Nonprofit in CSP

Partner and customer experience walk through

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About this deck

This deck provides an overview and experience walk through for:

1. Nonprofit registration for customers; two scenarios:
   - Nonprofit customer without an existing Office 365 tenant (Go to slide **5**)
   - Nonprofit customer with an existing Office 365 tenant that is not enabled for Nonprofit (Go to slide **19**)
2. Establishing a relationship with a customer in Partner Center (Go to slide **27**)
3. Purchasing Nonprofit offers in Partner Center, including:
   - How to get the Nonprofit trial subscription (Go to slide **40**)
   - How to convert the Nonprofit trial to paid subscription (Go to slide **46**)
   - How to purchase Nonprofit subscriptions (Go to slide **50**)

Determining eligibility

IMPORTANT NOTE: Nonprofit pricing is only available to customers registered with Microsoft as an approved eligible nonprofit. Eligible customers will have an existing Office 365 tenant enabled for Nonprofit.

Here are ways you can determine if the customer is registered with Microsoft as an approved eligible nonprofit:

- Does the customer have an Office 365 tenant?
  - If no, the customer is not an approved eligible nonprofit and needs to register following the "customer without an existing Office 365 tenant" scenario in this deck (Go to slide **5**).
  - If yes, do you see the nonprofit catalog or special qualification of nonprofit approved on account page in Partner Center for this customer?
    - If yes, the customer is an approved eligible nonprofit and does not need to register.
    - If no, the customer is not an approved eligible nonprofit and needs to register following the "customer with an existing Office 365 tenant that is not enabled for Nonprofit" scenario in this deck (Go to slide **19**).

Nonprofit registration

This section provides a process overview and customer experience walk through for nonprofit sign up based on two scenarios:

1. Nonprofit customer **without** an existing Office 365 tenant
2. Nonprofit customer **with** an existing Office 365 tenant that is **not enabled** for Nonprofit

Nonprofit registration – scenario 1

Nonprofit customer without an existing Office 365 tenant

Process for customer without an O365 tenant

Process overview

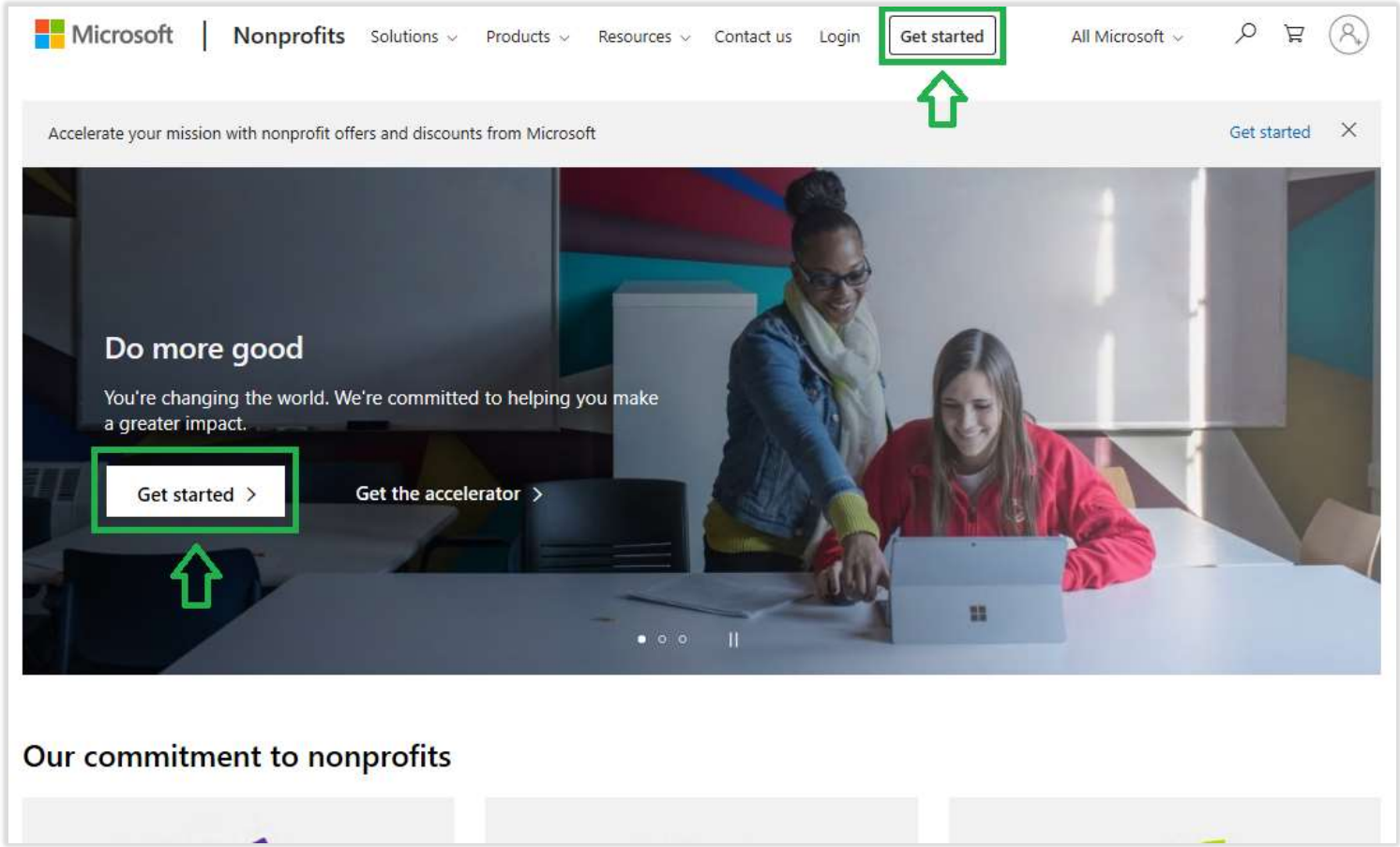
1. Customer goes to www.microsoft.com/nonprofits and clicks Get Started
2. Customer completes Sign Up (aka nonprofit registration) which includes creation of an Office 365 tenant
3. Customer's nonprofit eligibility is validated by Microsoft's eligibility vetting supplier
   Process may take *up to* 20 business days; typical turnaround 2-5 business days
4. Customer receives confirmation of eligibility for Microsoft's nonprofit offers via email and notifies partner that registration is complete
5. Partner sends relationship request to new nonprofit customer
6. Customer receives relationship request, logs in, and accepts relationship request
7. Partner can view and purchase nonprofit offers for the qualified nonprofit customer

Process for customer without an O365 tenant

Nonprofit registration: customer experience

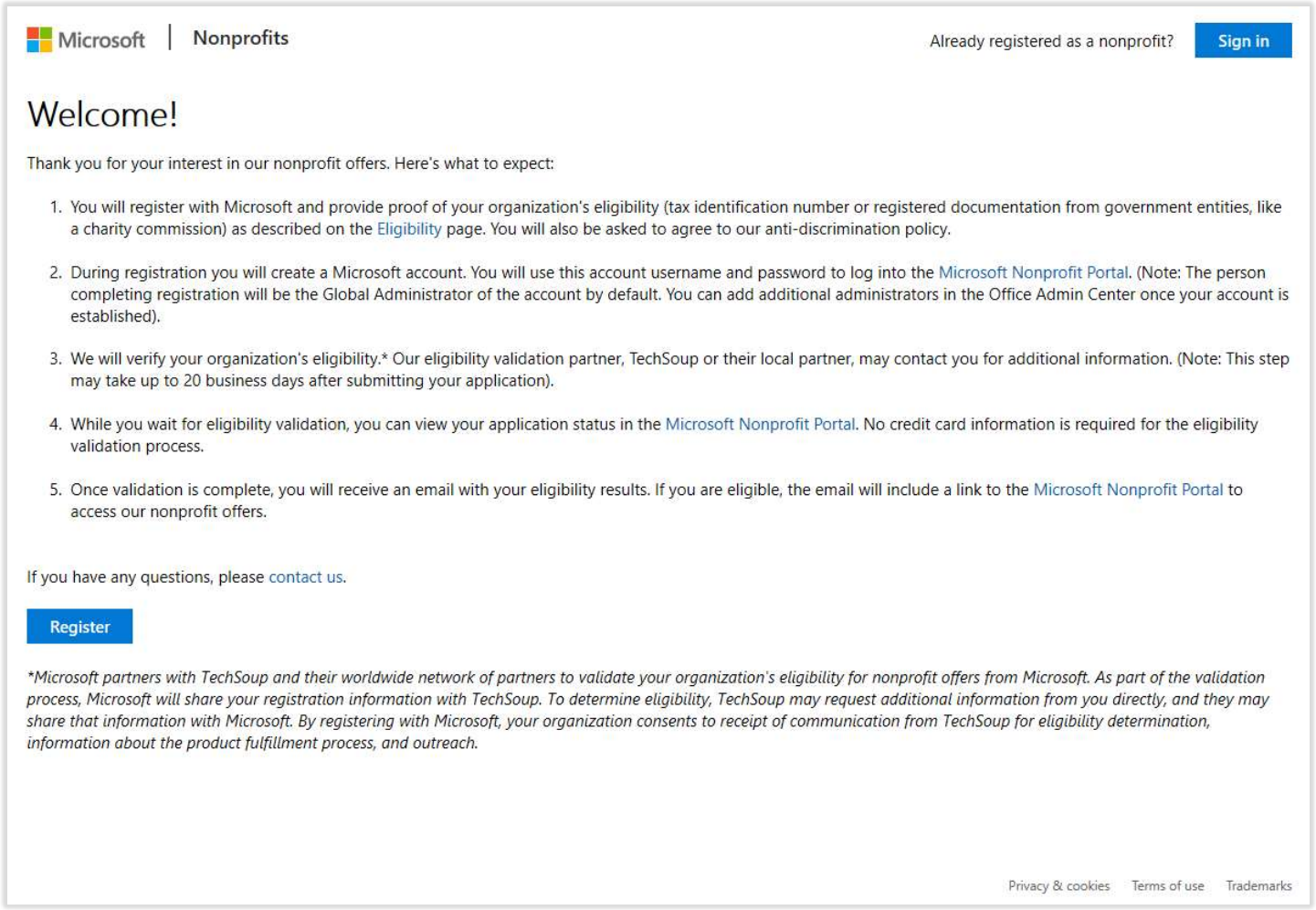
Process for customer without an O365 tenant

Customer goes to www.microsoft.com/nonprofits and clicks **Get Started**



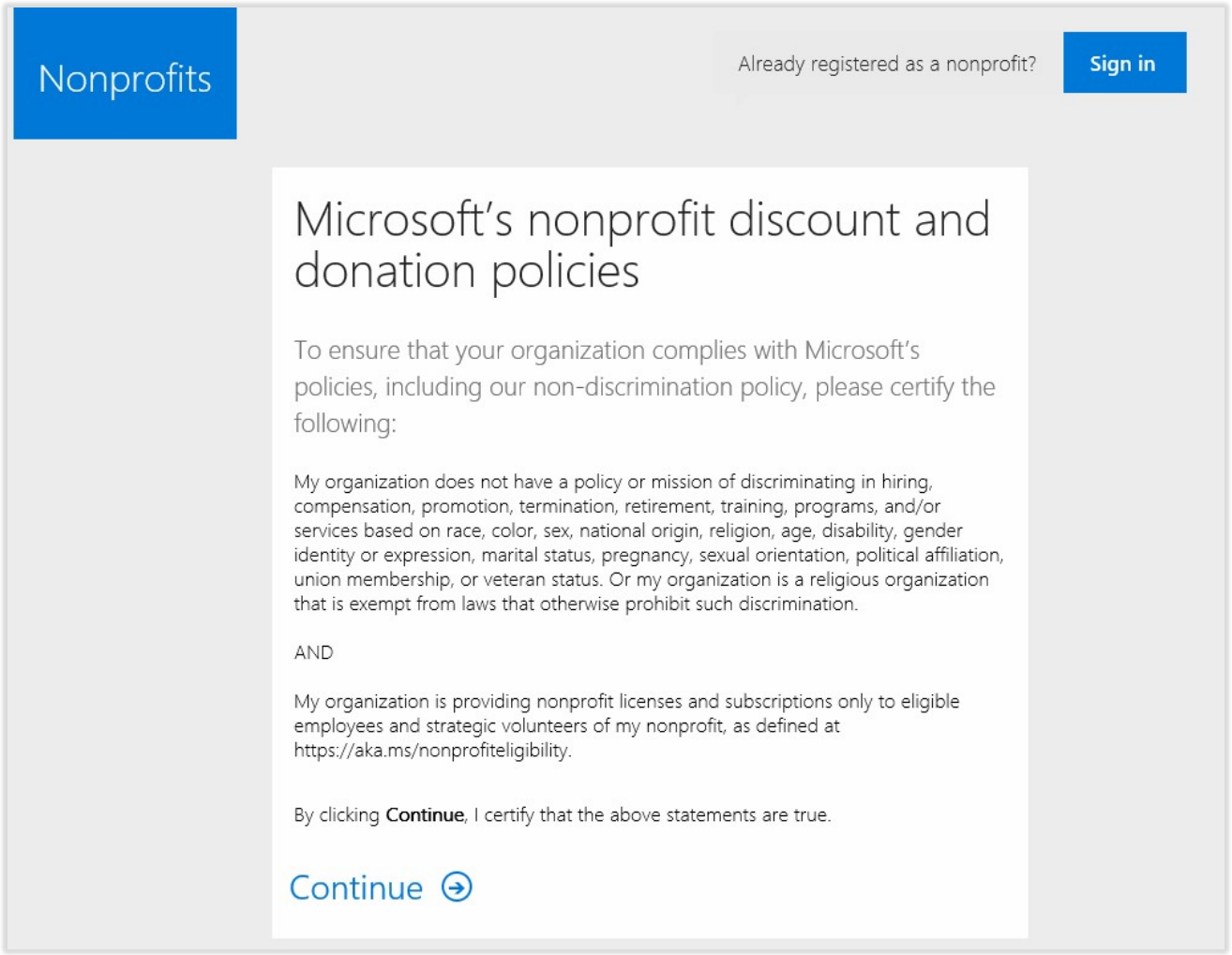
Process for customer without an O365 tenant

Customer views Get Started page and clicks **Register**



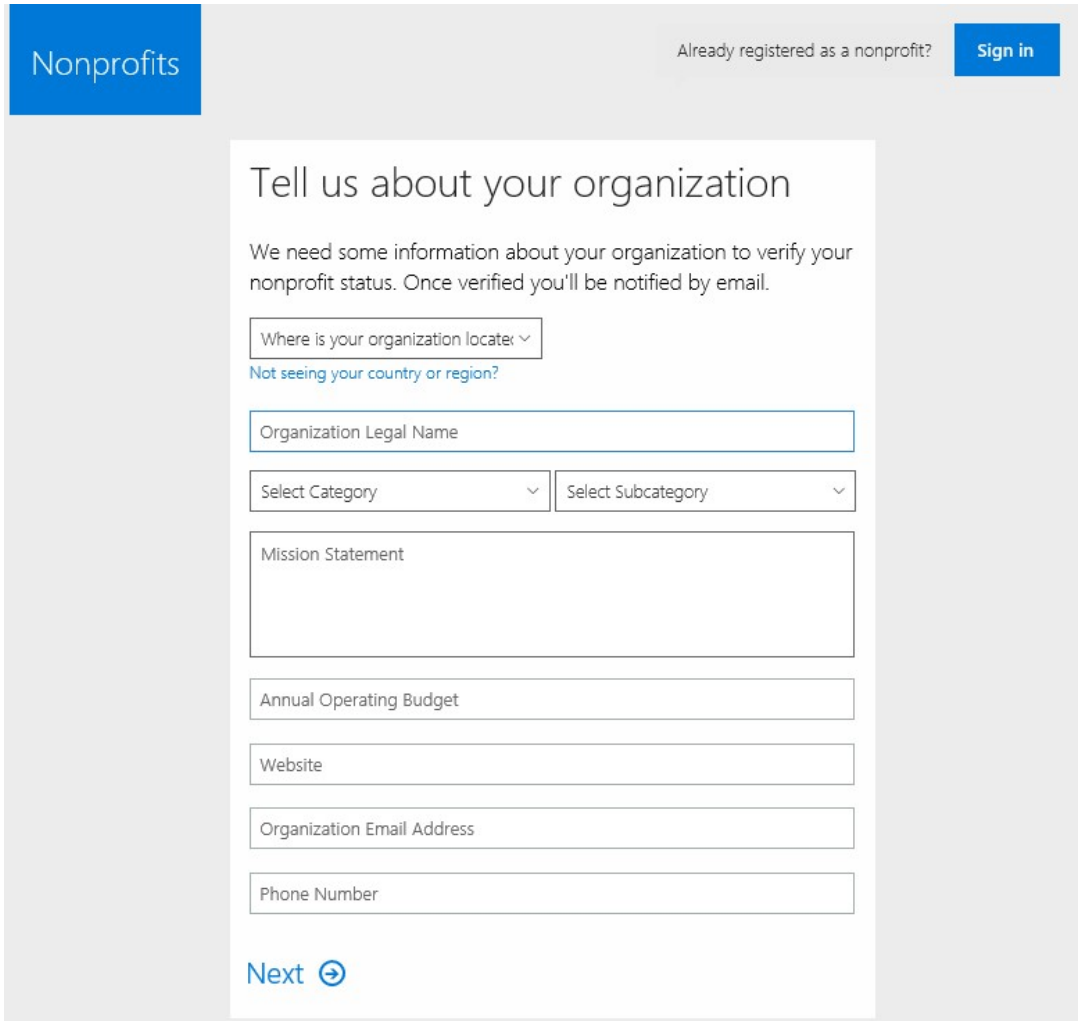
Process for customer without an O365 tenant

Customer completes Sign Up



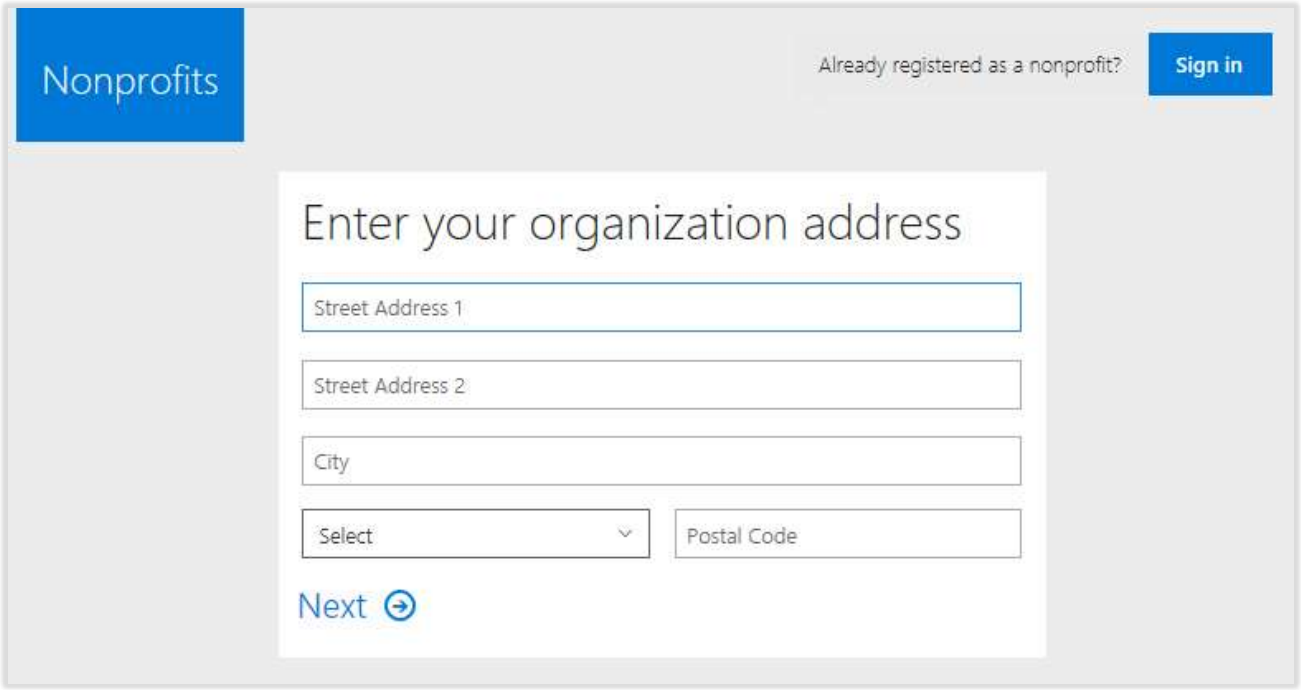
Process for customer without an O365 tenant

Customer completes Sign Up (continued)



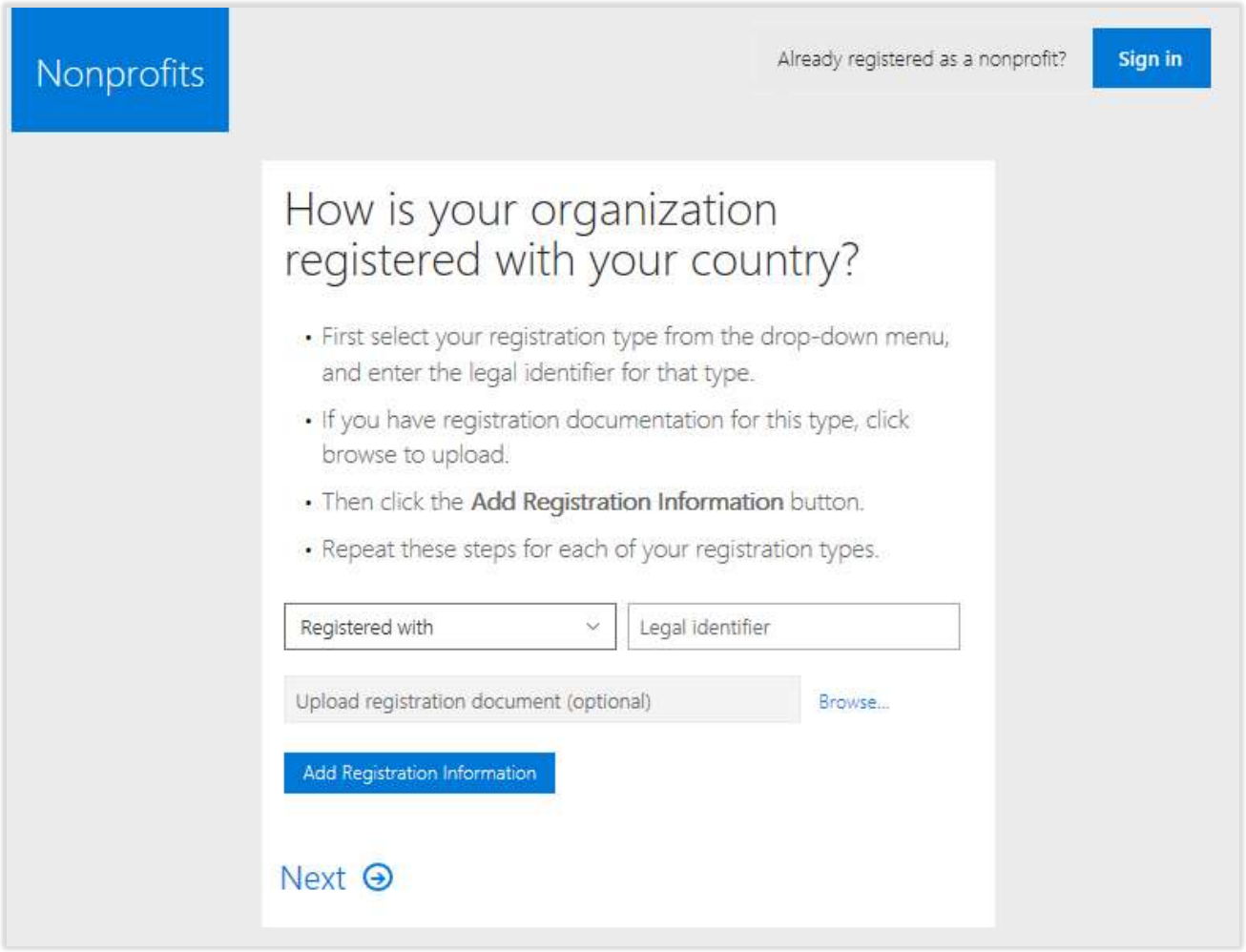
Process for customer without an O365 tenant

Customer completes Sign Up (continued)



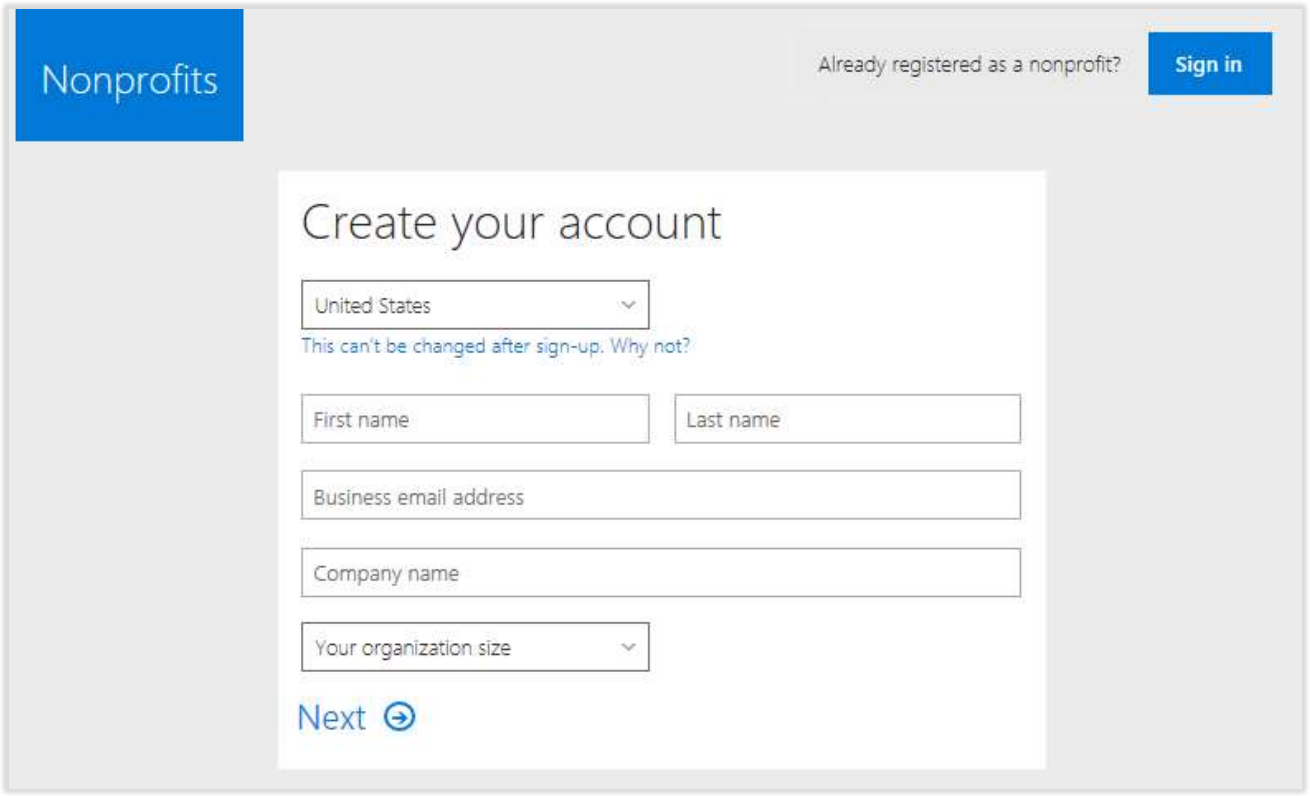
Process for customer without an O365 tenant

Customer completes Sign Up (continued)



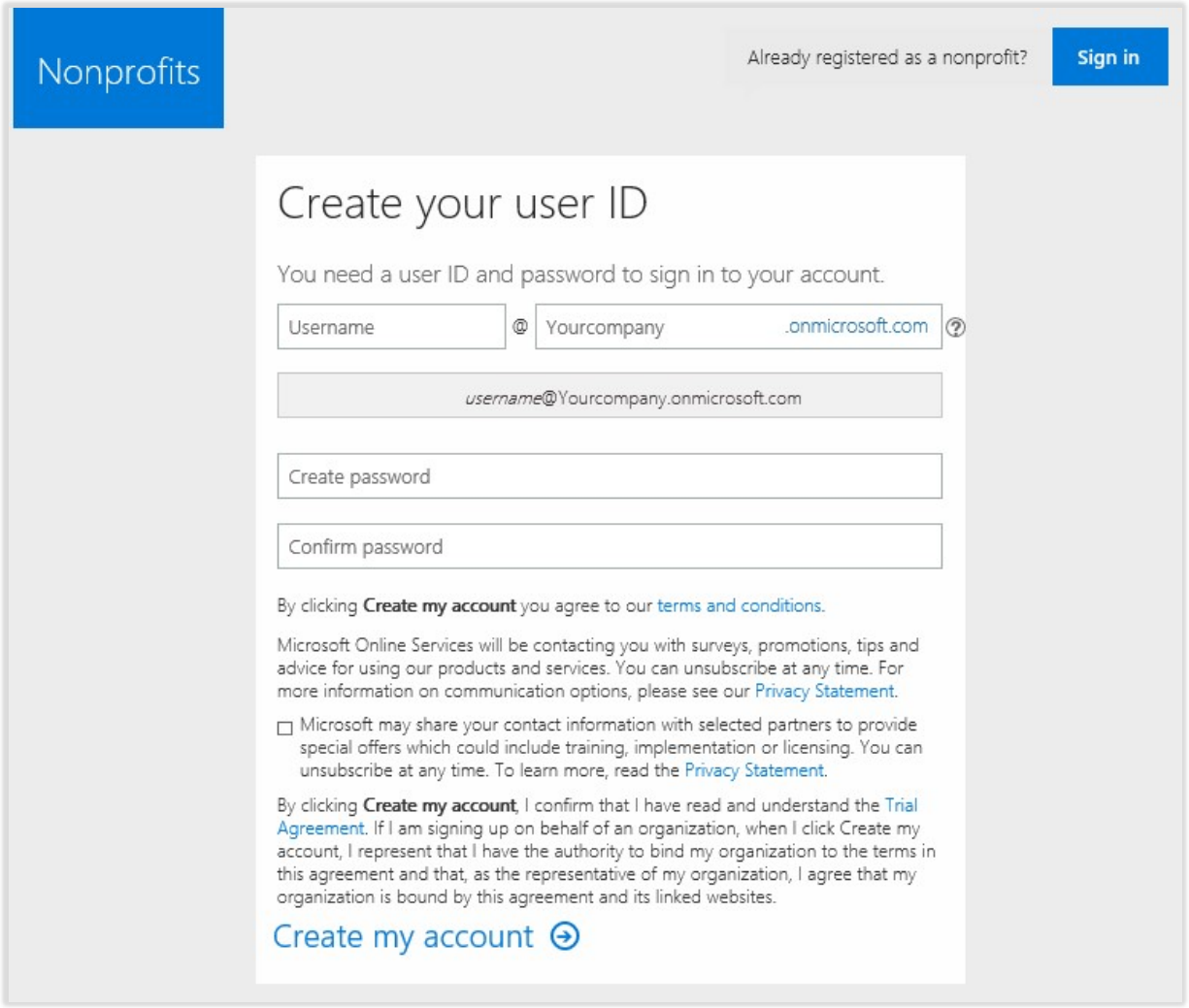
Process for customer without an O365 tenant

Customer completes Sign Up (continued)



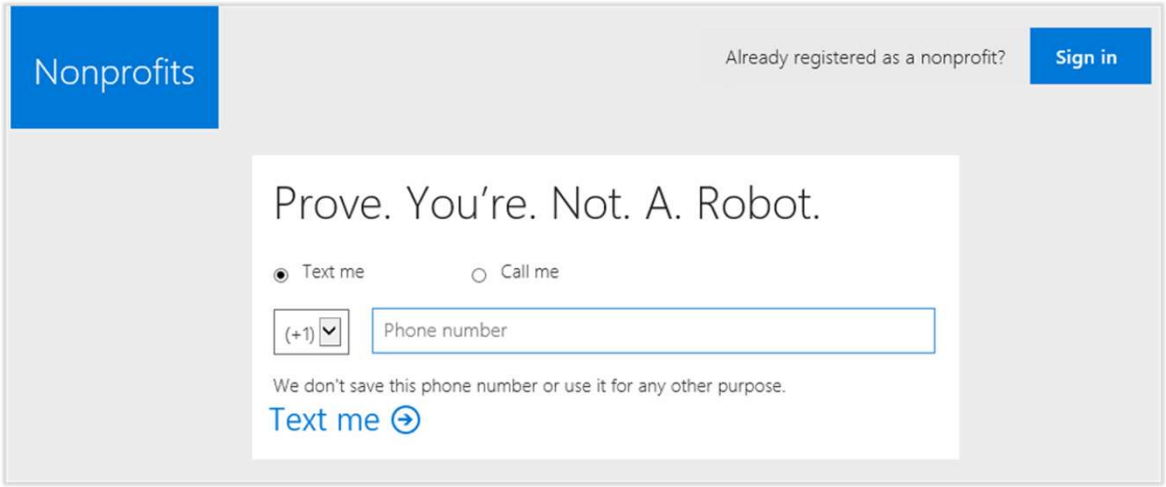
Process for customer without an O365 tenant

Customer completes Sign Up (continued)



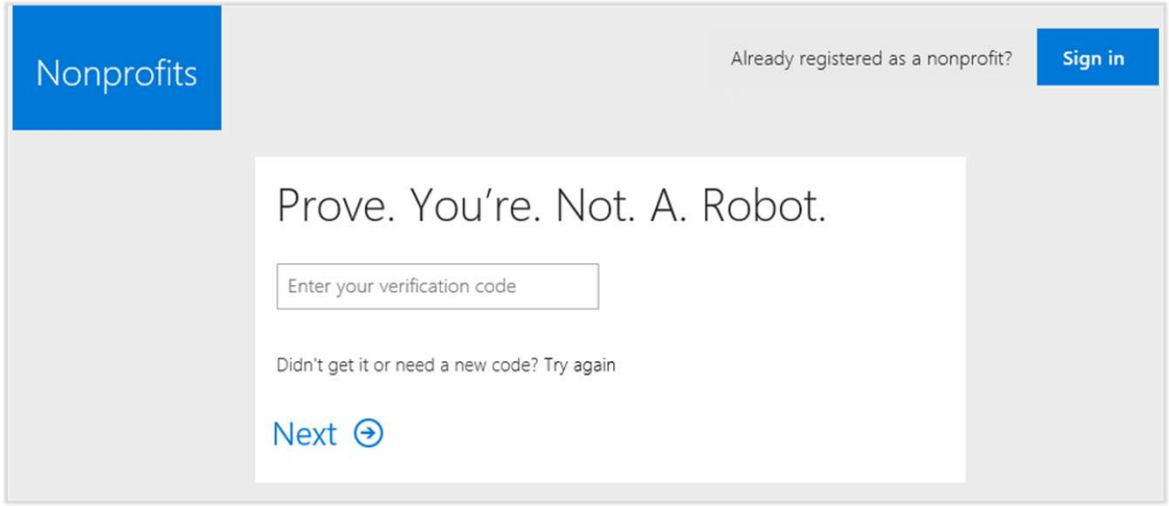
Process for customer without an O365 tenant

Customer completes Sign Up (continued)



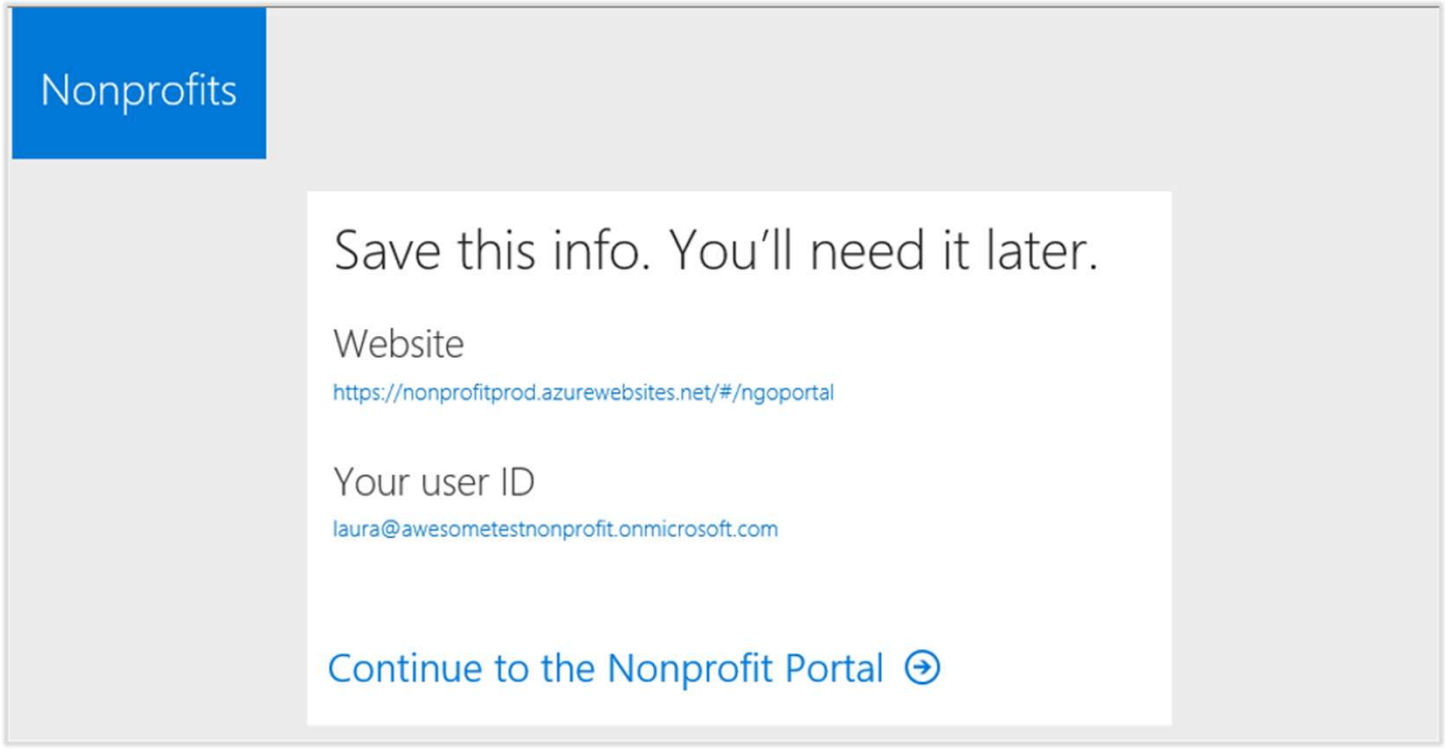
Process for customer without an O365 tenant

Customer completes Sign Up (continued)



Process for customer without an O365 tenant

Customer completes Sign Up (last page – registration complete)



Nonprofit registration – scenario 2

Nonprofit customer with an existing Office 365 tenant that is not enabled for Nonprofit

Process for customer with an O365 tenant not enabled for Nonprofit

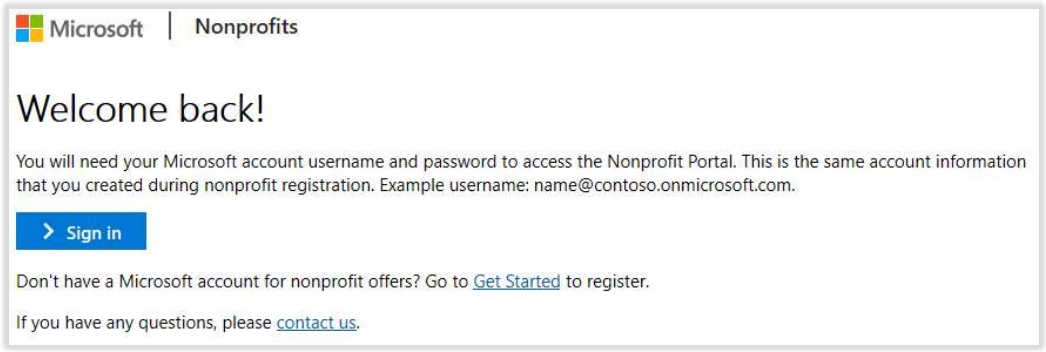
Process overview

1. Customer goes to https://nonprofit.microsoft.com/signin and signs in using existing Office 365 tenant* credentials
   *Customers cannot combine EDU/Gov/Nonprofit offers. If the customer completes this process using a tenant enabled for EDU/Gov, the tenant will be updated to Nonprofit, if eligible
2. Customer follows prompts to complete nonprofit profile to start eligibility validation process
3. Customer's nonprofit eligibility is validated by Microsoft's eligibility vetting supplier
   Process may take *up to* 20 business days; typical turnaround 2-5 business days
4. Customer receives confirmation of eligibility for Microsoft's nonprofit offers via email and notifies partner that registration is complete
5. Partner can view and purchase nonprofit offers for the qualified nonprofit customer
   If not already done, partner will first need to establish relationship with the customer in Partner Center via the relationship request process

Process for customer with an O365 tenant not enabled for Nonprofit

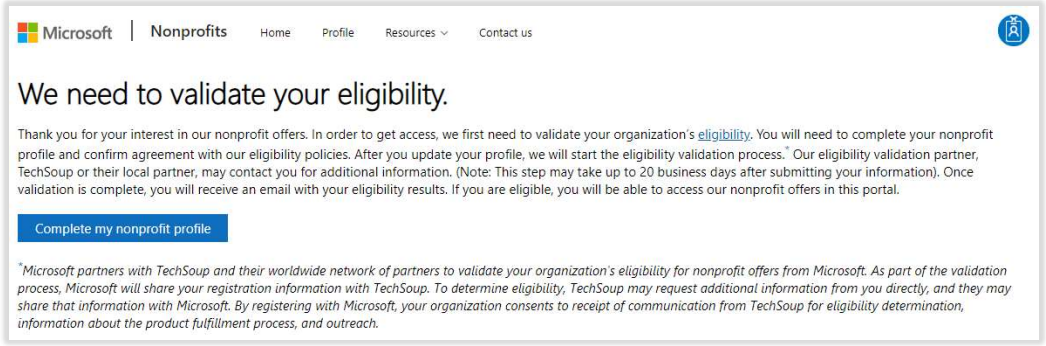
Nonprofit registration: customer experience

Customer goes to https://nonprofit.microsoft.com/signin and signs in with O365 credentials*

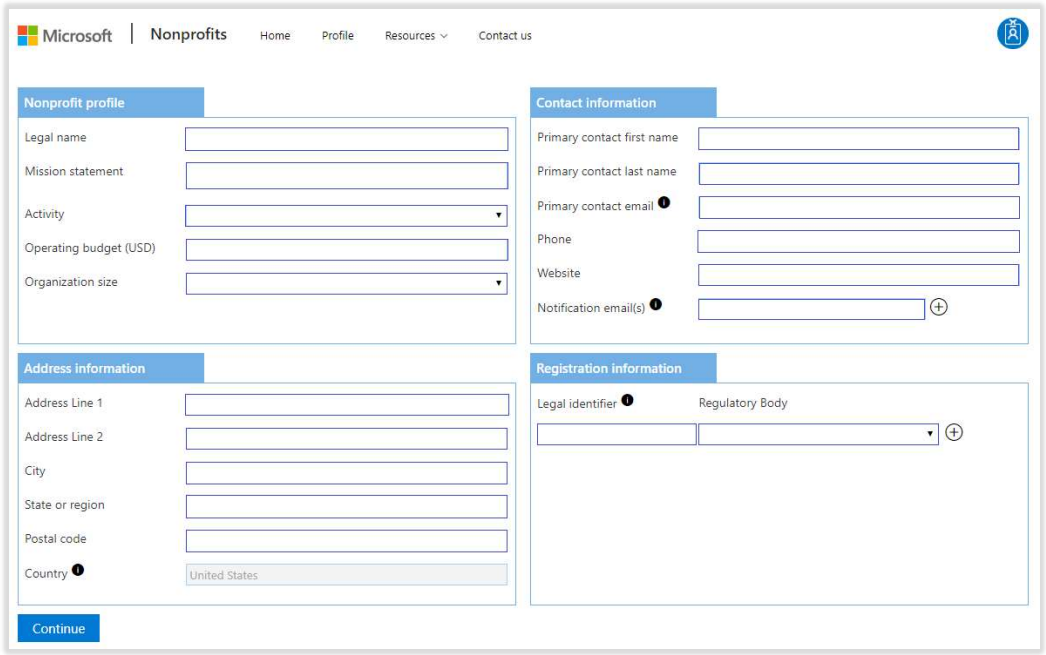


* Customers cannot combine EDU/Gov/Nonprofit offers. If the customer completes this process using a tenant enabled for EDU/Gov, the tenant will be updated to Nonprofit, if eligible, and the partner will need remove EDU/Gov subscriptions and add Nonprofit subscriptions to the customer's account.

Customer reads information and clicks **Complete my nonprofit profile**



Customer enters requested information and clicks **Continue**



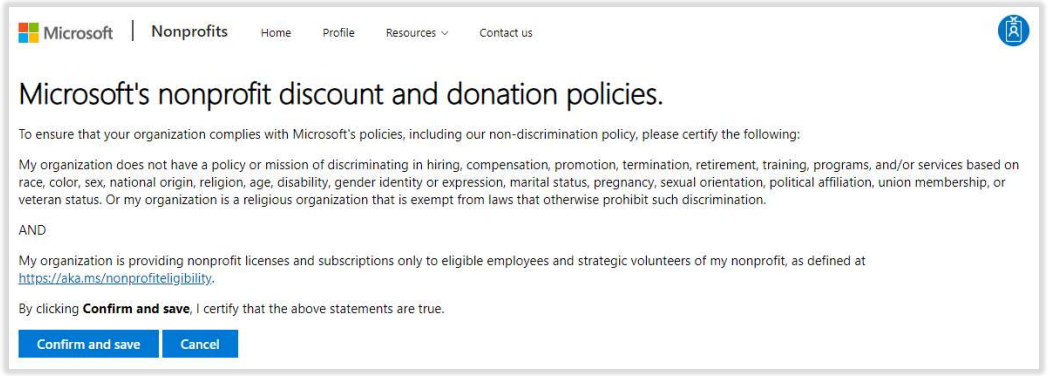
The following fields are pre-populated for the customer:

- Legal name
- Address, city, state, postal code (if available)
- Country code (not editable)
- Primary contact first name, last name, and email

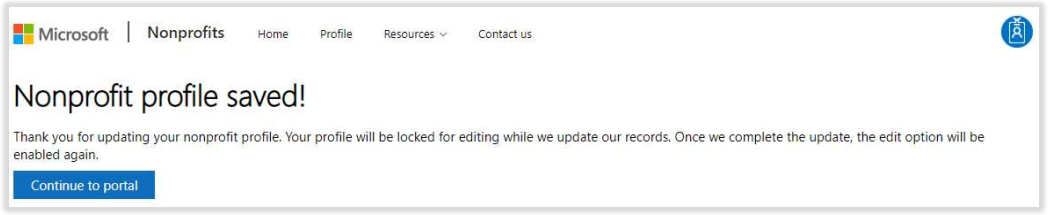
Tip: By default, partners are not copied on auto-communications sent to the customer about his or her nonprofit account. You can ask the customer to add your email address in the Notification email(s) field on the Profile page so that you are cc'd on auto-notifications. If added, you will receive every auto-communication email that the customer receives.

Process for customer with an O365 tenant not enabled for Nonprofit

Customer attests to compliance with our policies by clicking **Confirm and save**



Customer sees confirmation of submission (last page – registration complete)



Establishing a relationship

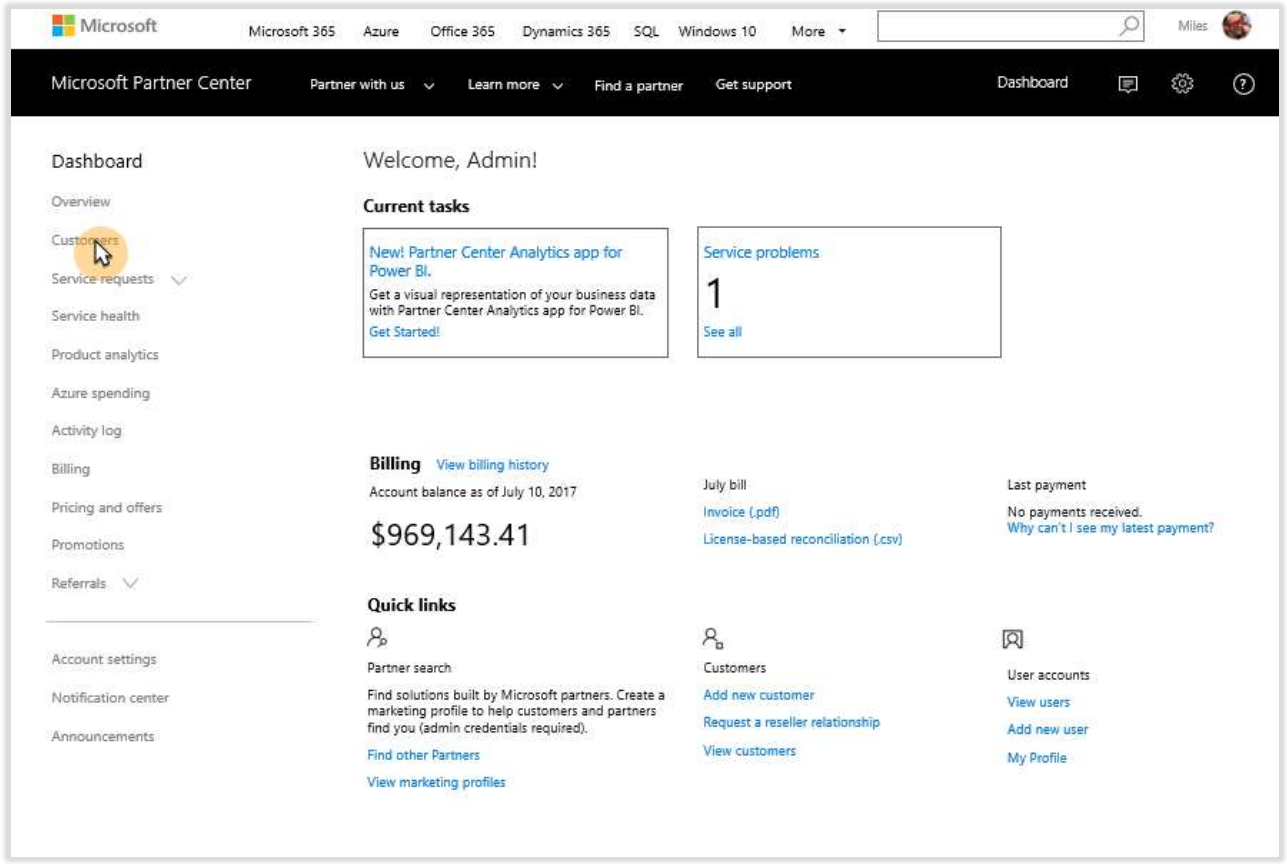
This section provides a walk through for establishing a relationship with a customer in Partner Center

Note: this is a standard process and is not unique to Nonprofit

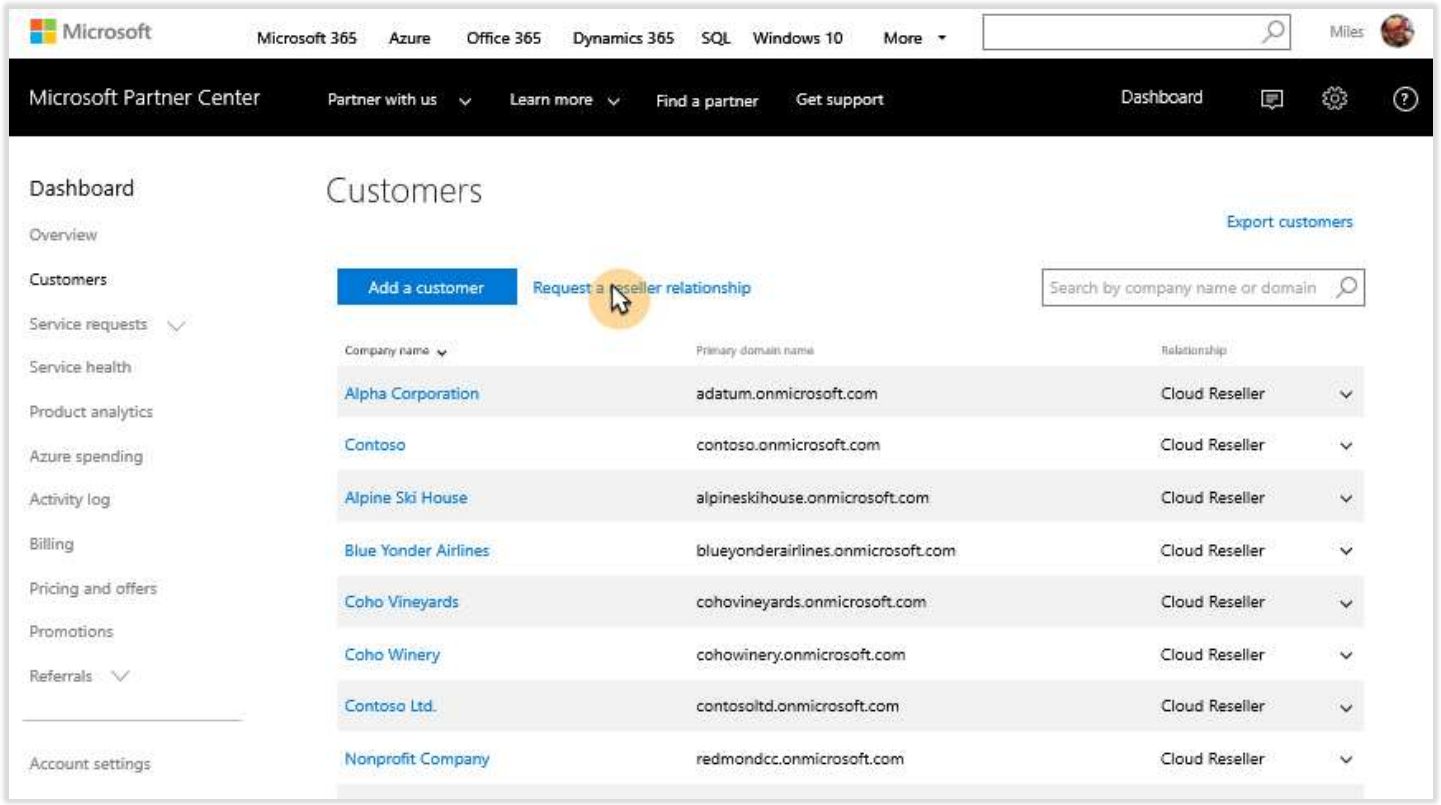
Partner view

Partner sends relationship request to customer

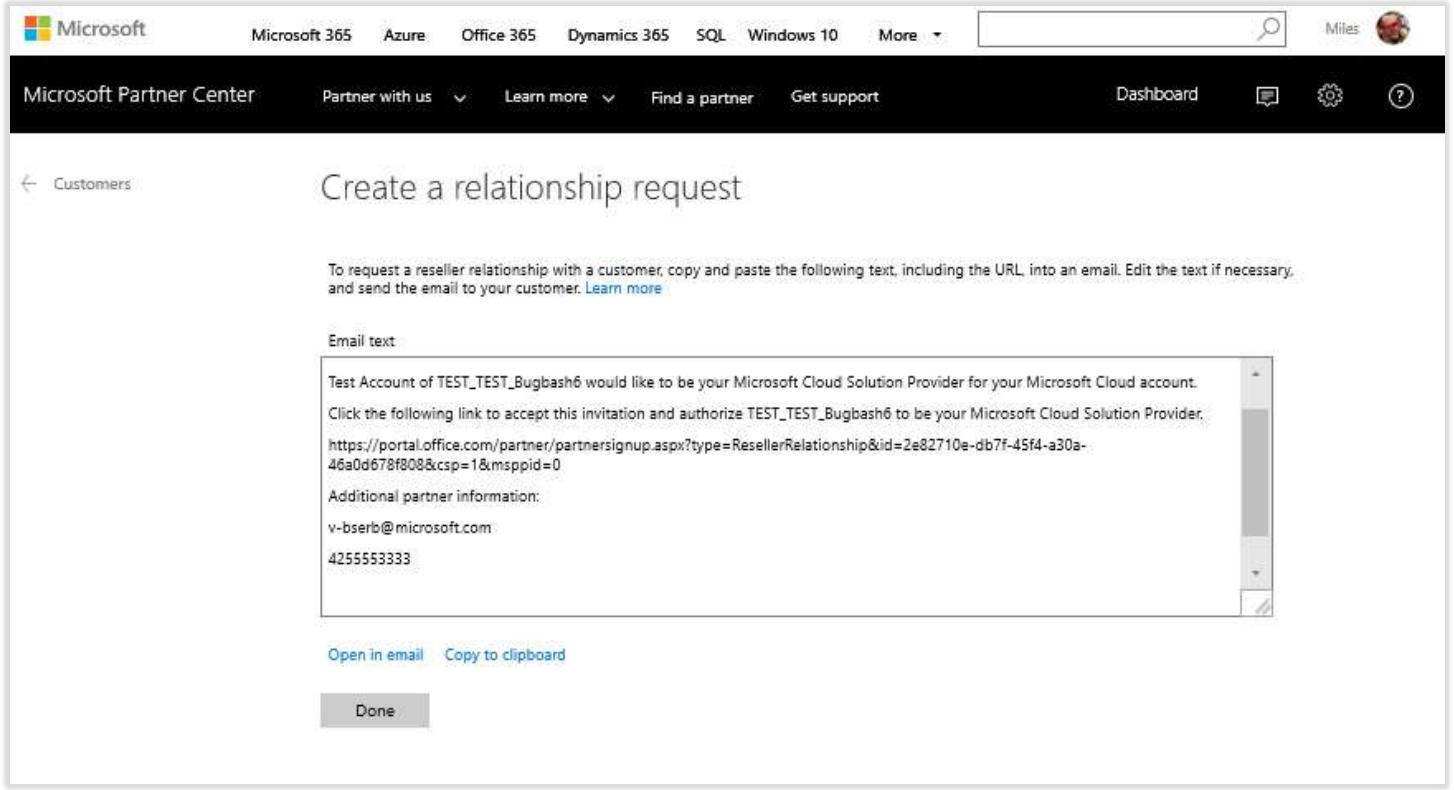
After receiving confirmation on sign up completion by customer, go to Partner Center and click **Customers**



Click **Request a reseller relationship**



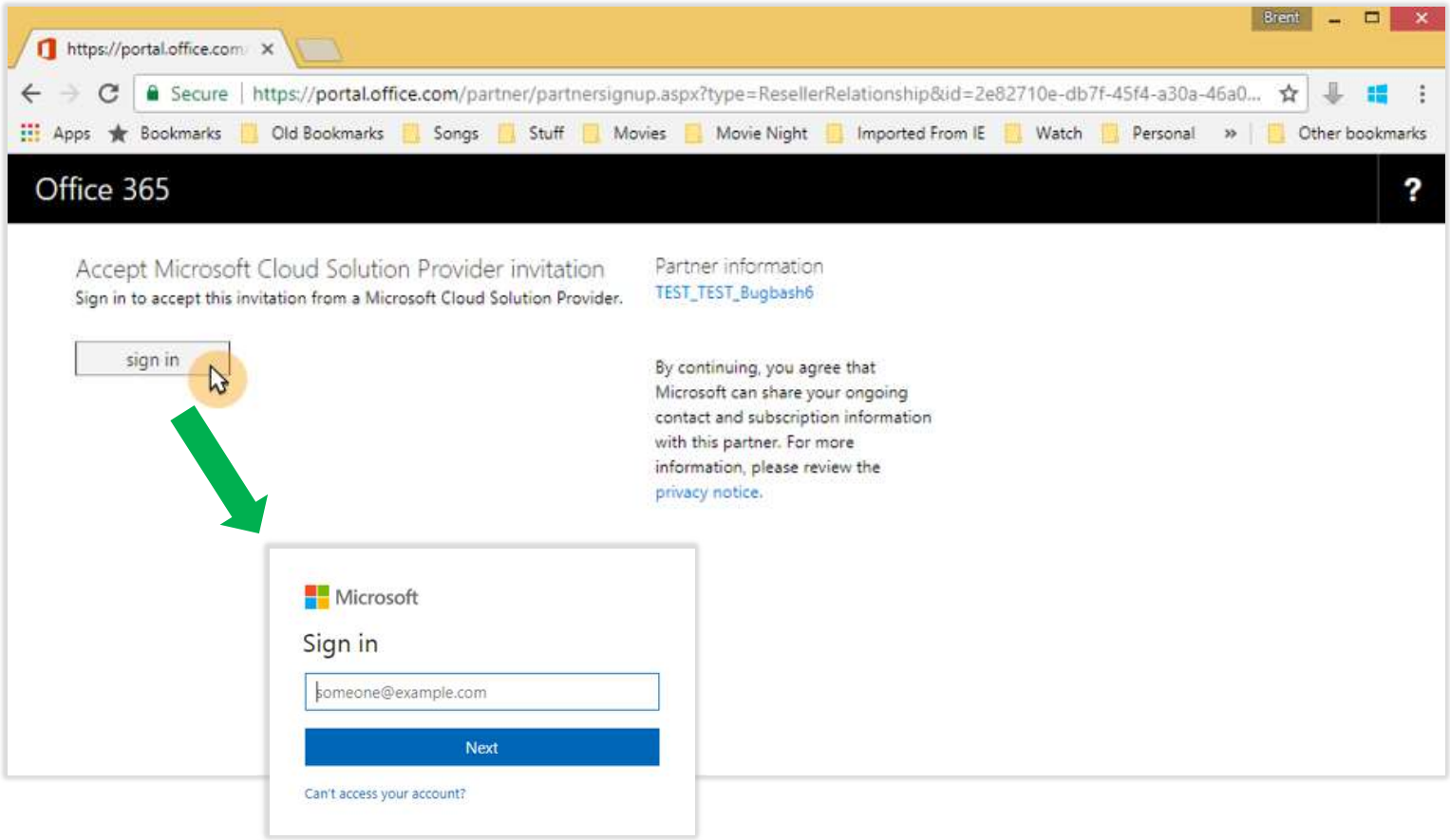
Follow instructions to create and a relationship request to customer



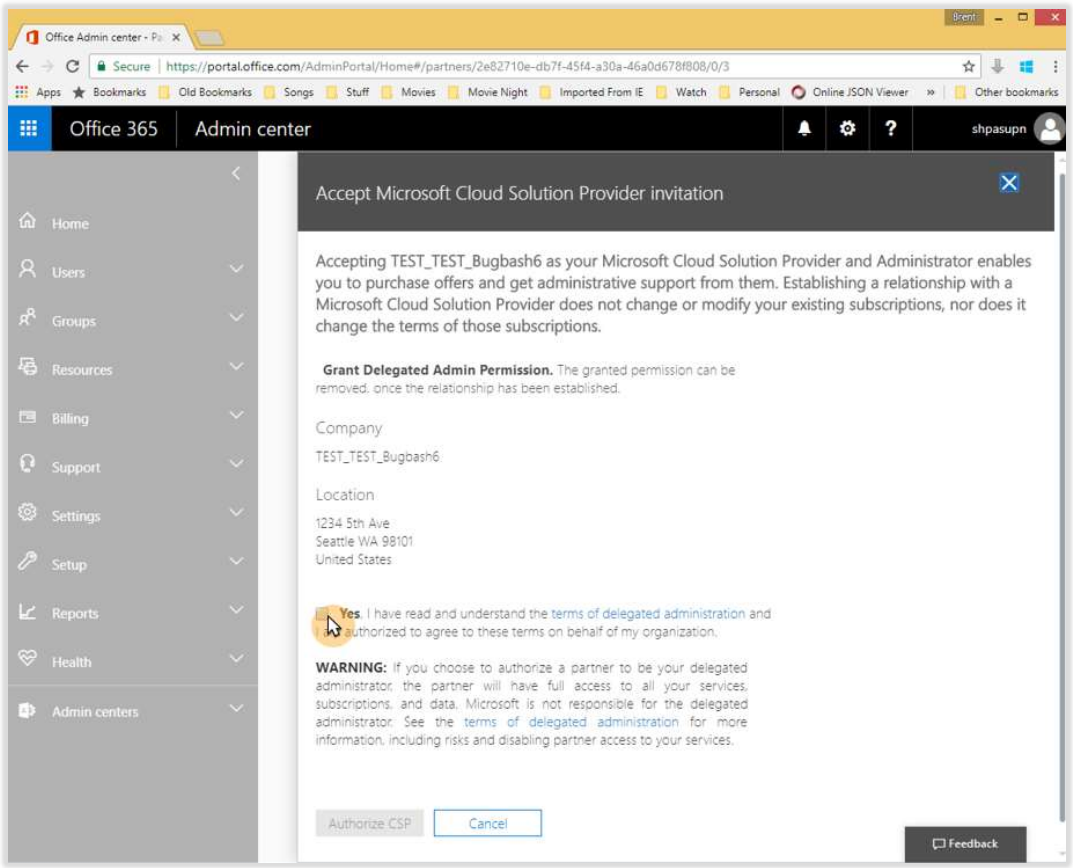
Customer view

Customer accepts relationship request

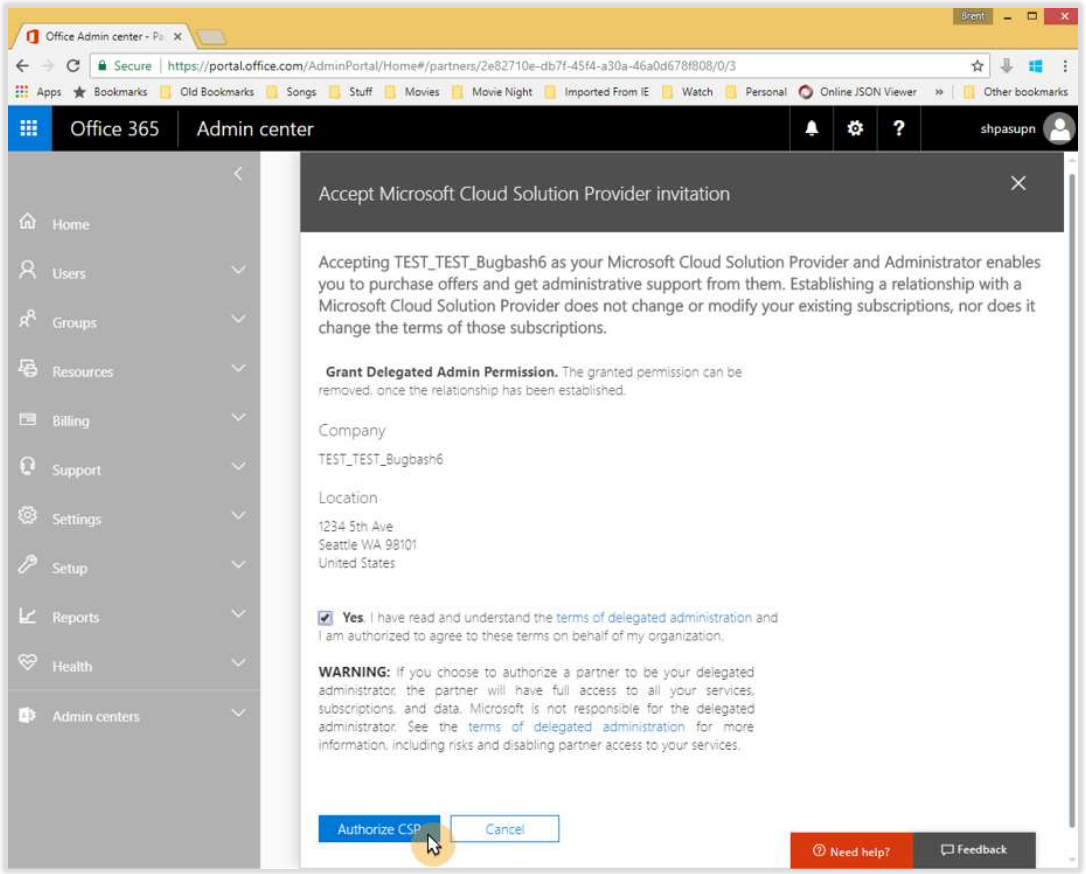
Customer receives relationship request, logs in, and accepts relationship request



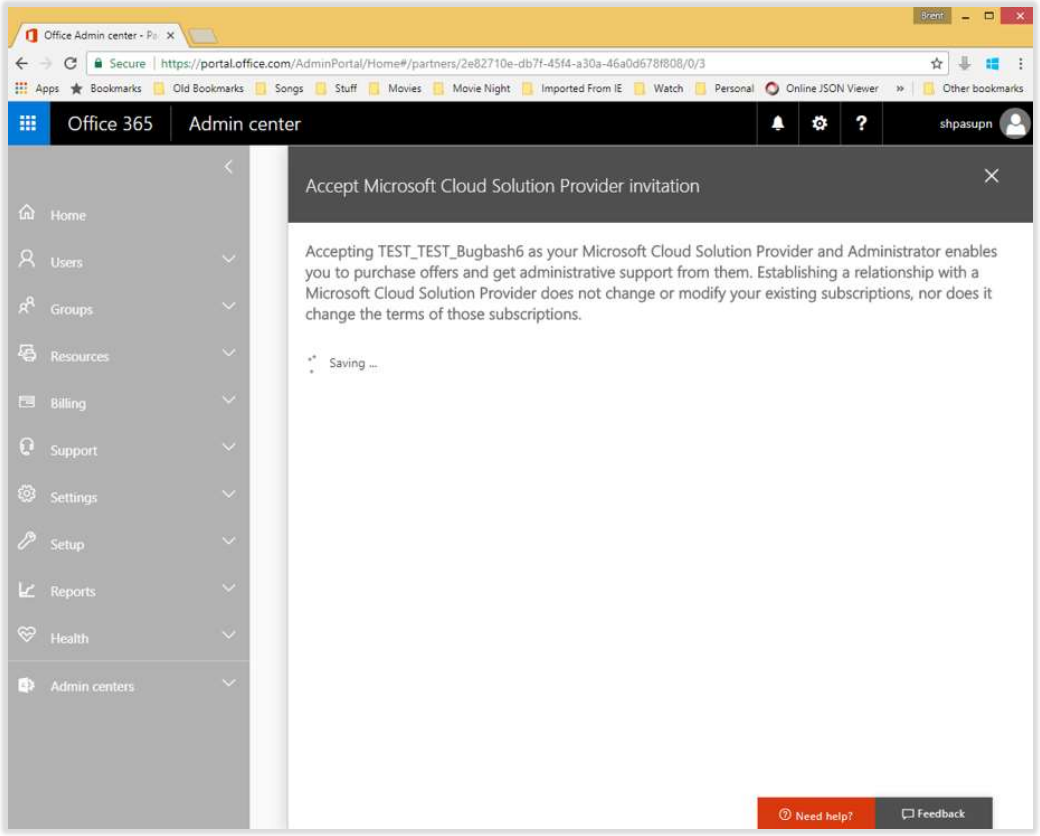
Customer checks box to accept terms



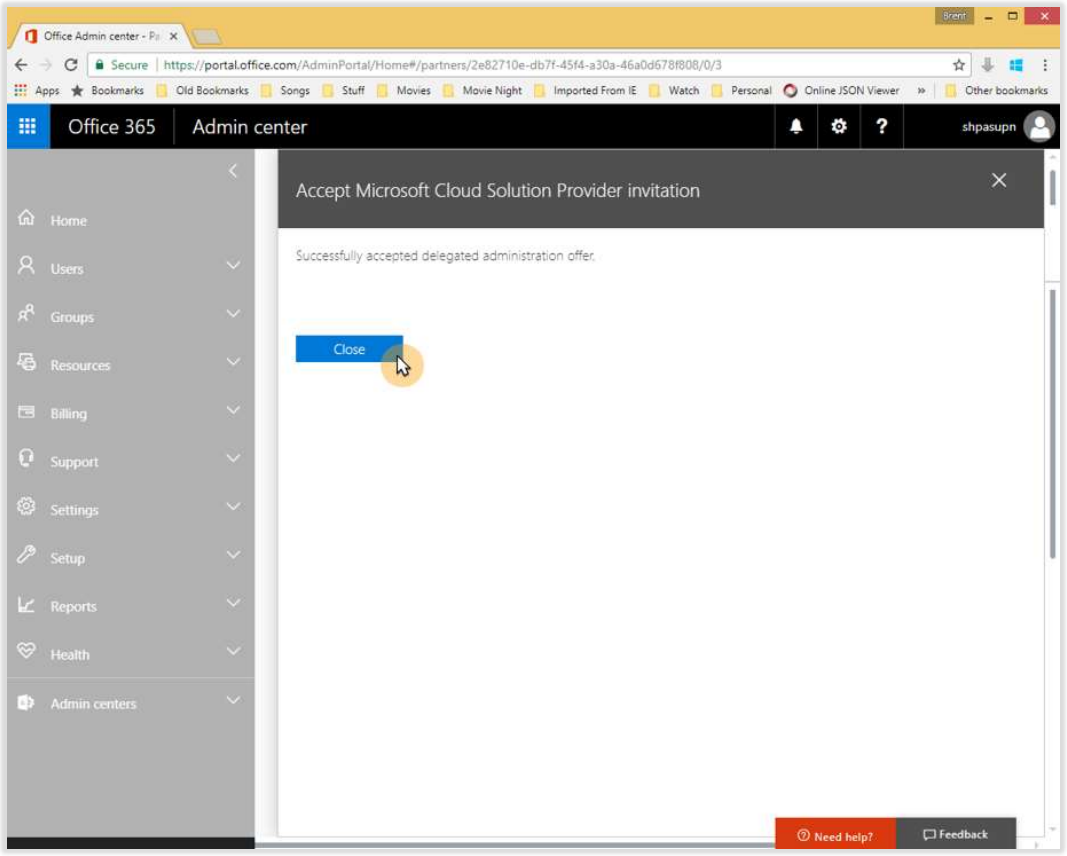
Customer clicks **Authorize CSP**



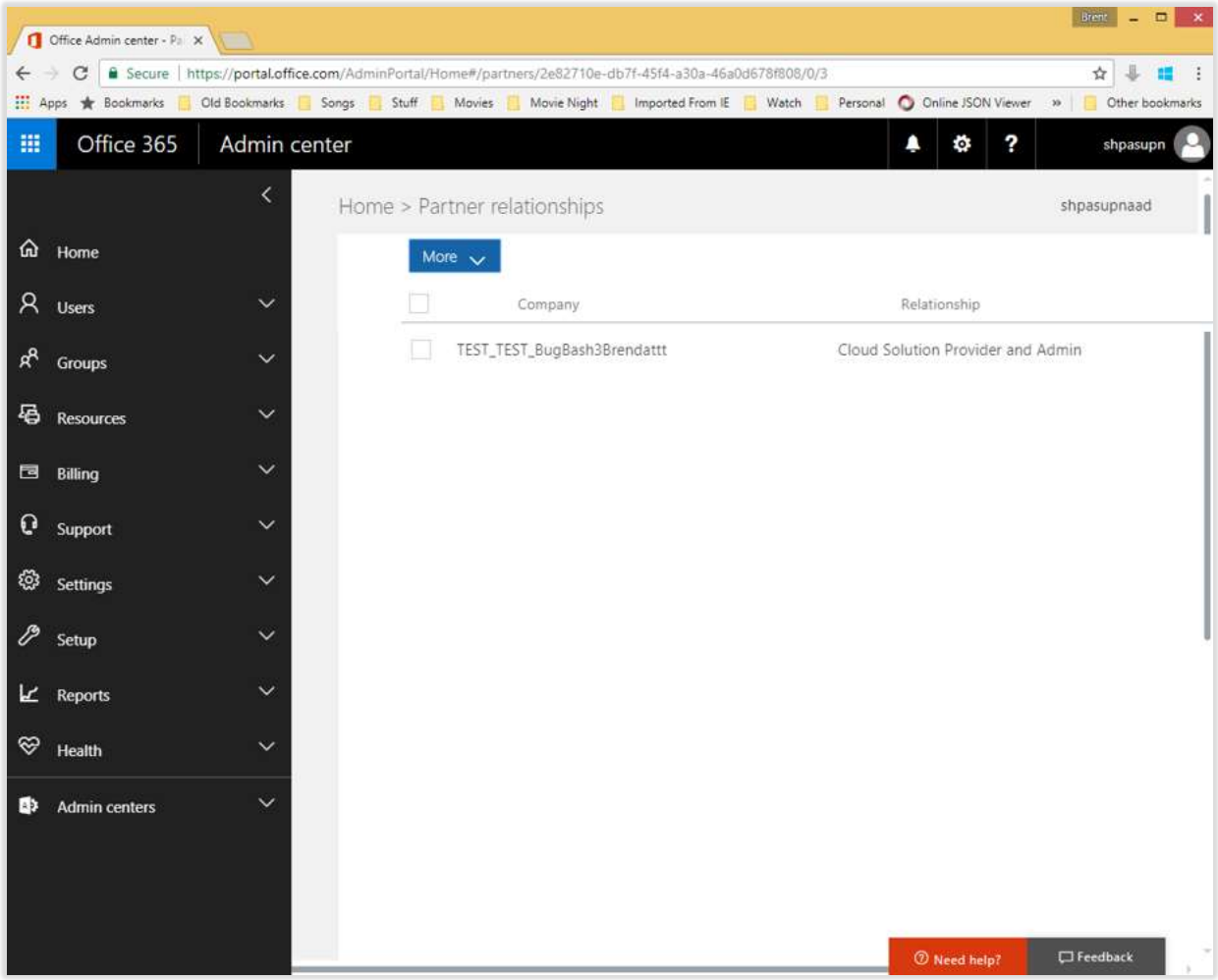
Page saves information



Success confirmation. Customer clicks **Close**



Customer can see partner relationship in Office 365 admin center



Nonprofit offers in Partner Center

This section provides a walk through for purchasing Nonprofit offers in Partner Center, including:

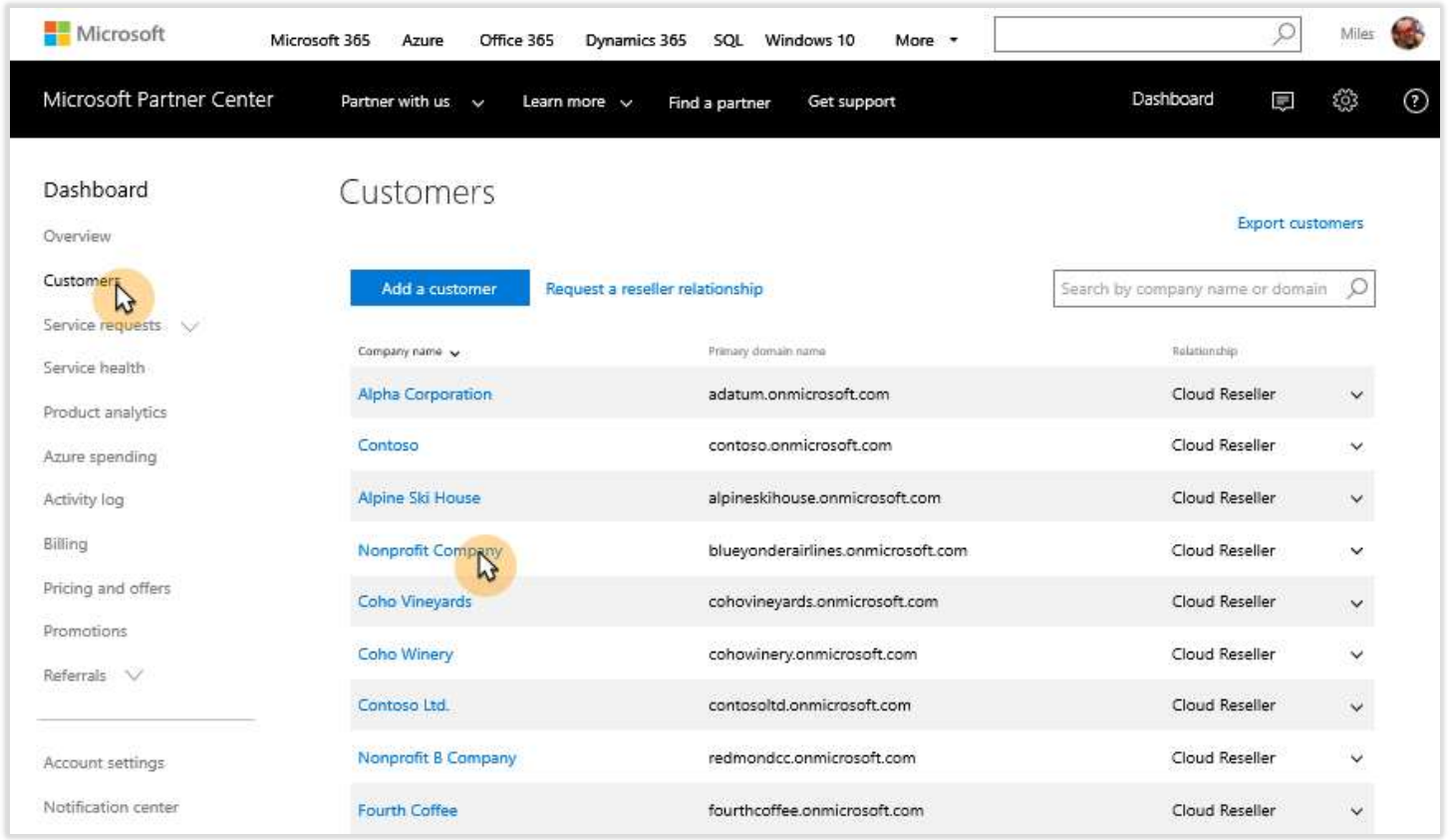
- Getting the Nonprofit trial subscription
- Converting the Nonprofit trial to paid subscription
- Purchasing Nonprofit subscriptions

Partner view

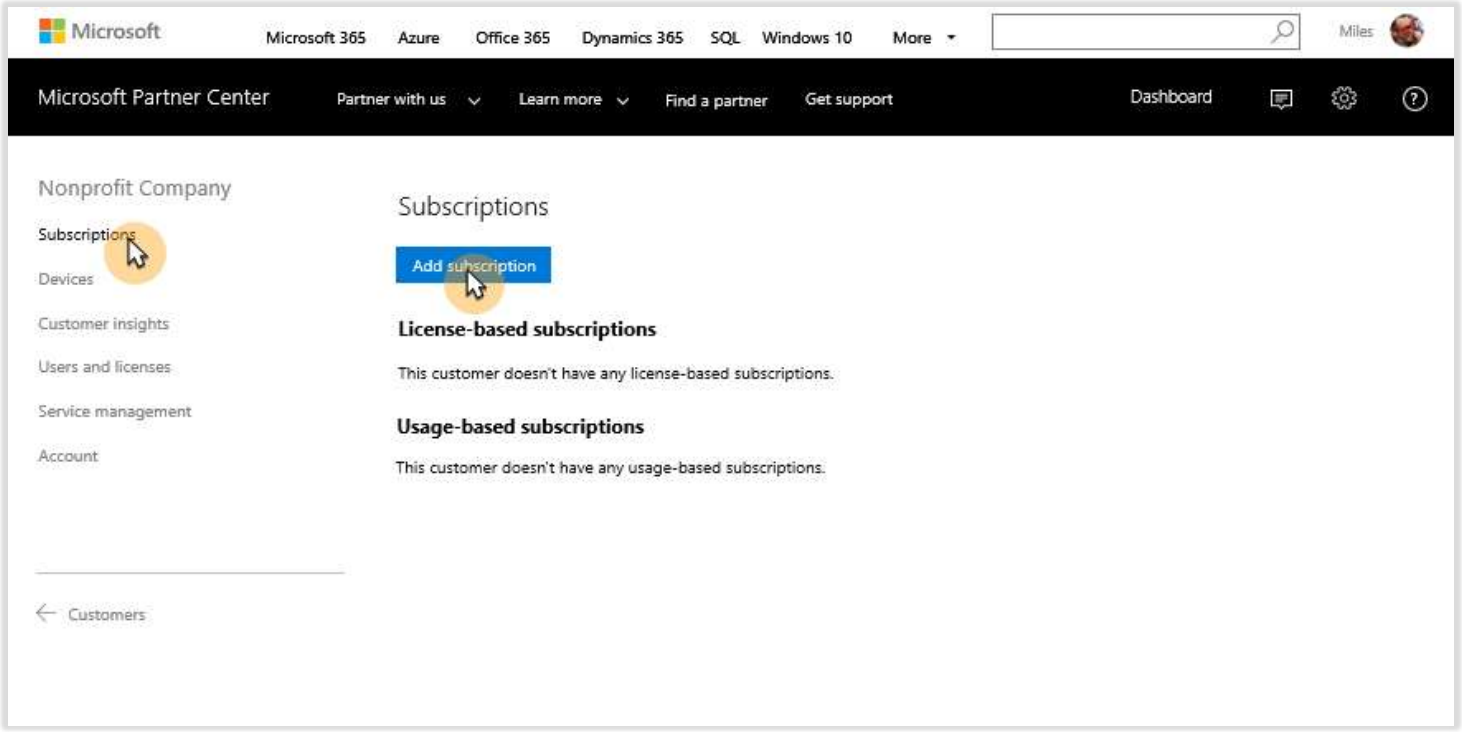
Get the Nonprofit trial subscription

While customer is pending eligibility validation, customer can get Nonprofit trial subscription

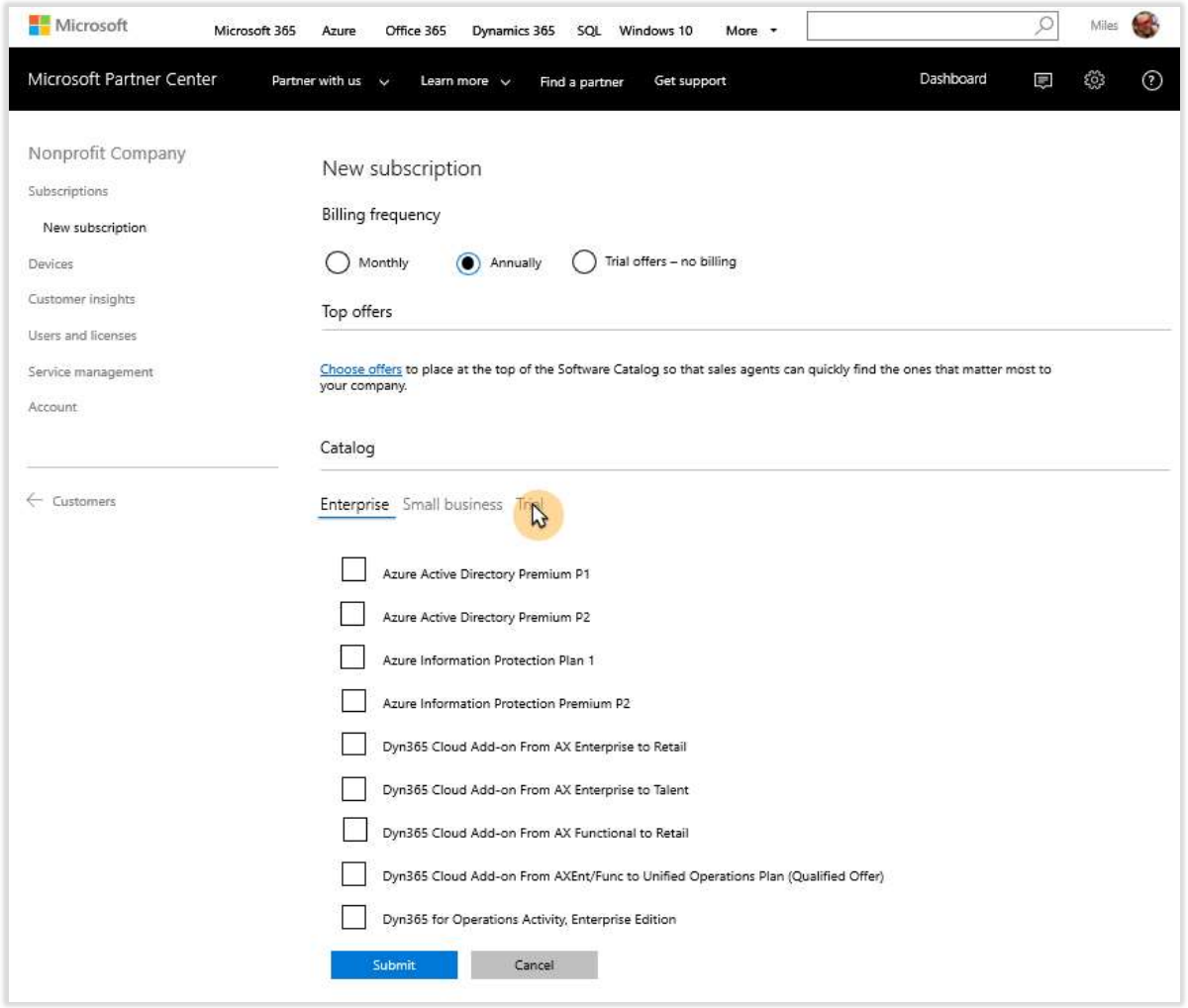
In Partner Center, click **Customers** then click desired customer from list



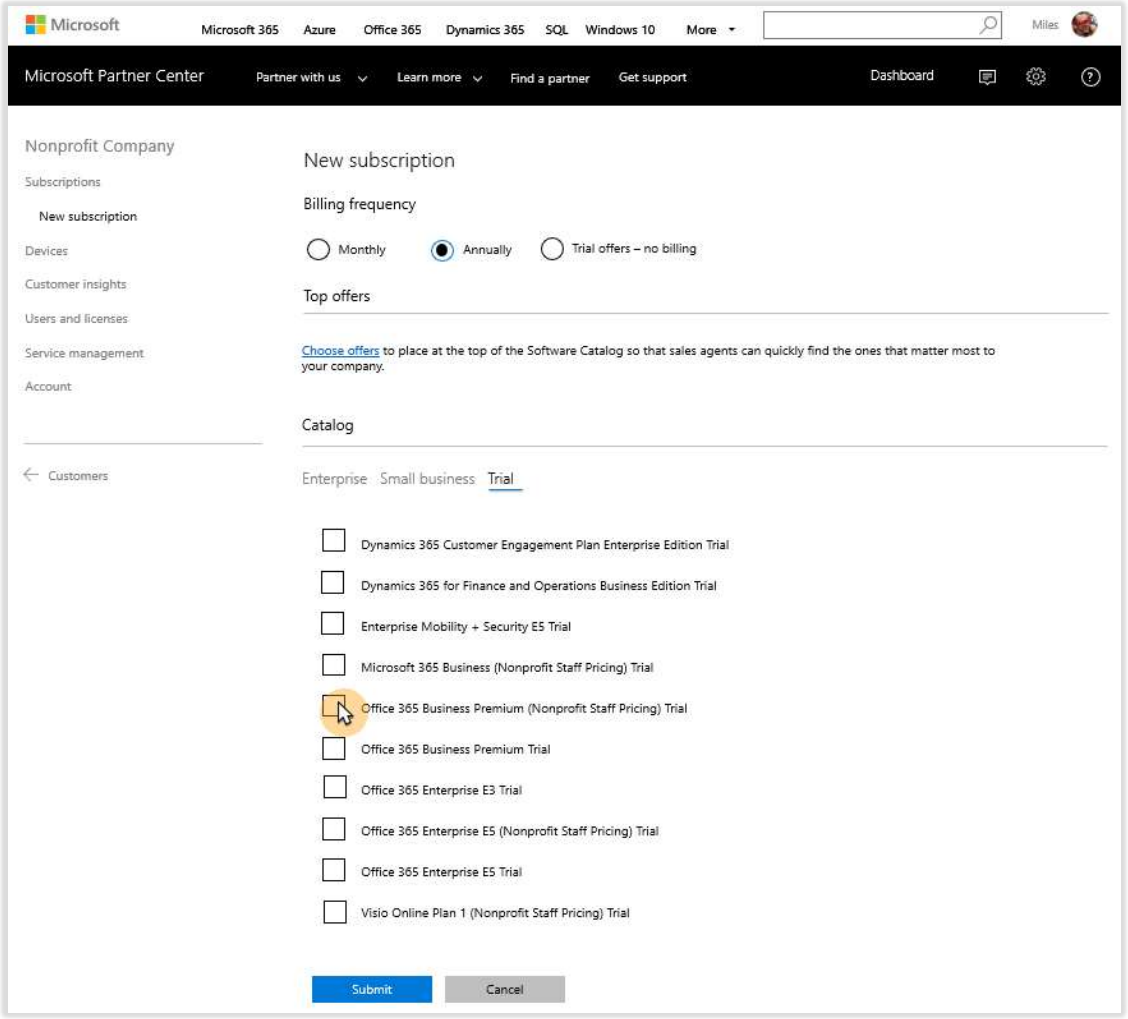
To add trial subscription for customer pending eligibility validation, click **Subscriptions** then **Add subscription**



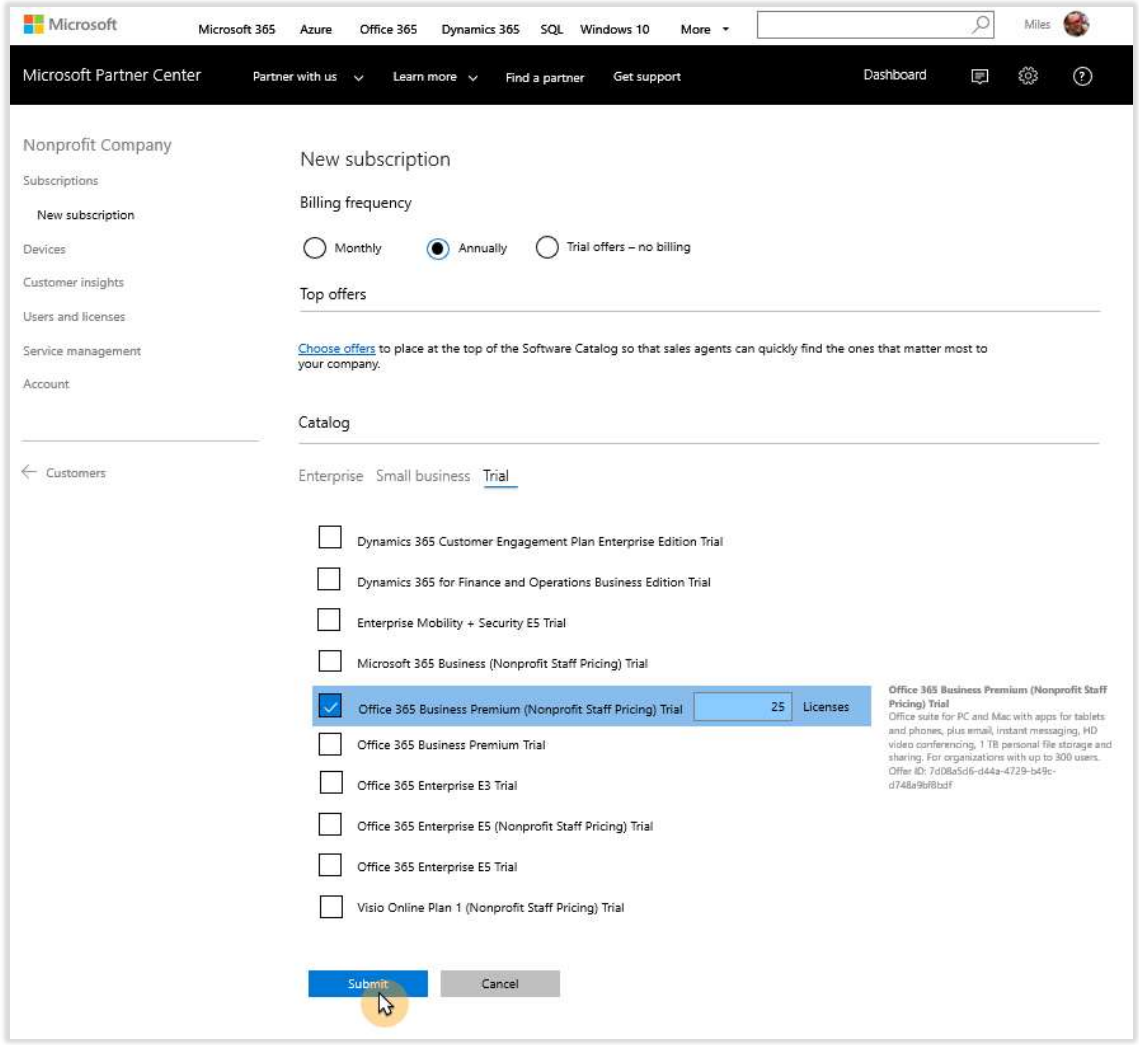
Click **Trial**


Microsoft
Microsoft 365
Azure
Office 365
Dynamics 365
SQL
Windows 10
More
Miles
Microsoft Partner Center
Partner with us
Learn more
Find a partner
Get support
Dashboard
Nonprofit Company
Subscriptions
New subscription
Devices
Customer insights
Users and licenses
Service management
Account
Customers
New subscription
Billing frequency
Monthly
Annually
Trial offers – no billing
Top offers
Choose offers to place at the top of the Software Catalog so that sales agents can quickly find the ones that matter most to your company.
Catalog
Enterprise
Small business
Trial
Azure Active Directory Premium P1
Azure Active Directory Premium P2
Azure Information Protection Plan 1
Azure Information Protection Premium P2
Dyn365 Cloud Add-on From AX Enterprise to Retail
Dyn365 Cloud Add-on From AX Enterprise to Talent
Dyn365 Cloud Add-on From AX Functional to Retail
Dyn365 Cloud Add-on From AXEnt/Func to Unified Operations Plan (Qualified Offer)
Dyn365 for Operations Activity, Enterprise Edition
Submit
Cancel

Select desired trial; nonprofit trial designated as “Nonprofit Staff Pricing”



Click **Submit**

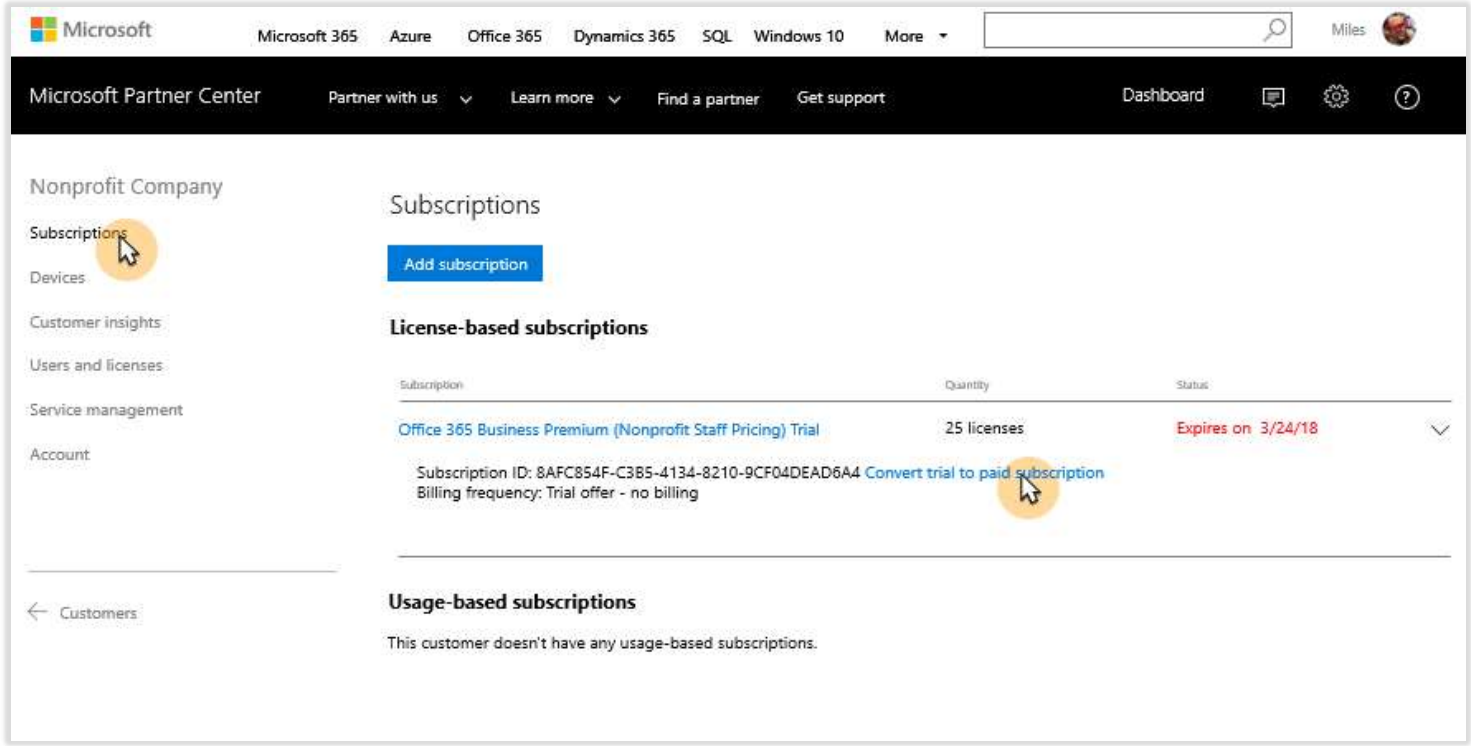


Partner view

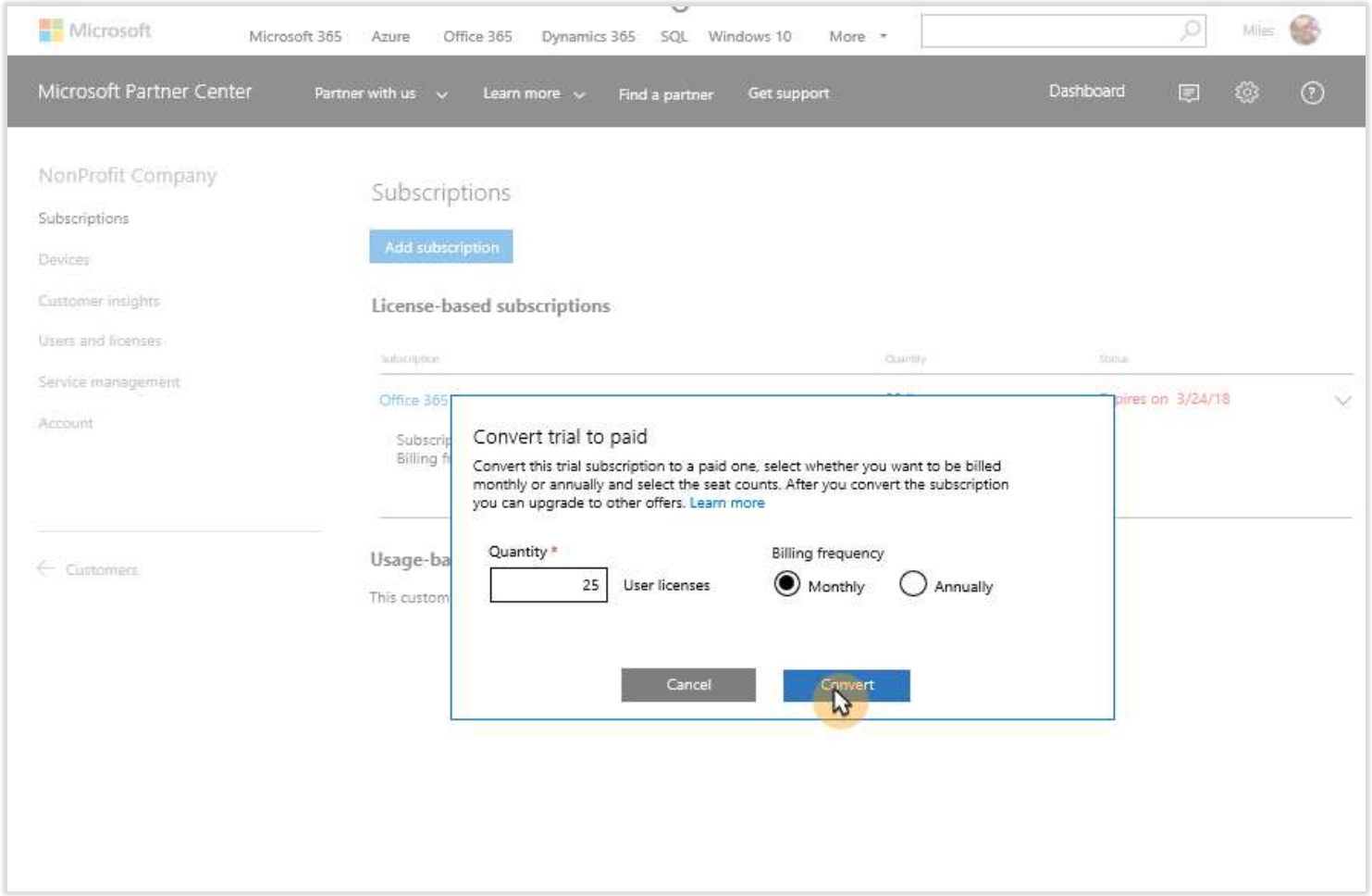
Convert Nonprofit trial to paid subscription

Once customer is qualified as eligible, convert trial subscription to paid subscription

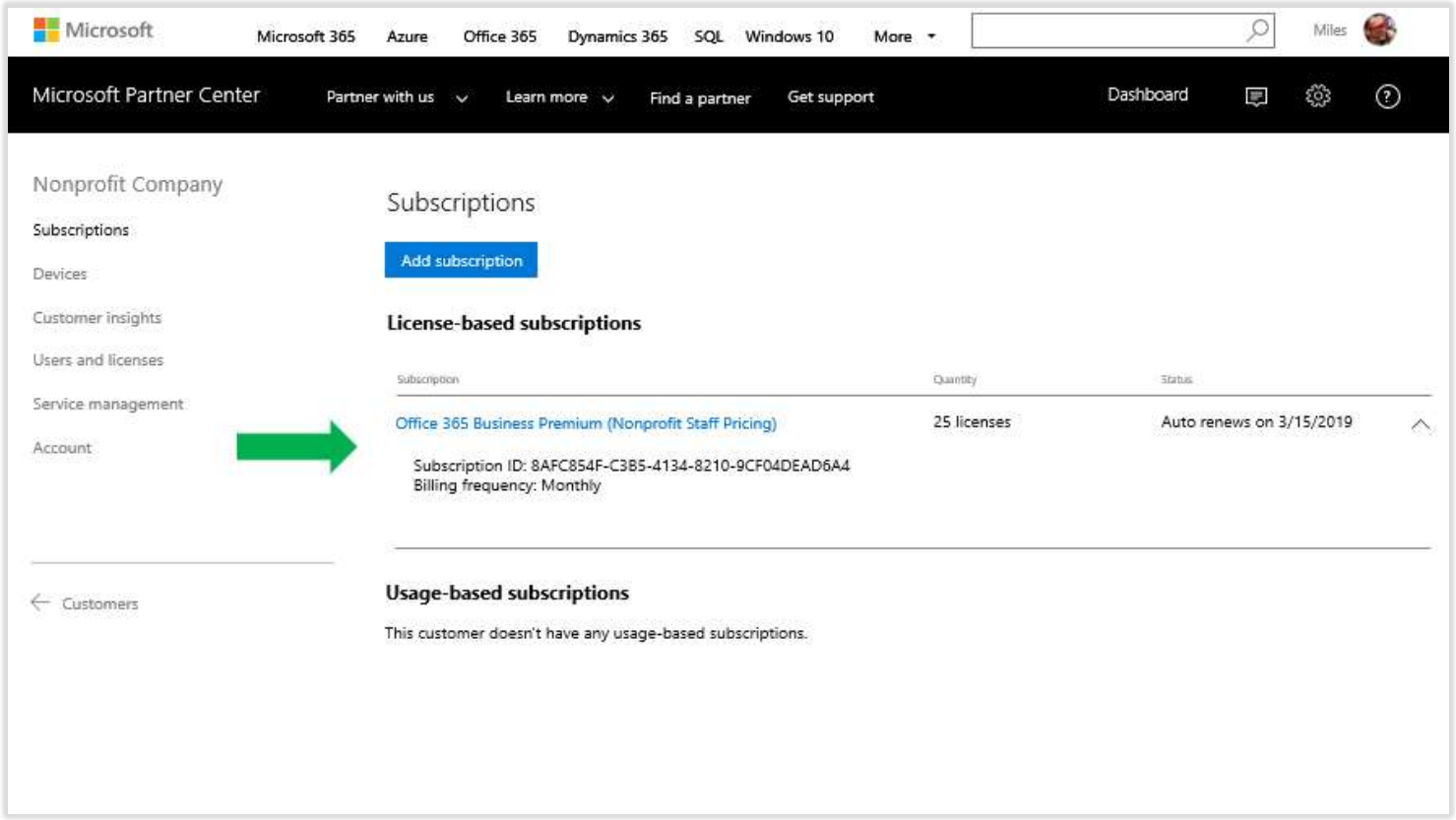
To convert trial to paid, from customer view click **Subscriptions**, then click **Convert trial to paid subscription**



Click **Convert**



Subscription is now converted from trial to paid

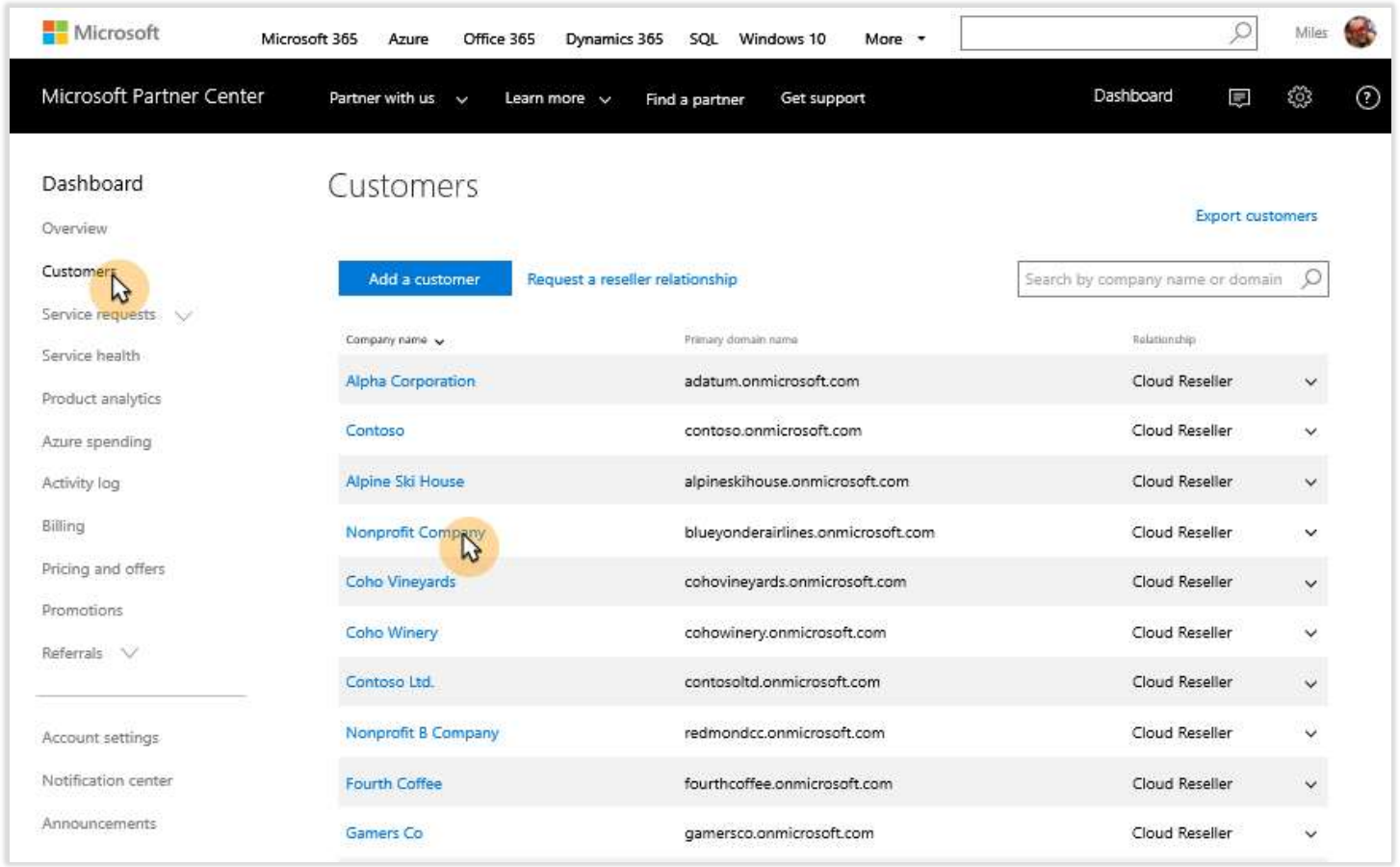


Partner view

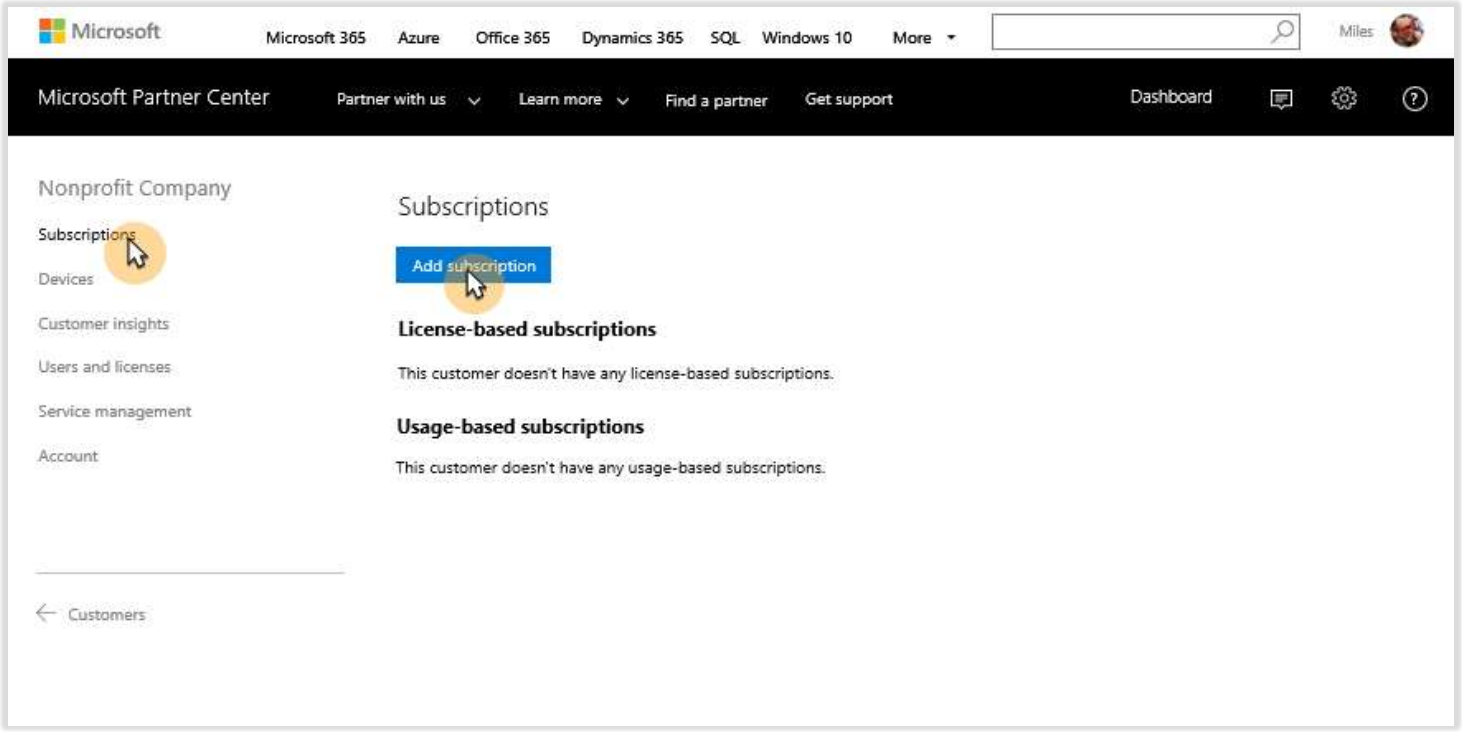
Purchase Nonprofit subscriptions

Once customer is qualified as eligible, customer can get Nonprofit subscriptions

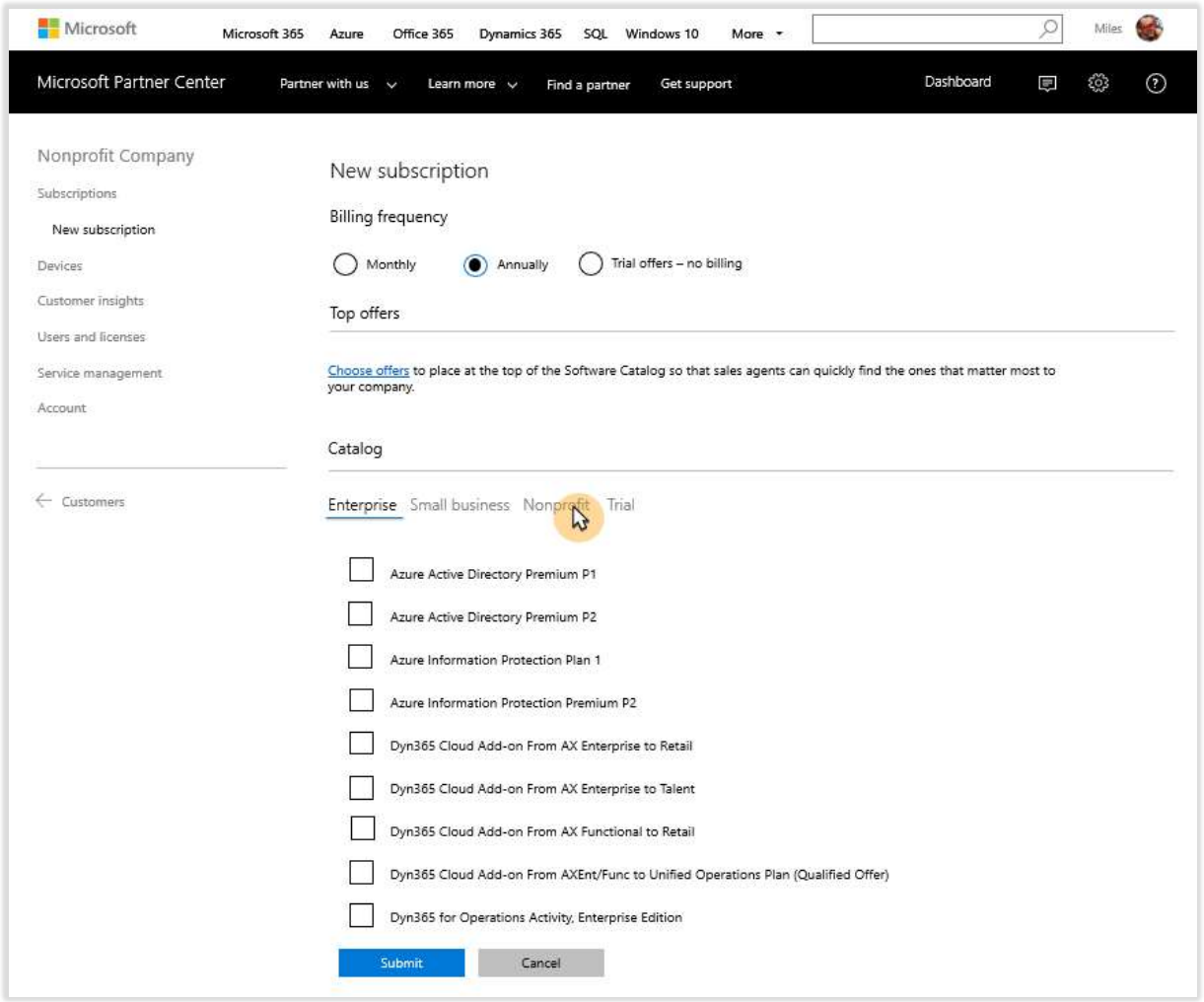
In Partner Center, click **Customers** then click desired customer from list



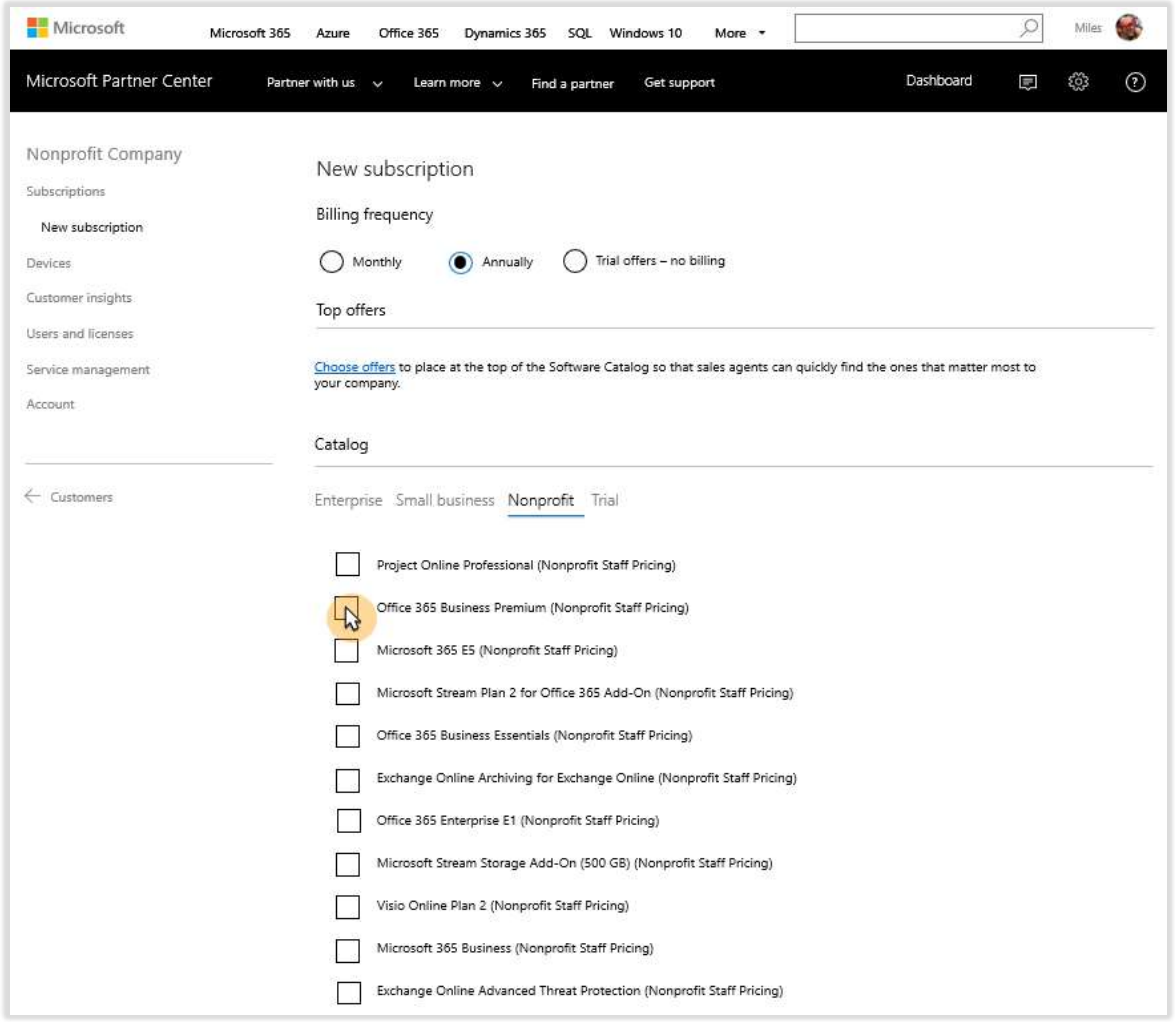
To add subscriptions for eligible customer, click **Subscriptions** then **Add subscription**



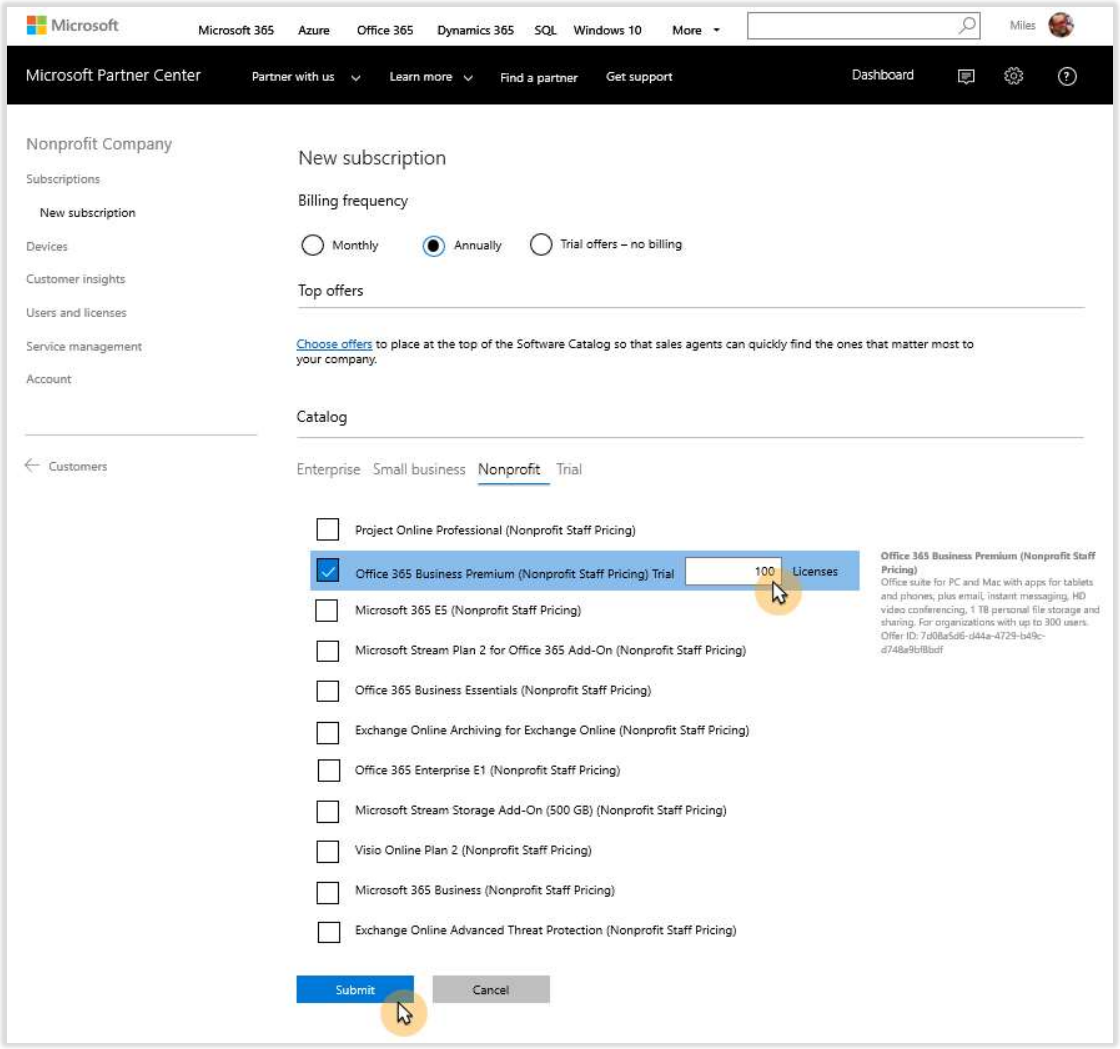
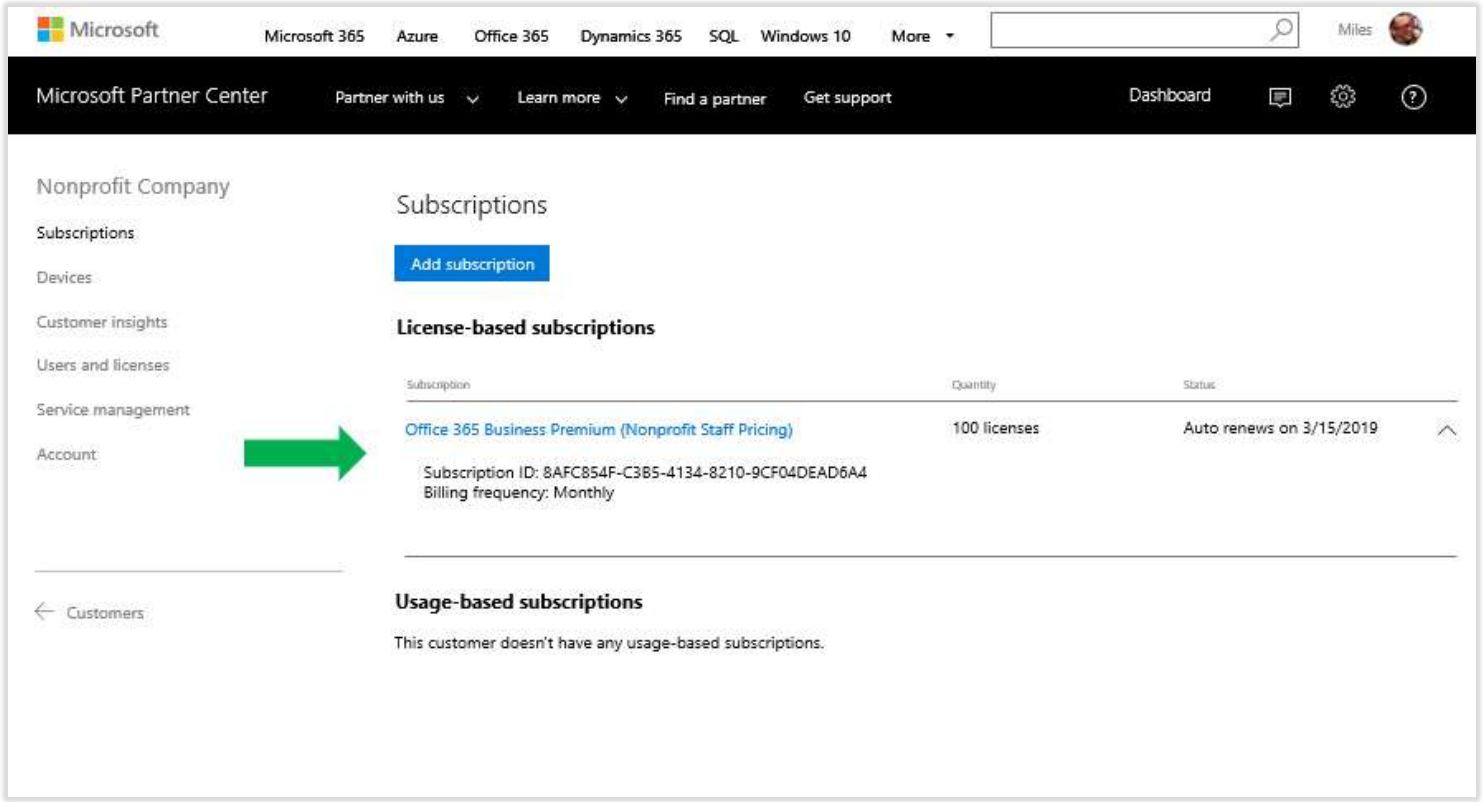
Click **Nonprofit** to see the Nonprofit catalog



Select desired product; nonprofit offer designated as “Nonprofit Staff Pricing”



Designate number of licenses and click **Submit**



Subscription is now added to account