



# ***CustomerSource Reference Guide***

**Use this guide to access key resources that helps make the most of the software you receive through the Microsoft® Dynamics™ Academic Alliance program. CustomerSource is a time-saving, secure, password-protected area of the Microsoft Dynamics Web site.**

## **To Access CustomerSource:**

*Follow these three easy steps to access the numerous resources available to you:*

1. Go to [www.passport.net](http://www.passport.net) to create your Microsoft .NET Passport or Windows Live™ ID account, if you do not already have one.
2. Visit <https://mbs.microsoft.com/CustomerSource>, If this is the first time you have accessed CustomerSource with your Microsoft .NET Passport or Windows Live ID, verify your e-mail address on record with Microsoft Dynamics and then associate your Microsoft .NET Passport or Windows Live ID with your account.
3. Respond to the e-mail you receive when you first sign in to CustomerSource using your Microsoft .NET

Passport or Windows Live ID.

- For help with technical difficulties accessing CustomerSource, contact Microsoft Dynamics at [voice@microsoft.com](mailto:voice@microsoft.com).
- More information about Microsoft .NET Passport and Windows Live ID can be found at [www.passport.net](http://www.passport.net).

## Features of CustomerSource:

### Enhancements and Support

#### Enhancement Benefit

- If you are using Microsoft Dynamics GP, Microsoft Dynamics SL or Microsoft Dynamics CRM, you will automatically receive software updates as they are released. If you are using Microsoft Dynamics AX or Microsoft Dynamics NAV, e-mail [dynaa@microsoft.com](mailto:dynaa@microsoft.com) to request an update.

#### Support Entitlement

- Find solutions to your technical questions by accessing self-support resources.
- If the self-support resources are unsuccessful, phone or e-mail our support team. You are given 10 free support incidents per membership year.
- Find how-to articles, benchmarks, system requirements, user guides, and white papers.
- Take advantage of service downloads and updates.
- Participate in a Public Newsgroup.

#### Before you call Support

Know your 10-digit authorization number. If you don't know this number, search in CustomerSource under MyAccount>>Account Information>>Company Profile

If you've received an error message, note the following information:

- The exact wording of the error message
- When the error first occurred
- What task you were trying to perform when the error message was first displayed
- Whether the task has been completed successfully in the past
- Which window you were in when the error occurred
- What you have done to attempt to fix the problem
- If using more than one company, whether the error occurs in another company
- Whether the problem occurs on another workstation
- Which version of the software you're using
  - Version of Microsoft Dynamics, database, and operating system (noting service packs)
- Whether you have add-on products installed
- Whether the problem occurs for the system administrator user
- Whether the problem occurs at the database server

### Training

You have unlimited access to E-Learning, as well as the authorization to download Microsoft Dynamics training materials.

*Note:* Availability will vary by region. Areas outside the Americas will receive these benefits in March 2007 or later.

#### To participate in E-Learning:

1. In CustomerSource, click on the Training & Certification link.
2. Click the E-Learning link.
3. Select the Product, Series, or Collection to search for specific E-Learning courses.
4. Click the E-Learning course you want.
5. Review the system requirements to ensure your computer complies.
  - a. You can test your computer's capabilities by clicking Test Your Computer's Capabilities

6. Click Content tab towards the top of the page.
7. Click the Begin button to start the course.
  - a. If the course does not automatically launch, you may have to follow an easy click-through manual install to run the course.
  - b. A page should display providing the necessary information for this process.

*Note:* You need to be listed on the CustomerSource account for your institution to participate in E-Learning. These courses are for professors and IT staff, not intended for use by students.

### **To access and download training materials:**

1. Click on the Training & Certification link.
2. Click the Training Material Downloads link.
3. Select the Product to search for the training materials associated with the product of choice.
  - a. You may also narrow the search by selecting a Version and/or Series of the product.
4. Click the specific training material download you want.
5. Click on the link in the upper right-hand corner to initiate the download through the File Exchange download tool.
  - a. The File Exchange tool should automatically begin.
  - b. Select where you want the file to be saved.
  - c. Click Transfer and the download will begin.
6. To access the training material you have downloaded, go into the location where you designated the file to be saved.

*Note:* The training materials that are downloaded can be printed and all, or portions, of the materials can be used in your classes.

## **My Account**

One person is required to be the “Bill to” person on each account. This designation is not related to any billing process, but means the person specified will be the main contact and the recipient of any correspondence concerning this account.

This person is also the administrator—the person allowed adding, modifying, or deleting other users on the account. Contact [voice@microsoft.com](mailto:voice@microsoft.com) if users do not have e-mail addresses in our system.

### **Updating Your Account**

Review and update your account regularly. We suggest listing both the classroom professor and the person responsible for IT at your institution.

### **Product Registration Keys**

If you are prompted to enter product registration keys when installing your Microsoft Dynamics product, you can find them under My Account>>Account Information>>Product & Service Summary.