Ingram Micro
White Glove Services

Ingram Micro is proud to extend the following White Glove NCE Migration services to your organization and its customers. Listed below you will find several types of migration options to help your customers migrate to NCE.

Prior to activating these services, Ingram Micro requires that you review and sign its *Authorization and Confidentiality* Agreement to proceed. We appreciate your partnership and look forward to helping your organization and its customers transition to the Microsoft NCE platform.

Getting Started

Please review your Microsoft customers with Modern Work and Dynamics seat-based licenses. This can be done by accessing the Control Panel within the Ingram Micro Cloud Marketplace. Next, consider the following options as you prepare to migrate your customers to NCE:

1. **Full Migration** migrates all customers and subscriptions to the equivalent NCE subscriptions and associated add-on's (Generated Report Excel (Page 2) is NOT required)

2. **Partial Migration** partner will provide a partial list of their customers and subscriptions moving from legacy CSP to the equivalent NCE subscriptions and associated add-on's

3. **Phased Migration** partner will provide partial lists of their customers and subscriptions on an as-going basis when moving from legacy CSP to the equivalent NCE subscriptions and associated add-on's

4. **Migration's w/ Changes** partner is required to run a Subscription Report from the Classic Panel (see instructions) within the Market Place and indicate changes to subscription type, quantity, and/or billing term. White Glove team will ONLY migrate those customers and subscriptions provided via the report. If quantity is downgraded from CSP to NCE, manual user assignment is required of the partner before the white-glove services team can cancel.

Process

1. Engage your Ingram Micro Account Manager to request White Glove migration services

2. Indicate the type of migration/s you will be requesting (Full, Partial, Phased, and/or Changes)

3. Unless selecting a *Full Migration*, provide a list of customers and/or *Subscription Report* to identify the customers and subscriptions selected for migration. (Directions are on Page 2 of this discount under "Generating Reports")

4. Provide the following to your Ingram Account Manager:

   a. Reseller Name
   b. CMP Account ID
   c. MPN ID
   d. Reseller. onmicrosoft
   e. Number of Tenants
   f. Specific date/deadlines requested

5. Existing subscriptions will be replaced with new NCE subscriptions for all users

6. Cancellation of the licenses to be processed in the Control Panel and credit memo created on behalf of partner

7. As migrations are completed, White Glove team will provide updates daily throughout your scheduled dates

8. Partner is responsible for checking the accuracy of the migrations and making any changes/corrections prior to the Microsoft 72-Hr cancellation policy window.

Partner Requirements

1. **Cancelling licenses** - in the event the original license/s cannot be cancelled by White Glove team, partner is responsible to ensure these are cancelled. Partner will be notified if this is the case.

2. **Confirm licenses changes** - if there are any changes after licenses have been purchased the partner is responsible for making the changes after the fact.

3. **Revoking access**- if the partner created or provided us with a global admin account, they will need to ensure that, either this account is deleted, or credentials changed.

4. **Confirmation** – partner is responsible for confirming that all orders submitted to the White Glove team have been processed and tenants are in the right state.

5. **Optional** - If migration is not like-for-like, partner is responsible for assigning seats to users for the new NCE subscriptions before cancellation of old CSP.

Generating Reports

Export Report from Marketplace Classic Panel

1. Navigate to the dashboard in Cloud Marketplace

2. Select "Control Panel" at top right of screen

3. Select "billing" at top right of the screen

4. Select "subscriptions" on the left side of screen

5. Using the filters in service status select "running" and search, this will remove anything inactive.

6. Then click "Export to Excel" from this view.

(NOTE: License quantity and addons do not get exported, this will need to be manually added to the export, see next step below)

Amending Spreadsheet for Migrations with Changes ([SEE EXAMPLE HERE](#))

1. Report will export as an XML, save as an Excel workbook.

2. Columns that can be removed Actions, Parent Subscription ID.

3. Insert a new column named "QTY" after Subscription Name

4. Insert an additional 3 columns named "QTY", "NCE Subscription", and "Billing Term" after Plan

5. Provide the original license quantities for each original Legacy CSP subscriptions using the first new QTY column.

6. Any add-on subscriptions will be duplicated on the NCE subscriptions unless otherwise noted on the XLS

7. If changing the add-on subscription/s please add an additional license under the Legacy CSP subscription and indicate the change

8. Using the "QTY", "NCE Subscription", and "Billing Term" indicate the number of licenses, type of NCE subscription (Monthly, Annual 12-Month, 36-Month), and billing term (Monthly, Annual) that you will be migrating to NCE

Customer Tenant Access

When processing an order for the partner, White Glove team will need to access the customer's Office 365 tenants. If tenants do not match the account name on the spreadsheet from the Control Panel, it might be required to add the tenant name/Default Domain. This will ensure that identification of the tenant and not slow down the migration to take place.

Authorizing Tenant

If tenants haven't been reauthorized for NCE since they were first created in the system, then White Glove Team will need to go into the tenants, create a Global Admin and reauthorize the tenants. If the partner does not appear, partner will need to be enrolled before migrations can be started.

Processing Orders

First, White Glove team will confirm access to the tenant and through Ingram's Parent Center. White Glove team will need to be able to locate the tenant based on the customer's company name or default domain in Office 365, so it is important this information is correct on the spreadsheet provided. Once located White Glove team will create an admin user to authorize the tenant and to run later steps. Then licenses will be purchased as documented on from the partner.

Best Practices & Considerations

- Review current subscriptions and licenses to ensure licenses are up to date, qty is correct, etc. This will increase the success of the migration process. And reduce the need to choose a migration that requires making QTY, subscription type, and/or billing term changes from CSP Legacy to NCE.

- Segment your customers by migration type and then select the migration option that works best for that block of customers. For example, you may have a subset of your customers that can do a partial migration right away and perhaps others that require doing a migration with changes.

- Be aware the dates and whether some customers might be better off maintaining their current legacy subscriptions through calendar year 2022.

  a) March 1, 2022 - M365 Price Increases (Microsoft 365 Business Basic, Business Premium, E3 and Office 365 E1, E3, and E5)
  b) March 10, 2022 - New subscriptions MUST be transacted on NCE
  c) March 31, 2022 - Last day to leverage NCE Annual Promotional Discount
  d) June 30, 2022 - Last day to leverage NCE Monthly Promotional Discount
  e) July 1, 2022 - Legacy subscriptions expiring on or after July 1st must be renewed using a new NCE subscription. Auto-renew feature will no longer function for these subscriptions and NCE subscriptions must be created manually
  f) December 31, 20222 - Microsoft incentives end for legacy CSP subcriptions