FastTrack Quick Reference for customers

Microsoft

Sign in to FastTrack

1. Navigate to http://fasttrack.microsoft.com/.
2. Select **Sign In** in the top right corner.
3. For new FastTrack users, follow the instructions for registration. If you have an account, select **Sign in now** on the right-hand side of the login page.
4. Enter your **Org ID** and **password**. You will need a company tenant to access the site. If you don't have an Org ID, sign up for a trial tenant on most Microsoft cloud product pages, for example Office 365, Azure, and EMS.
5. On first sign-in, you must grant the site access to read your profile. Select **Accept**. Your first name, last name, and email address will be filled in automatically after they are matched with your user record. The company name you enter will be overwritten later with the name from your paid subscription.
6. Enter your company name, select that you are a Microsoft customer, and enter your country.
7. Select **Save** to continue to the site.

> If you can't sign in, you can initiate a request by emailing support@fasttrack.office.com, and a customer support representative will get back to you promptly.

Create a Success Plan

1. From your **Dashboard**, select **+Create Success Plan**.
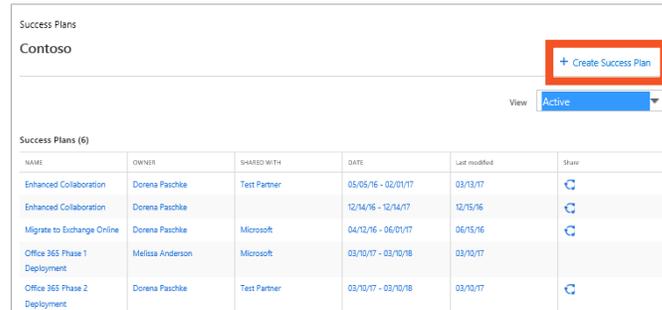
2. Enter the **Success Plan settings**, including the name of the plan, a short description, the product that this plan will include, and the timeframe. The launch date defaults to today's date and the completion date defaults to one year from now.
3. Select **Finish** to save and close the Create a Success Plan box.
4. You will see the default Success Plan template with three sections: **Business Case**, **Service Readiness**, and **Adoption**. To add the optional **Onboarding** section, go to step 5. Otherwise, go to step 6.
5. Select the **gear icon** and select **Activate Onboarding**. From the gear icon, you can also update the Success Plan settings that you entered in step 2 at any time.
6. From the **Success Plan Summary**, select each blue block to view and complete each section. Content varies by product and workload. Select **Save & Continue** until the plan is complete.
7. The Success Plan is a working document. After you create the initial draft, come back to add more information or change your answers.

> Go to TechNet to learn more about the Office 365 and EMS FastTrack Center benefit and services you may be eligible for.

Share a Success Plan

1. Once you have completed a Success Plan and are ready to share, select **Share Plan** from the Summary view.
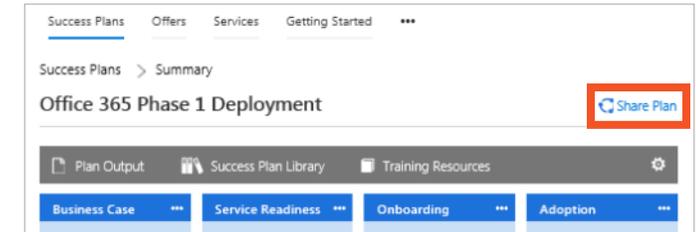
2. Enter the first name, last name, and email address for the contact and select **Submit**.
3. This will send an email invitation to the address you entered, with a copy also sent to you. The person you share the plan with will get a read-only copy of the plan.
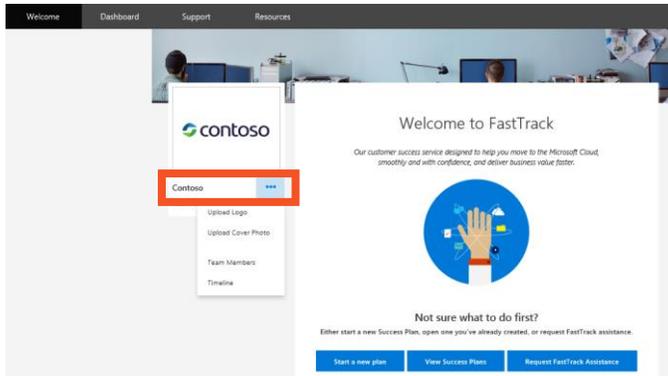
Request FastTrack Center assistance

1. From your **Dashboard**, select **Services**.
2. Under **Request**, select **Learn More** on the Service you are interested in.
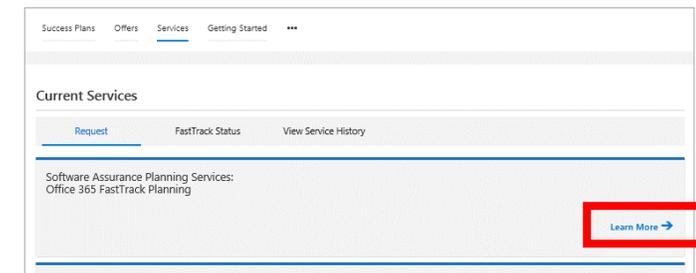
3. Complete the form and select **Submit** when you are done.

Edit customer details and add members

1. To view or update your details, select the ... navigation option to the right of your name.


2. Select **Upload Logo** and **Upload Cover Photo** to browse and choose a picture to add or change the logo and cover photo for your Dashboard.

3. Select **Team Members** to view your users, plus any Microsoft or partner users you have approved to participate in your team. All Team Members can add to and edit the plan.

4. Select **+Add a User** to add a team member.

5. Type the email address of the user you want to add and select **Send Invite**.

6. From the ... navigation option, select **Timeline** to view your milestones and events over time. Timelines can focus on specific Success Plans or look across your entire experience.

Respond to a partner offer submission

Once you have verified your customer registration in FastTrack, all aspects of offer redemption are managed by the eligible partner, who sends a request for approval to the customer project owner (or, for Windows offers, managed by an outside provider).

As the customer, you must verify the funding request:

1. After a partner creates an offer request, the customer offer owner is notified by email to validate the partner's request.

2. Select the bell icon in the upper right corner of the Dashboard. Select **View all notifications**.
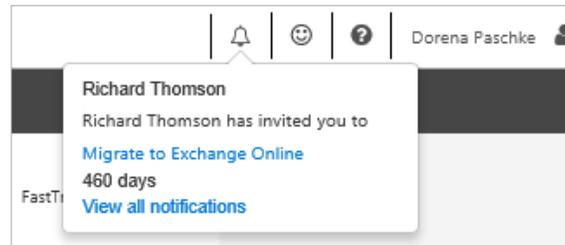

3. Accept or reject the funding request.

4. If you verify the partner submission, Microsoft is notified and will begin eligibility verification.

5. **Note:** The process described here is generic and steps may vary by offer.

Change the customer admin

The first customer user to sign in to the site is designated as the customer administrator. You can only change this person by submitting a support ticket.

1. Select **Support** in the top navigation (dark gray bar).
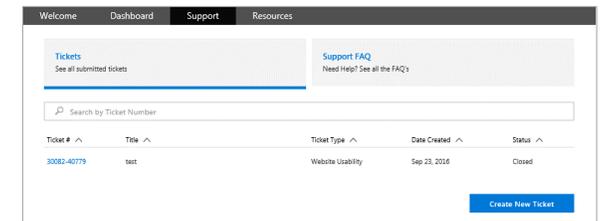
2. To create a new request, select **Create New Ticket**.

3. Complete the form, including the name and email address of the person who is the new customer administrator, and select **Submit Ticket**.

Get help

1. Select **Support** in the top navigation (dark gray bar) to access customer support tickets and FAQs for learning and troubleshooting.

2. To create a new request, select **Create New Ticket**.

3. Fill out details about your issue, attach screenshots, and select **Submit Ticket**.

4. Select **Support FAQ** to review common concerns and access any additional materials you might need.