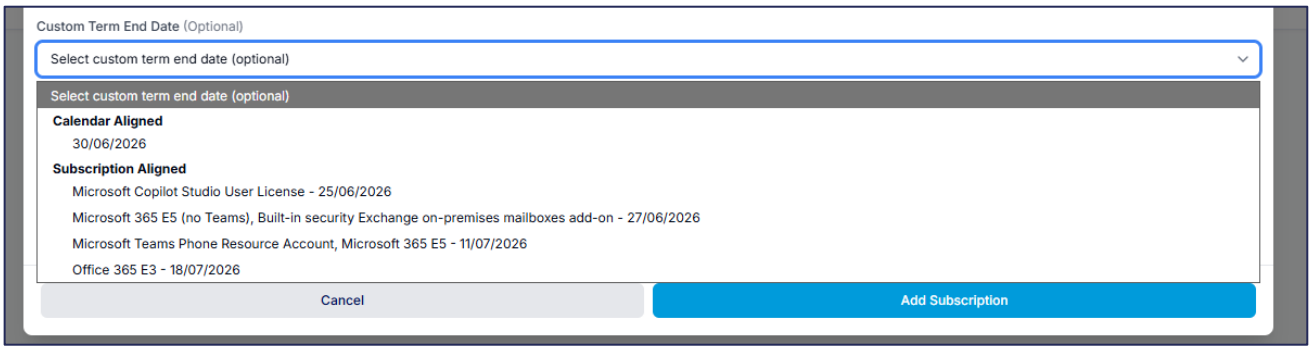


To purchase the product:

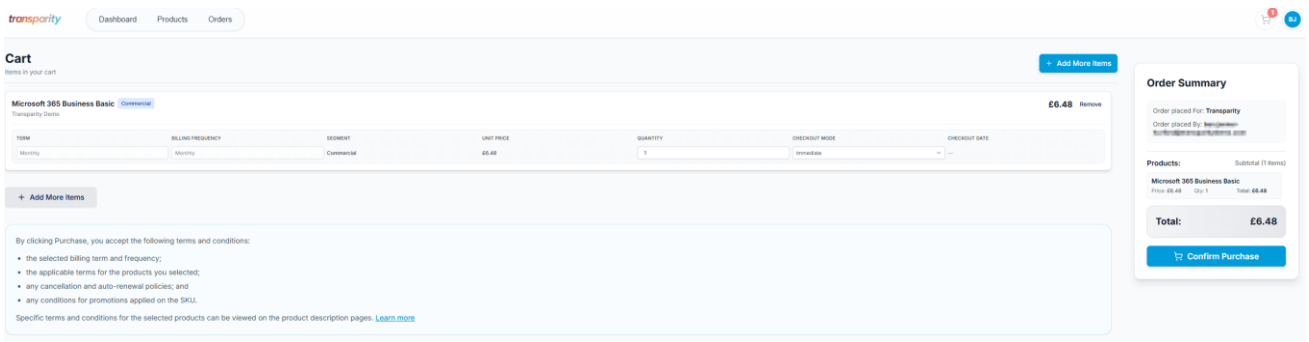
- Select the shopping cart icon for the required product.
- Enter the licence quantity.
- Choose a custom term end date, if required.



When creating or updating a subscription, you can choose a custom term end date instead of the default billing cycle. Set the date to the last day of a calendar month or align it with an existing subscription's renewal date to simplify future renewals and billing.



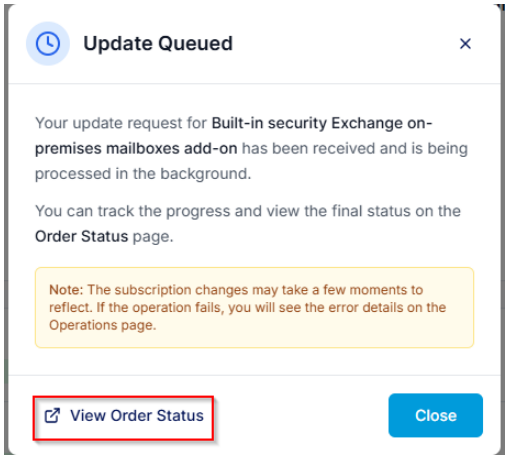
After selecting the licence quantity, select "Add Subscription" to add the product to your cart.



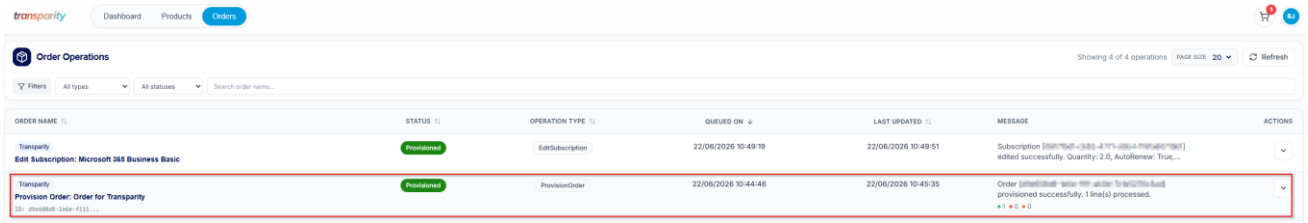
Click "Confirm Purchase"

The order will be queued.

Select "View Order Status" to monitor progress.



When provisioning is complete, the status will turn green and the licence will be available on your tenant.



If an order fails:

- Review the error message.
- Confirm that you selected the correct tenant, product and term.
- Record the order number and error message before contacting support.

A successful adjustment appears under the “Orders” tab. A failed order shows a red “Failed” status.

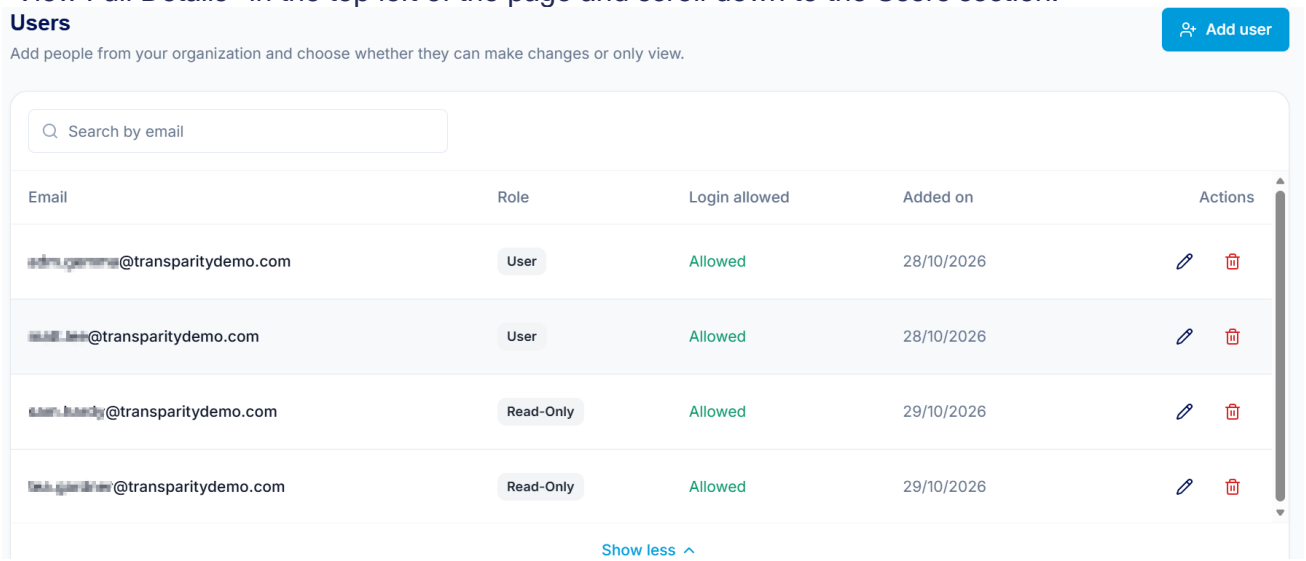


If the order still fails after these checks, contact the support team and include the order number and error message.

Managing Portal Users

The portal allows you to add and remove colleagues access; access can be provided to users in your M365 tenant and sign in is via Microsoft 365 SSO.

To access user management, login to the portal as a full user. From the home dashboard select “View Full Details” in the top left of the page and scroll down to the Users section.



User Roles

The portal has two user roles, they are detailed below:

User

Users assigned the “User” role have full access to the portal and can amend existing licenses, pace orders for new licenses and add, modify and delete users.

Read-Only

Users assigned the “Read-Only” role have access to view all aspects of the portal but cannot make any changes, place orders or amend/add/delete users.

Adding a New Portal User

Navigate to the Users section of the portal (detailed above)

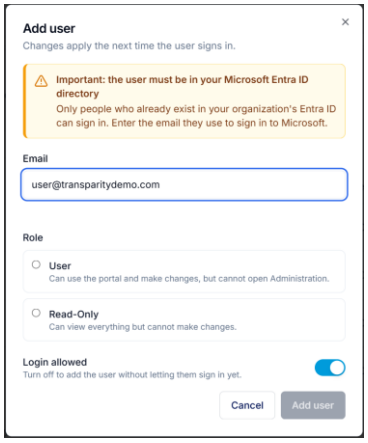
Click the Add user button in the top right

Enter the user’s email address (note this must be their primary email address in your tenant)

Chose their Role (User or Read Only)

By default Login allowed is toggled on, you can chose to toggle this off, if you wish to create the user but not allow them to login

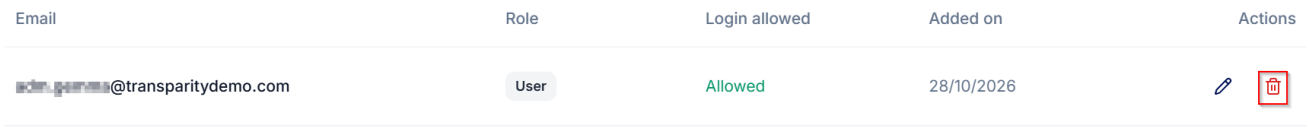
Click Add user



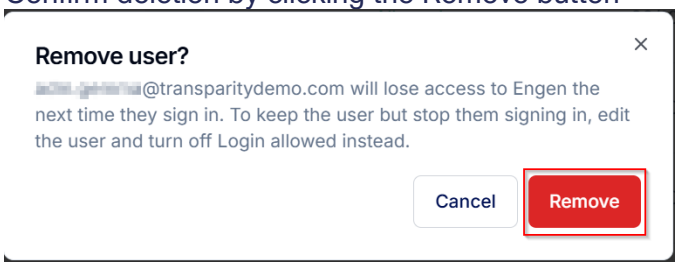
Deleting a Portal User

Navigate to the Users section of the portal (detailed above)

Click the red trash can icon to the right of the user you wish to delete



Confirm deletion by clicking the Remove button



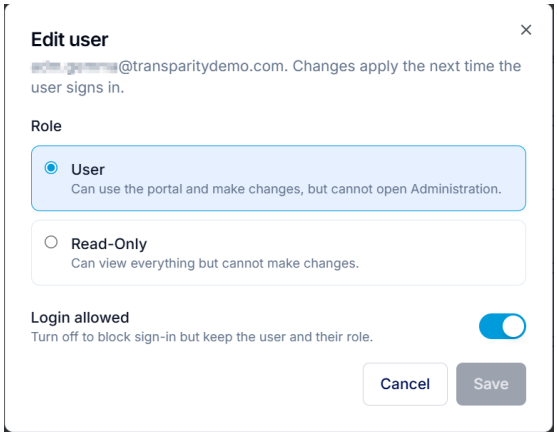
Modifying a User

Navigate to the Users section of the portal (detailed above)

Click the pencil icon to the right of the user you wish to modify



Within the window that pops up you can adjust the user's Role and disable/enable login



Once you have made the required changes click Save

FAQs

Do the prices shown in the portal include VAT?

All prices shown in the portal exclude VAT, this is added at invoicing, where applicable.

When will I be billed?

Invoices are raised on the 15th of each month and will be sent out to your provided billing contacts on the same day, unless the 15th falls on a weekend or bank holiday, then they will be sent on the next working day.

Can orders be reversed?

Microsoft NCE licensing terms dictate that orders can be reversed in the 7 days from placing the order (inclusive of the day of the order), this is applicable to license increases and new purchases. To request the reversal of an order please contact support.

Please note that Microsoft start charging for a license 24 hours after it is ordered so if an order is reversed after this time, then a prorated charge will still apply.

My license is eligible for a Microsoft promotion; will this be shown in the portal?

Microsoft promotions are not shown in the portal. If your license is eligible for a promotion, it will be applied at time of invoicing and updated price will be reflected on the invoice.

How can I get support?

If you require any support with using the portal or have any questions, please contact the support team at support@transparity.com or call +44 1202 800001, available during UK business hours.