Microsoft Partner Guidance for CSP Microsoft Office 365 E1 Trial

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Using this guide

This document provides Microsoft Partner guidance for the CSP partner-initiated Microsoft Office 365 E1 Trial.

Overview

**Note: Beginning May 4th, 2020, Microsoft will replace the 6-month CSP Office 365 E1 Trial, with a new 6-month promo for CSP Office 365 E1. Read our go-forward guidance here.**

To support partners in their response to the ongoing COVID-19 situation, Microsoft has made a number of program changes to enable customers to start using Teams as a hub for collaboration that brings together chat, meetings, and Microsoft 365, all in one place.

<table>
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<tr>
<th>Audience</th>
<th>Partner Guidance to support Remote Work</th>
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<tr>
<td>For existing Microsoft 365 customers</td>
<td>Help your customers deploy and use Teams. Take advantage of new and increased incentives for Partners who drive Teams usage.</td>
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<tr>
<td>For existing Office 365 Exchange Online Standalone customers</td>
<td>Get your customer started using Teams by adding a 6-month Partner-Initiated Microsoft Teams Trial.</td>
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<tr>
<td>For new Microsoft 365 customers with more than 300 users</td>
<td>Get your customer started using Teams by creating a new tenant with a 6-month CSP Office 365 E1 Trial.</td>
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<tr>
<td>For new Microsoft 365 customers with fewer than 300 users</td>
<td>Get your customer started using Teams by creating a new tenant with a 6-month CSP Office 365 E1 Trial.</td>
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The 6-month CSP Office 365 E1 Trial is designed for new customers only. Partners Center reporting allows partners to confidently engage with customers throughout the sales and deployment lifecycle. See below for details of this trial offer.

**Display name:** Office 365 E1 Trial  
**Trial offer ID:** c0c1386f-4a95-466b-8974-cefd71414def
Frequently asked questions

Why create a partner-initiated trial?
Partners manage a large portion of customers who do not have access to Microsoft Teams today and interact with many businesses considering remote work solutions. Creating a trial for partners to enable customers to leverage the value of Teams for remote work scenarios allows you to further enable your customers by initiating and managing the trial experience.

This trial provides partners with the trial lifecycle reporting they need to help customers begin on their Teams journey and enables conversion to paid subscriptions through the CSP channel for long term customer success.

How is this different from the managed Direct Office 365 E1 Trial?
In response to the ongoing impacts worldwide, Microsoft has shared Our commitment to customers during COVID-19, making Teams available to everyone. To enable this commitment, we announced a 6-month Office 365 E1 trial available to customers through their Microsoft account manager.

The CSP Office 365 E1 Trial is our effort to make this commitment available through the CSP channel. For partners, we recommend that you lead with the CSP Office 365 E1 trial which you can initiate and manage for your customer. However, if your customer has a need for greater than 3,000 users or transacts via a licensing model other than CSP, the Direct Office 365 E1 Trial will be the best option.

You can get a passcode for this trial by working with the customer’s Microsoft account manager, or if this customer is not managed you can request passcode from Partner Center Support. Click CSP, then select Cannot find an offer in the catalog.

Which trial should partners use for different customer types?
The below chart defines which offer is recommended for different customer types.

<table>
<thead>
<tr>
<th>Customer Type</th>
<th>Suggested Offer</th>
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<tbody>
<tr>
<td>Existing Office 365 Exchange Online Standalone customers</td>
<td>6-month Partner-Initiated Microsoft Teams Trial</td>
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<td>New Microsoft 365 customers with fewer than 300 users</td>
<td>6-month CSP Office 365 E1 Trial</td>
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<tr>
<td>New Microsoft 365 customers with more than 300 users</td>
<td>6-month CSP Office 365 E1 Trial</td>
</tr>
<tr>
<td>New Microsoft 365 customers with more than 3000 users</td>
<td>Direct Office 365 E1 Trial</td>
</tr>
</tbody>
</table>
Can I use the CSP Office 365 E1 Trial with existing Microsoft 365 customers?
The CSP Office 365 E1 Trial offer is offered for resell to, and intended to be used for, new Microsoft 365 customers only. This means that leveraging the trial to downgrade existing customers or offset existing customer licensing costs is not allowed. By placing an order for the CSP Office 365 E1 Trial offer you represent to Microsoft that it is being ordered for provisioning to and for the benefit of new customers only. Partners who abuse the purpose of this trial will be considered in breach of their commitments and obligations under their Cloud Solution Provider Program agreement.

How should partners use the CSP Office 365 E1 Trial?
Partners can include this trial into current customer acquisition motions to enable new customers in need of remote work scenarios to sign up with a partner. Throughout the trial, partners have opportunity to showcase the value of Teams and Microsoft 365 to new customers to drive to a business decision.

Can the CSP Office 365 E1 Trial and CSP Teams Trial run at the same time?
Yes, these two trials can run on the same tenant. We recommend only using the CSP Office 365 E1 Trial in COVID-19 new customer engagements as it contains the superset of functionality contained in the CSP Teams Trial.

Do partners have to wait 6 months to convert customers to higher paid SKU?
No, partners can convert customers from Trial to Paid SKU’s via CSP at any time.

Will the trial automatically convert to a paid SKU with Teams?
No, the trial licenses will expire after 6 months with no automatic charges. Partners own the relationship with end customers and are responsible for converting trials on behalf of their customers.

Can partners get usage credit for usage during the trial period?
No, trial usage does not count toward Teams usage. To capitalize on the usage incentives, convert the customer to a paid SKU before they cross the usage incentive threshold.
Details of the CSP Office 365 E1 Trial

Which customers are eligible for the 6-month free trial?
The CSP Office 365 E1 Trial offer is offered for resell to, and intended to be used for, new Microsoft 365 customers only. This means that leveraging the trial to downgrade existing customers or offset existing customer licensing costs is not allowed. By placing an order for the CSP Office 365 E1 Trial offer you represent to Microsoft that it is being ordered for provisioning to and for the benefit of new customers only. Partners who abuse the purpose of this trial will be considered in breach of their commitments and obligations under their Cloud Solution Provider Program agreement.

Which customers are not eligible for the trial?
Organizations are not eligible for the trial if:

- They are a Syndication Partner customer
- They are a GCC, GCC High, DoD or EDU customer

How many licenses are included in the trial?
Trial subscriptions can be provisioned for up to 3,000 licenses to ensure teams can be deployed to the entire organization. With all Trials, the number of licenses cannot be changed after initial set-up. If customers require a change in number of trial licenses after initial set-up, partners will need to reach out to CSP support.

What is included in the trial?
For each license assigned to a user in the trial they will be provisioned additional backend services that enable them to experience the full value of Microsoft Teams. This includes:

- Exchange Online Plan 1
- Flow for Office 365 Plan 1
- Forms
- Microsoft Planner
- Microsoft Whiteboard
- Microsoft Teams (Teams1, Teams IW)
- Office Online
- PowerApps for Office 365 Plan 1
- SharePoint Online Plan 1
- Stream
- Sway
- Yammer Enterprise
How long does the trial last?
The trial lasts for six (6) months from the date it is initiated in Partner Center. The duration is tracked from trial subscription creation, meaning that a user added to a trial that was initiated five months ago will only have one month of trial usage remaining. For example, if a partner initiated the trial in Partner Center on January 25, 2020, the trial would expire on July 24, 2020 at midnight GMT for all users assigned subscription licenses.

When does the trial start?
The trial starts on the date that the trial is initiated for the tenant, not when users are assigned licenses.

How do I enable the CSP Office 365 E1 trial?
CSP partner can initiate the trial through Partner Center on behalf of the customer. For more information, review the step-by-step guide at the end of this document.

How is the trial managed and users assigned licenses?
Tenant admins or delegated admin partners can assign or unassign licenses provided through the trial for users to take advantage of the Microsoft Teams.

Once the trial subscription has been created what else needs to be done?
Before users can access the trial, users must be enabled in the Microsoft 365 Admin Center.

How do you upgrade from the Trial?
To upgrade users from the trial license, do the following:

1. Help your customer purchase a subscription through CSP that includes Teams. ([See Office 365 Licensing](#))
2. Unassign the Microsoft Office 365 E1 Trial license from users
3. Assign the newly purchased license to each user

What happens to user data when the trial ends?
When the trial ends and if a user is not immediately upgraded to a paid subscription that includes Teams, the user data is not removed. The user still exists in Azure Active Directory and all data within Teams remains. Once a new license is assigned to the user to enable Teams functionality again, all content will still exist. For more information, see [Office 365 licensing for Microsoft Teams](#)
If the customer has no active paid or trial subscriptions, the tenant will follow normal Office 365 data retention policies. For more information, see Office 365 Data Retention, Deletion and Destruction Overview.

**What if my customer needs more than 3,000 seats or is not a current or prospective CSP customer?**
Partners can get their customer access to the managed Direct Office 365 E1 Trial by working with the customer to get a passcode through their Microsoft account manager or for non-managed customers, by contacting Partner Center Support, and clicking on CSP > Teams Trial offer.

**Can add-on SKUs be sold alongside the Office 365 E1 trial?**
No, paid add-ons can only be added to paid base offerings. Our recommendation is to lead with a paid SKU if you are planning to sell add-ons on top to ensure the best customer experience.

**Partner-initiated vs. End User-Initiated Trials**

**What is the Microsoft Teams Exploratory experience?**
The Microsoft Teams Exploratory experience is a user-initiated trial and offers companies with an AAD Commercial domain or an Office 365 license that does not include Teams the ability to explore Microsoft Teams. Syndication Partner Customers or customers in GCC, GCC High, DoD, or EDU are not eligible for this experience.

**How are User-Initiated trials different from Partner-Initiated trials?**
Partner-initiated trials such as the CSP Office 365 E1 Trial are designed to help partners acquire new customer by leveraging the customer value of Microsoft Teams. The partner trial duration is 6-months so that partners can build pipeline and convert customers to premium SKU’s within a typical sales campaign.

- Partner-initiated trial is integrated into Partner Center
- Partners can initiate the trial for customers when they are ready
- Partner Center reports allows visibility into customers trial dates enabling additional services and upsell opportunities

**Can both trials run at the same time?**
From a technical standpoint, a partner can set up a CSP Office 365 E1 Trial for a customer that has also has Microsoft Teams Exploratory licenses. However, we recommend partners move all customer
Microsoft Teams Exploratory licenses to CSP Office 365 E1 Trial licenses to make the upgrade process to paid licenses easier.

What should partners do if they see Microsoft Teams Exploratory licenses in their customers’ tenants?
This means there is end-user demand for Microsoft Teams. While there is no seamless upgrade path from a user-initiated license to a CSP paid subscription, we encourage partners to discuss with their customers’ purchase decision makers about expanding their CSP licensing to cover these additional users. If partners or customers wish to block end-users from claiming Microsoft Teams Exploratory licenses, they can do so. Learn more about the Teams Exploratory License.

Trial Activation Walkthrough

The below walk-through details the experience for CSP Partners who transact via Partner Center. If you are a reseller who transacts through a CSP Provider, please refer to their guidance on the trial for details on your experience. (Note: Screenshots reference the CSP Teams Trial rather than Office 365 E1 Trial)

Step 1 Log into Partner Center and navigate to Customers blade.

Select the Customer you wish to enroll in the Teams Trial by clicking on the Customer Name.

Step 2 Locate the offer called: Office 365 E1 Trial c0c1386f-4a95-466b-8974-cefd71414def
3. Click the “Add to Cart” link next to the offer, and complete the checkout process.

4. Review the terms, and click “Buy” button to add the offer to the tenant.

6. After completing the transaction, you can verify that the Partner-Initiated Microsoft Office 365 E1 Trial was successfully associated with the customer by returning to the Customer blade, and looking in the Subscriptions section.