Microsoft FastTrack
Customer User Guide

Updated July 21, 2017

Step-by-step instructions to help customers navigate and perform tasks on the FastTrack site.

Introduction to FastTrack .......................................................... 2
FastTrack site overview ............................................................ 4
Step-by-step guide to FastTrack ............................................... 17
Customer details ...................................................................... 23
Success Plans .......................................................................... 28
Offers .......................................................................................... 42
Services ....................................................................................... 47
Getting Started .......................................................................... 50
Support ....................................................................................... 54
Appendix .................................................................................... 56
Introduction to FastTrack

This guide is designed to be a resource to Microsoft, Microsoft partners, and customers for navigating the FastTrack site and performing a variety of activities.

Microsoft FastTrack is our customer success service to help customers realize business value faster with Microsoft cloud services. The goal is for customers to achieve their objectives by taking advantage of the help and resources available through FastTrack.

Your primary activities within FastTrack will likely consist of building Success Plans that are specific to your organizational needs and taking advantage of readiness resources or templates to help you get the most out of your chosen solution.

FastTrack roles

The FastTrack site enables Microsoft, partner, and customer teams to drive adoption in a shared environment while protecting user privacy with audience-level permissions.

FastTrack requires a work or school account, often referred to as an Organizational ID (Org ID). This means that all partners and customers require a work or school account to access the site. Any partners or customers without an Org ID can sign up for a trial tenant available here. Partners can take advantage of the tenant available by using their Microsoft Partner Network (MPN) ID. For more information about using your Org ID to sign in to the FastTrack site, go to the Sign in section of this guide.

Windows 10 does not require an organization to have a tenant. For organizations who are using FastTrack for Windows 10 only, you will still need an Org ID. TechNet has additional guidance to help you get started.
There are three distinct site profiles that FastTrack assigns at the organizational level based on user Org ID:

**Microsoft | @Microsoft.com**

**Partner | Org ID + MPN**

**Customer | Org ID**

Microsoft users can view and edit any customer record. Any changes made to a customer profile are visible to users associated with that customer. To actively engage customers, partners must request access to a customer record in FastTrack. However, partners can view a customer’s eligibility for offers before obtaining access.

If you need to determine whether you already have an Org ID, check with your administrator. Members receive Org IDs once a cloud service tenant (such as Office 365 or Microsoft Azure) has been provisioned. You can find current Org IDs under the Users tab in the Office 365 Admin Center or Azure Active Directory.

---

**Assistance with the site**

If you need help with FastTrack, use the support option in the site to open a support ticket request with the FastTrack team. If you cannot sign in, initiate a request via email: support@fasttrack.office.com.
FastTrack site overview

Microsoft 365 ........................................................................................................................................................................5
Microsoft 365 powered devices................................................................................................................................................6
Office 365................................................................................................................................................................................7
Windows 10.............................................................................................................................................................................9
Enterprise Mobility + Security ................................................................................................................................................11
Azure....................................................................................................................................................................................13
Dynamics 365...........................................................................................................................................................................15

When you first go to fasttrack.microsoft.com, you can:
- Learn more about FastTrack, including answers to frequently asked questions.
- Choose from the products in the top navigation bar to view available resources to support building your deployment and adoption plans.
- Sign in to begin building your Success Plan.
Microsoft 365

Microsoft 365 is a complete, intelligent solution comprised of Office 365, Enterprise Mobility + Security, and Windows 10. The purpose of Microsoft 365 is to provide customers with secure solutions that foster collaboration and creativity.

Read case studies that describe how these solutions have helped a variety of our customers.

You can also access additional information about Microsoft 365 powered devices, as well as the home page for Office 365, EMS, and Windows 10.
Microsoft 365 powered devices

Microsoft 365 powered devices are the easiest, most secure way for IT professionals to provide their users with the latest productivity applications and always keep PCs up to date. Microsoft 365 powered devices are PCs that combine Windows 10 Enterprise and Office 365 ProPlus, and managed with Enterprise Mobility + Security (EMS).

You can read about deployment services, as well as access a user guide to help with the creation of a Microsoft 365 powered device Success Plan. You can also access Windows 10 and Office 365 ProPlus deployment and adoption resources.
Office 365

Accelerate your rollout of Office 365 by utilizing resources and tools to drive deployment and adoption.

From the top navigation bar, the Office 365 section opens with an overview page and then introduces the three key phases of an Office 365 deployment: Envision, Onboard, and Drive value. From the main menu, you can directly access Office 365 resources, the Productivity Library, the Office 365 Roadmap, and information about relevant offers.

The table on the following page has more detail about each of these sections.
<table>
<thead>
<tr>
<th>Section</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Overview</strong></td>
<td>Read descriptions of <strong>Envision</strong>, <strong>Onboard</strong>, and <strong>Drive value</strong>. Review the <a href="#">Office 365 Adoption Guide</a>, as well as the FastTrack Product Guide.</td>
</tr>
<tr>
<td><strong>Envision</strong></td>
<td>Identify scenarios that map Office 365 capabilities to your business goals. Identify key stakeholders to be part of a team to drive change in your organization. Use this information to plan a phased rollout approach.</td>
</tr>
<tr>
<td><strong>Onboard</strong></td>
<td>Review deployment options based on the size of the customer’s organization. Customers can access resources, request assistance from qualified partners, and take advantage of onboarding and adoption services based on eligibility.</td>
</tr>
<tr>
<td><strong>Drive value</strong></td>
<td>Use key FastTrack scenarios to raise awareness about the value of Office 365. Use the success guide and satisfaction survey tools to measure Office 365 success and explore new ways to add business value. Access interactive tools from the Office 365 service management learning center to manage the subscription, including change management and service incidents.</td>
</tr>
<tr>
<td><strong>Resources</strong></td>
<td>Find scenarios, guides, templates, videos, and other resources from the <strong>Envision</strong>, <strong>Onboard</strong>, and <strong>Drive value</strong> tools collected in one place.</td>
</tr>
<tr>
<td><strong>Productivity Library</strong></td>
<td>Support adoption activities with productivity resources designed for different customer segments and industries. To use this feature, select an industry, organizational role, and/or product to view productivity use cases and associated resources and case studies to get started.</td>
</tr>
<tr>
<td><strong>Roadmap</strong></td>
<td>See a snapshot of what Office 365 features are available or in development. This enables users to plan for upcoming changes or improvements.</td>
</tr>
<tr>
<td><strong>Offers</strong></td>
<td>FastTrack provides offers to help customers realize value from Office 365. Read about the offers to see what is available to help you accelerate your Office 365 adoption.</td>
</tr>
</tbody>
</table>
Windows 10

Microsoft FastTrack for Windows 10 is designed to help you accelerate the deployment of Microsoft’s desktop platform. The purpose is to enable employees to be successful by utilizing Windows 10, and to get Office when needed, while keeping company data protected.

From the top navigation bar, the FastTrack for Windows 10 section opens with an overview page and then introduces the three key phases of a Windows 10 deployment: Envision, Onboard, and Drive value. Additionally, you can directly access all Windows 10 resources, industry solutions, and product roadmap from the main menu.

The table on the following page has additional details about each of these sections.
<table>
<thead>
<tr>
<th>Section</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Overview</td>
<td>Read descriptions of Envision, Onboard, and Drive value.</td>
</tr>
<tr>
<td>Envision</td>
<td>The resources in Envision will help you to assess your needs and prepare for a successful rollout at your own pace. You will find content about Windows 10 deployment scenarios, infrastructure requirements, application compatibility, and more. This section outlines the benefits of Windows 10 to IT Pros and the organization, as well as the business and technical value.</td>
</tr>
<tr>
<td>Onboard</td>
<td>Create a Success Plan with help from partner experts to migrate smoothly and with confidence. Read more about the different deployment options, plus the offers that are currently available to assist your progress.</td>
</tr>
<tr>
<td>Drive value</td>
<td>Deliver more value for your business by increasing user adoption and helping your employees make the most of Windows 10. There are communications, resources, training, and links to a variety of relevant sites to help you execute your adoption plan, as well as measure success and get community support.</td>
</tr>
<tr>
<td>Resources</td>
<td>Find guides, templates, videos, use cases, and other resources from the Envision, Onboard, and Drive value tools collected in one place, and easily download all of them at once.</td>
</tr>
<tr>
<td>Industry solutions</td>
<td>Learn how Windows 10 can benefit businesses, watch videos, read case studies, and more.</td>
</tr>
<tr>
<td>Roadmap</td>
<td>Learn about the latest developments for Windows 10, including what is now available for use.</td>
</tr>
</tbody>
</table>
Enterprise Mobility + Security

Get started with Enterprise Mobility + Security (EMS) with the help of resources, tools, and experts from FastTrack.

From the top navigation bar, the EMS section opens with an overview page and then introduces the three key phases of an EMS rollout: **Envision**, **Onboard**, and **Drive value**. From the main menu, you can also go directly to EMS Resources, the Cloud Platform roadmap, and information about relevant offers.

The table on the following page describes each section in detail.
### Table of contents

<table>
<thead>
<tr>
<th>Section</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Envision</strong></td>
<td>Explore relevant scenarios to inspire users to work in new ways using EMS. FastTrack offers resources on scenarios, such as <em>Managing mobile productivity</em>, <em>Identity and access management</em>, <em>Identity driven security</em>, and <em>Information protection</em>.</td>
</tr>
<tr>
<td><strong>Onboard</strong></td>
<td>Create a Success Plan, explore Getting Started guides for EMS components, dive into Microsoft Hands-on Labs, and find additional support materials.</td>
</tr>
<tr>
<td><strong>Drive value</strong></td>
<td>Help customers get the most out of their investment by taking advantage of training, videos, and resources.</td>
</tr>
<tr>
<td><strong>Roadmap</strong></td>
<td>Learn about the latest developments for the Microsoft Cloud, including what is now available for use.</td>
</tr>
<tr>
<td><strong>Offers</strong></td>
<td>Read about eligibility for the FY16 EMS Adoption Offer.</td>
</tr>
</tbody>
</table>
Azure

FastTrack for Azure provides guidance from both Microsoft and partner experts to help you build solutions quickly and with confidence using Azure.

From the top navigation bar, the Azure section opens with an overview page, then introduces the Azure journey and what a typical FastTrack for Azure preview engagement looks like. From the main menu, you can also go to a page with all Azure resources, an FAQ, and the product roadmap.

The table on the following page describes each section in detail.
<table>
<thead>
<tr>
<th>Section</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Overview</td>
<td>Read about how FastTrack for Azure helps guide customers throughout the three key phases of a successful cloud journey, and a description of a typical engagement.</td>
</tr>
<tr>
<td>Resources</td>
<td>Find all Azure resources, including online training, white papers, and more, in one location.</td>
</tr>
<tr>
<td>FAQ</td>
<td>Read the frequently asked questions about FastTrack for Azure.</td>
</tr>
<tr>
<td>Roadmap</td>
<td>As Azure continues to grow, go to the roadmap that will keep you informed and help you plan for the future. Find out what’s new and what’s coming next.</td>
</tr>
</tbody>
</table>
Dynamics 365

FastTrack for Microsoft Dynamics 365 is a set of best practices, tools, resources, and experts committed to making your experience with Dynamics a success.

From the top navigation bar, the Dynamics section opens with an overview page and then introduces the three key phases of a rollout: **Envision**, **Onboard**, and **Drive value**. From the main menu, you can also go directly to a page with all Dynamics 365 resources and the product roadmap.

The table on the following page describes each section in detail.
<table>
<thead>
<tr>
<th>Section</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Overview</td>
<td>Read descriptions of the <strong>Envision</strong>, <strong>Onboard</strong>, and <strong>Drive value</strong> sections.</td>
</tr>
<tr>
<td>Envision</td>
<td>Read about how to define a clear, concise, and comprehensive Success Plan and outline your desired business scenarios. The plan should list specific business objectives and will guide you throughout your launch and rollout planning, and help gain agreement and support from key stakeholders.</td>
</tr>
<tr>
<td>Onboard</td>
<td>Learn more about FastTrack for Dynamics 365, specifically about eligibility criteria, including the apps/plans and SKUs covered, and minimum number of seats required.</td>
</tr>
<tr>
<td>Drive value</td>
<td>Realize your intended business value sooner with links to resources—including templates and training—available to help your team and partner drive user adoption across your organization.</td>
</tr>
<tr>
<td>Resources</td>
<td>Find all Dynamics 365 resources for <strong>Envision</strong>, <strong>Onboard</strong>, and <strong>Drive value</strong> in one location.</td>
</tr>
<tr>
<td>Roadmap</td>
<td>Conveniently access the Microsoft Dynamics 365 Roadmap, which provides a snapshot of what is currently available, as well as what is in development for the future.</td>
</tr>
</tbody>
</table>
Step-by-step guide to FastTrack

Overall FastTrack site
This section highlights how to sign in to the FastTrack site, as well as actions and tasks that users can complete upon signing in.

How to sign in to FastTrack
Signing in to FastTrack enables you to collaborate with your team on technical implementation and user adoption strategies across Office 365, Windows 10, Enterprise Mobility + Security, Dynamics 365, and Azure.
1. Go to the FastTrack site: http://fasttrack.microsoft.com/
2. Select Sign In in the top right corner.
3. For users new to FastTrack, please 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 product pages.

5. On first sign-in, you must grant the site access to read your profile. Select Accept.
   Note: 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. Indicate that you are a Microsoft customer and select your country.

7. Select **Save** to continue to the site.
How to navigate the FastTrack site

Once signed in, you can manage your Success Plans. Note that the site supports building Success Plans for Office 365, Windows 10, Enterprise Mobility + Security, Dynamics 365, and Azure.

Upon sign-in, users will come to the Welcome page:

1. The **Welcome** page introduces FastTrack to new users, showcases important announcements, and has recommended actions, such as starting a new Success Plan or viewing existing Success Plans.

2. Select **Dashboard** in the top level navigation (dark gray bar) to view your record, access your Success Plans, and begin new Success Plans.
3. Select **Support** in the top level navigation (dark gray bar). Submit and manage FastTrack **customer support tickets**, and refer to FAQs for learning and troubleshooting.

4. Select **Resources** in the top level navigation (dark gray bar) to find a link to this user guide, as well as a link to the FAQ page.
How to navigate the Dashboard

From the Dashboard, access your profile, which enables you to view your company details, including all Success Plans.

1. From the **Dashboard**, you see a list of your Success Plans. There are also tabs for Offers, Services, Getting Started, and Team Members.

2. To view any notification reminders, select the **bell icon** in the upper right above the dark gray nav bar.

3. Select **View all notifications**.
FastTrack includes your customer details. You can add an optional logo and cover photo, as well as a list of their team members and a timeline for all of your Success Plans.

How to navigate and edit customer details

You can update your details.

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

   Select **Upload Logo** to browse and choose a picture to add or change the logo for your Dashboard.

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

   Be aware that company logos and cover images are seen by all users connected to the company profile, including all company users, Microsoft, or partner (if applicable) users.

2. Select **Team Members** to view your users, in addition to any Microsoft or partner (if applicable) users you have invited and approved to participate on your team.
3. Select the arrow to the right of the View field to select the view you want: see all team members, or just those from Microsoft, the partner, or your company.

4. In this example, just the Blue Yonder Airlines team members (the customer) are displayed.

5. Select +Add a User to add a team member.
6. Type the email address of the user you want to add and select **Send Invite**.

7. 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.
8. Back on your **Dashboard**, change your view by selecting the down arrow to the right of the **View** field. You can choose to see all Success Plans, or selected plans:

- **Active**: Success Plans that are currently being worked on
- **Archived Plans**: Success Plans that have been completed and are no longer active
- **Legacy**: Success Plans that are in the previous format and have not been updated
- **All**: All of the above types of Success Plan
How to change the customer administrator

The first customer user to sign in to the site is designated as the customer administrator. That person has the ability to manage your user access levels, including assigning project ownership to individuals, and granting partners access so they can collaborate through the site. To change the Customer Admin, the customer, partner, or Microsoft user can submit a support ticket, however, Microsoft will confirm with the customer before making a change.

1. Select **Support** in the top level 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**.

If you can’t sign in to FastTrack, send an email to support at support@fasttrack.office.com and a customer support representative will get back to you promptly. You will receive a confirmation email with specific response details.
Success Plans

How to create a new Success Plan .............................................................................................................................................. 29
How to share a Success Plan .......................................................................................................................................................... 34
How to upload documents to the Success Plan Library .................................................................................................................. 36
How to generate Success Plan output ........................................................................................................................................... 37
How to edit Success Plan settings ................................................................................................................................................ 38
How to archive and unarchive a Success Plan ................................................................................................................................. 40
How to add someone as a Success Plan owner or member ........................................................................................................ 40

Success Plans capture the intent of your project and can be completed by you, or a partner or Microsoft employee on your behalf. Planned activities and workloads for the project are scoped through a series of questions about your organization and environment. The plan provides recommended planning, remediation activities, and resources based on the specific details of your plan.
How to create a new Success Plan

To get started, make sure you are signed in to the FastTrack site.

1. From your **Dashboard**, select **Create Success Plan**.

2. Enter the name of the plan.

3. Provide a short description.

4. Choose the product(s) that this plan will include.

5. Enter the timeframe. The launch date defaults to today’s date and the completion date defaults to one year from now. You can change these later, if needed.

6. Select **Finish** to save and close the Create a Success Plan box.
7. You will see the default Success Plan template that contains three sections: **Business Case**, **Service Readiness**, and **Adoption**.

There is an optional **Onboarding** section. For Enterprise customers working with Microsoft FastTrack Architects, FastTrack Center, or both, the Onboarding section is needed.

If you do not need the Onboarding section, skip the following step.

8. To add the Onboarding section into the Success Plan, select the **gear icon** and then select **Activate Onboarding**.
9. Select the ellipsis to the right of each section title to either assign that section to a team member or mark that section as complete.

10. Working with your Success Plan team, complete each section of the Success Plan. The content in these sections varies by product and workload. From the Success Plan Summary, select the blue **Business Case** block to view and complete the section.

For Office 365 Success Plans only, users will see a link to **Training Resources**. Selecting this will lead to resources to support your Office 365 engagement.

The **Business Case** section helps you identify scenarios, timelines, and key project personnel. It guides you by asking you to identify:

- Product capabilities to meet desired outcomes and use cases you will implement for your plan.
- Benefits you expect to see.
- An implementation timeline for each scenario.
- Business and technical owners for each scenario.
- Risks and corresponding mitigation plans.
- In the case of Office 365, the results of your Value Discovery Workshop (VDW), to help define implementation priorities.

11. Complete each sub-section (these will vary by product, and may include Business Scenarios, Capabilities, Benefits, Timelines, Team, and Risk) and select **Save & Continue**.
The **Service Readiness** section reviews the current service environment and experience within your organization. Key considerations include:

- Microsoft cloud services you currently use.
- Plans for engaging the FastTrack Center in onboarding, migration, or adoption assistance for Microsoft services.
- Projected workloads for deployment within the Success Plan.
- Number of users within the organization and scoped within the Success Plan.
- Total number of devices per type within the organization.

12. Answer all the questions and select **Save & Continue**.

The **Onboarding** section contains a set of questions regarding your current infrastructure and environment along with technical questions regarding your requirements for implementing the specified workloads.

13. Answer all the questions in each sub-section and select **Save & Continue**.
The **Adoption** section includes questions about your deployment environment, personnel, and actions to support the launch and ongoing adoption activities. Key considerations include:

- Personnel responsible for launch communications and training plans
- Training plan elements
- Adoption activities before, during, and after the launch

In Office 365 plans, you can also find resources to help deliver scenarios to users in your project.

14. Answer all the questions and select **Save & Continue**.

The Success Plan is intended to be a working document. After you create the initial draft, you can come back at any time to add additional information or change your answers.
How to share a Success Plan

One of the keys to a successful deployment is working together with the project team (Microsoft, partner, and customer). You can easily share the Success Plan with any team member.

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.

3. Select **Submit**. This will send the email invitation to the address you entered, with a copy of the email also sent to you.
How to upload documents to the Success Plan Library

Users can upload documents that support the deployment to this library. This is also where saved copies (refer to the Plan Output section) of the Success Plans are located.

1. Click **Success Plan Library**.

2. To add a document to the Library, select **Upload**. A dialog box opens and you can browse your documents to find the correct one to upload.

   To delete a document, check the box to the left of the document and select **Remove**.
How to generate Success Plan output

This tool enables you to output an HTML version of the Success Plan at your convenience and share with others. This output shows where you are in the plan at that moment. You can use this output in the redemption of offers, as required.

1. From the Success Plan Summary, select **Plan Output**.

2. Within Plan Output, select **Included** to choose which Success Plan sections you want to include.

3. After selecting **Included**, you can choose which sections (Business Case, Service Readiness, Onboarding, and/or Adoption) you want to include.

4. Once you are done, select **Save**, and a PDF copy of the plan is saved to the **Success Plan Library**.
How to edit Success Plan settings

In the How to create a new Success Plan section, you got started by naming your plan and entering a description, product focus, timeline, etc. You can change that initial information by following these steps.

1. From the Success Plan overview, select the **gear icon**.
2. Select **Edit Settings**.
3. Select the field(s) you want to change, make the desired changes, and select **Finish** when you are done.
How to archive and unarchive a Success Plan

You can archive a Success Plan that is no longer considered active. This is useful if you have multiple Success Plans and only want the most current plans in your Dashboard view.

1. From the Success Plan overview, select the gear icon.
2. Select Archive Plan.
3. The Success Plan will now show in the Archived and All views only.
4. From the Success Plan overview, select the gear icon.
5. Select Unarchive.
6. The Success Plan will now show in the Active and All views only.

How to add someone as a Success Plan owner or member

The person (customer, partner, or Microsoft user) who creates the plan is the owner, by default. The owner is the primary point of contact for anything related to the plan, specifically for approvals pertaining to offers and requests for services. The owner can also modify permissions, such as change the plan owner and add members. Members may contribute to the plan.
1. From the Success Plan overview, select the **gear icon**.
2. Select **Edit Members**.

3. Select **Add/Edit Members**.

4. Select the + sign by a name to add this person to the team. If you do not see the person’s name that you want to add, share the plan with them first.
5. Select the + sign, then the **trash icon** by a name to remove this person from the team.
6. Select the drop-down menu to select a different Customer Success Plan Owner.
7. Select **Save**.
Offers

How to check offer history ........................................................................................................................................... 44
How to respond to a partner offer submission .................................................................................................................. 46

Offers available for both eligible customers and their eligible partners are managed through the FastTrack site. Note that you can view available offers and eligibility requirements on the Offers tab.
The following table illustrates several status types and the action necessary for the offer request to progress:

<table>
<thead>
<tr>
<th>Offer Status</th>
<th>Required Action</th>
<th>By Whom</th>
</tr>
</thead>
<tbody>
<tr>
<td>Available</td>
<td>Submit a request for the offer</td>
<td>Partner</td>
</tr>
<tr>
<td>Pending Offer Team Review</td>
<td>None, Microsoft is reviewing customer eligibility</td>
<td>Microsoft</td>
</tr>
<tr>
<td>Pending Funding Verification by Customer</td>
<td>Approve partner’s request</td>
<td>Customer</td>
</tr>
<tr>
<td>Funding Verified by Customer</td>
<td>Sign SOW</td>
<td>Partner and then Microsoft</td>
</tr>
<tr>
<td>Funding Rejected by Customer</td>
<td>None</td>
<td>N/A</td>
</tr>
<tr>
<td>Customer qualifies / PO in progress</td>
<td>Verify customer funding is available and open PO</td>
<td>Microsoft</td>
</tr>
<tr>
<td>Request Declined</td>
<td>None</td>
<td>N/A</td>
</tr>
<tr>
<td>Funding/PO Approved – work may commence</td>
<td>Begin driving Active Seat Usage on approved workload</td>
<td>Partner</td>
</tr>
</tbody>
</table>
How to check offer history

To view your offer history:

1. From your **Dashboard**, select **Offers** and then select **View Offer History** to view a recap of all offer requests.

These are the seven most common types of offer status:

- **Available**: The offer is available for the partner to request.
- **Pending Funding Verification by Customer**: The partner has submitted a request for the offer and the request is pending customer verification in FastTrack.
- **Funding Verified by Customer**: Customer has confirmed they want the partner to request funds and provide services to drive active seat usage.
- **Funding Rejected by Customer**: Customer has rejected partner request. Request will be declined.
- **Customer qualifies / PO in progress**: Offer team has approved request. Microsoft Finance and Procurement are working on Purchase Order.
- **Funding / PO Approved – work may commence**: PO was sent to partner and partner can begin work with customer.
- **Request Declined**: Microsoft has declined the offer request.

The appendix has a [complete list of the status values for offers](#).

2. For additional information about a specific offer, select the Offer Name.

<table>
<thead>
<tr>
<th>Date Submitted</th>
<th>Submitted By</th>
<th>Offer Name</th>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>12/09/2015</td>
<td>Status Update Job</td>
<td>PT36 Office 365 Adoption Offer</td>
<td>Request Declined</td>
</tr>
<tr>
<td>12/09/2015</td>
<td>Mitch Earl</td>
<td>PT36 Office 365 Adoption Offer</td>
<td>Available</td>
</tr>
<tr>
<td>12/23/2015</td>
<td>Susan Langer</td>
<td>PT36 Office 365 Adoption Offer</td>
<td>Available</td>
</tr>
</tbody>
</table>
3. Details about the status of the offer will display, so you can see what the next step is. This information may vary based on geography.

<table>
<thead>
<tr>
<th>FY16 Office 365 Adoption Offer</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Current</strong></td>
</tr>
<tr>
<td>Status</td>
</tr>
<tr>
<td>Name</td>
</tr>
<tr>
<td>Date</td>
</tr>
<tr>
<td>Pending Action By</td>
</tr>
<tr>
<td>Status Detail</td>
</tr>
<tr>
<td>Pending Offer Team Review</td>
</tr>
<tr>
<td>Request Complete/Pending Formal Funding</td>
</tr>
<tr>
<td>MS Finance Formal Funding Approval</td>
</tr>
<tr>
<td>Pending Purchase Order</td>
</tr>
<tr>
<td>Additional Procurement Documents Required</td>
</tr>
<tr>
<td>Purchase Order Processing</td>
</tr>
<tr>
<td>Funding/PD Approved</td>
</tr>
<tr>
<td>Invoice Approved</td>
</tr>
<tr>
<td>Invoice Not Approved</td>
</tr>
<tr>
<td>Funded Project Complete</td>
</tr>
<tr>
<td><strong>History</strong></td>
</tr>
<tr>
<td>11/15/2016 Request Complete/Pending Formal Funding</td>
</tr>
<tr>
<td>11/16/2016 On Hold Funding Requestor Response</td>
</tr>
<tr>
<td>11/16/2016 Customer Funding Verified</td>
</tr>
<tr>
<td>11/18/2016 Pending Customer Funding Verification</td>
</tr>
<tr>
<td><strong>Documentation</strong></td>
</tr>
<tr>
<td>Uploaded Files</td>
</tr>
</tbody>
</table>
How to respond to a partner offer submission

Once you have verified your customer registration within FastTrack, all aspects of offer redemption will be managed by the eligible partner, who sends a request for approval to the customer project owner (or, for Windows offers, an outside provider). When a partner submits an offer, you will receive an email notification. As the customer, you must verify the funding by taking the following actions:

1. After a partner creates an offer request, you are notified by email to validate the partner’s request.

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

3. Accept or reject the funding request.
   
   If you verify the partner submission, Microsoft is notified and will begin eligibility verification.

Note: The process described here is general and steps may vary by offer.
Services

How to request customer services........................................................................................................................................... 48
How to view service history ......................................................................................................................................................... 49

Within Services, you can request assistance (such as planning services and expert consultation) and resources from the FastTrack Center, as well as view your service history.
How to request customer services

To request services, follow the steps below.

1. From your Dashboard, select Services and the default view is Request.
2. Select Learn More on the desired service.

3. Review further information about the service on the screen that follows.
4. If you would like to proceed, select Create Request.
5. Complete the form and select Submit.
How to view service history

To access your service history:

1. From your **Dashboard**, select **Services**, then **View Service History** to view your service request history. If you have additional questions about a service item, select **Submit a ticket**.

<table>
<thead>
<tr>
<th>Date Submitted</th>
<th>Submitted By</th>
<th>Service Name</th>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>06/08/2018</td>
<td>Chris Hopkins</td>
<td>Request Assistance for Office 365 Education customers</td>
<td>Available</td>
</tr>
</tbody>
</table>
The Getting Started section currently includes two options—extend an existing trial tenant and get a sandbox environment.

How to extend a trial

If you started with a standard 30-day trial, your production pilot trial can be extended. This feature is currently available for Office 365, Enterprise Mobility + Security, and Dynamics 365.

1. From your Dashboard, select Getting Started.
2. Select Get Extension to extend a trial.
3. Complete the form with your name, email, associated domain, reason for extension, and the type of trial. Select **Finish** when you are ready to submit.
# How to get a sandbox environment

The sandbox tenant helps you get to know Office 365 with helpful scenarios and how-to documentation for users and IT professionals. This tenant is an Office 365 Enterprise E5 trial only.

1. From your **Dashboard**, select **Getting Started**.
2. Select **Get Sandbox** to get started.

## Extend a Trial

FastTrack provides you an option to extend your existing Office 365, Enterprise Mobility + Security (Microsoft Intune and Microsoft Azure Active Directory Premium), or Dynamics 365 trial. If you started with a standard 30-day trial, you can request an extension. This will modify your existing trial(s) to be 90-days in length and up to 250 trial licenses (for Office 365 and Enterprise Mobility + Security only). You can only request the extension to your trial once.

We are only able to extend trials once on the tenant. If you are interested in viewing additional products, please activate these trials in the admin portal before requesting an extension.

### Sandbox

Get a sandbox environment to see the experience and the value that Office 365 can deliver. This tenant helps you begin your journey with helpful scenarios and how-to documentation for end-users and IT professionals. You get to experience this in an Office 365 environment.

This tenant is to be used as a trial tenant. It is populated with content and scenarios to experience what’s possible. This tenant will not be able to be moved into production – it’s for evaluation of the experience only. This tenant is an Office 365 Enterprise E5 trial. This will include (VE/3) conferences capabilities, these capabilities may not be available in your region.

This sandbox is provided by the Microsoft Customer Immersion Experience (CIE) program and it is an exact copy of the Office 365 tenants used in that experience. The Microsoft CIE provides a facilitated, hands-on environment where business and IT decision-makers test drive powerful, integrated product/feature solutions. By utilizing the Microsoft CIE experience in your sandbox, you will be able to leverage the same content, normally reserved exclusively for those hands-on experiences, within your own organization.

A true-to-life experience, the Customer Immersion Experience takes you through everyday business situations and helps you see how Microsoft products make it all easy, convenient and secure.
3. You will see a confirmation notice stating that the Sandbox tenant has started and showing how many days you have remaining.

<table>
<thead>
<tr>
<th>Sandbox</th>
</tr>
</thead>
</table>
| Get a sandbox environment to see the experiences and the value that Office 365 can deliver. This tenant helps you begin your journey with helpful scenarios and how-to documentation for end-users and IT professionals. You get to experience this in an Office 365 environment. This tenant is to be used as a trial tenant. It is populated with content and scenarios to experience what’s possible. This tenant will not be able to be moved into production — it’s for evaluation of the experiences only. This tenant is an Office 365 Enterprise E5 trial. This will include PSTN conferencing capabilities; these capabilities may not be available in your region.

This sandbox is provided by the Microsoft Customer Immersion Experience (CIE) program and is an exact copy of the Office 365 tenants used in that experience. The Microsoft CIE provides a facilitated, hands-on environment where business and IT decision makers test drive powerful, integrated productivity solutions. By utilizing the Microsoft CIE experience in your sandbox, you will be able to leverage the same content, normally reserved exclusively for these hands-on experiences, within your own organization.

A true-to-life user experience, the Customer Immersion Experience takes you through everyday business situations and lets you see how Microsoft products make it all easy, convenient, and secure.

<table>
<thead>
<tr>
<th>Tenant Name</th>
<th>Requested by</th>
<th>Requested date</th>
<th>Days Remaining</th>
</tr>
</thead>
<tbody>
<tr>
<td>N/A</td>
<td>N/A</td>
<td>N/A</td>
<td>N/A</td>
</tr>
</tbody>
</table>

The trial information has been emailed to the user who requested the trial.

**How to connect**

Get the tenant details from the email sent to the requestor of the trial.

Open an InPrivate browsing session and visit [https://portal.office.com](https://portal.office.com) to sign in with details in the email.
Support

You can request FastTrack customer support tickets and reference FAQs for learning and troubleshooting. If you cannot sign in, you can initiate a request by emailing support@fasttrack.office.com, and a customer support representative will get back to you promptly. You will receive a confirmation email with specific response details.

How to submit a support ticket

To create a support ticket:

1. Select **Support** in the top level navigation (dark gray bar).
2. Here you can see a history of your support tickets, including ticket number, title, type, date created, and status.
3. To create a new request, select **Create New Ticket**.
4. Fill out details about your issue, attach screenshots, and select **Submit Ticket**.

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

   For example, request specific assistance from a FastTrack Center representative. You can also **Submit a Ticket** here.
Appendix

FastTrack products

The FastTrack site supports the following products:

- Office 365
- Enterprise Mobility + Security
- Dynamics 365
- Microsoft Azure
- Microsoft 365 powered devices (Windows 10, Office 365 ProPlus, Systems Center Configuration Manager, and Intune/Azure AD)
Languages

The FastTrack site is available in the following languages:

- Chinese (Simplified)
- Chinese (Traditional)
- Czech
- Danish
- Dutch
- English
- Finnish
- French
- German
- Hungarian
- Indonesian
- Italian
- Japanese
- Korean
- Malay
- Norwegian
- Polish
- Portuguese (Brazilian)
- Portuguese (European)
- Romanian
- Russian
- Spanish
- Swedish
- Thai
- Turkish
- Vietnamese

Note that some new FastTrack features may be introduced in English and then be localized in a following release.
Offer status

The following is a complete list of the offer statuses.

- Available
- Pending Verification by Eligibility Team
- Eligible
- Not Eligible
- Pending Funding Verification by Customer
- Funding Verified by Customer
- Funding Rejected by Customer
- Offer may be requested
- Eligibility team is reviewing customer and partner criteria
- Customer and partner are eligible for offer
- Neither the partner or customer or both are not eligible for offer
- Customer needs to validate partner funding request in FastTrack
- Customer has validated partner funding request in FastTrack
- Customer has not validated partner funding request in FastTrack and request is declined
- Pending Offer Team Review
- On Hold Pending Requestor response
- Request Declined
- Preparing Statement of Work (SOW)
- Pending SOW Signature
- Additional Documentation Required
- Customer qualifies / PO in progress
- Funding /PO Approved - work may commence
- Offer team is reviewing all criteria based on date of customer validation
- Offer team is requesting information from partner
- Offer team has declined request
- Offer team is preparing SOW
- Partner needs to sign SOW
- Offer team is requesting additional partner information
- Offer team has confirmed eligibility and is working on PO for partner
- Offer team has sent approved PO to partner so they can begin driving active seat usage
- Success Plan Verified by Customer
- Success Plan Rejected by Customer
- Partner Invoice Approved
- Partner Invoice Not Approved
- Customer has verified Success Plan
- Customer has rejected Success Plan
- Microsoft has approved partner invoice
- Microsoft has denied partner invoice as at least one POE element is not complete