**Customer Guide**

November 2016

This quick start guide walks you through the steps to set up and manage your online services in the Microsoft Business Center. You can sign up for many online services through the Business Center. You can also ask your Microsoft partner to set them up for you.

This guide shows you how to do that and how to associate a domain so people in your organization can sign in to their services and begin using them.

**NOTE** You can set up online services before you associate a domain with a purchasing account, but no one in your organization can sign in and begin using them until you associate a domain.

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Quick Start: Set Up and Use Your Online Services

Introduction

You can sign up for many online services through the Business Center. You can also ask your Microsoft partner to set them up for you. Setting up a new online service yourself is called **self-provisioning**. After you set up (self-provision) an online service for your organization and start using it, your Microsoft Partner must then place the order for the service and bill you for it.

You can view details about your services in the Business Center, and then manage and use your services outside the Business Center.

Microsoft offers many different services. Visit the Business Center to check the latest list.

Set up a domain to use with your online services

**Before anyone in your organization can begin using online services, an administrator at your organization must associate a domain with your purchasing account.** This tells Microsoft who gets to use your subscriptions.

For example, an admin at a fictitious company named Contoso might set up the domain **contoso.com** to use with your online services. This allows people at the organization with an email address ending in contoso.com to use those services.

**IMPORTANT** You can set up online services before you associate a domain with a purchasing account, but no one in your organization can sign in and begin using them until you associate a domain.

Who can set this up

You must be designated in the Business Center as an **Account Administrator** or **Account Manager** to associate a domain. You typically do this task only once, when you first set up a domain to begin purchasing and using online services from Microsoft.

**NOTE** The purchasing account contact listed on your Microsoft Products and Services Agreement (MPSA) is often the Account Administrator.

For more information about roles, see the Quick Start help guide titled **Manage Users and Partner Visibility**.

One domain per purchasing account, but multiple purchasing accounts per domain

A purchasing account can be associated with only one domain, but you can associate multiple purchasing accounts with one domain. This works well if your organization uses multiple purchasing accounts to purchase services for people on a single domain, such as contoso.com.

Different purchasing accounts with different domains

Sometimes it may be helpful to set up different purchasing accounts with different domains. For example, if your organization owns two domains, contoso.com and contoso.co.uk, you could associate one purchasing account with contoso.com and the other purchasing account with contoso.co.uk.

Subscriptions ordered through one purchasing account would be available to users with an email address ending in contos.com, for example, harry@contoso.com. Subscriptions ordered through the other purchasing account would be available to users with an email address using its associated domain, for example, taiyo@contoso.co.uk.

To associate a domain with a purchasing account

1. Select **Account**, then select **Associate domains**.
2. Select a purchasing account using the first drop-down menu (on the left), then select a domain you want to associate with that purchasing account using the second drop-down menu (on the right).

If you don’t see the domain you want in the drop-down menu, click **Select a domain not in this list**.
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3. You must designate a global admin for this domain. Select Invite or Make yourself global admin. For more information about this, see the section below on how to [Invite a global admin or make yourself global admin](#).

4. If you want to designate someone else as global admin for this domain, enter their email address in the field marked Enter their email. The system will check to make sure their email address ends with the domain you selected (such as jeffs@contoso.com for the domain contoso.com).

   Microsoft will send the admin you invited an email message with instructions on how to manage this domain.

   If you select [Make yourself global admin](#), Microsoft will automatically send you this email message.

**Invite a global admin for this domain (or make yourself global admin)**

The domain you associate must have a global admin. If a global admin is not already assigned to this domain, you will need to invite someone or select yourself following the steps above.

Once you make this selection, Microsoft will send an email message to the new global admin to verify that they are the right person to have this role for your organization.

1. The person you select as global admin for your domain will receive an email message from Microsoft with a link to [Get started now](#).

   When the person selects [Get started now](#), this will open a page in their web browser that steps them through the process of becoming a global admin. The screen they see will depend on whether they already have a work account registered with Microsoft or not.
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Explore the new Microsoft Business Center

You must complete this step before your organization can begin using services already purchased.

You are receiving this invitation because Lori Penor of your organization invited you to become a global administrator for contoso.com.

To begin using the Business Center, we need to have you register with this work account:

admin@contoso.com

Get started now

The Microsoft Business Center allows users in your organization to securely view your Microsoft Products and Services Agreement (MPSA) information, view volume licensing orders and inventory, download software and keys, set up and manage online services, and much more.

Because you're accepting this invitation with a work email address, your employer may control your communications and data, and their policies apply to your use of the service.
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The screen if this person does not already have a work account with Microsoft

2. The global admin does one of these two tasks, depending on which screen they see:
   - Fill in all the information to create their organizational account and then select **Start**.
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OR

- Select Sign in.

3. A screen opens where this person must verify if they want to become the global admin for this domain. They select either Yes, I want to be the admin or No, not me.

Ready to take charge and become the admin for contoso.com?

As the admin, you’ll control and manage how everyone in your organization uses Office 365. To become the admin, you have to create a special record in DNS to prove you own the contoso.com domain.

Follow these step-by-step instructions

Yes, I want to be the admin ☑️

No, not me

4. If they select Yes, I want to be the admin, a new screen opens asking them to add a TXT record to prove they control this domain.

5. They select their domain hosting company and then follow the steps described in this technical article on the Office 365 Support site. Go to the section titled Add a TXT or MX record for verification.
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Add this TXT record to show you own contoso.com

Note: Only the domain owner can update DNS records, so we ask you to add this TXT record. Adding this TXT record won’t affect your current email or other services.

To add the record:
- Go to your DNS host (Change)
- Copy the values from the following table and add them at your DNS host.

TXT records (Step-by-step instructions for adding a TXT record)

<table>
<thead>
<tr>
<th>TXT name</th>
<th>TXT value</th>
<th>TTL</th>
</tr>
</thead>
<tbody>
<tr>
<td>@</td>
<td>MS=01234567890</td>
<td>3600</td>
</tr>
</tbody>
</table>

Okay, I've added the record 😊

Can't add a TXT record? Use an MX record instead

Back

6. Once the global admin has successfully finished adding a TXT record to verify they control this domain, they will see a screen telling them they are done and that they are now an Office 365 admin. They are now the global admin for this domain and can also access the Office 365 Admin Center.

Users in their organization can now use any online services (such as Office 365) associated with this domain.

Done! You’re now the Office 365 admin for contoso.com

Associate a domain after you set up online services

If you or your Microsoft partner set up online services before you associate a domain with your purchasing account, you will see this popup notification notifying you that you must associate a domain now. You will not be able to use your online services until you do this.
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Select **Associate domain** and follow the instructions above to *Associate a domain with a purchasing account*.

**Set up a new online service**

Once you have associated a domain with a purchasing account, you can begin setting up and using new online services. Here's how:

1. Select **Inventory** from the top menu, and then **Manage my inventory**.
2. Now you must choose a purchasing account to use for this purchase. If you have more than one purchasing account, choose **Select an account**.
   
   If you have only one purchasing account, the account selector will not appear and your purchasing account will automatically display. Skip to Step 5 below.
3. Start typing all or part of the purchasing account name that you want in the search box. Keep typing more of the name until you see the account you want, then select it from Search Results.

Typing “Fab” brings up several different purchasing accounts that begin with those letters

If you have trouble finding the purchasing account you want, use the drop-down menu to select a specific field you want to search on, then type that information into the search box:

- Customer Legal Entity Name
- Purchasing Account Name
- Location
- Purchasing Account Number
- Agreement Number
4. Once you find the Purchasing Account you want in the Search Results and select it – or if you have only one Purchasing Account – you are ready to start choosing online services. Select the button on the Licenses and Services tab that says **SET UP ONLINE SERVICES**.

The **SET UP ONLINE SERVICES** button is on the **Licenses and Services** tab

5. Select an online service from the list of available services.
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6. Select the **PLAN NAME** and enter the **QUANTITY** for each service you want.

   For example, for Office 365 you must select whether you want Office 365 Enterprise E1 or another plan. You can select multiple online services, plans and quantities for each service.

   **NOTE** You must add new services in quantities of 100.

7. Select **NEXT** to move to the next step
8. Verify that you have selected all the online services you want to set up and that all the information is correct. Note the date when your services will renew. When you’re done verifying the information, select **SUBMIT**.

![License, Services and Benefits](image)

*These online services will renew on your next purchase account anniversary date of 7/1/2014.*

9. After you select **SUBMIT**, a green message should open at the top of your screen telling you that Microsoft is setting up your new online services. It also tells you that you should receive an email message confirming when the services are ready for you to use. This screen also confirms the services you have requested.

![We are setting up your online services](image)

*This green confirmation message opens at the top of your screen after you select **SUBMIT***

10. Under **Next steps**, select one of these two options:

   - Setup more online services
   - Back to your Licenses and Services

**IMPORTANT** After you set up (self-provision) an online service for your organization and begin using it, Microsoft will notify your partner so they can bill you for service. You can also ask your partner to set up services for you.
Quick Start: Set Up and Use Your Online Services

**Licenses, Services and Benefits** ✗ Confirm online services setup

We are setting up your online services. We will send you a confirmation email when they are ready to use.

<table>
<thead>
<tr>
<th>PURCHASING ACCOUNT NAME</th>
<th>PURCHASING ACCOUNT NUMBER</th>
</tr>
</thead>
<tbody>
<tr>
<td>FABRIKAM IT</td>
<td>0005219460</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>PLAN NAME</th>
<th>QUANTITY</th>
</tr>
</thead>
<tbody>
<tr>
<td>Office 365 Ent E1 Per User Cloud Subs</td>
<td>100</td>
</tr>
</tbody>
</table>

These online services will renew on your next purchase account anniversary date of 6/30/2015.

**Next steps**

- Setup more online services
- Back to your Licenses and Services

**MSDN subscriptions**

MSDN subscriptions are available through your Microsoft partner, who can order them for you in the Volume Licensing Partner Center. You cannot set up MSDN subscriptions on your own. That is why they are not listed in the online services you can select from in Step 5 above.

After your partner orders MSDN for you, you will be able to see them listed with all your other products and services in the Business Center.

**Confirm your new online service**

Now you are done setting up your new online services. You should receive an email message like the one below confirming when your new services are ready to use.

Subject: Your online services are ready to use

Your online services are ready to use

The online services that you requested are now ready to use. For details, sign in to the Volume Licensing Center.

If you requested these online services yourself, your partner will contact you to place an order for them.

A confirmation email from Microsoft will tell you when your online services are ready to use
Quick Start: Set Up and Use Your Online Services

After you receive this email, you can view details about your new services in the Business Center. Here’s how:

1. Sign in to the Business Center and go to the Licenses, Services and Benefits section.
2. If you have more than one purchasing account, select the one you used to sign up for your new online services.
3. The page opens by default to the Licenses and Services tab. This displays a list of your licenses and online services, arranged by product group.
4. Find your new online services. Use the Search box to look for them or browse the list of your products displayed on the page.
5. When you find the new online service you requested, select the Expand/Collapse icon to view details about the service. Expand the product group with the service you requested, such as Office 365. This will display each EDITION of the service.

   TIP: Check the box next to Show expired to view any online services you had that are now expired.

You can view details about each new online service you requested, and check the AVAILABLE QUANTITY and ORDERED QUANTITY

6. Check the quantity of your new online service.

   The AVAILABLE QUANTITY field shows the net quantity of online services available to you, not what the partner has ordered.

   The ORDERED QUANTITY field shows what online services the partner has ordered on your organization’s behalf.

   Any difference between these two fields shows what online services you are already using (set up on your own) but have not yet ordered through your partner.
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View history and manage your online services (assign users)

You can view details of your online services and a history of your transactions in the Business Center, but managing and assigning subscriptions to users using your online services actually takes place outside the Business Center. Here’s how:

1. Select the Expand/Collapse icon to view details about an edition of your online services.

   In this example, we expanded the **Enterprise E1** edition of Office 365, which shows there are 450 subscriptions available.

2. To see a history of all your transactions for this edition, go to the **ACTIONS** drop-down menu and select **View History**. This displays the effective start date of your subscription, the status of your subscription, the quantity of subscriptions your organization is using, and more.
Quick Start: Set Up and Use Your Online Services

View History displays your transactions for any edition of an online service

Select EXPORT if you want to download and save this history in a CSV spreadsheet.

3. To manage an online service and assign subscriptions to users in your organization, go to the ACTIONS drop-down menu and select Manage services. This takes you outside the Business Center to the site for that online service.

For example, if you select Manage services for an edition of Office 365, this will take you to the Office 365 site, where you can start using Office 365 and manage your service.

NOTE Because you are already signed in to the Business Center with your Organizational Account when you select Manage services, you should not need to sign in again when you are redirected to the Office 365 site. You can take advantage of Microsoft’s single sign-in capability.
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You can assign subscriptions to users in your organization and start using online services when you select Manage services.

Sign in and start using your new online service

If you follow all the instructions above and reach the step where you select Manage services, you will leave the Business Center and go to the site for that service. The Manage services link will direct you to the site where you can begin managing and using your new online service.

There are many different Microsoft online services, some with their own websites. Every site has information to help you learn about your services. If you have questions about a specific service, look for the help links on the site for your new online service.

Using and administering Office 365

Office 365 is the most widely used Microsoft online service. The Office 365 site has a great deal of help and support information for administrators and end users. Here are a few key links:

Create or edit users in Office 365

- Office 365 administrators can create or edit user accounts for everyone in their organization that uses Office 365 services. When they create or edit a user account, they can also assign licenses to a user and set administrative permissions.

Assign or remove licenses

- In Office 365 for business, users need licenses to use Outlook, SharePoint Online, Lync Online, and other services. As a global or user management admin of Office 365 Enterprise or Office 365 Midsize Business, you can easily assign licenses to new users when creating new accounts, or to users with existing accounts.

Office 365 for Business Learning Center
Start using Office Online
Office 365 Support