Partner Membership Center to Partner Center Transition

Step by Step Guide

Prepared for
Microsoft Partners Utilizing Partner Membership Center

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Microsoft Services

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1 Introduction

This document is designed to guide Microsoft partners utilizing the Partner Membership Center (PMC) portal to manage MPN benefits and related services in migrating to the new Partner Center portal.

2 Pre-requisites

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

1. Identify or create the Azure Active Directory (AAD) tenant that will be associated with the new Partner Center portal
   
   **Note:** Azure Active Directory (AAD) tenants can only be associated with one Partner Center instance.

2. Ensure 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 four MPN-related RBAC 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 side 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/competencies are NOT in an expired state. If they are, renew before commencing transition activities. You can check at https://partners.microsoft.com

6. If you have purchased ABTK(s), you should renew/re-purchase them before migrating

7. If your tenant is serving CSP, verify that the HQ country matches the AAD tenant country (see Appendix I & Appendix J)

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

**Step 1:** Login to [https://partners.microsoft.com](https://partners.microsoft.com) and sign in with your PMC Global Administrator credentials

![Microsoft Sign in](image)

**Step 2:** Click on ‘Get started’

**Note:** When your Partner Membership Center account is eligible for transition (whitelisted), you will see the following media video as well as the ‘Get started’ button. If you do not see this, you are either not an administrator, or not eligible for transition yet.
Step 3: Enter the credentials of an active work account within your Azure Active Directory

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

Step 4: Click ‘Next’
Step 5: Click ‘Next’

Note: This wizard is also capable of creating a net new Azure Active Directory tenant. If the user ID you user does not exist in any Azure Active Directory tenant, wizard will provide you with an opportunity to create one.

Step 6: Wait while Partner Center finishes setting up

Note: This could take 2 – 6 minutes to complete
Step 7: 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. You must remove all parentheses, +1, and dashes from the phone number field.
3. 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 8: Enter your email and click ‘Save’

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 – please use your Azure AD credentials to login and follow the guidance in each step.
Step 1: On the left menu, click on the ‘Overview’ tab (https://partner.microsoft.com), and then click ‘View users’ under user accounts.

![Overview tab screenshot](image)

Step 2: Verify that you can now see all expected users in your Azure AD tenant.

**Note:** If you would like to assign users role specific administrative access to Partner Center, click on their name and assign them a role. You do not have to assign regular users a role. For more information on roles, click [here](#).

Step 3: On the left menu, click on the ‘Competencies’ tab under MPN node 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. Migration 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 migration 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-migration, 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 C) 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.
6 Appendix A – 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 ‘Referrals’ tab on the left menu.

Step 3: Click ‘Business Profile’.

Step 4: Pick the country for your profile and click ‘Create a business profile’.
Step 5: Update the profile, then scroll to the button to accept the terms and conditions and add location. Click ‘Publish’.

Note: You can only have 5 business profile locations per country. These are not to be confused with MPN locations, which does not have such limit.
Note: You must hit ‘Save this location and add another one’ to publish.
Appendix B – 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.

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 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 ‘I’m Interested’ to track the lead.

Step 6: Once you click ‘I’m interested’, the lead will appear in the evaluating stage for 7 days. Click on the organization name to view more information.

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.
Appendix C – Perform MCP Association in Partner Center

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

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

Step 2: Click on the Dashboard button

Step 3: Sign in by entering your work account credentials, which is typically the Azure Active Directory account you use to access Office 365 or other Microsoft services, but could also be specifically provided to you for this purpose
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.

Note: 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.

Note: Association is now complete. Remaining steps are provided as a reference for future use in case association needs to be removed.

Note: If an employee’s Azure AD account gets deleted, this association will be voided and removed.
9  Appendix D – Perform MCP Disassociation in Partner Center

Step 1: Navigate to https://partner.microsoft.com

Step 2: Click on the Sign in button.

Step 3: Enter your work account credentials, which should be the Azure Active Directory account you use to access Office 365 or other Microsoft services.
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
10 Appendix E – 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](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.
11 Appendix F – 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 E – Maintaining Competency Status for information on how to meet competency requirements.
Appendix G – Assigning User Roles

This section provides high-level guidance on assigning various levels of administrative and non-administrative user rights to the work accounts of your employees.

**Step 1:** Click on ‘view users’ under user accounts.

**Step 2:** Click on the users’ name that you want to edit.
Step 3: Check the box for the role that you want to edit and click ‘update’.
13 Appendix H – Create User Accounts & Assign Roles in Partner Center

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

![User management menu](image)

Step 2: Select ‘Add user’.

![Add user](image)

Step 3: Enter the user’s full name and unique email address.
Step 4: Select the type of agent and/or the type of admin 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. For more information about what each role can do, see Assign user permissions, below.
Step 5: Select ‘Add’ to create the user account. Confirm the user's details on the next page.

Note: To view a list of all of the roles and permissions associated click here.
14 Appendix I – 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
15 Appendix J – View Azure AD HQ Location

Step 1: Log into 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.
Appendix K – 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).
Step 1: Log into [https://partner.microsoft.com](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).
18 Appendix M – Assigning Benefits

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

Select ‘done adding product keys.’
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,’ next click ‘My Insights’ followed by ‘Cloud Product Performance.’ For DPOR/customer details

**Step 3:** You will be redirected to your Insights page where you can view various 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
20 Appendix O – Changing your MPN Headquarters in PMC

**Note:** 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.

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**Step 1:** To change the Organization's Headquarters to a different Location in PMC, 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**

To change the Organization's Headquarters to a different Location, 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.

Note: PMC may take up to one hour to process and reflect the changes made to your account.
21 Appendix P – Identifying PMC Program Contacts and Permissions

**Note:** Because all permissions will be reset while transitioning to Partner Center, it would be useful to get a snapshot of who has access to MPN membership and what level of permissions they have. This section is prepared to guide you through the Partner Membership Center portal and help extract this information in order to perform necessary administrative delegations once the transition takes place.

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

**Step 2:** View the Program Contacts and permissions granted to each contact. You can assign or remove contacts as needed.
Appendix Q – Troubleshooting Errors

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.”

IT department may have configured a number of policies to restrict the type of operation that the migration process requires. You will need to work with them to temporarily allow migration to take place. Below steps show detailed steps to accomplish this goal. You will need Azure AD Tenant global admin role owner rights to complete this.

Solution:

Step 1: Right click on Windows PowerShell and click “Run as administrator”
Step 2: Run the following command:

```powershell
if (Get-Module -ListAvailable -Name msonline){
    Write-Host "Module exists"
} else {
    Write-Host "Module does not exist"
}
```

Step 3: View the output. If the output is “Module does not exist” continue to Step 4. If the output is “Module exists” skip to Step 5

Step 4: Run the following command:

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

Step 5: Run the following command:

`Connect-MsolService`
Step 7: Enter your Azure AD Global Admin credentials and click ‘Next’

Step 8: Run the following command:

```
Get-MsolCompanyInformation
```
Step 9: Document all current environment settings

Step 10: Run the following command:

```
Set-MsolCompanySettings -AllowEmailVerifiedUsers $true -AllowAdHocSubscriptions $true
```

Step 11: You can now complete the Migration – (Review the Transition Process Walkthrough step for more details)

Step 12: After migration, review previous documented setting and revert environment back to previous state

Example:

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

For more information visit this following site:

https://docs.microsoft.com/en-us/powershell/module/msonline/set-msolcompanysettings?view=azureadps-1.0