Microsoft Dynamics® Cloud Services Support Benefits

Quick Start Guide

Microsoft

Welcome to your Microsoft Dynamics Cloud Services Support Plan Quick Start Guide. Use this guide as a quick reference to maximize the benefits of your investment.

The support options provides flexible, industry-leading support, services, and resources that enable users to quickly address technical issues, deepen their professional expertise, and maximize return on investment (ROI). The flexible options lets you choose a plan that best meets your business needs, and gets you back to work faster whenever issues arise.

Here are the primary service plan benefits you'll want to take advantage of to get the most from your Microsoft Dynamics solution.

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Basic Subscription Support Plan Benefits

Unlimited Break/Fix Support

Unlimited online and phone incident submission where support engineers identify and resolve technical issues with next business day responses

CustomerSource

Your central source for quick resolutions, expert insights, proactive tools, and the service plan benefits available to you. This customer one-stop portal offers a wealth of information, including e-learning, self-directed support, downloads, productivity tools, and a community of industry experts and peers.

All Administrators entered into the customer online portal will be granted access to CustomerSource automatically. Administrators will must add employees who need access to the benefits in CustomerSource.

Invite someone to CustomerSource

1. Sign in to CustomerSource.
2. Navigate to and click on the User Menu (commonly containing the name of CustomerSource User) found in the upper right-hand side of the page.
3. Select Our CustomerSource Accounts from the User dropdown menu
4. Click the Add New Professionals button.
5. Enter the required profile information.
6. Check the box at the bottom of the form to send invitation e-mail to this CustomerSource user to associate their Microsoft Account to this profile.
7. Click Save.

For more information or assistance click here.

Self-Service Support

- Participate in the Microsoft Dynamics Community — Post your questions and review answers from other customers, MVPs, and Microsoft engineers.
- Subscribe to Blogs — Sign up for the latest blog posts that address your specific interests.
- Access Self-Help Support on the CRM Customer Center or CustomerSource
- Microsoft Dynamcis Lifecycle Services

Service Health Dashboard

Your central source for a quick review of your service health is available to you at the click of a button. Visit your Service Health Dashboard to view important notifications about service health and uptime.

Environment Monitoring for Microsoft Dynamics AX

Utilize Microsoft Dynamics Lifecycle Services (LCS) for a quick review or deep analysis of your overall application health. This environment monitoring within LCS can provide important at a glance and will allow for detailed troubleshooting of system issues.

Customer Center

Find out what's new, as well as find answers, updates, videos, eBooks, and getting started resources and training in the Microsoft Dynamics CRM Customer Center.

Parature Success Center

Access the latest materials, training and videos on the Parature [Success Center](#).

Deliverability Services (Microsoft Dynamics Marketing)

Foster ISP relationships and monitor reputation to increase and improve deliverability.

Microsoft Dynamics Lifecycle Services (Microsoft Dynamcis AX)

Online collaboration workspace that helps you model, manage, and maintain your implementations. Lifecycle Services provides a variety of services to assist and help navigate you through the various phases of the project including define, develop and operate more robust systems, proactively monitor implementations, reduce the time it takes to resolve issues, and help realize greater return on investment while reducing the total cost of ownership.

Ask the Expert Webinars

A monthly online webinar where Microsoft experts share their knowledge and expertise on specific Azure, CRM, or AX topics. Webinars are offered twice a month to accommodate global time zones, with varying topics driven by customer feedback.   Webinars are one hour long, with time for Q&A.

Create a Technical Support Request

While there is a wealth of self-service tools to help assist you, you may need to contact our professional and experienced support engineers. Tips and tricks for working with the support team:
[Working with Microsoft Support](#)

- To log a support incident with Microsoft Technical Support:

  - Administrators go to your [Office 365 account](#).
  - End users - Contact your site administrator to submit a support incident.

    Note: Dynamics AX Users will be redirected to Microsoft Dynamcis Lifecycle Services

If you're enrolled in Microsoft Services Premier Support:

- Sign into [My Premier Online](#)

Premium Support Offerings

Enhanced Support

In addition to all of the benefits mentioned above, Enhanced Support customers will receive the following benefits:

Support Incident Response Time

Response times less than two hours for Severity A cases, followed by 4 hours respectively for Severity B and and 8 hours for Severity C cases. Please find the severity level definitions on Appendix B.

Severity	Response Time	Availability
A	2 Hours	Local Business Hours
B	4 Hours	Local Business Hours
C	8 Hours	Local Business Hours

Unlimited Access to Online Training

Get the knowledge you need with Microsoft Dynamics e-learning that you can access 24 hours a day, 7 days a week. E-learning opportunities help you learn to get the most from your solution and improve performance. With a Microsoft Dynamics Premium Support Plan, you can access unlimited online training—e-learning, training materials, and learning plans.

- **E-learning:** Benefit from online, self-paced courses dedicated to Microsoft Dynamics solutions on specific topic areas, comparable to classroom training. For a listing of all of the training courses see Appendix A.

- **Training Materials:** Download courseware content for use as a study tool or as a desktop reference.

- **Learning Plans:** Use these plans as a training roadmap for users, including detailed training and certification options available for each module or specific functionality.

- **Parature Success Center:** Access the latest materials, training, and videos on the Parature Success Center

    Note: Administrators require users to be set up in CustomerSource to access e-learning benefits. Please follow steps noted above to invite someone to CustomerSource.

Professional Direct Services

Professional Direct includes all of the above mentioned benefits of Enhanced Support, plus:

Support Incident Response Time

Response time for Severity A cases less than one hour, two hours for Severity B, and 4 hours for Severity C.

24x7 Support: Available for Severity A cases only. Please find the severity level definitions on Appendix B.

Severity	Response Time	Availability
A	1 Hours	24x7
B	2 Hours	Local Business Hours
C	4 Hours	Local Business Hours

Technical Call Routing

Direct access to tier 2 escalation engineers.

Service Delivery Management

To provide you a connected approach to your support with Microsoft, the Service Delivery Management team provides:

- **Escalation Specialists:** If your submitted support case becomes a critical issue your Escalation Specialist can assist by escalating your incident for faster resolution and will manage the case until closure.

- **Red Carpet Welcome:** A formal welcome meeting is scheduled to establish relationships and to ensure you have a deep awareness of the key benefits that are included in your service offering, including a walk-though of how to use your benefits.

- **Light Advisory Services:** Advisory Services helps you get to the right resources for your needs and facilitates information transfer. When you request additional guidance that goes beyond your billing and technical break/fix needs, Advisory Services acts as your liaison with groups at Microsoft providing high level guidance on resolution of how-to questions. The Service Delivery Manager

proactively works with you to understand your large pain-points, directs you to suggested self-service content, and acts as your voice to drive your insight upward in Microsoft.

- o Professional Direct does not provide detailed advisory assistance specific to an individual customer such as code or architecture reviews, design reviews, detailed instructions for application or configuration tuning (e.g., performance tuning), or the verification of specifications. Also, Service Delivery Manager does not engage in implementation activities such as, but not limited to, coding or configuration for customer development or deployment.

- **Release Upgrade Readiness:** The Professional Direct Service Delivery Manager will prepare and manage the customer's experiences for new product/version releases and upgrades by working directly with customer through the upgrade process to help ensure test/dev environments are upgraded and customer's concerns and conflicts are resolved prior to production upgrade.

- **Monthly Review:** The monthly review is designed to develop a rapport between the customer and its Service Delivery Manager. During this meeting the Service Delivery Manager gets to know customer's organization, reviews open service requests, seeks feedback, and, if needed creates a go-forward strategy to get the customer's service back on track. Additional topics covered during discussions are product feature requests, service incidents or outage related experiences, and future product adoption plans.

- **Service Interruption Handling:** At first notification of a Service Interruption Event (SIE) the Professional Direct Service Delivery Manager will look into the effects it may have on a customer's organization and will proactively contact impacted customers. The Service Delivery Manager will monitor service requests as needed until resolution and will also work with the customer if a credit for downtime is required by working with Microsoft billing teams.

- **Case Wellness:** The Service Delivery Manager *proactively* reviews a customer's high priority support requests (SRs), and collaborates with Microsoft's Service Engineering teams to ensure faster resolution. Severity A and Severity B cases are monitored on a daily basis.

- **Product Onboarding Assistance:** With rapid product releases, customers may feel inundated with the new features and services. The Service Delivery Manager reviews the customer's product setup and subscription purchase to ensure understanding and provide guidance. An introductory session on new features and services is conducted with follow-up to help you configure the product.

- **Ask the Expert Webinars:** A monthly online webinar where Microsoft experts share their knowledge and expertise on specific Azure, CRM, or AX topics. Webinars are offered twice a month to accommodate global time zones, with varying topics driven by customer feedback. Webinars are one hour long, with time for Q&A.

Upon purchase of the Professional Direct Services offering, a Service Delivery Manager will contact you to begin the onboarding process.

Customers may also submit an Advisory request or request escalation assistance by the following:

- By email: mailto:pddyn@microsoft.com
- By Phone: link to phone numbers

Premier Support

Your Technical Account Manager will engage to provide a full onboarding to your Premier benefits.

Additional Resources

Read News and Events

Stay up-to-date on the latest business and product-specific news, as well as upcoming conferences, online seminars and other events.

Submit Product Feedback

Submit suggestions and feedback about your Microsoft Dynamics solution.

Join a User Group

Microsoft Dynamics User Groups are independent associations of end-user companies who share the common interest of peer-to-peer knowledge sharing and networking to optimize their usage of Microsoft Dynamics products.

- [Microsoft Dynamics AX User Group](#)
- [Microsoft Dynamics CRM User Group](#)

Appendix A: Training Courses

One of the most valuable benefits you have as a Microsoft Dynamics customer active on a service plan or subscription is unparalleled access to training opportunities. Access e-learning 24 hours a day, 7 days a week on CustomerSource to empower your users to unlock your solution's potential. This course list is applicable for customers who have purchased a premium support offering.

*Note: Enhanced Support is available only for Microsoft Dynamics CRM Online, Microsoft Dynamics Marketing, Microsoft Social Engagement, or Parature, from Microsoft

Microsoft Dynamics e-learning Courses by Product

Microsoft Dynamics AX	Course
Development Basics in Microsoft Dynamics AX	80730
Introduction to Microsoft Dynamics AX	80732
General Ledger Configuration in Microsoft Dynamics AX	80743
Chart of Accounts and Ledger Balances in Microsoft Dynamics AX	80744
General Ledger Setup and Review in Microsoft Dynamics AX	80745
Microsoft Dynamics AX 7 Security	80753
Microsoft Dynamics AX 7 Performance, Reliability and Scale	80754
An Introduction to the Microsoft Dynamics AX 7 User Experience	80755
Monitoring and Diagnostics of Microsoft Dynamics AX 7 Environment	80757
Microsoft Dynamics AX7 Office Integration to Enhance User Productivity	80758
Microsoft Dynamics Lifecycle Services Solutions Overview	80759
Microsoft Dynamics AX7 Data Management Story	80760
Navigating Microsoft Dynamics AX	80763
Introduction to Microsoft Dynamics AX7 for Retail	80764
Introduction to Microsoft Dynamics AX7 Workflow	80768
Introduction to Task Recorder in Microsoft Dynamics AX	80769
Managing Users and Security in Microsoft Dynamics AX	80773
System Administration in Microsoft Dynamics AX	80774
Organization Model in Microsoft Dynamics AX	80775
Workflow in Microsoft Dynamics AX	80776
General Journals in Microsoft Dynamics AX	80805
Intercompany Accounting in Microsoft Dynamics AX	80806
Sales and Withholding Taxes in Microsoft Dynamics AX	80807
Vendor Invoicing in Microsoft Dynamics AX	80808
Free Text Invoices and Sales Order Invoices in Microsoft Dynamics AX	80809
Vendor Setup in Microsoft Dynamics AX	80810
Customer Setup in Microsoft Dynamics AX	80812
Vendor Invoice Journals in Microsoft Dynamics AX	80813
Cash and Bank Setup in Microsoft Dynamics AX	80814
Vendor Payments in Microsoft Dynamics AX	80815
Customer Cash Receipts	80816
Centralized Payments in Microsoft Dynamics AX	80817
Prepayments in Microsoft Dynamics AX	80818
Bills of Exchange in Microsoft Dynamics AX	80819
Fixed Assets Setup in Microsoft Dynamics AX	80820
Fixed Assets Depreciation in Microsoft Dynamics AX	80821
Fixed Assets Management in Microsoft Dynamics AX	80822

Microsoft Dynamics AX	Course
Fixed Assets Transactions in Microsoft Dynamics AX	80823
Budgeting in Microsoft Dynamics AX	80824
Period End in Microsoft Dynamics AX	80825
Customer Collections in Microsoft Dynamics AX	80826
Vendor 1099s in Microsoft Dynamics AX	80827
Cash and Bank Reconciliation in Microsoft Dynamics AX	80828
Eliminations and Consolidations in Microsoft Dynamics AX	80829
Budget Planning in Microsoft Dynamics AX	80830
Budget Control in Microsoft Dynamics AX	80831
Commitment Accounting in Microsoft Dynamics AX	80832
Management Reporter in Microsoft Dynamics AX	80833
Installation and Deployment in Microsoft Dynamics CRM 2013	80539
Customization and Configuration in Microsoft Dynamics CRM 2013	80542
Introduction to Microsoft Dynamics CRM 2013	80543
Customer Service in Microsoft Dynamics CRM 2013	80545
Sales Management in Microsoft Dynamics CRM 2013	80546
Extending Microsoft Dynamics CRM 2013	80547
Integrating Microsoft Dynamics CRM 2013 and Microsoft SharePoint 2013	80586
Deployment in Microsoft Dynamics CRM Online	80664
Customization and Configuration in Microsoft Dynamics CRM Online	80665
Extending Microsoft Dynamics CRM Online and On Premise	80666
Introduction to Microsoft Dynamics CRM Online	80667
Customer Service in Microsoft Dynamics CRM Online	80668
Sales and Marketing in Microsoft Dynamics CRM Online	80669
Reporting in Microsoft Dynamics CRM Online	90675
Installation in Microsoft Dynamics CRM 2015	80679
Sales and Marketing in Microsoft Dynamics CRM Online 2015 Update 1	80709
Customer Service in Microsoft Dynamics CRM Online 2015 Update 1	80710
Data Management in Microsoft Dynamics CRM Online	80712
Deployment in Microsoft Dynamics CRM Online 2015 Update 1	80713
Automating Microsoft Dynamics CRM with Business Process Management	80714
Office 365 Integration with Dynamics CRM Online	80715
Customer Service in Microsoft Dynamics CRM 2016	80726
Sales Management in Microsoft Dynamics CRM 2016	80727
Introduction to Microsoft Dynamics CRM 2016	80728
Customization and Configuration in Microsoft Dynamics CRM 2016	80729
Installation in Microsoft Dynamics CRM 2016	80735
Microsoft Dynamics CRM Online 2016 Deployment	80736
Microsoft Dynamics Marketing	Course
Functional Application in Microsoft Dynamics Marketing	80677
Technical Deployment and Customization in Microsoft Dynamics Marketing	80678
Functional Application in Microsoft Dynamics Marketing	80711
Microsoft Social Engagement	Course
Social Engagement in Microsoft Dynamics CRM Online	80676
Social Engagement in Microsoft Dynamics CRM 2015	80700
Social Engagement in Microsoft Dynamics CRM 2016	80734

Parature, from Microsoft Training

Access the Training Center, Knowledgebase, and API articles, to include the latest materials, training and videos on the Parature Success Center.

Appendix B: Case Severity Definitions

Severity	Customer's Situation	Expected Microsoft Response	Expected Customer Response
A	Critical business impact: • Customer's business has significant loss or degradation of services. • Needs immediate attention	Initial response: • 1 hour or less for Professional Direct and Premier • 2 hours or less for Enhanced • Next business day for Subscription	• Allocation of appropriate resources to sustain continuous efforts all day, every day[1] • Accurate contact information on case owner
B	Moderate business impact: • Customer's business has moderate loss or degradation of services but work can reasonably continue in an impaired manner	Initial response: • 2 hours or less for Professional Direct and Premier • 4 hours or less for Enhanced • Next business day for Subscription	• Allocation of appropriate resources to sustain continuous effort unless customer requests to opt-out of 24x7[2] • Accurate contact information on case owner
C	Minimum business impact: • Customer's business is substantially functioning with minor or no impediments of services	Initial response: • 4 hours or less for Professional Direct and Premier • 8 hours or less for Enhanced • Next business day for Subscription	• Accurate contact information on case owner

[1] 24x7 support is only available for Professional Direct and Premier. Premier customers, login to your Premier portal to submit.
24x7 support for Severity B incidents is only available for Premier

[2] Microsoft may downgrade the severity level if the customer is not able to provide adequate resources or responses to enable Microsoft to continue with problem resolution efforts.