Partner Membership Center to Partner Center Transition

Step by Step Guide

Prepared for

Microsoft Partners Utilizing Partner Membership Center

Prepared by

Microsoft Services

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1 Introduction

This document is designed to guide Microsoft partners on the transition from Partner Membership Center (PMC) to the new Partner Center portal, where partners will go to manage their MPN network, benefits and related services.

2 Pre-requisites

Before commencing transition activities, the following pre-requisites must be satisfied:

1. Identify or create the Azure Active Directory (AAD) tenant(s) that you will associate your MPN virtual organization(s) with in the new Partner Center.
   
   **Note:** Azure Active Directory (AAD) tenants can only be associated with one Partner Center instance.

2. Ensure a user with an active work account in the Azure Active Directory (AAD) tenant is available during the transition.

   **Note:** The AAD user performing the PMC to PC transition will be granted the following MPN-related RBAC (role-based access control) roles:
   
   - Account Admin
   - MPN Partner Admin
   - Business Profile Admin
   - Referrals Admin

3. Ensure the PMC Global Administrator is available during the transition, as this is the only role in PMC that can start the transition process.

4. Be prepared to accept the Terms and Conditions of Partner Center during the transition process.

5. Ensure your MPN membership is **NOT** in an expired state. If it is, renew in PMC before commencing transition activities. You can check at [https://partners.microsoft.com](https://partners.microsoft.com)

6. If your tenant is servicing CSP (cloud solution provider), verify that the HQ country matches the AAD tenant country (see Appendix J & Appendix K)

7. Review and verify PMC Program Contacts and user roles

8. Ensure a supported browser is installed (Microsoft Edge or Google Chrome) and inPrivate or incognito modes are used during migration
3 Transition Process Walkthrough

Step 1: Navigate to https://partners.microsoft.com and sign in with your PMC Global Administrator credentials

Step 2: Click on ‘Get started’

Note: When your Partner Membership Center account is eligible for transition, you will see the ‘Get started’ button shown below. If you do not see this, you are either not an administrator, or not eligible for transition yet.
Step 3: Click on ‘Sign in with your work email’

Step 4: Enter the credentials of an active work account within your targeted Azure Active Directory tenant then click ‘Next’

Note: The user credentials entered will be granted MPN-related RBAC roles.

Step 5: Click ‘Sign in’ then enter your password and click ‘Sign in’ again

Note: If your work address is already associated with an AAD tenant, you will see the “You have an account with us” message as shown below. If your work address does not exist in any Azure Active Directory tenant, proceed to Step 10.
Step 6: Accept the terms and conditions by clicking ‘Next’
Step 7: Wait while Partner Center finishes setting up

**Note:** This could take 2 – 6 minutes to complete

Step 8: Verify the information displayed is correct and click ‘Accept and Continue’
Note:

1. Verify the organization name displayed. Azure AD Tenant admin can always change it from the Azure AD Portal if needed.
2. Make sure you have access to the email address specified, as it will be used to verify the account during the transition process (you can change the email address later).

Step 9: Enter your email and click ‘Save’

Migration is now complete. Continue to the Post-Transition Verification Steps
Start here if you do not have an Azure Active Directory Tenant

**Step 10:** Enter your phone number and choose ‘Text me’ or ‘Call me’

**Note:** If your work email address does not exist in any Azure Active Directory tenant, the wizard will create a new Azure Active Directory tenant.

**Step 11:** Enter the verification code you received and click ‘Next’
**Step 12:** Enter your user information and enter the verification code sent to your email address then click ‘Next’

**Let’s get you signed up**

![Form](image)

**Step 13:** Wait while Partner Center finishes setting up

**Note:** This could take 2 – 6 minutes to complete
Step 14: Verify the information displayed and click ‘Accept and Continue’

Note:
- Verify the organization information.
- Make sure you have access to the email address specified, as it will be used to verify the account during the transition (you can change the email address later).

Step 15: Enter your email and click ‘Save’

Migration is now complete. Continue to the Post-Transition Verification Steps
4 Post-Transition Verification Steps

This section provides guidance for validating the transition has been completed successfully. All verification steps are done within the new portal, https://partner.microsoft.com. Going forward, use your Azure AD credentials to login to Partner Center.

**Step 1:** On the left menu, click on the ‘Overview’ tab and then click ‘View users’ under user accounts

**Step 2:** Click on ‘User Management’ and verify that you can now see all expected users from your Azure AD tenant

**Note:** If you would like to assign users role specific administrative access to Partner Center, search/click on their name and assign them a role. For more information on roles, click [here](https://partner.microsoft.com).

**Step 3:** On the left menu, click on the ‘Competencies’ tab under the MPN menu and verify competency levels are correctly reflected
Note: If you do not remember what competencies you had before, check in PMC (which is now read-only but still available at [https://partners.microsoft.com](https://partners.microsoft.com)).

Notes:

1. Transition of competencies can take up to 48 hours to propagate over to Partner Center.
2. Partner Center will ‘look back’ to PMC to verify competency(s) MCP threshold requirements were met prior to transition and will respect PMC’s qualification status for 6-12 more months or until renewal – whichever comes first.
   a. If you decide to renew post-transition, you will be able to renew at the same qualification status even if you have NOT yet completed MCP re-associations in Partner Center.
3. To preserve competencies beyond this period, inform users to sign into Partner Center using their work accounts and associate their Microsoft Learning account (see Appendix D & Appendix E) to requalify for benefits.
4. Depending on the competencies your organization has, the minimum number of users who need to have their MCP ID associated with Partner Center could vary (usually 2 to 3 users).
Microsoft Certified Professionals (MCP) have an ID to which their certifications are associated. To avoid any confusion or errors in this process, we strongly recommend individual MCP users to visit their Microsoft Learning profile page and confirm everything is showing as expected. These include signing in to https://microsoft.com/learning with their Microsoft Account (MSA) to make sure that they can see their MC ID and their associated certifications.

**Note:** MCP ID and MC ID refers to the same information. The guidance below shows these steps.

**Step 1:** Open a private browser and go to https://microsoft.com/learning
Step 2: Click on the ‘Your dashboard’ tab near the top of the page

Step 3: Sign in with your Microsoft account. This could be @hotmail.com, @outlook.com, @live.com but can also be a custom one, perhaps your company domain

Note that if you are using your work email address as your MSA account, the passwords are likely different.

Step 4: Verify that the MC ID is correct and that you can view previously taken exams
Note: At this point, you have verified that as a Microsoft Certified Professional, you are able to access the learning portal with your Microsoft account and see their MCP ID. You can now login to Partner Center (https://partner.microsoft.com) and associate your certified professional profile to your Partner Center account.
Appendix A – Identifying PMC Program Contacts and Permissions

User permissions will reset after transition to Partner Center, so PMC admins should obtain a snapshot of MPN membership and permissions. This section will guide you through the process of extracting MPN membership and permissions information for administrative delegations.

**Step 1:** Navigate to PMC (partners.microsoft.com), click on ‘Requirements & Assets’, and then click on ‘Assign Contact Roles’

**Step 2:** View the Program Contacts and permissions granted for each contact
Appendix B – Create User Accounts & Assign Roles in Partner Center

Step 1: On the Settings menu, select ‘User management’

Step 2: Select ‘Add user’

Step 3: Enter the user’s full name and unique email address

Step 4: Select the role you want to assign the user. Partner Center access is role-based, so you can assign permissions to customize the user's view and only show the features the user needs to see

Step 5: Select ‘Add’ to create the user account
Note: To view a list of all of the roles and permissions associated click here.
8 Appendix C – Associate Azure AD Tenant

Step 1: Under ‘Partner Account’, click ‘View your partner profile’

Step 2: Click ‘Tenants’ and then click ‘Associate another Azure AD tenant’

Step 3: Sign in with the work account for the Azure AD tenant you want to associate and then click ‘Next’
Step 4: Click ‘Confirm’
9  Appendix D – Perform MCP Association in Partner Center

This important section includes a walkthrough showing how a Microsoft Certified Professional employee should perform mapping of his or her Microsoft Learning Profile to their work account.

Step 1: Navigate to https://partner.microsoft.com
Step 2: Click on the ‘Dashboard’ button

Step 3: Sign in by entering your work account credentials, which is the Azure Active Directory tenant account your partner center instance is linked to

Step 4: Click ‘Skip tour’ if you do not want to go through the quick tour introducing you to the portal

Note: There is an option to complete the tour later if needed.
Step 5: Click the ‘Overview’ button on the left menu
Step 6: Click on the ‘My Profile’ button under User accounts

Step 7: Click on ‘Get Partner University access’ under Microsoft training & assessments

Step 8: Sign in with your Microsoft account (MSA)

Note: If you use your corporate email for your Microsoft account, ensure you use the Microsoft account password and NOT your corporate account password. If you do not remember your password, you can reset it by clicking on the Forgot my password link.
Step 9: Click on ‘Associate Microsoft Learning account’ under Microsoft exams and certification

Note: If in the rare case where your Microsoft account to sign in to Partner Center University is different from the account you use to access Microsoft Learning, uncheck the “Use <your user account> to associate my Microsoft Learning account” checkbox and sign in with your other Microsoft account.

Notes:

- Association is now complete. Remaining steps are provided as a reference for future use in case association needs to be removed.
- If an employee’s Azure AD account gets deleted, this association will be voided and removed.
Appendix E – Perform MCP Disassociation in Partner Center

**Step 1:** Navigate to [https://partner.microsoft.com](https://partner.microsoft.com)

**Step 2:** Click on the ‘Sign in’ button

**Step 3:** Enter your work account credentials

**Step 4:** Under User accounts, Click ‘My Profile’
Step 5: Click ‘Disassociate’

Step 6: When the prompt comes up click ‘Yes, disassociate my account’
Disassociate Microsoft Learning account
Are you sure you want to disassociate your Microsoft Learning account? Note: Your organization will no longer receive credit for exams and certifications you've earned.

- Yes, disassociate my account
- Cancel
11 Appendix F – Maintaining Competency Status

This section walks you through how to ensure you meet the minimum requirements to maintain your competency status.

Step 1: Log into https://partner.microsoft.com

Step 2: Click on either ‘Competencies’ to the left or click on the message notification to the right to view information about your competencies.

Step 3: If your competencies are at risk, you will notice either a yellow banner at the top or a triangle under the risk section. Click on the name of the at-risk competency.
Step 4: Click on ‘Azure Consumption option’ to view the requirements to maintain your competency level.

Step 5: If you do NOT see a green checkbox by the requirement, then you have NOT met the requirement/threshold for that task. You must have a green checkbox under each section of the competency level that you want to obtain.

Note: If you need to see who has completed an exam, click ‘Competencies’ and then ‘Download skills report’.
Note: An excel sheet will be generated with details on user exam completion.
Appendix G – Post Transition Notification

After transition to Partner Center, your MCPs need to perform Microsoft Learning profile mapping. If your anniversary date is close, you may receive the following email until you meet respective competency criteria for your target level. Part of this requalification relies on MCP registrations, part of it relies on other defined competency requirements. Your MPN administrator(s) should work with respective groups to ensure qualification level is achieved for an uninterrupted membership experience at the level you desire.

Action Required:

This is a notice that your organization is no longer meeting the requirements for the following competencies, making your organization ineligible for Gold membership renewal:

- Application Integration
- Cloud Platform

Please review your competency status on Partner Center, and complete any necessary requirements before 14-Jun-2019 to maintain your Gold MPN membership.

Please note that your current Gold MPN membership and benefits will continue until 14-Jun-2019.

Thanks,
Your Partner Center team

Note: See Appendix F – Maintaining Competency Status for information on how to meet competency requirements.
Appendix H – Extract Report of Employees with Competencies

Step 1: Log into https://partners.microsoft.com

Step 2: Click on ‘Requirements & Assets’ and then click ‘Manage Microsoft Certified Professionals’

Step 3: Click on ‘Export All MCPs to Excel’

Step 4: Click on the ‘Partner_MCP_Details’ excel document at the bottom (depending on browser this step might be different)
Appendix I – Extract Report of Associated Employees

Step 1: Log into https://partner.microsoft.com

Step 2: Under User Accounts, Click on ‘View Users’

Step 3: Click ‘Export report of users’
Step 4: Click on the ‘PartnerCenter_users’ Excel document at the bottom (depending on browser this step might be different)
Appendix J – View MPN HQ Location

Step 1: Log into https://partners.microsoft.com

Step 2: Under Organization Information click ‘Manage Locations’

Step 3: Under Select Location, you can now view the MPN HQ Location
16 Appendix K – View Azure AD HQ Location
Log into [https://portal.azure.com](https://portal.azure.com)

Step 2: Click ‘Azure Active Directory’

Step 3: Click on ‘Properties’
Step 4: View the Azure AD HQ under the ‘Country or region’ tab
17 Appendix L – Changing your MPN Headquarters in PMC

Before changing MPN HQ, ensure all stakeholders from incentives, benefits, billing, operations, etc. are involved to ensure no adverse effects occur from the change.

Additionally, verify if your virtual organization has been whitelisted. Upon logging in, if you see the blue banner below inviting you to ‘Get started’, you have been whitelisted. In this case, the below steps will not work, as PMC is in a read-only state.

Step 1: Log into PMC and hover over ‘Organization Information’. Click ‘Manage Locations’. Click the ‘Modify Hierarchy’ tab

Step 2: Select a Location from the dropdown menu below and click ‘Change Headquarters’. The view in Your Modifications will reflect your change. If the change is not what you expected, click ‘Undo Last Move’

Define new Headquarters Location

Note: PMC may take up to one hour to process and reflect the changes made to your account.
Step 1: Log into https://partner.microsoft.com

Step 2: Click the ‘Software’ tab to see all software available to download and install

Note: If a product requires a product key for installation, the end-user will be prompted to enter a product key during the installation process.

Note: Only users with Admin roles (Global admin, MPN Admin) can get product keys and download and activate software.

Cloud Services Activation

Note: To activate an Azure subscription in Partner Center, you should assign the access to a user within the company. The assigned user can login to the Azure portal and manage users from there. They can add new users or remove users from this subscription.
To activate License based subscriptions:

**Step 1:** Select the product name, such as Microsoft Office 365, and then click on ‘Get keys’

**Step 2:** Click the link (as shown in below screenshot) to redeem the token

**Step 3:** This redirects you to the key redemption portal. To activate the product key, select the checkbox and then click ‘Start’
redeem your product key

Things you should know before you start:

- If you are the first person in your organization to redeem a product key for this product, your account will be created as the administrator.
- After you redeem your product key, in most cases you’ll need to add users and assign licenses to them.
- If you are setting up Office 365 and need help, see Set up Office 365 for business - Admin Help

I understand. I’m the right person to be doing this for my organization.

Step 4: Enter your product key. If you are entering multiple product keys, select ‘Add another product key’. When finished, select ‘Next’

enter product key

Enter the product keys you want to redeem.
19 Appendix N – Obtaining Customer List DPOR Reports in PMC

To access DPOR (Digital Partner of Record) reports in Partner Membership Center, follow the steps below.

**Step 1:** Navigate to [https://partner.microsoft.com/en-us/membership](https://partner.microsoft.com/en-us/membership) and log in with your PMC Microsoft Account

**Step 2:** Click on ‘Your Accounts and Reports,’ and then click ‘My Insights’ followed by ‘Cloud Product Performance’

**Step 3:** Here you can view performance metrics. Click on any of the sub-tabs under ‘Cloud Product Performance’. Sort the ‘Partner Association Type’ to ‘Partner of Record’

**Step 4:** Click ‘Export to Excel’ to export a report to an .xls file.
Note: If you need additional support, you can contact the Microsoft Partner Insights alias: askpi@microsoft.com
Appendix O – Referrals

Referrals help you connect with customers who need your solutions and expertise. Before you can receive referrals from Microsoft, you need to create a business profile that highlights your company’s offerings and capabilities.

Learn more about setting up your business profile and being successful with your customers here.

Note: Creating a business profile allows you to highlight your company’s offerings, solutions, and expertise. Your business profile will be listed in all the places customers and internal Microsoft sales agents search for qualified partners.

Step 1: Navigate to https://docs.microsoft.com/en-us/partner-center/referrals to learn more about referrals

Step 2: To get started with Referrals, Sign into https://partner.microsoft.com as an administrator and click on the ‘Business Profile’ tab on the left menu.
Step 4: Pick the country for your profile and click ‘Create a business profile’
Step 5: Update the profile, then scroll to the bottom to accept the terms and conditions. Save the location, then click ‘Publish’.

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<th>Location Information</th>
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<td>Country:</td>
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<td>Industry:</td>
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<td>Technology:</td>
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<tr>
<th>Customer preferences</th>
<th>Target customer organization size (check at least one)</th>
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<tbody>
<tr>
<td>- 5 employees</td>
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<tr>
<td>6-24 employees</td>
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<td>25-49 employees</td>
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<td>5,000+ employees</td>
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<tr>
<th>Locations</th>
<th>Add up to 5 locations.</th>
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<td>Last name:</td>
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<td>Email:</td>
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</tbody>
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Note: You can only have 5 business profile locations per country. These are not to be confused with MPN locations, which do not have such limits.
Appendix P – Referrals: Solution Provider Search Experience

Business profiles you have configured within Partner Center Referral system shows up in the Solution Provider search experience for end-customers. This section provides an overview of the experience.

https://www.microsoft.com/solution-providers/search

**Step 1:** Customer goes in and searches for Partners that match their criteria

![Solution Provider search interface](image)

**Step 2:** The results will populate with all information that matches their criteria

**Step 3:** If your organization is picked by a customer, you will receive an email notifying you of the lead; an example is provided below:

---

**Dear**

You have a new Microsoft customer referral awaiting for your prompt review. Please [log in to your account on Partner Center](https://www.microsoft.com) to view the referral. You will have up to 72 hours to express interest. If we don’t hear from you, we will notify the customer that you are not available.

A summary of the request is listed below.

**Organization Name:**

**Customer location:**

Thank you and good luck.

The Microsoft Team

---
Step 4: You can view the lead by either clicking on the link in the email or going to the portal and clicking ‘Engagements’ and then ‘Inbox’

Step 5: Click ‘Active’ to track the lead

Step 6: Click ‘New’ to review all new leads. Once you click ‘I’m interested’, the lead will appear in the evaluating stage for 7 days

Step 7: By clicking on the organization, you will be able to estimate the deal value, add a customer target closing date, view customer information, and accept the referral
Note: For more information on referrals, click the following link:
https://docs.microsoft.com/en-us/partner-center/responding-to-referrals
22 Appendix Q – Troubleshooting Errors

22.1 Error #1: IT Department has turned off sign-up for Partner Center
Error Message: “Your IT department has turned off sign-up for Partner Center. Contact them to complete signup.”

The IT department has configured policies to restrict the type of operation that the transition process requires. You will need the Azure AD Tenant global admin role owner rights to temporarily change policies to allow the transition.

Solution Guide:

Step 1: Right click on Windows PowerShell and click ‘Run as administrator’

Step 2: Run the following command:
Step 3: View the output. If the output is ‘Module does not exist’ continue to Step 4. If the output is ‘Module exist,’ skip to Step 5

Step 4: Run the following command:

```
Install-Module -Name MSOnline
```

Step 5: Run the following command:

```
Connect-MsolService
```

Step 6: Enter your Azure AD Global Admin credentials and click ‘Next’

Step 7: Run the following command:

```
Get-MsolCompanyInformation
```
Step 8: Document all current environment settings

Step 9: Run the following command:

Set-MsolCompanySettings -AllowEmailVerifiedUsers $true -AllowAdHocSubscriptions $true

Step 10: You can now complete the transition – (Review the Transition Process Walkthrough steps above for more details)

Step 11: After transition, review previous documented setting and revert environment back to previous state

Example:

Run Set-MsolCompanySettings -AllowEmailVerifiedUsers $false -AllowAdHocSubscriptions $false

Note: For more information, click here.