

# Global Promo Readiness Guide

April 2, 2025
Microsoft



The content presented in this guide was last updated on:

April 2, 2025

Any changes applied after this date will be included in the next version of this guide.

# Promo guide contents

Your promo guide contains two sections:

Section 1

- <u>Useful information on how to use promos</u>
- Useful resources

# Section 2

New commerce experience (NCE) promotions

Do you want to know more about Microsoft's offers?

You might want to check:

- Your Partner Center Announcements page.
- The Operations Readiness Resource Gallery.



# Navigating the promo calendar view

If you want to know more about a launch, select the title. You'll be automatically redirected to the details page. Additionally, you can refer to the following legend:







# Useful information on how to use promos | Volume Licensing and CSP

Promotional discounts are end-customer benefits. Partners are expected to pass the discount on to their customers.

Channel	Identifier	On price list	In Partner Center	ldentifier SKU
Volume Licensing (EA, EAS, EES)	Promo Offers/SKUs	Yes	No	Display Name: Office 365 E1 Promo SKU ID: AAA-12345
CSP	Promo Offers/SKUs	Yes	Yes	Display Name: Office 365 E1 Promo SKU ID: AAA-12345
CSP	Campaigns	No	Yes	Display Name: Office 365 E1 Offer GUID: 91fd106f-4b2c-4938-95ac-f54f74e9a239

# Additional notes for CSP campaigns:

- If the promotion is restricted to "new customers only," technical enforcement will apply to new customer tenants, as defined by the promotion eligibility rules.
- No conversion is required at the end of the promotion; customers will make an annual commitment as part of the promotion.
- Billing is consistent with any existing CSP purchases; monthly billing starts when purchases are made.
- When the promotional rate expires, normal prices apply.
- Charges will appear on your monthly bills when promotions are in effect or expire.

EA = Enterprise Agreement

EAS = Enterprise Agreement Subscriptions

EES = Enrollment for Education Solutions

CSP = Cloud Solution Provider

# **Useful resources**

Information related to promos in Partner Center can be found at:

# **Promotion support**

You can also use your regular support channels (for Volume Licensing create a case using the My Cases and Support workspace in VL Central, Partner Center Support for CSP) to log a call if needed.

# **Excel version**

We've made an <u>Excel version of the promo file</u> available to partners who wish to ingest this information directly into owned tools. Select the link to download the file.

# What's changed since our last publication?

The following promotions have been removed:

- Promotion SKUs to launch Nuance HLS products on Microsoft enrollments (pilot)
- North America Microsoft 365 Business Premium 15% off
- Copilot for Microsoft 365: Getting Started promotion (EDU)
- Business Premium 15% promo (US and CAN)

New commerce experience promotions



# New commerce experience promotions

The following is a list of promotions available in new commerce experience. Some of these promotions might also be available in traditional license-based Cloud Solution Provider (CSP).



For details about how promotions work in the new commerce experiences, review the <u>how-to topic for new commerce</u> <u>promotions</u>. This includes valuable functional information about promotions in the new commerce world.

As with all transactions, partners should pay special attention to the review screen in the Partner Center checkout experience to ensure the promotion is being applied they expect.

New commerce promotions can be retrieved using the Partner Center API or by viewing the promotion in the Partner Center catalog experience. For additional details on discovering, operationalizing, and verifying eligibility for new commerce promotions, see:

- Partner Center Introduction: New commerce promotions
- Partner Center New commerce license-based overview
- New commerce experience handbook

# List of promotions

New commerce promotions are most easily viewed using the <u>Operations Promo Guide Excel file</u>. This file has a tab for new commerce details and includes all active current new commerce promotions. Partners can filter and sort the data. Filtering by column A, **Promotion Type**, partner can quickly find the promotion type that they're looking for. The file includes the following data:

- **Promo type:** These fields align to the promotions listed in the previous section, such as list: Business Voice promo and Pro Direct Support promo. Use the next fields listed to see further details about each promotion type.
- Promo Id: The promo ID is made up of three IDs delimited by a colon and represents the promotion that is applied.
  The promo ID shows up in the reconciliation file after purchase and throughout the Partner Center experience. This
  is an example of a promo ID—39NFJQT1PFPJ:0007:39NFJQT1Q5FN. The last value, sometimes called the promotion's
  availability ID, can change if the promotion is edited or reissued by the system. Partner Center API users should
  always get the current promotion IDs if they are transacting through the APIs.
- **Promo name:** This is the name of the promotion as it appears in the Partner Center user interface, along with the other promotion details. This should also be the title of the SKU being purchased.
- **startDate**: This is the date the promotion became available.
- endDate: This is the date from which the promotion is expected to no longer be available.
- AutoApplied: This indicates if the promotion is automatically applied when transacting. Currently all new commerce promotions are auto-applied.
- **Product Id:** This is the product ID being purchased that the promotion is configured for.
- **SKU Id:** This is the SKU ID being purchased along with the product Id.
- Term: This refers to the term of the product and SKU that the promotion is configured for.
- Billing Cycle: This is the billing plan of the product, SKU and term that the promotion is configured for.
- **Discount type:** This field indicates whether the promotion is a percentage discount or a fixed discount. All current new commerce promotions are a percentage discount.
- Discount value: This field describes the amount of discount.

You can view the actual promotion IDs in the Partner Center catalog purchase experience as well as the promotion details that are returned when calling the getPromotions API.

# Verify promotions before being billed

Partners can check the estimates file or unbilled open period line items by going to the Partner Center billing page or by calling the Partner Center APIs to see if promotions were applied to a transaction. The **PromotionID** indicates whether or not the promotion was applied, and the **EffectiveUnitPrice** indicates the price after discount. On average, these details are updated six hours after the transaction. However, sometimes they can take as little as one hour or as long as 24 hours due to system latency.

Partners can also verify if the promotion was applied in the Partner Center order history and activity logs.

# Additional information

The discount is calculated as (promo price – unit price) / unit price. Promotions don't apply to nonprofit, academic, and government prices available in CSP.

# Purchase price and details:

- Promotional details can be viewed using the Partner Center API or by viewing the promotion in the Partner Center catalog experience.
- Apply the percentage discount in the promotion details to unit prices on the posted price list to determine the expected price.
- You can find purchased promotions in the reconciliation file after the purchase is billed.

# Autorenewal:

- **Annual.** At the end of a 12-month subscription, promotion renews into regular price, which includes any price increases that might have been announced.
- **Monthly.** Renews monthly at the promo price during the promo term. Once the promotion ends (June), the subscription will renew into the regular SKU price, which will include price increases that went into effect during the promo period.

# Midterm conversions and promotions:

- Midterm conversions of term or billing plan are currently not possible if the subscription was purchased via a
  promotion, including the monthly and annual term promotional discounts that went into effect on January 10, 2022,
  on commercial seat-based offers in new commerce.
- If the subscription has a promotion applied, the term and billing plans can be changed only at the end of the subscription's term.

# i Important

A subscription that has been acquired with a promotion disables the ability to change term and billing cycle. Partners that need to change these properties will need to wait until the end of the current subscription term to do so and acquire a new subscription, letting the old subscription end, turning off auto-renew. This is true for both mid-term changes and scheduled changes.

# Bridge to the Cloud 2 promotion

# **Promotion summary**

This promotion provides discounted Dynamics 365 online services for eligible Dynamics on-premises commercial customers committed to migrating to the cloud.

#### Duration

February 1, 2023, to December 31, 2025

# Geography

Global

# Promo type

New commerce experience, partner-led (CSP)

#### **Products**

Most Dynamics 365 SKUs with a three-year term are eligible; see product list in Exhibit A of the policy document

# Discount percent and discount description

Discount of 40 percent for a three-year fixed term (non-renewable, non-cancellable)

# **Customer eligibility**

Available to existing Dynamics on-premises commercial customers (as of September 1, 2022) with current/active Enhancement Plan (EP); promo not available for net-new customers

Customer's monthly CSP cost must be equal or greater than its EP cost (at suggested pricing per month)

#### End customer value prop

Provides "introductory" promotional price for customers migrating from Dynamics on-premises to Dynamics 365 online

# Partner value prop

Receive CSP/NCE margins while helping your customer transition to the cloud

#### How it works

Partners placing eligible purchases through NCE partner-led motion should select the promotion during the purchase process and then update customer's on-premises account.

# Next steps/Learn more

Bridge to the Cloud 2 Policy and FAQ

# New! Do More with Microsoft 365 E3 Accelerate promotional offer

# **Promotion summary**

We're pleased to announce that a new Microsoft 365 E3 15 percent offer is now available to CSP partners. With the Do More with Microsoft 365 E3 Accelerate promo, CSP partners can continue offer 15 percent off Microsoft 365 E3 for eligible, new-to-Microsoft 365 E3 customers.

This continues to be a great opportunity for partners to position this offer to reengage with existing Office 365 E3 customers to consider upgrading for a secure productivity solution.

This offer will replace the previously available Do More with Less (DMWL) Microsoft 365 E3 offer.

#### Duration

July 1, 2024 to June 30, 2025

# Geography

Worldwide

# Promo type

New commerce experience, partner-led (CSP)

#### **Products**

Microsoft 365 E3 (including EEA and No Teams), annual commitment

# Discount percent and discount description

15 percent off Microsoft 365 E3, annual commitment only

# **Customer eligibility**

Available only to new-to-Microsoft 365 E3 customers ("FirstPurchase" constraint). Note that customer subscriptions purchased prior to July 1, 2024, with the previous DMWL 15 percent offer applied will not renew with the new promotion.

#### End customer value prop

Microsoft 365 E3 empowers customers to do more with less, eliminating redundant licenses to save costs, simplifying IT management, and protecting their digital workers.

Microsoft 365 also enables customers to safely run their business from anywhere with a secure, comprehensive, Al-powered cloud solution. Get ready to put the power of AI to work.

### Partner value prop

The Do More with Microsoft 365 E3 offer was created for partners to accelerate new customers migrating from on-premises software to the Microsoft 365 cloud and/or upsell existing customers from eligible subscriptions (such as Office 365 E3) to Microsoft 365 E3 through AI and cloud-only value.

#### How it works

Offer applies automatically to eligible customers purchasing Microsoft 365 E3

#### **Transaction Limits**

1-2,400 licenses

# Next steps/Learn more

See the offer FAQ for more details and next steps.

# Dynamics 365 Business Central 10 percent discount for Microsoft 365 customers

# **Promotion summary**

We're offering new Business Central customers a 10 percent discount on Business Central Essentials and Premium licenses for Microsoft 365 users. With the recent launch of Microsoft Copilot for Microsoft 365, the ability to work seamlessly between Business Central and Excel, Outlook, and Teams brings the power of AI to small and medium-sized businesses to improve the way work gets done.

#### Duration

August 1, 2024 to June 30, 2025

# Geography

Global

# Promo type

New commerce experience, partner-led (CSP)

#### **Products**

Dynamics 365 Business Central (Essentials and Premium)—annual commitment

# Discount percent and discount description

10 percent off Dynamics 365 Business Central Essentials or Premium annual subscription

# **Customer eligibility**

Available to new Business Central customers who have either Microsoft 365 Business Standard or Microsoft 365 Business Premium subscriptions, maximum of 300 seats.

# End customer value prop

Microsoft Dynamics 365 Business Central is a comprehensive business management solution that helps small and medium-sized businesses (SMBs) connect their finance, sales, service, and operations teams within a single easy-to-use application. Join over 30,000 businesses that have moved to the cloud with Business Central to work smarter, adapt faster, and perform better.

When Dynamics 365 Business Central and Microsoft 365 work together, small and medium-sized businesses can boost productivity and redefine how work gets done. With data connected from Business Central to familiar apps like Excel, Outlook, and Teams, employees get the information they need without switching between applications. Using next-generation AI with Microsoft Copilot, employees can further streamline routine tasks like drafting content, summarizing meetings, providing email follow-up, and quickly finding answers to questions—all within the tools where they work best.

# Partner value prop

This Business Central 10 percent discount helps CSP partners to cross-sell Business Central to Microsoft 365 customers looking for AI-powered business management solutions.

#### How it works

Offer applies automatically to eligible Microsoft 365 customers purchasing Business Central

# Next steps/Learn more

See the Offer FAQ for more details and next steps.

Visit the **Dynamics 365 page** for additional AI resources.

Read the blog to learn more about Business Central + Microsoft 365.

# Office 365 E1 Plus CSP 30% launch promotion

# **Promotion summary**

Microsoft launched Office 365 E1 Plus in Cloud Solution Provider (CSP) on September 1, 2024. This new product launch and 30 percent off promotional offer is designed to provide partners another option to acquire new, price-sensitive customers on an entry-level SKU that still retains key security features for a M365 zero trust advantage.

Normally priced at 20 USD per user per month, Microsoft is also launching a 30 percent promotion for eligible customers to help fuel partner acquisition efforts in markets where pricing sensitivity and budget constraint headwinds exist.

#### Duration

September 1, 2024 to June 30, 2025

# Geography

LATAM, India, ASEAN, Africa\*, the Middle East\*, and Central Asia\*
\*available to select markets starting October 1, 2024

#### Promo type

New commerce experience, partner-led (CSP)

#### **Products**

Office 365 E1 Plus, Office 365 E1 Plus No Teams

# Discount percent and discount description

30 percent off annual subscriptions
Billing availability: Prepaid (one year upfront) | Monthly

# **Customer eligibility**

New-to-Office 365 E1 Plus ("FirstPurchase" constraint)

#### Licenses minimum/maximum

Seat minimum: 100 licenses Seat maximum: 2,400 licenses

# End customer value prop

Office 365 E1 Plus builds upon Office 365 E1's basic Office applications and email bundle by adding Intune, Entra ID, and O365 DLP. At 20 USD per user per month, O365 E1 Plus serves as a budget alternative for price-sensitive customers unable to purchase M365 E3.

#### Partner value prop

Designed as an alternative option for customers without the budget flexibility to purchase M365 E3, partners can use this offer to standardize their customer base on an offer that still has entry-level security value.

With the 30 percent discount, partners can use O365 E1 Plus to:

- 1. Acquire new customers
- 2. Drive on-premise to M365 migration
- 3. Upsell existing O365 E1 customers to a product with security

# Next steps/Learn more

Review the Offer FAQ for additional details.

# Office 365 E1 60% Acquire promo for ASEAN

#### **Promotion summary**

On September 1, 2024, we're launching the ASEAN Emerging Markets Office 365 E1 promotion for eligible new-to-Microsoft Cloud commercial customers. This 60 percent offer is designed for customers looking to migrate from non-Microsoft cloud subscriptions or on-premises perpetual products to an Office 365 E1 Microsoft Cloud subscription.

#### **Duration**

September 1, 2024 to June 30, 2025

# Geography

ASEAN, excluding Singapore (See the <u>promo terms and conditions</u> for specific market coverage.)

# Promo type

New commerce experience, partner-led (CSP)

#### **Products**

Office 365 E1, annual commitment

# Discount percent and discount description

60 percent off Office 365 E1 and Office 365 E1 (No Teams), annual commitment

### **Customer eligibility**

See the <u>promotion terms and conditions</u> for customer eligibility criteria. This offer is designed to provide "introductory" promotional pricing for customers migrating from non-Microsoft cloud licenses or current on-premises solutions.

Eligible customers currently cannot have more than 100 seats of a Modern Work cloud license (see Schedule 1 in the T&Cs for products that count toward the limit) and must purchase a minimum of 100 seats of Office 365 E1.

# End customer value prop

This introductory promotional pricing will help alleviate migration costs to the Microsoft 365 environment. Partners should use this offer as a fallback option for customers looking to migrate from third-party solutions or on-premises software to Microsoft 365, but whose budget cannot support Microsoft 365 E3 adoption.

#### How it works

Partners placing purchases for eligible customers who fit the promotional T&Cs through NCE partner-led motion should select the promotion during the checkout flow in Partner Center.

Optional promotion: Partners must validate their customer's eligibility under the terms and conditions and then manually select or apply the promotion to the customer's transaction in Partner Center.

#### **Transaction limits**

100–2,400 seats of Office 365 E1. For transactions under 100 seats or over 2,400 seats, partners won't have the option to apply the promotion in the checkout flow.

#### Next steps/Learn more

See the Offer FAQ for more details and next steps.

# M365 Copilot 15% off commercial offer extension for CSP

# **Promotion summary**

On September 1, 2024, we launched a 15 percent off Microsoft 365 Copilot offer in Direct and CSP. The offer was initially planned to end on December 31, 2024, but we'll extend it due to the potential acceleration on business impact.

#### **Duration**

January 1, 2024 to June 30, 2025

# Geography

Worldwide

### Promo type

New commerce experience, partner-led (CSP)

#### **Products**

Microsoft Copilot 365

#### Discount percent and discount description

15 percent off annual subscriptions Annual/annual, annual/monthly

#### **Customer eligibility**

N/A

### End customer value prop

Extending the 15 percent offer for Copilot in CSP provides customers with an easy way to begin their Al journey.

# Partner value prop

This approach can inherently reduce your sales costs and speed up the sales cycle. Additionally, it bundles many of the same services partners are currently offering with an initial license purchase, enabling customers to find value more quickly.

This also presents an opportunity for partners to extend additional services and licenses as customers look to grow and scale their rollout. Ultimately, this is a chance for partners to accelerate the growth of both Copilot and their services revenue.

#### How it works

Various go-to-market (GTM) approaches designed to get customers to buy via discount

# Next steps/Learn more

Review the offer FAQ for additional details.

# Microsoft 365 E5 15% CSP Accelerate one-year offer

# **Promotion summary**

To help you accelerate your Microsoft 365 practice by providing customers with a secure, comprehensive, Al-powered cloud solution, we're excited to announce a new promotion discount for Microsoft 365 (M365) E5.

CSP partners will receive 15 percent off the net partner price of M365 E5 when eligible customers who have no purchase history of M365 E5 purchase a Microsoft 365 E5 annual subscription for the first time. This M365 E5 Accelerate offer is available exclusively in CSP on new commerce.

#### **Duration**

January 1, 2025 to June 30, 2025

### Geography

Worldwide

# Promo type

New commerce experience, partner-led (CSP)

#### **Products**

M365 E5 and Microsoft 365 E5, no Teams/EEA

Annual commitment: Annual bill and monthly bill

# Discount percent and discount description

15 percent off an M365 E5 annual subscription

For subscriptions between 1 and 2,400 licenses

# **Customer eligibility**

Available only to new-to-Microsoft 365 E5 customers (subject to the first purchase constraint)

# End customer value prop

M365 E5 provides powerful, best-in-class cloud productivity solutions with advanced security and compliance capabilities to help customers get end-toend protection across apps, data, endpoints, identities, infrastructure, and Al solutions.

Additional customer benefits include additional Al-powered productivity tools (Viva Insights), Audio Conferencing with Microsoft Teams, and secure, generative AI through Microsoft Copilot with commercial data protection.

# Partner value prop

Now is the time for CSP partners to use this new promotion during customer renewal conversations. You should prioritize closing current Office 365 or M365 E3 customers with the opportunity to reduce the burden of managing multiple vendors while improving customer security.

#### How it works

Offer applies automatically to eligible customers purchasing M365 E5. Check the transaction quide.

#### Next steps/Learn more

See the offer FAQ for more details and next steps.

# M365 E5 Compliance promo offer for M365 Copilot

#### **Promotion summary**

We're offering 50 percent off E5 Compliance PUPM for every seat of Microsoft 365 Copilot purchased. This offer can be applied retroactively to customers who have already purchased M365 Copilot but don't have E5 Compliance.

#### **Duration**

February 1, 2025 to February 1, 2026

# Geography

Worldwide

# Promo type

New commerce, Volume Licensing (VL), Enterprise Agreement (EA), Cloud Solution Provider (CSP)

#### **Products**

This offer applies to E5 Compliance. The customer must also have M365 Copilot, as well as the standard prerequisites required for attaching E5 Compliance.

# Discount percent and discount description

50 percent off each seat of E5 Compliance for each seat of M365 Copilot sold

#### **Customer eligibility**

All commercial customers

### End customer value prop

The promo aims to ensure that each M365 Copilot is safely secured with our Hero Data Security product.

# Partner value prop

Partners can not only increase the size of M365 Copilot deals but can also go back to previously closed M365 Copilot deals and solicit the new discount opportunity.

#### How it works

The promo has both modern partner-led and customer SKUs which are available in Partner Center.

#### Next steps/Learn more

- See the FAO for more information.
- If you have additional questions about this promotion, refer to the Global Readiness Promo Guide.

# CSP-EP to online Business Central (CSP2BC)—special offer

# Special offer summary

This offer applies to transitions from Dynamics CSP-EP on-premises (via legacy CSP) to online Dynamics 365 Business Central.

#### Duration

November 1, 2023, to March 31, 2026

# Geography

Global (except China)

# Promo type

NCE partner-led (CSP)

#### **Products**

Dynamics 365 Business Central (Essentials, Premium, Team Member, and Device) annual commitment only. Renewable prior to duration end date.

# Discount percent and discount description

40 percent partner discount (applied to estimated retail price before normal partner margin or discount percentage). Structured as special offer, so ordering process is different from that for typical promotion.

# **Customer eligibility**

Available only to customers currently with active CSP-EP subscriptions bought in legacy CSP who are committed to migrating to online Dynamics 365 Business Central. This special offer is only available through CSP partners who were actively transacting these legacy CSP-EP subscriptions in FY23. Minimum purchase also applies. Review the policy document (as linked in the Next steps section) for details before ordering.

#### End customer value prop

This offer supports applicable customer migrations. Unlike prior offers, it's one way to online only (no reversion to on-premises EP).

#### Partner value prop

Enables a discounted pathway for partners to offer their customers who are currently on CSP-EP subscriptions (which are no longer renewable).

### How it works

In Partner Center, the partner should select customer and legacy subscription and select Migrate to new commerce.... See the policy document in the next section for detailed instructions.

# Next steps/Learn more

Policy and FAQ