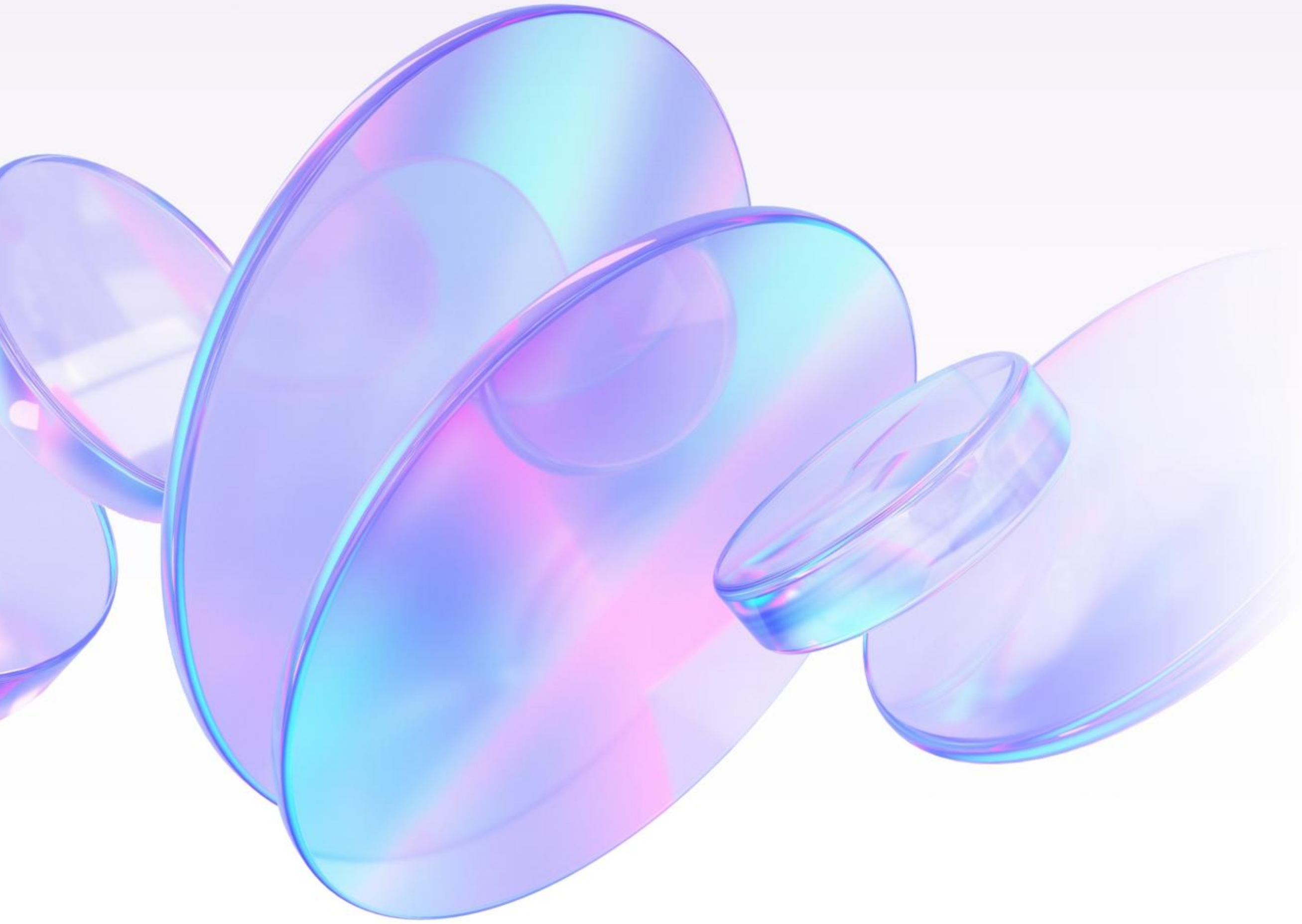
PARTNER CENTRE SETTINGS



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Introduction

This guide is designed to help Microsoft partners successfully set up their organisation in Partner Centre, meet Microsoft's legal, security, and identity requirements, and begin transacting with an approved Indirect Provider. Whether you're a new IT provider joining the Microsoft ecosystem or an established business formalising your partnership, this document will walk you through each step of the onboarding process in clear, practical terms.

You'll learn how to:

- Register your organisation and verify legal status
- Complete all required identity and security validations
- Understand Microsoft's vetting process and how to avoid common delays
- Collaborate effectively with your chosen Indirect Provider
- Stay compliant with Microsoft's annual checks and requirements

Important: Microsoft enforces strict vetting and identity verification standards to protect the integrity of its cloud ecosystem. Failing to meet these requirements may delay or block your ability to transact or access incentives.

This guide is specific to **Australia and New Zealand** and reflects the most up-to-date onboarding practices as of **June 2025**.

Step 1: Access Partner Centre Account Settings – Signing Microsoft Partner Agreement- Tax Profiles

1. Sign in to Partner Centre

- Go to https://partner.microsoft.com

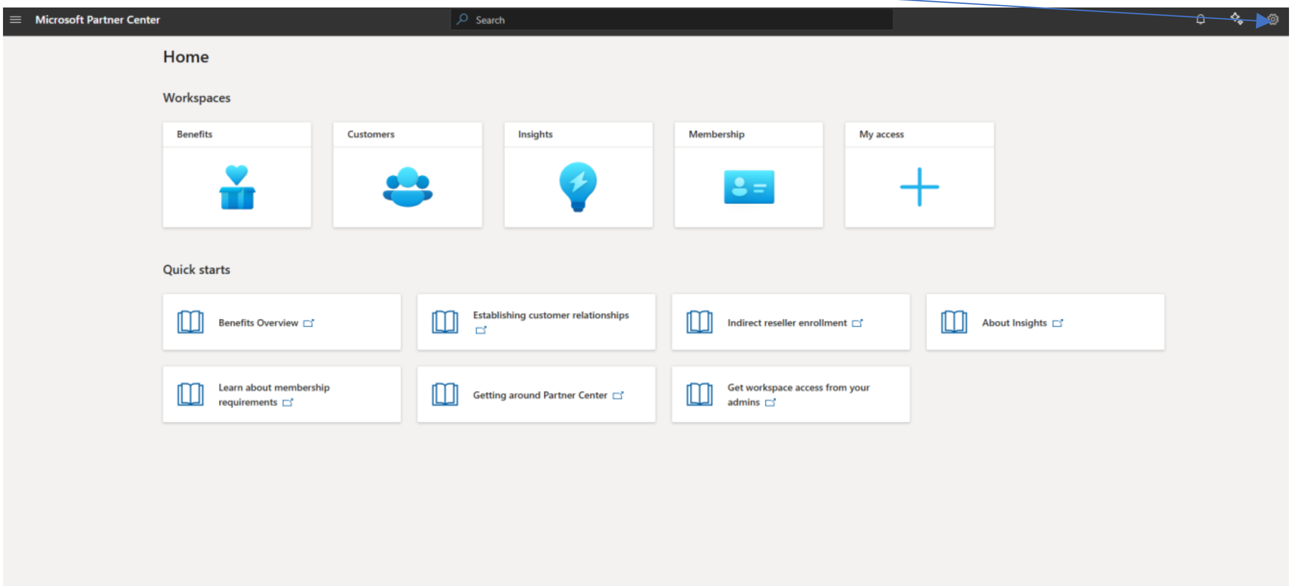
- Sign in with your work account that has the appropriate role (e.g., Partner Admin, Account Admin, or Manager Global Admin)

2. Open the Account Settings Workspace

- Click the gear icon (⚙) in the top-right corner of the Partner Centre dashboard

The "My Access" + tile will also take you to the same section

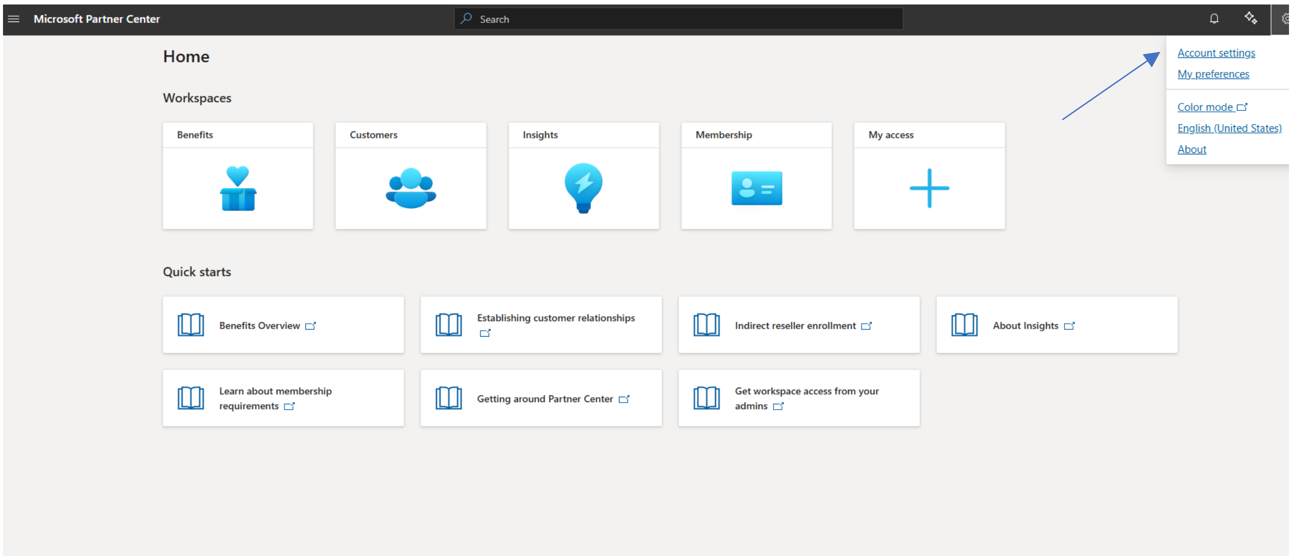
In Partner Centre, go to Account Settings > Legal Info
Select on the left hand side the "gear wheel" This will change the screen for all "Account Management"



Signing Microsoft Partner Agreement

- Before proceeding with any transactions, your organisation must review and accept the Microsoft Partner Agreement.
- Navigate to **Account Settings > Legal Info** or use the notification banner at the top of the dashboard if prompted
- Review the terms and conditions
- Accept electronically on behalf of your organisation
- **Only a user with Global Admin rights** can accept the MPA

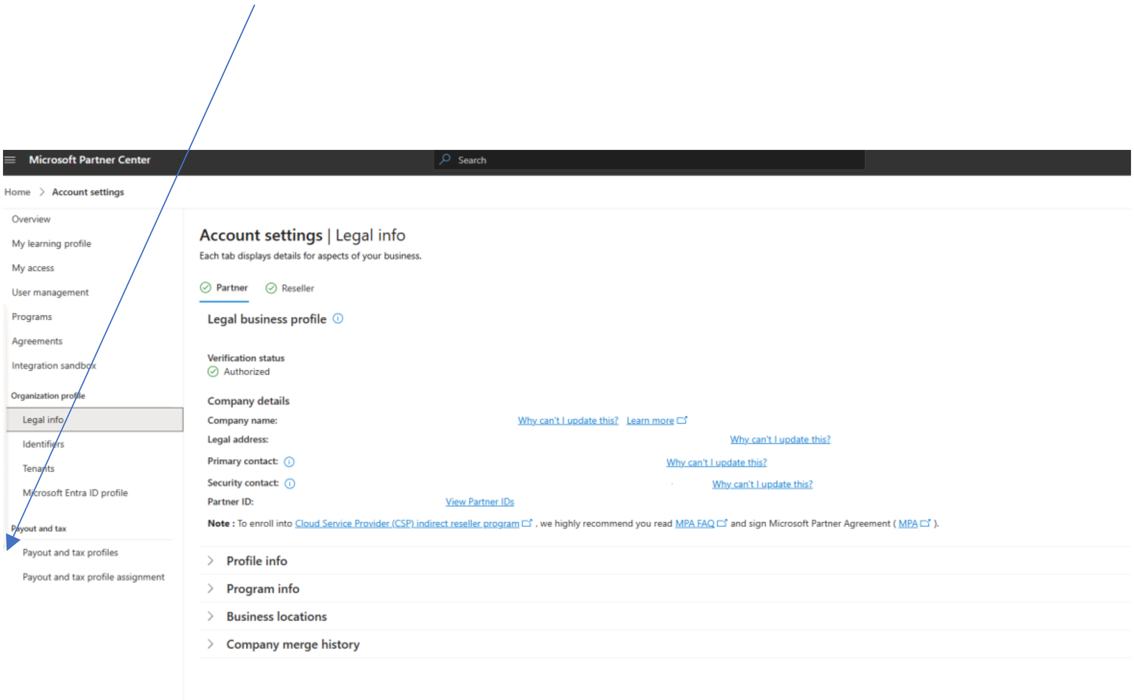
Once accepted, this step confirms your organisation's formal registration in the Microsoft Partner Network.



- Select Account settings from the dropdown.
- This workspace allows you to view and update your organisation profile, manage users and permissions, access program enrolments, review legal agreements, and file tax exemptions (if applicable).

Here is where you also need to check your banking and tax profiles

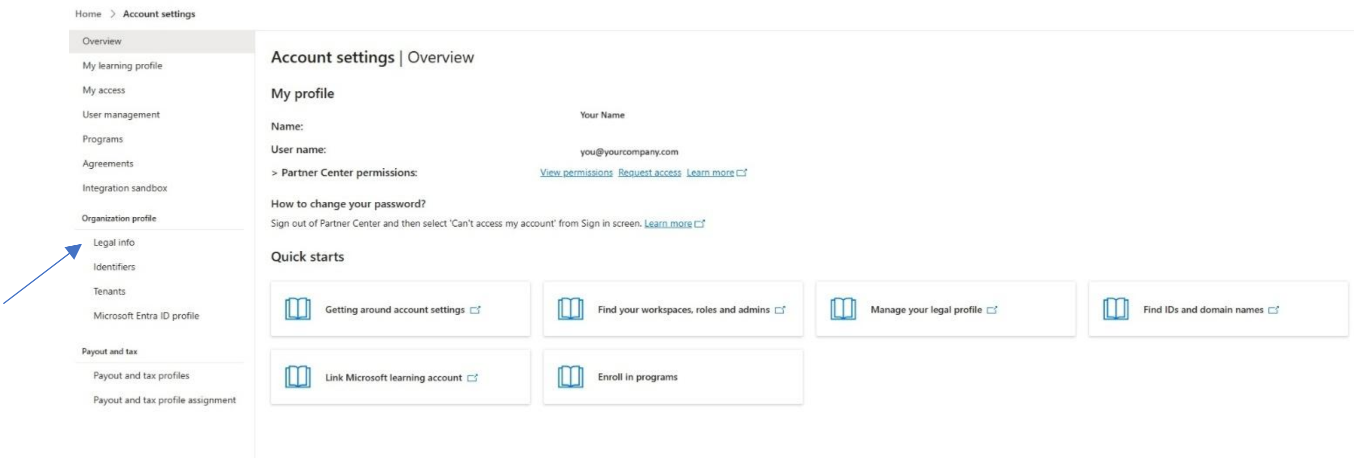
Payout & Tax Profiles



- In the same manner as above click on the Payout and TaxProfiles
- Ensure all accounts and profiles are completed and have a green tick, if there are any issues with your details ensure they are updated and rectified

Step 2: Verify Your Organisation's Legal Profile

Navigate to: **Account Settings > Legal Info**



Required Fields:

- **Legal Company Name**: Must match your official registration (ASIC in Australia, NZBN in New Zealand). Ensure that your **company name** matches exactly with ASIC (AU) or NZBN (NZ) records
- **Country/Region of Operation**: Select Australia or New Zealand.
- **Registered Business Address**: Must be a physical, verifiable address. PO Boxes are not accepted
- **Phone Number**: Must be valid and answered.
- **Primary Contact**: A senior staff member using a corporate email.
- **Business Email**: Must be from a verified domain (e.g., jane.citizen@company.com) This cannot be a distribution email list and it is best practice to use an email with a first.last name

Documents Microsoft May Request (AU/NZ):

- Australia:
  - ASIC Company Extract or Certificate of Registration

    https://asic.gov.au/online-services/search-asic-registers/business-names/
  - ABN Confirmation from the Australian Business Register

    https://abr.business.gov.au/Search/Index
  - Recent utility bill or business bank statement
- New Zealand:
  - New Zealand Companies Office
  - New Zealand Companies Register
  - IRD number confirmation

    https://myir.ird.govt.nz/
  - Utility bill or bank statement (dated within last 90 days)

What Microsoft Verifies:

- Existence and legitimacy via ASIC/NZBN and credit agencies.
- Matching of name, country, and address with submitted documents.
- Valid contact methods and corporate domain emails.
- No conflicts under sanctions, AML, or politically exposed persons (PEP) lists.

Common Mistakes That Delay Approval:

- Using incorrect or trading names (instead of the registered legal entity). Mismatched legal names (e.g., Pty Ltd vs PTY LIMITED)
- Submitting screenshots instead of official PDFs or scans
- PO Boxes or virtual addresses.
- Using alias or unmonitored email addresses.

Rejection or Delays: What To Do

- Update company details to reflect legal name accurately
- Provide missing or supplementary documentation (e.g., new ASIC extract)
- Write a business explanation letter if flagged (e.g., for old address or domain mismatch)
- Submit a Microsoft Partner Centre support request for escalation

Step 3: Email and Contact Verification

- The **primary contact** must have a corporate email address (e.g., jane.doe@yourcompany.com).
- Personal email domains (Gmail, Hotmail, Outlook.com) are **not permitted**.
- Partner Centre requires domain verification through DUNN & BRADSTREET
  Find Any Company's D-U-N-S Number - Dun & Bradstreet
- Records to confirm ownership of the corporate email domain.
- Partner Centre will prompt you to verify ownership of your domain using a DNS TXT record.

Step 4: Identity Verification (New Requirement)

1. Log in to Partner Centre:
   Go to **https://partner.microsoft.com** and sign in with your Partner Global Account (PGA).
2. Navigate to the User Profile Section:
   - Click on your profile icon (top right corner of the Partner Centre dashboard).
   - Select "My Profile" from the dropdown menu.
3. Access the Identity Verification Page:
   - Inside your profile, look for a section or prompt titled "Identity Verification" or "Verify your identity".
4. You may also see a dashboard banner prompting verification.
5. Direct link: **https://partner.microsoft.com/en-us/dashboard/account/vetting** (login as GA required)
   - If you cannot see this, you may not have the correct permissions
   - Alternatively, if you have pending verification, you may see a notification banner on the dashboard prompting you to complete identity verification—click it to proceed.
6. Start the Verification Process:
   - Click "Start Verification" or similar button.
   - You will be redirected to a third-party verification service.
7. Complete the Verification Steps:
   - Upload a valid government-issued photo ID (passport, driver's license, or national ID card).
   - Take a live selfie via your webcam or mobile device to confirm your identity matches the ID.
   - Follow all on-screen instructions carefully and submit your verification.
8. Verification Outcome:
   - The process typically completes within minutes, but in some cases, manual review may take longer. However, if verification fails or is pending for an extended period, contact Microsoft Partner Support via logging a ticket.

- You can check your verification status anytime by returning to My Profile > Identity Verification

Accepted ID Types

- Australian or NZ Passport
- Australian or NZ Driver Licence (must be current)
- National Photo ID Card (must be government-issued)

Common Rejections

- ID expired or unreadable
- Name on ID does not match profile name
- Photo unclear or taken in poor lighting

Step 5: Security Compliance Requirements (For Indirect Resellers)

Maintaining strong security controls is mandatory to protect your organisation and customers. Microsoft expects all partners to follow baseline security practices:

- **Sign in** to https://partner.microsoft.com with your Partner Global Account (PGA).
- Click the **gear icon** (top right) or select your name > **Partner Centre**.
- In the left-hand menu, go to **Dashboard** > **Security requirements**.
- You will see the current compliance status for:
- Multi-Factor Authentication (MFA)
- Security contact setup
- Admin role assignments

Best Practice:

- Enable MFA for all Partner Centre users.
- Limit Global Admin roles.
- Remove unused accounts and enforce password policies.
- Regularly audit Partner Centre roles and permissions.

FAQ's

Legal & Vetting

Q: Why does Microsoft need my legal documents?
To verify that your organisation is a registered, legitimate business entity in Australia or New Zealand.

Q: What documents are accepted?

- ASIC/NZBN registration documents
- Government-issued tax notices
- Utility bills, lease agreements, or council rates
- ABN/IRD certificates (must show business name and match Partner Centre profile)

Q: What documents are NOT accepted?

- Screenshots or photos of monitors
- Personal bank statements
- PO Boxes or virtual office addresses
- Documents older than 90 days

Q: What causes delays or rejections in vetting?

- Mismatched legal names (e.g., ABN name vs. Partner Centre profile) This includes things such as PTYLTD compared to PTY LTD or PTY Limited bother personal names including any middle names on personal documents need to be included.
- Expired or illegible documents
- Home or PO Box addresses used as business location
- Personal email addresses used for verification

Q: How do I check my vetting status?
Go to **Partner Centre > Account Settings > Legal Info** and check for status messages or alerts.

Q: Can I appeal a vetting rejection?
Yes. Correct your business profile and upload valid documents. Contact Microsoft Partner Support if needed.

Identity Verification

Q: Is identity verification mandatory?
Yes. One authorised individual must complete a government ID + live selfie verification.

Q: Where do I go to verify my identity?
Log into Partner Centre > Click Profile Icon > My Profile > Look for "Identity Verification."

Q: What if I fail identity verification?
You'll be notified with a rejection reason. Ensure your ID is valid, photo is clear, and name matches your profile.

Q: What kinds of IDs are accepted?
Australian or NZ passport, driver's licence, or national photo ID card.

Security

Q: Do I need MFA?
Yes. MFA is required for **all** users who access Partner Centre.

Q: Do I need a Microsoft support plan (ASfP)?
No. Your Indirect Provider handles support. ASfP/PSfP are only required for Direct CSPs.

Q: Should we use shared admin accounts?
No. Each user must have their own login. Shared credentials are a compliance risk.

Check List

Use this checklist to ensure your organisation is fully prepared for onboarding and ongoing compliance with Microsoft Partner Centre policies.

Legal & Business Setup

- Legal company name matches ASIC (Australia) or NZBN (New Zealand) registry exactly
- Registered address is a physical, verifiable business location (no PO Boxes or virtual addresses)
- All submitted documents are recent (dated within the last 90 days)

Identity & Contact Information

- Primary contact uses a **corporate email address** (e.g. jane@yourcompany.com)
- Email domain is verified (DNS/MX records configured properly)
- Contact phone number is active, direct, and monitored

Identity Verification

- At least one individual has completed Microsoft's identity verification
- Valid government-issued ID and selfie photo submitted correctly

Security & Compliance

- Multi-Factor Authentication (MFA) enabled for all Partner Centre users
- Global Admin roles limited to essential staff
- Partner Centre access regularly reviewed for dormant accounts or role misuse
- Awareness of DAP/GRAP permissions and customer access policies
- Aligned to your Indirect Provider's security requirements and tools

Operational Readiness

- Relationship established with a local Indirect Provider
- Staff trained on how to transact licenses and manage subscriptions
- Internal process for managing billing inquiries, license changes, and basic support requests
- Record-keeping process for Microsoft communications and compliance history