Shape, square

Description automatically generated

PRISM Portal User Guide:

Getting Started

# What is PRISM?

PRISM is a self-service ordering and billing portal that allows our partners a single pane of glass to manage every program they have with rhipe. The PRISM portal includes the following list of features:

Dashboard:

* + View a Breakdown donut chart of products used

Programs:

o View Active & Pending Vendor Programs

* + View Information about Programs Available to Enrol In
  + Onboard to a New Program
  + Manage Active Vendor Programs

Manage your Microsoft CSP Program:

* + Create Tenants
  + Manage Existing Tenants
  + Transition Tenant
  + Pricelist
  + Manage Subscriptions & Support Plans
    - Annual Order Renewal Subscription
  + Microsoft Azure
    - Create an Azure Subscription
    - Rename an Azure Subscription
    - Set up Azure Spend Notifications
    - Edit & Cancel Existing Azure Spend Notifications
  + Related Programs (ISV)
    - Add a Related Program product that is not linked in quantity to MS CSP Subscription
    - Add a Related Program product that is linked in quantity to MS CSP Subscription
    - Manage a Related Program product
    - Cancel a Related Program product

Customer Management:

* + View existing end customers, and their associated programs
  + PRISM Creation & Management of Users
  + Resetting Passwords
  + Deactivating Users
  + Reactivating Users

Invoices:

* + Find and download invoices
  + Find and download order confirmations
  + Find and download Azure usage breakdown
  + Use invoice filters
  + Use invoice bulk download

Reports:

* + Usage Reporting Programs
    - Submit Usage Report, and relevant invoices (Microsoft SPLA, Citrix CSP, Red Hat, Datacore, Kemp per user)
    - Adjust usage reports
    - Reset Usage Report that was just submitted within the last 24 hours
    - View previously submitted usage reports
  + Non-Usage Reporting Programs
  + Customer Agreements Report
  + Add end customer to a program

Contact us information.

Products & Programs

Graphical user interface, application

Description automatically generated The list of Products and Programs that you can find on the PRISM Portal are:

Graphical user interface, application

Description automatically generated

Getting Started: PRISM Portal

How to access PRISM Portal:

Link to Access PRISM Portal: [https://www.prismportal.online/](https://www.prismportal.online/%20)

Login using details provided by rhipe (if required you can reset your password using the “Forgot my password” link above the log in button)

Graphical user interface, application

Description automatically generated

• Once you are logged in, you will see the main dashboard of your PRISM Portal. The Dashboard provides the view product breakdown donut chart of products used

Graphical user interface, application, website

Description automatically generated

PRISM creation and management of users

Once a partner is set up in PRISM; partners have the ability to create and manage users themselves. This means providing other staff with access to PRISM against their specific account.

Create PRISM access for additional users

To add a user, partners are to navigate to the ‘Customer Management’ tab in PRISM

Under the Customer List, select your reseller account (which is always listed as the top) and select “View” under actions

Graphical user interface, application

Description automatically generated

You’ll see the Customer Details, select ‘Manage Users’

Graphical user interface, text, application, Word

Description automatically generated

Enter new user’s First Name, Last Name and Email Address. Then select ‘Create User’

Graphical user interface, application

Description automatically generated

New user will then be auto sent an email from PRISM to create password to finalize their set up

Resetting passwords

Partners can reset passwords for their own staff. To deactivate a user, partners are to navigate to the ‘Customer Management’ tab in PRISM.

To reset a password, a partner navigates to the Customer List, select your reseller account (which is always listed at the top) and select ‘View’ under actions.

Graphical user interface, application

Description automatically generated

Graphical user interface, application

Description automatically generatedSelect Manage Users

Under ‘Active Users’ section, locate the specific user and select ‘More’

Background pattern

Description automatically generated with medium confidence

Enter new password, then select ‘Reset Password’

Text

Description automatically generated with medium confidenceSend new password details to use

Deactivating users

To deactivate a user, partners are to navigate to the ‘Customer Management’ tab in PRISM

Under the Customer List, select your reseller account and select ‘View’ under actions

Graphical user interface, application

Description automatically generated

Graphical user interface, application

Description automatically generatedSelect ‘Manage Users’

Search for user under Active User section, then select ‘Deactivate’

Application

Description automatically generated with medium confidence

User will no longer be able to access PRISM

Reactivating users

Graphical user interface, application

Description automatically generated with medium confidenceTo re-activate a user, partners are to navigate back to Customer Management > Manage Users within PRISM, and locate user under Inactive User section, then select ‘Activate’

Manage your vendor programs

Select the “Programs” Icon on the navigation on your left.

Graphical user interface, website

Description automatically generated

On the Programs Tab, you will be able to:

View Active & Pending Vendor Programs

View Information about Programs Available to Enrol In, and access pricing for programs available to enrol in

Onboard to a New Program

Manage Vendor Programs you have already signed up for

View active, pending contract agreements and programs available to enrol in

Graphical user interface, application

Description automatically generated

Onboard to a new program

To Onboard to a New Program, select “View More” on the Program you would like to be enrolled into

Graphical user interface, application, logo, company name

Description automatically generated

You can Sign Up immediately or view and download the Price List

Graphical user interface, text, application, email

Description automatically generated

Select the Vendor Program and click “Manage” to view your program details, price list, invoices & Program Guide.

Graphical user interface, application

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Manage your Microsoft CSP program

To manage your CSP program, select “Programs” icon on the left hand navigation. Ensure to click “Manage” on the Microsoft CSP icon to view the program details.

Graphical user interface, website

Description automatically generated

Creating a new tenant

Function to create new tenant for a customer that is new to Office 365:

Click on “Create New Tenant” and fill out the order form with your client’s company information, providing a primary contact within the end client company.

Ensure to select the correct country for your client as this determines which data centre the series are provisioned from

Click on “Create Tenant” to continue onto next stage for product selection

Product Selection:

Here you can select the products you would like to provision for your client

You can either key in the quantity directly or adjust the quantity using the up and down arrows

Order Overview:

Using the overview section on the right, confirm the selected products & associated quantity

Click on “Submit Order” to provision the tenant and purchase the product(s).

Graphical user interface, application

Description automatically generated

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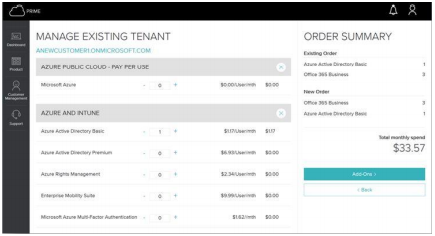
Product Selection:

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You can either key in the quantity directly or adjust the quantity using the up and down arrows

Order Overview:

Using the overview section on the right, confirm the selected products & associated quantity

 Click on “Submit Order” to provision the tenant and purchase the product(s).

Manage an existing Microsoft CSP tenant

Function used to manage the licenses of a customer with rhipe CSP Office 365 subscription. Managing the licenses of a tenant originally procured through rhipe Microsoft CSP Program or transition into CSP has never been easier.

Select your customer:

From the “manage existing tenant”, select drop down menu to select your customer

Once the customer has been selected, click on “Manage”

Amend the subscription as needed:

Increase or decrease the quantity of products as needed

Confirm the quantities are correct in the overview section, click on “Submit Order”

Order Processing:

Once the order has been submitted, you will see the status of the order through the notification icon

Connect/transition a tenant to rhipe Microsoft CSP

Function used when a customer has an existing Office 365 subscription through EA, Open Advisor, or purchased directly through Microsoft. This will allow you to sell licenses under the Microsoft CSP Program.

There are a few things to check before you move your customers’ licenses from other licensing channels or from other partners to rhipe Microsoft CSP:

1. To move a tenant with subscriptions from Open program: First check the expiry date of your customer's Microsoft online subscription. Move to rhipe CSP program within 30 days upon expiry of your customer's subscription.
2. To move a tenant with subscriptions from Web direct (direct purchase from Microsoft): First follow the instructions below to transition the tenant and purchase the subscriptions through rhipe. Then, raise your service request online in the Office 365 admin center and ask the billing support team to cancel the subscription, stating that the customer is moving to CSP program so that Microsoft will waive the early termination penalty equivalent to 1-month subscription.
3. To move subscriptions from other CSP indirect providers or other CSP direct resellers to rhipe CSP: Follow the steps below to transition the tenant and create a subscription with the correct license quantity through rhipe CSP. Then, cancel the subscription with the existing CSP partner. You will need to ensure that your customer's contractual obligation with the previous reseller is fulfilled to avoid any dispute.
4. To move subscriptions from another rhipe CSP reseller to you: Please raise a support case via email to partner.support@rhipe.com. You will need to ensure that your customer's contractual obligation with the previous rhipe CSP reseller is fulfilled to avoid any dispute.

To move subscriptions and licenses to rhipe CSP, you first need to Connect a tenant to rhipe CSP.

First, log into rhipe [PRISM Portal](http://www.prismportal.online/), and go to Programs -> Microsoft CSP

Click Connect Tenant to begin the process of connecting rhipe with your customer who has already purchased Microsoft Online services through other programs or partners before to rhipe CSP. Connect tenant only establishes a relationship between rhipe and your customer tenant. The existing subscription with the previous subscription provider will remain in place until these subscriptions are suspended or terminated.

Enter the name, email and billing address of your customer.

Graphical user interface, application, Teams

Description automatically generated

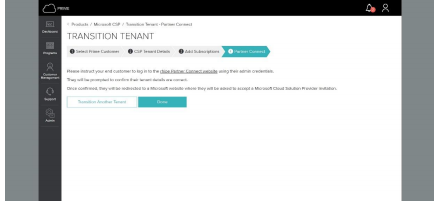
Enter the market category (Corporate, Government, NFP or Education) and contact details of your customer

Graphical user interface, application

Description automatically generated

Enter the license quantity that the customer wish to purchase via Microsoft CSP program and click Submit Order. If you are creating an Azure only tenant, click Skip. Also, note that add-ons are only available after you have purchased the main SKUs.

You will now be prompted to get your end customer to log into the rhipe Partner Connect Website using their global administrator credentials. You will also receive a separate email that includes the rhipe Partner Connect Website link that you can forward to your customer’s admin



The admin of the end customer can proceed to the rhipe PRISM Partner Connect Website using the Partner Connect link. Alternatively, you can also do this on behalf of your customer if you have the login credentials

Graphical user interface, text, application, website

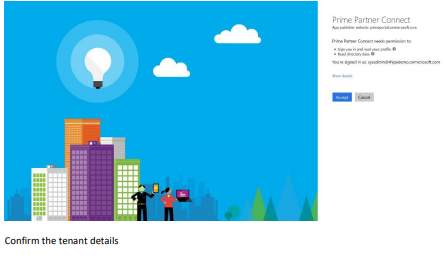
Description automatically generated

Login using the customer’s Global Administrator credentials

Graphical user interface, application

Description automatically generated

Accept the Directory Connection of your tenant.



Confirm the tenant details

Graphical user interface, application, website

Description automatically generated

Once confirmed, you will be greeted with a sign in page to your Admin Center - here you need to accept rhipe as a 'Delegated Admin' to enable rhipe to provision Microsoft online service Licenses for the end customer.

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Description automatically generated

Accept rhipe as a 'Microsoft Cloud Solution Provider and Administrator' by ticking 'yes' and click 'Authorise CSP'.

Graphical user interface, application

Description automatically generated

You can see that rhipe is now a CSP Admin under 'Partner Relationships'. Try to refresh the page if you cannot see it.

Graphical user interface, application

Description automatically generated

Return to rhipe PRISM portal and you will see that the status of the tenant you just transitioned is now 'Transitioning'. It takes up to an hour for the tenant transitioning process to be completed and the status of the tenant to change to 'Normal'. You will be able to assign licenses to your users after the tenant transitioning process is completed.

After your licenses have been provisioned, remember to go back to your previous license providers (other CSP, Microsoft etc.) to cancel and suspend the subscriptions following the instructions at the beginning of the article to avoid being double billed.

Price list

You can view your Price List by selecting the price list icon when you are in your Microsoft CSP Program page.

Graphical user interface, application

Description automatically generated

Manage subscriptions and support plans

Annual order renewal subscription

For all annual orders, PRISM now allows you to continue renewal without contacting the rhipe Support team. If you have a customer with annual orders and would like to continue the renewal of the subscription, select Manage.

Graphical user interface, text, application, email

Description automatically generated

The red frame will inform you when is the renewal date due. If your customer confirms that they are going to continue renewal, please click "Renew Subscription"

Graphical user interface, text, application, email

Description automatically generated

You will receive a notification as below once you click on "Renew Subscription" in the portal.



\*If the customer does not want to renew the annual subscription, you do not need to perform this action and let the annual subscription suspend itself when it hits the due date.

Microsoft Azure create an Azure subscription

To add an Azure subscription to existing customer. Go to Prism portal – on the dashboard click view details under “PROGRAMS IN USE”

Graphical user interface, website

Description automatically generated

Click Manage link under Microsoft CSP Program.

Graphical user interface, application

Description automatically generated

Click MANAGE EXISTING TENANT

Graphical user interface, application, website

Description automatically generated

Click Manage link against the customer, where the Azure subscription is to be added.

Graphical user interface, text, application, Teams

Description automatically generated

Click Add new Azure subscription button on the right

Chart

Description automatically generated

Add a custom unique name for the Azure subscription

Graphical user interface, text, application, Teams

Description automatically generated

Once the subscription is created. rhipe support team will run the necessary permissions script in the backend and send a confirmation email to the partner.

This allows a partner to manage the customer’s azure tenant using their own partner center login.

Manage Azure subscriptions

Go to Microsoft CSP, click on the Tenant you’d like to manage and then click on ‘Manage Subscription” next to the Azure subscription you’d like to update.

Graphical user interface, application

Description automatically generated

Creating Azure spend notification

Go to Manage an Azure Subscription and click on ‘Set Spend Notification ‘

Graphical user interface, application

Description automatically generated

A screen will pop on the right-hand side’

Graphical user interface, text, application, chat or text message

Description automatically generated

Enter the details as requested, limit and the email address that will receive these notifications.

Graphical user interface, text, application, Teams

Description automatically generated

Updating / cancelling existing spend notifications

Click on Update Spend Notification or Clear Spend Notification to edit or cancel the notification

Graphical user interface, application

Description automatically generated

Click on clear spend notification button and one should see a confirmation popup. Click yes to continue.

Graphical user interface, application

Description automatically generated

For modifying existing spend notification click Update spend notification. This should open the side bar for adjusting the values.

One should see a confirmation message popup on the top corner of the screen on the update confirmation.

Graphical user interface, application

Description automatically generated

Graphical user interface, application

Description automatically generated

Usage reporting programs

On a monthly basis usage reports are required for various programs. Usage reports are required for any of the following programs you are enrolled with. Instructions for each vendor program’s usage reporting are listed below

* Microsoft SPLA
* Kemp Per User
* Red Hat
* DataCore
* Citrix CSP
* Trend Micro
* VMware
* Veeam.

Microsoft SPLA, Citrix CSP, Red Hat, Datacore and kemp per user

Within PRISM, navigate to the ‘Programs’ tab

Locate the relevant vendor program and select ‘Manage

Graphical user interface, application, website

Description automatically generated

Within the Program tile, you will see Usage Reports listed with the Dashboard.

Each month will have a usage report listed against (for months that the agreement was active). Any pending or open usage reports will appear with a blue ‘Submit Usage’ icon as shown below

Graphical user interface, application

Description automatically generated

To submit a usage report, select the ‘Submit Usage’ icon under the appropriate month.

Within the usage report you can submit usage select ‘Change Usage.’

Graphical user interface, text, application

Description automatically generated

Locate the SKUs you wish to submit usage for and update the quantity.

Graphical user interface

Description automatically generated

Once all product usage had been added, select ‘Submit Changes’ to review the order prior to full submission

Graphical user interface

Description automatically generated

If you need to make a change to the report, select ‘Change Usage’ and follow the previous steps

You can add a Purchase Order Number within this text box, this Purchase Order number will then appear on your invoice

Graphical user interface, text, application, email

Description automatically generated

Once ready, select the ‘Submit Usage’ button.

Graphical user interface, text, application, email

Description automatically generated

Submit zero usage

If there is no usage to be reported, simply select the ‘Submit Zero Usage’ button, this will record your usage as zero with rhipe and the vendor.

Graphical user interface, text, application

Description automatically generated

Usage reporting status

Please see below overview of all statuses for usage reports and their meaning:

Not Submitted: Usage report is open and pending your submission

Submitted: Usage report has been submitted and is pending to be invoiced (24-hour period between submission and invoice between 1st and 10th of the month)

Complete: Zero usage report has been submitted

Invoiced: Usage report has been submitted and invoiced

Agreement On Hold: Agreement has been placed on hold by rhipe for various reasons (long period of no usage, credit hold), please contact <mailto:operations@rhipe.com>for more information

VMware

Navigate to the VCCP Commerce Portal <https://vcp.vmware.com/>and log in

Within the Dashboard view, click on the Task number shown under MBO Related. The task would be visible only when usage reporting for the month is opened by VMware.

Graphical user interface, chart

Description automatically generated

In the MBO Pending Report wizard, Enter a Purchase Order.

Graphical user interface, application

Description automatically generated with medium confidence

Expand the Usage Data section, for example: Datacenter and Cloud Infrastructure, Storage and Availability

Graphical user interface, application, table

Description automatically generated

This section shows all the products and bundle part of each.

Enter the usage against the matching product or Bundle. Review the usage if it is automatically collected through vCloud Usage Insight.

Enter any comments (optional) for rhipe and VMware to be noted.

Click Submit.

Veeam

Navigate to the Veeam PULSE Portal <https://propartner.veeam.com/vcsp-pulse> and log in

Within the dashboard toolbar, select the ‘Monthly Usage’ drop down and then select ‘My Actions’

Graphical user interface, text, application

Description automatically generated

Select the link against the month’s usage report you are submitting

Table

Description automatically generated

Review the ‘Rental Agreement Details’ and ‘Monthly Usage Details’ under the report for accuracy.

Under the ‘Product Usage Details’ you will see a list of products that you currently have licenses for. You can also add products using the search bar, shown as No.1 in screenshot below.

Enter individual usage units against each item under the ‘Current Month Usage’ column. Shown as No.2 in screenshot below.

The point value of each product will then be calculated under the ‘Points’ column; and tallied under ‘Reporting Points’. Shown as No.3 in screenshot below.

Once all usage has been added, select ‘Save’ and then ‘Submit.

Graphical user interface, application, table, Excel

Description automatically generatedTrend Micro

Navigate to the Trend Micro License Management Portal (LMP): [https://licensingplatform.trendmicro.com/xLP/Home/SSOLoginRequest?T=C3DBBE4C&\_currentRequestUrl](https://licensingplatform.trendmicro.com/xLP/Home/SSOLoginRequest?T=C3DBBE4C&_currentRequestUrl=)= and log in

Under the dashboard toolbar, navigate to ‘Billing’ and ‘Usage Reports.’

Graphical user interface, text, application

Description automatically generated

Select the link against the month’s usage report you are submitting

The "Chargeable Units" column will be auto populated by Trend Micro. This is the field that will be used for verifying compliance and invoicing.

If you adjust the Chargeable Units field, you will be required to add a comment before the usage can be saved.

Graphical user interface, application

Description automatically generated

NOTE: If a usage report isn’t submitted by the 10th of each month, Trend Micro will auto submit based on chargeable unit.

Non-usage reporting programs

On a monthly basis invoicing occurs for the following programs, as these programs are a mixture of consumption or vendor reported usage, no usage reports are required to be submitted by your company. However, you will receive an invoice based on the consumption and/or usage tracked by the vendor. These programs are:

* Microsoft CSP
* Nexon
* Symantec
* Portal Go!
* LiveTiles
* Kemp Per Instance
* Kemp MELA
* Sinefa
* Skykick Backup
* Skykick Migration
* Zimbra BSP
* Docusign
* CRM Kickstart
* Wiise
* Acronis ABC
* SMX.

Please note that under the Program tile for these programs you can also view and download invoices.

Customer management

View existing end customers, and their associated programs

Graphical user interface

Description automatically generated Creating a new tenant requires you to create a customer record in PRISM Portal. You can view all your customers in the “Customer Management” section on the left-hand navigation pane.

NOTE: The top listed entity in your ‘Customer List’ will always be your own company’s reseller entity

Invoices

You can view all your invoices in the PRISM Portal. On the left-hand navigation pane, select “Invoices”

Graphical user interface, application

Description automatically generated

You will be able to:

Find and download invoices in PDF & CSV

Find and download order confirmations

Find and download Azure usage breakdown (for the Microsoft CSP Program)

Use Invoice Filters & Use Invoice Bulk Download

Graphical user interface, text, application, email

Description automatically generated

If you navigate from the left-hand navigation panel, click on “Contact us”. You will see a list of contact numbers according to your country.

