

Table of Contents

Introduction	1
Signing In.....	1
My Services	2
CloudServus	3
How to schedule subscription quantity changes	3
Annual Term Subscription Change Requests.....	4
Monthly Term Subscription Change requests.....	5
Adding Net New Subscriptions	6
View Previous Subscription Quantity Changes	6
View or Cancel Future Scheduled Subscription Changes	7
Adding and Removing Self-Service Portal Administrators	7
View Azure Usage by Resource.....	8

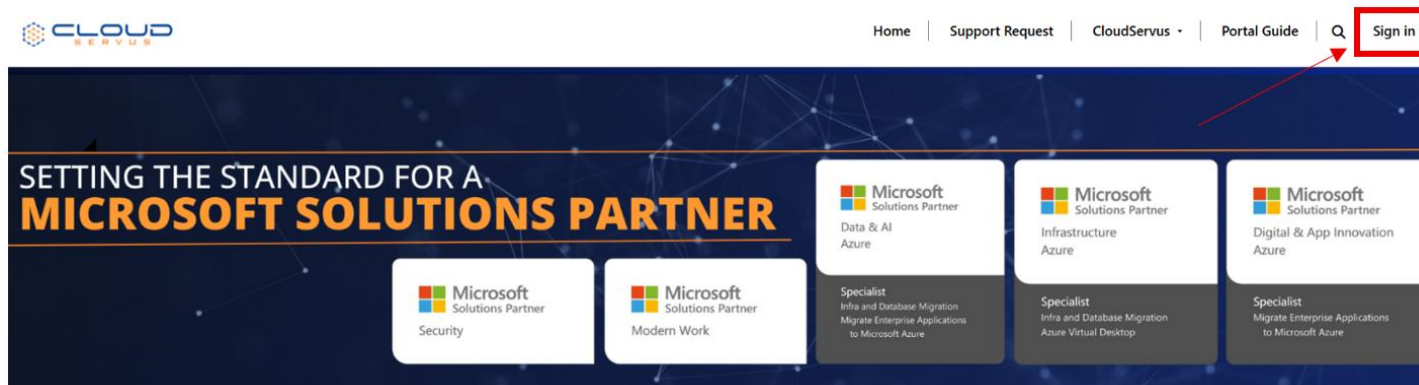
Introduction

Below is a basic overview of the new CloudServus CSP Self-Service Portal. This guide breaks down different drop-down menu items within the portal. New features and functionality will be released throughout the year.

If you cannot find answers within this guide, please reach out to Support@CloudServus.com.

Signing In

- You can sign into the Self-Service Portal by clicking the 'Sign In' icon on the top right of the page

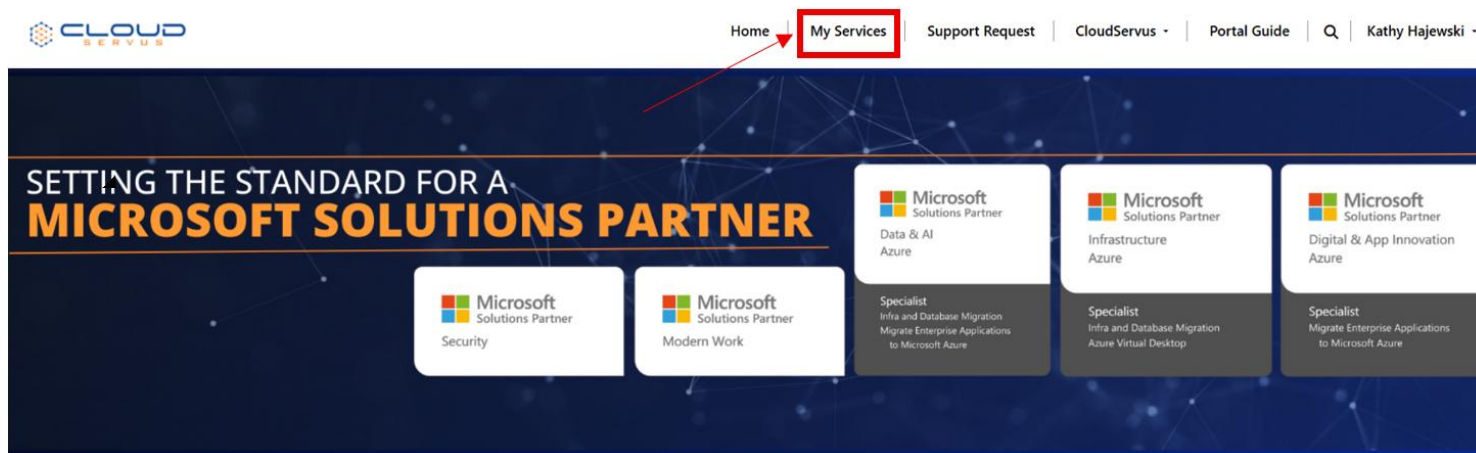


CSP SELF-SERVICE PORTAL GUIDE



My Services

- 'My Services' icon will take you to the 'My Services' page where you can:
 - View current subscriptions
 - Schedule changes to subscriptions
 - View upcoming renewals
 - View recent changes
 - View Azure usage by resources



Products

Home | My Services | Support Request | CloudServus - | Portal Guide | Kathy Hajewski -

Dashboard

Products

Type

☒ Usage-Based

☒ Subscription

☒ One Time Purchases

Term

☒ Monthly

☒ Yearly

☒ Quarterly

☒ Triennial

Billing Contracts

☒ All

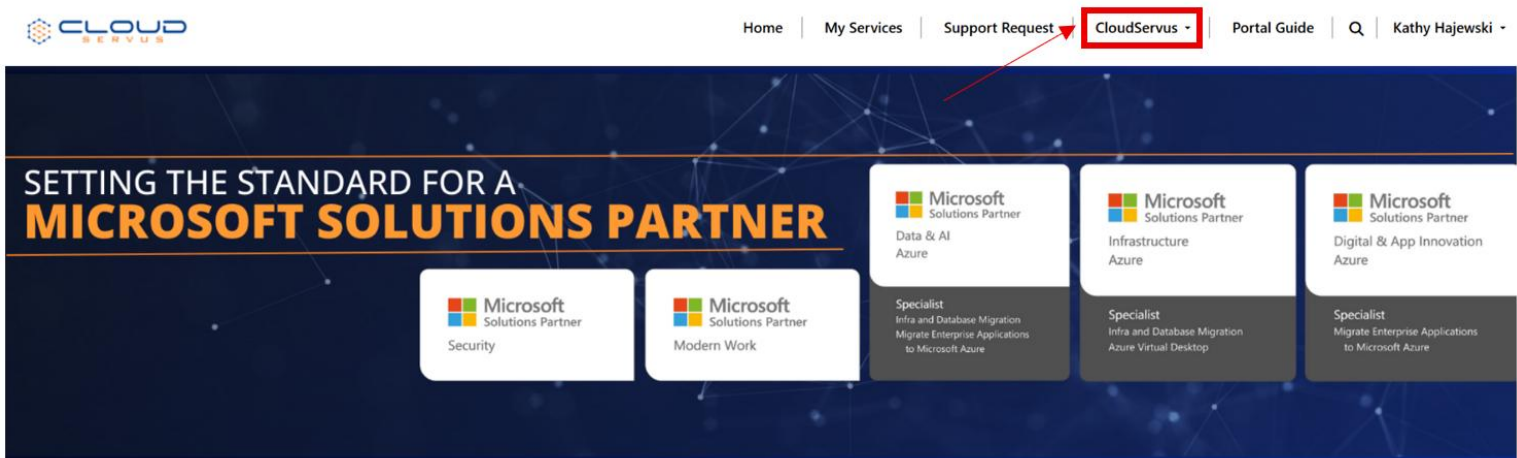
☒ CloudServus-NCE Monthly Term

☒ CloudServus-NCE Annual Term

Product Name	Quantity	Next Renewal	Changes
Copilot for Microsoft 365	4	in 20 days	Last changed on 05/14/2025
Enterprise Mobility + Security E3	350	in 20 days	
Enterprise Mobility + Security E5	2	in 20 days	
Exchange Online (Plan 1)	76	in 20 days	Last changed on 05/15/2025
Exchange Online (Plan 2)	1	in 20 days	
Exchange Online Archiving for Exchange Online	1	in 20 days	
Microsoft 365 Business Basic	20	in 20 days	Last changed on 03/26/2025
Microsoft 365 Business Premium	208	in 20 days	

CloudServus

- The CloudServus drop-down menu includes links to:
 - Core Competencies** – Includes CloudServus’ mission statement and outlines our capabilities, knowledge, and skills.
 - Blog** – Our blog posts focus on CloudServus case studies, technology updates and current trends, tips and tricks, and recent Microsoft licensing changes.
 - About Us** – Learn more about our company, partner competencies, and values.
 - LinkedIn** – Directs you to our LinkedIn page. Follow us to receive notifications on latest technology trends, our blog posts, and upcoming events.



How to schedule subscription quantity changes

- Click the drop-down icon located on the right-hand side of the subscription you want to edit:

Home My Services Support Request CloudServus Portal Guide Kathy Hajewski					
Product Name	Quantity	Next Renewal	Changes	Action	
 Copilot for Microsoft 365	4	in 20 days	Last changed on 05/14/2025	 	
 Enterprise Mobility + Security E3	350	in 20 days		 	
 Enterprise Mobility + Security E5	2	in 20 days		 	
 Exchange Online (Plan 1)	76	in 20 days	Last changed on 05/15/2025	 	
 Exchange Online (Plan 2)	1	in 20 days		 	
 Exchange Online Archiving for Exchange Online	1	in 20 days		 	

- In Subscription Details, click 'Edit' to adjust subscription parameters (such as quantity)

 Exchange Online (Plan 1)

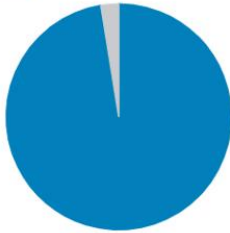
76 in 20 days

Last changed on
05/15/2025

License Assignment

Assigned Available



Subscription Details

Start Date
11/30/2024

Commitment Term
Annual-Monthly

Commitment End Date
6/29/2025

Unit Price Per Term ⓘ
\$48.00

Change log
[View](#)

Discount
1.00%

Total Price Per Term
\$47.52

Edit

Purchase and Contract Details

Billing Contract
CloudServus-NCE Annual Term

Contract Start Date
8/31/2024

Next Invoice Date
7/1/2025

Billing Frequency
Monthly

Renewal Date
2/27/2026

Contract Term
12 months

Annual Term Subscription Change Requests

Note: Quantity reductions can only be made at renewal

- **Request quantity reduction:**
 - Enter the quantity you want to decrease the subscription by in the 'Adjust Quantity Count by' box
 - Select 'On Renewal' from the 'Changes are effective' drop-down menu
 - Click 'Submit' to save changes - This will trigger a notification once provisioned successfully
- **Request quantity increase:**
 - Enter the quantity you want to increase the subscription by in the 'Adjust Quantity Count by' box
 - The 'Changes are effective' selection will default to 'Immediate' however if you want to schedule the change for a future date select either 'On Renewal' or 'Custom' (a date will need to be selected in the 'Effective Date' box)
 - To schedule a future quantity increase, select 'Custom' from the 'Changes are effective' drop-down menu, then select desired 'Effective Date'
 - Click 'Submit' to save changes - This will trigger a notification once provisioned successfully
 - *Optional:* 'Order Reference' box can be used to reference PO number or another label/identifier (i.e., location, sub entity)

Adjust Quantity Count...  

Resulting Quantity 77

Changes are effective

Effective Date 

Should this Subscription Auto Renew?

Order Ref (Optional)

Changes are effective

Effective Date 

Should this Subscription Auto Renew?

Order Ref (Optional)

Monthly Term Subscription Change requests

Note: Quantity reductions can only be made at renewal

- **Request quantity reduction:**
 - Enter the quantity you want to decrease the subscription by in the 'Adjust Quantity Count by' box
 - The 'Changes are effective' selection will default to 'Immediate' however if you want to schedule the change for a future date select either 'On Renewal' or 'Custom' (a date will need to be selected in the 'Effective Date' box)
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 - *Optional:* 'Order Reference' box can be used to reference PO number or another label/identifier (i.e., location, sub entity)

Adding Net New Subscriptions

- For net new subscriptions please reach out to Support@CloudServus.com

View Previous Subscription Quantity Changes

- Last change can be viewed in the 'Changes' column of each subscription
- To view additional previous changes, click on 'Last changed on'

Home

My Services

Support Request

CloudServus

Portal Guide

Kathy Hajewski

Product Name	Provisioned Q...	Next Rene...	Changes	Action
Office 365 Extra File Storage	900 ⓘ	in 247 days	Last changed on 06/09/2025	
Power BI Pro	2 ⓘ	in 247 days	Last changed on 06/22/2025	

Products

Home | My Services | Support Request | CloudServus | Portal Guide | Kathy Hajewski

Product Name	Provisioned Q...	Next Rene...	Changes	Action
Office 365 Extra File Storage	900 ⓘ	in 247 days	Last changed on 06/09/2025	

Name	Start D...	Quantity	Order By	Order Reference	Order Source	Status
Update Quantity	6/9/2025, 6:00:00 PM	400	Kathy Hajewski (kathy.hajewski@cloud...)		Portal	✓
Update Quantity	6/8/2025, 6:00:00 PM	100	Kathy Hajewski (kathy.hajewski@cloud...)		Portal	✓
Update Quantity	6/4/2025, 6:00:00 PM	100	Kathy Hajewski (kathy.hajewski@cloud...)		Portal	✓

View or Cancel Future Scheduled Subscription Changes

- To view future changes, click on the 'changes scheduled' note in the 'Changes' column
- A window will pop up with the future scheduled changes

Product Name	Provisioned Q...	Next Rene...	Changes
Microsoft 365 Business Standard	6 ⓘ	in 34 days	1 changes scheduled

Start D...	Quantity	Order By	Order Reference	Order Source	Status	Action
7/31/2025, 6:00:00 PM	-3	Kathy Hajewski (kathy.hajewski@clou...)		Portal	● ●	Cancel

- To cancel a scheduled future change, click on 'Cancel' on the right-hand side of the scheduled change

Start D...	Quantity	Order By	Order Reference	Order Source	Status	Action
7/31/2025, 6:00:00 PM	-3	Kathy Hajewski (kathy.hajewski@clou...)		Portal	● ●	Cancel

Self-Service Roles to Assign

Administrator: Has access to full CloudServus self-service portal menu items

Subscription Manager: Only has access to CloudServus self-service portal subscription license and usage data

Finance Manager: Only has access to CloudServus self-service portal invoices and payment profiles

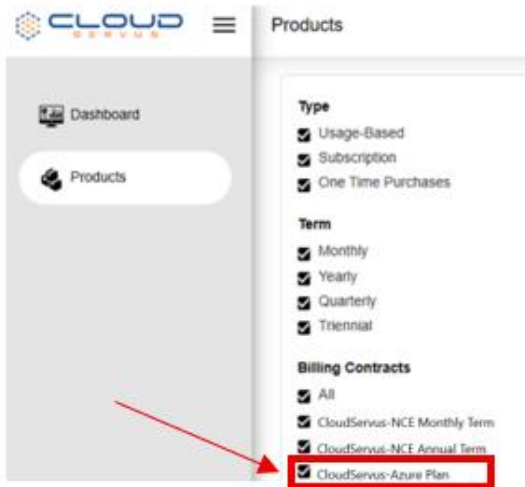
Important Note:

Please ensure anyone who has access to the self-service portal understands the rules regarding New Commerce Experience terms (Annual Term vs. Monthly Term), and license cancellation policy (Within 24 hours for full refund, within 168 hours for prorated refund, no refund available after 168 hours.)

View Azure Usage by Resource

- Provides the ability to view total amount of usage by resource for an Azure subscription
- **To view usage by resource:**
 - On the Products page, make sure your Azure Billing Contract is selected
 - Click on the drop-down arrow on the right-hand side of the Azure subscription
 - Usage by Resource for the Azure subscription will be shown on the left-hand side
 - You will see the total for each resource by hovering over it in the pie chart

CSP SELF-SERVICE PORTAL GUIDE



Product Name	Provisioned Quantity	Next Renewal	Changes	Action
Azure plan	1			
Azure subscription 1 Add on	1			

Product Name	Provisioned Quantity	Next Renewal	Changes	Action
Azure subscription 1 Add on	1			

Usage By Resource



Basic User
Microsoft-hosted CI/CD Concurrent
Self-hosted CI/CD Concurrent Job
Standard User
Standard P1 Node

Subscription Details

Parent Subscription
Azure plan

Start Date
07/26/2023

Commitment End Date
12/31/9999

Purchase and Contract Details

Billing Contract
CloudServus-Azure Plan

Contract Start Date
08/12/2023

Next Invoice Date
09/13/2025

Billing Frequency
Monthly

Renewal Date
08/11/2026

Contract Term
12 months

Azure subscription 1 [Add on](#)

