

## CustomerSource Access Frequently Asked Questions

CustomerSource (<https://mbs.microsoft.com/customersource/>) provides you with access to resources such as self-help tools, product updates, newsgroups, training, documentation and online newsletters to help you optimize your use of your Microsoft Dynamics product. Customers with an Enhancement Plan or support plan may access CustomerSource.\*

CustomerSource uses Microsoft® Passport Network for authentication. This is a Web-based service designed to make signing in to Web sites fast and easy. Passport enables participating sites to authenticate a user with a single set of sign-in credentials, eliminating your need to remember numerous passwords and sign-in names.

This document provides the most common questions and answers related to using Passport with CustomerSource. If your question isn't found below, please visit the **Microsoft Passport Network site** at <https://accountservices.passport/ppnetworkhome.srf?vv=330&lc=1033> or e-mail [voice@microsoft.com](mailto:voice@microsoft.com).

### **My organization has a current service plan, but no one from my organization has used CustomerSource before. As a first-time user, how do I start using CustomerSource?**

Customers must first associate their Passport account with their Microsoft Dynamics account via these steps:

#### **Step 1.** *Get a Passport account.*

- If you don't have a Passport account, if you're not sure if you have one, or if you forgot your Passport password, read the Passport questions below.
- Once you've completed the creation of the Passport account, close the browser window. This will be the username and password you use to log into CustomerSource in the future.

#### **Step 2.** *Log into CustomerSource.*

- Once you have a Passport set up, go to <https://mbs.microsoft.com/customersource>.

#### **Step 3.** *Enter Passport information.*

- You will be prompted to enter your Passport username and password.

#### **Step 4.** *Enter your e-mail address.*

- You will be prompted to enter an e-mail address and click Continue.
- You'll need to use the e-mail address provided to Microsoft Dynamics when your solution was registered. This may or may not be the same e-mail address as your Passport account.
- If you don't know the e-mail address on your Microsoft Dynamics account, send an inquiry to [voice@microsoft.com](mailto:voice@microsoft.com).

#### **Step 5.** *E-mail Sent Message.*

- The screen will then display a message that says, "Thank You. You will be receiving an e-mail that gives you further instructions on how to log into this extranet."

#### **Step 6:** *Open Received E-mail.*

- Microsoft Dynamics will send you an e-mail from [voice@microsoft.com](mailto:voice@microsoft.com) that you will use to associate your Passport account with your Microsoft Dynamics account.
- Go to the inbox of the e-mail address you entered in Step 4.

#### **Step 7.** *Click on association link.*

- Open the e-mail and click on the long blue link in the e-mail.

#### **Step 8:** *Enter Passport account.*

- You will be prompted again for your Passport. Enter the Passport you entered in Step 4.

#### **Step 9:** *Success Message.*

- You will get a message saying you have successfully associated your Passport with your Microsoft Dynamics profile.

#### **Step 10:** *Access CustomerSource.*

- Go to CustomerSource (<https://mbs.microsoft.com/customersource/>).
- When you use CustomerSource in the future, you'll only need to use this Passport username and password to log in. Passport is designed to make future access fast and easy!

### **I am able to use CustomerSource. How do I get the rest of my colleagues set up to use it?**

In each organization, at least one person is considered an administrator who can manage individual profiles and their access to CustomerSource. With CustomerSource, the initial administrator is the main contact within your organization for Microsoft Dynamics (sometimes called the 'Bill To' contact). It is possible to designate additional or alternative people as the CustomerSource administrator.

Anyone designated as a CustomerSource administrator of your account may invite other users to use CustomerSource by following these steps:

1. Sign in to CustomerSource <https://mbs.microsoft.com/customersource>
2. Navigate to My Account | Account Information | Our CustomerSource Accounts
3. Click the Add New Professionals button
4. Enter the required profile information
5. Check the box at the bottom of the form to Send Invite E-mail to this CustomerSource user to associate their Microsoft Passport Network to this profile
6. Click Save
7. The individual will receive an e-mail inviting them to CustomerSource. The user will be instructed to sign in to the Passport account he/she would like to use in association with CustomerSource and then click on the link within e-mail invitation.

In addition to creating new profiles, administrators may also remove or modify profiles. It is very important for your organization to keep your list of individual profiles up to date. Administrators can also re-send an invitation e-mail to an employee having difficulty associating their Passport to their CustomerSource profile.


If an individual didn't receive the e-mail to associate their Passport account, you can review their profile to verify that the e-mail address is correct. If you edit the e-mail address, save the profile, then return to the profile and click Send Invite E-mail.

Within the profiles, the administrator can also make other individuals administrators. While editing a profile, mark the Administrator checkbox. Click Save. This individual now has administrator rights.

#### **Who do I contact if our administrator is no longer with our organization?**

If your CustomerSource administrator is no longer with your organization, contact [voice@microsoft.com](mailto:voice@microsoft.com) for assistance in declaring a different individual as the administrator.

#### **How do I create a Microsoft Passport?**

If you have signed in to any site or service that displays  Microsoft Passport Network, or if you have an e-mail address that ends with @hotmail.com or @msn.com, then you may already have a Passport account. You can use that e-mail address to sign in to Passport-participating sites and services. You may use that existing Passport to access CustomerSource.

If you don't have a Passport account:

1. Go to the Microsoft Passport Site (link at top) and click "Sign Up" on the left-hand navigation bar.
2. Enter your e-mail address.
3. You'll be asked to create credentials, including creating a password and a secret question and answer. (If you forget your password, you will need to provide the secret answer to reset it.)

#### **What if I forget my Microsoft Passport Network password?**

If you forget your password, you can reset it so that you can access the Microsoft Passport Network with your current Passport Network ID. Go to the Passport site (link at top) and choose Account Services on the left.

Before resetting your password, Microsoft will need to verify your identity by one of the following methods:

- If you provided an alternate e-mail address (an e-mail address that is different from your primary Passport Network e-mail address – an alternate e-mail address can help you reset your password if you cannot access your account on the Passport Network) to Account Services, you can request that the Microsoft Passport Network send a password reset e-mail to your alternate e-mail address.
- If you provided personal information and a question and secret answer (a security measure to help keep others from accessing your account or changing your password without your permission - the answer should be something that no one knows but you) to Account Services, you can reset your password by providing account information and your secret answer.
- If you sign in to the Passport Network with an MSN account that you pay for with a credit card, you can provide your billing information to reset your password.

If you have additional problems and cannot reset your password, contact Passport support at <http://support.passport/default.aspx>.

**I do not recall registering for Microsoft Passport Network. However, when I try to register my e-mail address, it says that it is already registered. What should I do?**

First, attempt to reset your password. When you create a Passport account, you also create a secret question and answer to use when you need to reset your password. If you're not able to reset your password, you can either set up a new Microsoft Passport ID or request further assistance from the Passport support team.

When creating a new Passport ID, it is ideal to use your valid e-mail address, but it is not required. Nor is it required that the e-mail address you enter for your Passport match the e-mail address stored in your Microsoft Dynamics profile.

**Can I view a list of my current Passport accounts?**

No. While you can set up several Passport accounts, these accounts are not linked together per person; therefore, the service does not offer the ability to view all Passport accounts you've established.

You get the greatest benefit by having only one Passport. With one Passport, you have a single e-mail address and password that you can use to sign in to participating sites and services. If you want more than one Passport, you can register for as many as you would like; however, each one must have a different e-mail address.

**I created a new Passport to access my Microsoft Dynamics profile, but it does not appear in my drop-down list when I sign in to Passport. However, if I try to create it again, it says it's already been created. What now?**

Immediately after creating a Passport account, the account name will not appear in the drop-down list on the sign-in page. On this first use of your account or any other time your account name doesn't appear in the sign-in page, you will need to enter the account information.

**Every time I go to CustomerSource, I am automatically logged into my Passport. Is this secure?**

When you sign into Passport, you may select a checkbox to indicate you would like to sign in automatically. If you select this check box when you sign in, you remain signed in to your Passport and any participating sites or services until you click Sign Out, even if you close the browser window or turn off the computer. We recommend that you use this option only if you are the only person using the computer.

If you are not prompted for your Passport credentials when you access CustomerSource, you may have selected that checkbox. Alternatively, you may have already signed into Passport through a different site or application.

**Why did I get multiple e-mails when I entered my e-mail address in the account association page?**

When you enter your e-mail address, we search our systems for all occurrences of that e-mail address. You will then receive an e-mail for each one of those profiles. You may associate the same Passport account to all of these profiles; just click the link included in each one of the e-mails.

After you've associated your Passport to more than one Microsoft Dynamics profile, you will need to select which profile to use upon each visit to CustomerSource. To switch between profiles, close your browser and open a new browser or sign out of Passport and sign in again.

**I've already associated one Passport account with my Microsoft Dynamics extranet profile. How can I switch my CustomerSource profile to use a different Passport account?**

In CustomerSource, select My Account. From the left navigation, choose Account Information, then Personal Profile. On this page, verify that your e-mail address is correct and click on the button at the bottom that says Send Invite E-mail.

If you are editing this page, verify your e-mail address, save the profile, go back to the profile, and click Send Invite E-mail. After receiving this e-mail, sign into the Passport Account you'd like to use and click on the link within your new invitation e-mail.

\* CustomerSource availability may vary by location. Microsoft Dynamics partners and employees also have access to the site. Site availability may vary based on scheduled maintenance and other downtime.