

# P2P Transfer Check list

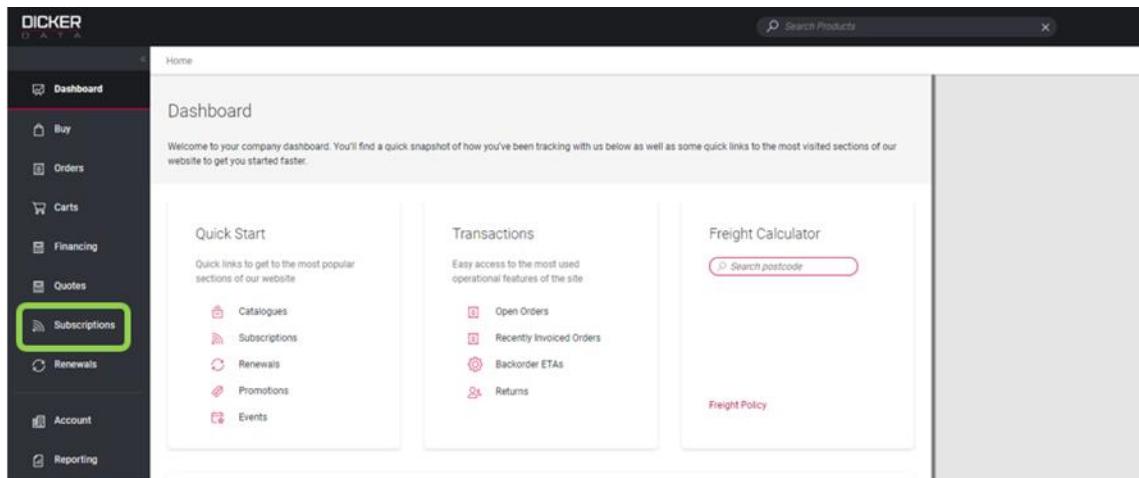
This Step-by-Step process will ensure a smooth transfer to Dicker Data from your existing Indirect CSP Provider.

The steps below must be completed in full:

## Step 1: Partner

Visit [www.dickerdata.com.au](http://www.dickerdata.com.au) and sign in with your username, account number and password.

Select Subscriptions option <https://portal.dickerdata.com.au/manageSubscriptions>



The screenshot shows the Dicker Data Partner Portal dashboard. The left sidebar has a 'Subscriptions' menu item highlighted with a green box. The main area has three main sections: 'Quick Start' (with links to Catalogues, Subscriptions, Renewals, Promotions, and Events), 'Transactions' (with links to Open Orders, Recently Invoiced Orders, Backorder ETAs, and Returns), and 'Freight Calculator' (with a search bar for postcode).

## Step 2: Partner

Estimated Timeline for uploading bulk tenant list 1 hour if no errors.

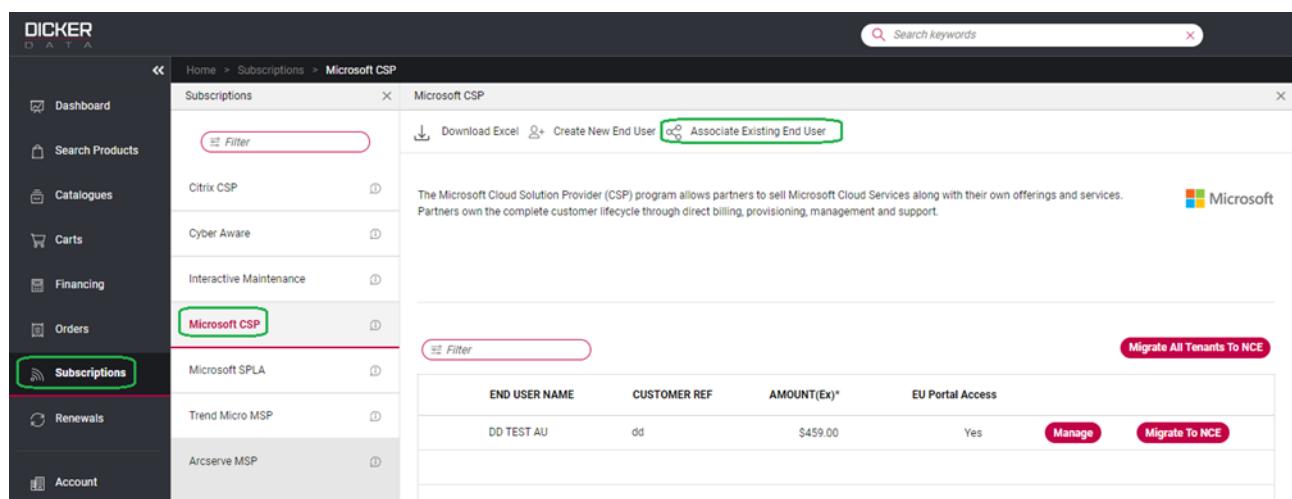
Estimated Time for associating tenants: 1 Day (might be longer depending on the information available)

**Associate your tenants on the Dicker Data website either individually or by bulk**

**Option 1.** If the End User has Access/Global admin rights, ensure the Association Email is sent to their email address (We recommend you talk to your End Users before you start the process so they are aware)

**Option 2.** If you (the partner) have global admin rights to your End Users you could enter your email address as these notifications would be sent to you instead of the End User.

**Please note** the association request needs to be accepted by a global admin for the end user's tenancy.



The screenshot shows the Dicker Data Partner Portal Subscriptions page for Microsoft CSP. The left sidebar has a 'Subscriptions' menu item highlighted with a green box. The main area shows a list of CSP partners: Citrix CSP, Cyber Aware, Interactive Maintenance, Microsoft CSP (highlighted with a green box), Microsoft SPLA, Trend Micro MSP, and Arcserve MSP. Below this is a table for managing Microsoft CSP tenants, showing columns for END USER NAME, CUSTOMER REF, AMOUNT(Ex)\*, and EU Portal Access. A row for 'DD TEST AU' is shown with values: dd, \$459.00, Yes, and buttons for 'Manage' and 'Migrate To NCE'.

Bulk association is a feature that allows you to associate multiple tenants in a single action. This helps you to avoid the manual process of associating each tenant individually with each subscription. (Request a full list of tenants from your current provider as this will help in this section)

The screenshot shows the Dicker Data platform interface. On the left, there is a sidebar with various menu items: Dashboard, Search Products, Catalogues, Carts, Orders, Subscriptions (which is currently selected and highlighted in red), and Renewals. The main content area is titled 'Microsoft CSP' and shows a list of subscriptions: Cisco SaaS, Microsoft CSP (which is selected and highlighted in red), SkyKick Backup, Arcserve MSP, and Arcserve Xafe MSP. There are buttons for 'Download Excel', 'Create New End User', 'Associate Existing End User', and 'Bulk Associate'. A search bar at the top right says 'Search keywords'. A Microsoft logo is in the top right corner.

Click on “Download” to populate the template enter the mandatory columns Upload the completed CSV file and review the summary. You can edit or remove any lines before sending them.

The screenshot shows the 'Bulk Associate' page for Microsoft CSP. The left sidebar is the same as the previous screenshot. The main content area is titled 'Bulk Associate' and shows a 'GUIDELINE' section with a 'Download' button and a note about providing tenant domain, name, and email address. Below this is a section for 'Select a File to Upload Bulk Association' with a 'Choose File or Drag And Drop' button. A search bar at the top right says 'Search keywords'.

### Step 3: Partner

**Estimated Timeline: 1 Hour if there are no errors**

If there are Azure subscription that will be transferring with this request, a new \$0 subscription under the New Indirect Provider will need to be created so the transferring subscription has a destination.

The bulk order creation feature allows you to create multiple Azure subscriptions for multiple tenants at once. This saves you time and hassle when having to upload multiple Azure subscriptions to your tenants.

Click on “Download” to populate the template enter the mandatory columns Upload the completed CSV file and review the summary.

The screenshot shows the Microsoft CSP Subscriptions page again. The left sidebar is the same. The main content area is titled 'Microsoft CSP' and shows the same list of subscriptions. There are buttons for 'Download Excel', 'Create New End User', 'Associate Existing End User', 'Bulk Associate', and 'Bulk Order Creation'. A search bar at the top right says 'Search keywords'.

Click on “Download” to populate the template enter the mandatory columns Upload the completed CSV file and review the summary.

**Bulk Order Creation**

Import Bulk Orders	In-Process	Archive
<b>GUIDELINES:</b> Download a sample file that you can populate CSP order details and upload.		

Select a File to Upload Bulk Order:

#### Step 4: Partner

##### Estimated Timeline: 1 Day if there are no errors

Once you have done the above steps, email [microsoft.sales@dickerdata.com.au](mailto:microsoft.sales@dickerdata.com.au) with the below information Provide Dicker Data the below information to start the transfer from the current Indirect CSP provider.

- Customer name: (End User)
- Customer email: (Global Admin)
- Current partner name: (Tier 1 Name)
- Current partner Microsoft ID: (Microsoft ID Number (Account Settings>Entra Profile))
- Reseller (MPNID)

#### Transfer requests | Add new

Invite the customer's current partner to transfer billing ownership of Azure subscriptions, Reservations, Savings plans and/or new commerce license-based subscriptions to your billing account. By sending this transfer request, you acknowledge and agree that the transfer items selected by your customer's current partner will transfer to your account as of the Transition Date. Any moved items may be used for this customer only. You agree that you may not cancel any prepaid subscriptions (including Reservations) transferred to your account. If the recipient does not act in 30 days, the transfer request will expire.

Before you proceed:

- Confirm that the customer has identified the Azure plan subscriptions, Reservations, and Savings plans and/or new commerce license-based subscriptions to be transferred and has notified the current partner.
- Ensure that the customer has accepted your terms and conditions since you will be responsible for charges based on the existing billing terms and frequency for subscriptions after the transfer is complete.
- If you are transferring an Azure reserved instance or Azure savings plan and the billing currencies of the current and target partners are different, the Azure reserved instance or Azure savings plan will be cancelled at the start of the next billing cycle. In order to continue service, the future partner will need to repurchase the Azure reserved instance or Azure savings plan.

Schedule time for each employee once per week

Details

Customer name \*

Customer email \*

Current partner name \*

Current partner Microsoft ID \*

Reseller (MPNID) \*

Indirect reseller(MPNID)

By opting in to this process, you represent and warrant to Microsoft that you are initiating/participating in this transfer in good faith, and agree to indemnify, defend, and hold Microsoft harmless from and against any and all third-party claims arising from or relating to this transfer. For Azure items, you will be invoiced for usage from the date this request is accepted and will be responsible to Microsoft for all ongoing, scheduled billings related to the transfer items as of the Transition Date, provided that Microsoft will move any prepaid subscriptions (including Reservations and Savings plans) for the transfer items to your account. License-based subscriptions will result in new subscriptions being created under your partner account. You assume the financial responsibility of the new subscriptions being created from the data transferred to the end of the subscription's term.

#### Step 5 Dicker Data

##### Estimated Timeline: 1 Day to send the transfer requests

Dicker Data will send the transfer requests to incumbent Indirect CSP Provider through Partner Centre

*The incumbent Indirect CSP Provider needs to approve the transfer and if they do not approve the transfer within 30 days the transfer request expires and must be re-submitted.*

**Partner – We recommend you notify your incumbent Indirect CSP Provider to expedite the transfer to ensure it is not delayed.**

### Important Notes

*Transfer requests only support Azure Plan subscriptions, reservations, savings plans and/or new commerce license-based monthly and annual subscriptions. **Legacy Subscriptions, Software subscriptions, perpetual software, and third-party subscriptions cannot be transferred using this transfer capability.***

**Important to Note** Most Azure Marketplace products can be transferred with their Azure Subscription. However sometimes a product will be ineligible. An error message is generated when something is ineligible at which point it is recommended that all Azure Marketplace products under the sub be cancelled. These can be reprovisioned once the sub completes transfer.

**Foreign Principle Rights** does not automatically get provided to the subscription once transferred. We recommend adding this by having a user that has global admin rights to the subscription run the PowerShell for this.

<https://learn.microsoft.com/en-us/partner-center/reinstate-csp?tabs=workspaces-view#reinstate-your-csp-admin-privileges-your-actions>

Our 'AdminAgents' resource ID (ObjectID) : e727c534-c0e2-4440-81b0-f5a28a5dac51

*Azure Cost Management was previously enabled via the old Indirect Provider the settings do not carry across with the transfer.*