# Microsoft Partner Guidance for Partner-initiated Microsoft Teams Trial

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## Contents

<table>
<thead>
<tr>
<th>Section</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>Using this guide</td>
<td>3</td>
</tr>
<tr>
<td>Overview</td>
<td>3</td>
</tr>
<tr>
<td>Frequently asked questions</td>
<td>4</td>
</tr>
<tr>
<td>Why create a partner-initiated trial?</td>
<td>4</td>
</tr>
<tr>
<td>How is this different from the CSP Office 365 E1 promo?</td>
<td>4</td>
</tr>
<tr>
<td>Which trial should partners use for different customer types?</td>
<td>4</td>
</tr>
<tr>
<td>Can I use the Microsoft Teams Trial with new Microsoft 365 customers?</td>
<td>4</td>
</tr>
<tr>
<td>How should partners use the Microsoft Teams Trial?</td>
<td>4</td>
</tr>
<tr>
<td>Do partners have to wait 6 months to convert customers to higher paid SKU?</td>
<td>4</td>
</tr>
<tr>
<td>Will the trial automatically convert to a paid SKU with Teams?</td>
<td>5</td>
</tr>
<tr>
<td>Can partners get usage credit for usage during the trial period?</td>
<td>5</td>
</tr>
<tr>
<td>Details of the trial</td>
<td>5</td>
</tr>
<tr>
<td>Which customers are eligible for the 6-month free trial?</td>
<td>5</td>
</tr>
<tr>
<td>Which customers are not eligible for the trial?</td>
<td>5</td>
</tr>
<tr>
<td>How many licenses are included in the trial?</td>
<td>5</td>
</tr>
<tr>
<td>What is included in the trial?</td>
<td>5</td>
</tr>
<tr>
<td>What is not included in the trial?</td>
<td>6</td>
</tr>
<tr>
<td>How long does the trial last?</td>
<td>6</td>
</tr>
<tr>
<td>When does the trial start?</td>
<td>6</td>
</tr>
<tr>
<td>How do I enable the Partner-initiated Teams trial?</td>
<td>6</td>
</tr>
<tr>
<td>How is the trial managed and users assigned licenses?</td>
<td>6</td>
</tr>
<tr>
<td>Once the trial subscription has been created what else needs to be done?</td>
<td>6</td>
</tr>
</tbody>
</table>
How do you upgrade from the Trial?.................................................................6
What happens to user data when the trial ends?...............................................7
Partner-initiated vs. User-Initiated Trials ..............................................................7
What is the Microsoft Teams Exploratory experience? .......................................7
How are User-Initiated trials different from Partner-Initiated trials? ....................7
Can both trials run at the same time? ..................................................................7
What should partners do if they see Microsoft Teams Exploratory licenses in their customers’ tenants? ..........................................................................................8
Trial Activation Walkthrough .............................................................................8
Using this guide

This document provides Microsoft Partner guidance for the CSP partner-initiated Microsoft Teams Trial.

Overview

To support partners in their response to the ongoing COVID-19 situation, Microsoft has made a number of program changes to enable customers who do not have access to Teams today to start using Teams as a hub for collaboration that brings together chat, meetings, and Microsoft 365, all in one place.

<table>
<thead>
<tr>
<th>Audience</th>
<th>Recommended Offer</th>
</tr>
</thead>
<tbody>
<tr>
<td>For new Microsoft 365 customers with more than 300 users</td>
<td><strong>Office 365 E1 promo</strong>, first 6 months free on annual commitment</td>
</tr>
<tr>
<td>For new Microsoft 365 customers with fewer than 300 users</td>
<td><strong>Microsoft 365 Business Basic promo</strong>, first 6 months free on annual commitment promo</td>
</tr>
<tr>
<td>For existing Office 365 Exchange Online Standalone customers</td>
<td><strong>Partner-Initiated Microsoft Teams Trial</strong>, 6-months duration (documented in this FAQ)</td>
</tr>
</tbody>
</table>

The partner-initiated 6-month trial of Microsoft Teams in CSP enables partners to provide customers with the full Teams experience to existing customers who currently use Exchange Online standalone. 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:** Microsoft Teams Commercial Cloud Trial

**Trial offer ID:** dd3496ba-a49b-4475-9f40-8c333709ef87
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 CSP Office 365 E1 promo?
This trial is designed for existing customers with Exchange Online. It builds on top of existing Exchange Online user licenses to enable Teams functionality for those users.

Which trial should partners use for different customer types?
Get additional details and full list of Teams trials and offers.

Can I use the Microsoft Teams Trial with new Microsoft 365 customers?
We recommend using the CSP Office 365 E1 promo for new customers rather than the Microsoft Teams Trial. Calendaring functionality in Teams will not be supported if organizations are not using Exchange Online or a supported version of Exchange On-Prem (Exchange 2016 CU3+ or Exchange 2013 CU17+).

How should partners use the Microsoft Teams Trial?
Partners can add this trial to existing Exchange Online Plan 1 or Plan 2 customers to upsell them to plans that include Teams cloud services. Throughout the trial, partners have opportunity to showcase the value of Teams and Microsoft 365 to customers to drive to a purchase decision.

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 trial

Which customers are eligible for the 6-month free trial?
The Microsoft Teams Trial offer is offered for resell to, and intended to be used for, existing Exchange Online 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 Teams Trial offer you represent to Microsoft that it is being ordered for provisioning to and for the benefit of Exchange Online 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 will be provisioned for 3000 licenses to ensure teams can be deployed to the entire organization.

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 Foundation
- Flow for Office 365 Plan 1
- Forms
- Microsoft Planner
What is not included in the trial?
Full Exchange Online Plan 1 is not included in the trial as it is intended to be added to existing customer Exchange Online Plan 1 or Plan 2 customers.

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 Partner-initiated Teams 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](https://docs.microsoft.com/en-us/microsoft-365/office-365/licensing))
2. Unassign the Microsoft Teams Commercial Cloud 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](https://docs.microsoft.com/en-us/microsoft-365/office-365/licenses)

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](https://docs.microsoft.com/en-us/previous-versions/office/365/de/office-365-data-retention-deletion-and-destruction-overview(v=office.15))

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### Partner-initiated vs. 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 Microsoft Teams Trial are designed to help partners drive upsell 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 Teams 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 Teams 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 wish to block end-users in CSP tenants from claiming Microsoft Teams Exploratory licenses, they can do so. Learn more about the Teams Exploratory License.

Trial Activation Walkthrough

This walk-through is intended for Direct 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 old display name of “Microsoft Teams Commercial Cloud (User-Initiated) 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: Microsoft Teams Commercial Cloud Trial
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**Step 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 Teams Trial was successfully associated with the customer by returning to the Customer blade, and looking in the Subscriptions section.