

# Tiers

	Email Essentials	Email Plus	Online Essentials	Business Premium
MS Office Business Desktop Software for up to 5 PCs / Macs with free automatic updates any time a new version is released				✓
Office Mobile: Apps for iPhone, Android, and Windows phones			✓	✓
Office Online: Web versions of <a href="#">Word</a> , <a href="#">Excel</a> , and more			✓	✓
Seat limits	300	No Limits	300	300
Unlimited email aliases	✓	✓	✓	✓
Shared online calendars	✓	✓	✓	✓
Sync across all devices	✓	✓	✓	✓
Resource Rooms & Equipment Reservations	✓	✓	✓	✓
Email Forwarding & Distribution Groups	✓	✓	✓	✓
Shared Mailboxes	✓	✓	✓	✓
Full Access/Send As/Send on Behalf of Permissions	✓	✓	✓	✓
Free/Busy Status	✓	✓	✓	✓
Global SPAM & Malware Control	✓	✓	✓	✓
Backward Compatible with POP/IMAP	✓	✓	✓	✓
Storage for email, contacts, and calendars	10 GB	50 GB	50 GB	50 GB
Domain-based email	✓	✓	✓	✓
✓ Apps <a href="#">(click to collapse)</a>				
	Email Essentials	Email Plus	Online Essentials	Business Premium
<a href="#">Bookings</a>				✓
<a href="#">MileIQ</a>				✓
<a href="#">Microsoft Teams</a>			✓	✓
Power Automate			✓	✓
<a href="#">Planner</a>			✓	✓
<a href="#">Shifts</a>			✓	✓
Secure online storage via <a href="#">OneDrive for Business</a>			1 TB	1 TB

<a href="#">SharePoint</a>			✓	✓
Access (Windows only, no web version)				✓
Stream			✓	✓
Sway			✓	✓
Whiteboard			✓	✓
Delve			✓	✓
MyAnalytics			✓	✓
Yammer			✓	✓
Kaizala			✓	✓
To Do	✓	✓	✓	✓
<b>Notes:</b>				

## | Qualifying

**Microsoft 365 is available in the following countries:**

- [See list here](#)

### **Seat limits**

- Email Essentials: 300 users
- Email Plus: Unlimited users
- Online Essentials: 300 users
- Business Premium: 300 users

### **Meet system requirements**

- Outlook on the Web requires the current version of the most popular browsers
- Microsoft 365 is compatible with Outlook 2010 or higher
- Outlook 2010 requires an update. [Click here](#) for more information.
- For a full list of system requirements, [click here](#).

### **Our Microsoft 365 Limitations**

- We currently do not have a path for customers to downgrade their Microsoft 365 licenses to a lower tier.
- As it stands currently, our Microsoft 365 Platform does not support Active Directory Federation Services
- Ability to add additional Microsoft products and services is limited
- Ad-hoc can be enabled for MOSI customers. This allows customers to add free versions of certain Microsoft Products. Reach out to ATS to enable this.
- Ad-hoc is already enabled for our CSP customers

## | Consulting

We're in the business of helping everyday entrepreneurs take their idea and turn it into a reality. We do this by providing them with the tools necessary to establish and grow their business online. In order to provide the best guidance possible, we have to understand our customer's business as well as ask questions to uncover their needs. Only after doing this can we make informed recommendations to help solve their problems and move their business forward.

✦ ★ **How do you currently use email for your business?**

This question is designed to uncover how your customers actually use email. Are they using it to communicate with customers, business partners, vendors, and employees? Do they use it for marketing purposes or managing appointments?

✦ ★ **How much of your work relies on being mobile?**

This question will help uncover whether your customer needs to be able to work while on-the-go. This is important because Microsoft 365 is a mobile first platform designed to simplify work, regardless of where you're working from.

✦ ★ **What email address do you use to communicate with your customers?**

This question will help you identify whether or not your customer is using professional email to communicate with their customers. We know professional email is important for all the reasons above.

✦ ★ **How do you manage your appointments?**

This question will help you uncover how your customer manages their appointments. This is important because it's a common struggle for many businesses. Microsoft 365 has robust calendaring features as well as an appointment management system (Bookings - Business Premium) to help stay on top of customer appointments.

✦ ★ **I know that business owners wear many different hats. How do you keep track of all your projects and tasks?**

Whether it's keeping the books up to date, working on the ad campaign, maintaining inventory, or a host of other projects and tasks, it's important that business owners have tools to keep on top of it all. You may find that many people try and remember everything they need to do on a daily basis. This can result in missed tasks, appointments, or deadlines. Fortunately, Microsoft 365 provides powerful tools like To Do (all SKUs) and Planner (Online Essentials, Business Premium) to help stay on top of it all.

## **Why domain-based email?**

✓ It's a great way to market your business and establish credibility

- Your business is serious
- People are more likely to remember your professional email address
- You're not advertising for another company
- You legitimize your email marketing campaigns

✓ More control of your businesses data

- If you have employees, you don't want them using their personal email address to conduct business. Why? If they leave your organization, they take their personal email with them, along with your company data.

✓ Key Stats

Using @gmail and other generic email affects your business credibility:

- 33% of users doubt trustworthiness
- 24% of users are concerned about sharing personal info
- 23% of users are concerned about sharing credit card info

Build trust with business email:

- 75% of users believe having a business email address that matches the business's website is key to building trust.

*Results based on a 2016 sample survey of 1,000 adult U.S. small business eCommerce customers.*

Additional reading here: [Benefits of professional email for business](#)

## Why Business Premium?

Microsoft 365 Business Premium is an all in one business solution designed from the ground up to simplify work and promote on-the-go productivity, wherever you are. Whether you're putting finishing touches on a project from the local Café, joining a meeting while working from home, or tracking the miles on the way to your next customer project, Microsoft 365 Business Premium has the tools to help you get work done.

✓ Mobility

- World class email synchronized across all of your devices
- Take all of your important files with you everywhere you go using OneDrive
- Connect with team members and customers on the go with Microsoft Teams
- Manage your customer appointments on the fly with Microsoft Bookings
- Track your mileage on the way to your next customer appointment using MileIQ

Additional reading here: [How to simplify online scheduling with Microsoft Bookings](#), [MileIQ: The easier way to track business mileage](#), [How to use Microsoft OneDrive for business](#)

✓ Productivity

- The Office software you know, on all of your devices

- If you stop editing a doc on the computer, you can pick up where you left off on mobile
- Plan out and check off tasks as you complete them using Microsoft To Do
- Keep track of project progress using Microsoft Planner
- Discover your habits and work smarter with MyAnalytics

Additional reading here: [How to supercharge productivity using Microsoft 365 tools](#)

#### ▼ Security

- Keep bad actors at bay with powerful SPAM and malware filtering
- Enable an additional level of security with [Multi Factor Authentication](#)

#### ▼ Teamwork

- Join a meeting from anywhere using online conferencing in Microsoft Teams
- Collaborate with your team in real time using the Office Suite and Microsoft Teams
- Keep track of document revisions made by collaborators using Revision tracking
- Manage work schedules and timecards with the Shifts app in Microsoft Teams
- Set and keep track of appointments using the Scheduling Assistant in Outlook and OWA

Additional reading here: [What is Microsoft Outlook in Microsoft 365 and how do I use it?](#), [How to start hosting virtual meetups](#)

### Do's and Don'ts

- 👍 **Do advise** the customer of possible performance improvements.
- 👍 **Do advise** the customer of possible cost savings due to discounts or seat arrangements.
- 👍 **Do advise** the customer of (renewal) pricing after their initial term ends.
- 👎 **Do not advise**, hint, or insinuate that the customer is required to move at any point.
- 👎 **Do not advise** the customer that POP/IMAP email is X number of years old.
- 👎 **Do not advise** the customer that they are using 'outdated' or 'unsafe' technologies.
- 👎 **Do not advise** the customer that Workspace Email is being discontinued.
- 👎 **Do not advise** the customer that Workspace Email is no longer offered on front of site.
  - If a customer objects to an offer by telling you they will purchase Workspace Email on FOS, you may then reactively inform them that the product is not available there.

## | Personalization

#### ▼ Professional Services

### Needs

- Grow their clientele by reaching more clients with professional email
- Empower employees to get work done wherever the job takes them.
- Harness technology and data assets to make smart business decisions.

### Features that Matter

- Office Suite with mobile apps to give professional service workers the tools to run their business like Excel, Powerpoint, Outlook, and Word that can be accessed on any device, anywhere.
- OneDrive to allow professional service professionals access to their documents from any device at any location.

## ✦ Accounting, Tax, Payroll

### Needs

- Connect with clients and your own team anytime, anywhere from any device.
- Fuel growth by prospective and winning new business.
- Protect & control data – especially sensitive client data.

### Features that Matter

- Office Suite to give financial providers the tools to run their business like excel, powerpoint, and word
- OneDrive, Teams and mobile applications to allow financial providers to work anywhere, on any device, so they can go to client sites or get work done at home

## ✦ Legal

- ★ Have you ever left the office and forgot to copy a document from your desktop computer? What do you usually do in those situations?

### Needs

### Features that Matter

**Needs**

- Stay on top of cases and get work done anywhere
- Respond faster to clients and colleagues
- Ensure data is kept safe and confidential

**Features that Matter**

- Office Suite to give Legal providers the tools to run their business like powerpoint, outlook, and word
- OneDrive, Teams, and mobile applications to allow legal professionals to work anywhere, access documents, and collaborate with coworkers, on any device, from the courtroom to the office to home

## ✦ Healthcare

**Needs**

- Collaborate easily across teams and get work done from anywhere with any device to provide the best patient care
- Work through interruptions with built-in recovery capabilities

**Features that Matter**

- Work anywhere on multiple devices, allowing medical staff to switch physical locations (hospital, clinic, etc.) and communicate in real-time with coworkers.

## ✦ Retail

**Needs**

- Reduce costs while increasing sales
- Create a shopping experience with a personalized feel
- Work together easily across numerous retail locations
- Keep your product data up-to-date and accessible to the whole team

**Features that Matter**

- Sharepoint and OneDrive to centrally store importance product and business information so it is accessible by all employees

## ✦ Creative and Personal Services

**Needs****Features that Matter**

### Needs

- Grow their clientele by reaching more clients
- Empower employees to get work done wherever the job takes them
- Harness technology to make smarter business decisions

### Features that Matter

- Bookings to enable customers to book appointments and send reminders online or through an app

## Home Services

### Needs

- Stay on top of projects and get work done anywhere
- Connect with clients whether in an office or on the go
- Grow business by reaching more clients

### Features that Matter

- MileIQ to automatically track and report vehicle mileage for tax and wear and tear purposes, saving business time and money
- Bookings to enable customers to book appointments and send reminders online or through an app

## Real Estate

- ★ How important is it for you to get an email almost instantly rather than waiting for your phone to check your messages every 5–10 minutes?

### Needs

- Connect with clients and your own team anytime, anywhere from any device
- Fuel growth by prospective and winning new business
- Protect & control data – especially sensitive client data
- Stay on top of projects and get work done anywhere

### Features that Matter

- MileIQ to automatically track and report vehicle mileage for tax and wear and tear purposes, saving business time and money
- Office Suite to give financial providers the tools to run their business like Excel, Powerpoint, and Word
- OneDrive, Teams and mobile applications to allow financial providers to work anywhere, on any device, so they can go to client sites or get work done at home

# | Benefits

✓ Understand that customers purchase benefits, not features.

While it's important to understand the features of Microsoft 365, so that you can speak about the product with confidence, we all know that customers don't buy features – they buy benefits. Therefore, when you are recommending that your customer purchase Microsoft 365 (or any product!), it's best to lead with WHY they should buy the product, instead of WHAT they are buying, or HOW it works.

✓ Put this knowledge to practice with a solid positioning statement.

Powerful positioning statements paint a picture for your customer, making them picture how your proposal will improve their business. In general, we recommend a positioning statement that sounds like: "Based on what you told me, I recommend (product) because of (reason)."

The reason should be a benefit, not a feature. A bad example of this would sound like: "Based on what you told me, I recommend Microsoft 365 because it provides you with domain based email." This is accurate! And also not exciting at all.

A much better example would sound like: "Based on what you told me, I recommend Microsoft 365 because it will help you look more professional, and make your clients more likely to do business with you." We're talking about the same WHAT (domain based email), but one explains WHY your customer should invest, and that makes the second positioning statement much stronger.

✓ Learn your customer's WHY, and speak their language.

We need to understand that by our very human nature, every decision we make is based on emotions – we apply logic after the fact. This includes your customer's decision to make a purchase with you. You can make your recommendation even more powerful by speaking their language. Beyond necessities, such as food/water/shelter, we find that people make purchases based on the following five factors:

- **Pride:** name brands, top of the line, early adopters: these folks care how they look to others
- **Affection:** gifts, non-profits, kid's soccer teams: these folks are trying to do something nice for somebody else
- **Profit:** make more money, save money, increase return on investment: these folks are all about impacting the bottom line
- **Security:** protection, privacy: these folks want their websites, their email, and their information to be as safe as possible
- **Comfort/Convenience/Control:** auto discover, things just working, spending less time doing tedious tasks: these folks just want you to make their life easier

✓ Microsoft 365 Benefits that appeal to Pride

Names you know and trust: With Microsoft 365, peace of mind is included. Every email plan is backed by Microsoft's 99.9% uptime guarantee and our award-winning 24/7 support. You'll can feel confident knowing our all-star team is powering your email and Office.

### ✓ Microsoft 365 Benefits that appeal to Profit

**Business email that shows you're a pro:** Research data shows that 9 out of 10 customers would choose a company with a professional email address over one with a free email address. With a memorable, domain-based email account, you'll promote your company with every message. You can even create additional email addresses--like sales@ or info@--that deliver messages to your inbox.

**Business Premium is way more than just the Office Suite:** Business Premium is a one stop shop for a Small Business to have the tools they need to run their business. From team collaboration and productivity to customer marketing and management, Business Premium is the comprehensive management tool to help you save time and be more productive.

[See all that is available with Business Premium here](#)

### ✓ Microsoft 365 Benefits that appeal to Security

**Keep your files safe in the cloud:** Hard drives crash. Coffee spills. Stuff happens. But our Microsoft 365 plans include up to 1 TB of secure online storage with [OneDrive for Business \(with select plans\)](#), so your files are always safe and always accessible.

### ✓ Microsoft 365 Benefits that appeal to Comfort

**We'll help you every step of the way:** You don't need to know about SMTP relays or MX records to create an email account – our award-winning support is here 24/7. And if you choose an Microsoft 365 plan that includes the Office apps, help you get set up and running smoothly.

**Never have to upgrade your Office suite, ever again:** With Microsoft 365 Business Premium, you'll get the latest versions of Excel, Word, PowerPoint, Outlook, OneNote, Access and Publisher. Microsoft 365 can be installed on up to 5 PCs or Macs per user. As long as your Microsoft 365 subscription is current, your Office programs will automatically get updates, so you'll always have the latest version of Office...you'll never have to upgrade again.

**All your email, on any device:** Always have your latest emails, contacts, and appointments at your fingertips. Microsoft 365 email services work with Outlook, Apple Mail and other top programs to keep all your devices – from your laptop to your smartphone to tablet – up to date and in sync.

**Take your Office on the road:** With Microsoft 365, if you can access the web, you can access every one of your important documents. [OneDrive for Business \(with select plans\)](#) allows you to access important documents on any mobile device. You'll even be able to create, edit and save documents using online versions of [Word](#), [Excel](#), and [PowerPoint](#).

## | General Microsoft 365 questions

✓ How-to: Additional plans from Microsoft or other providers

While the CSP platform for our Microsoft 365 organizations is designed to allow customers to purchase services from multiple providers, we do not provide support for adding, removing, or maintaining additional plans purchased outside of our company.

Some customers may have found ways to add additional subscriptions directly from Microsoft or other providers, but if they have trouble with the services supplied they will need to reach out to the provider of that service for assistance.

✓ Changing the username or domain on an Microsoft 365 account?

- Customers can change the username by following the steps outlined [here](#)
- Customers can change the domain by following the steps outlined [here](#)

When a customer changes the username or domain for an existing Microsoft 365 user, the previous address is automatically added as an alias to the new address. This helps ensure anything sent to the old address automatically delivers to the new address.

**NOTE:** If the customer wants to set up the old address as another user, they'll need to delete the alias to do this.

✓ Did we discontinue Online Essentials?

We did not. We found that most of our customers were purchasing Online Essentials for the increased storage. Our newest plan, Email Plus, fulfills that need and therefore is the plan we chose to highlight on our primary email landing page. However, for those who want to take advantage of collaboration tools such as OneDrive For Business and Teams, Online Essentials is still available on the page labeled "Microsoft Office" on our site. You can find that [landing page here](#), and you can find it through the catalog by going to the primary landing page first, then going to the navigation menu and selecting "Microsoft Office." It also is still available in the drop down on the Migrations as a Service (MaaS) tool.

✓ What regulations does Microsoft 365 meet?

While Microsoft 365 does help our customers keep their data safe and secure, customers are expected to know their own business-specific requirements for compliance and should seek legal counsel to ensure they are processing data covered by applicable laws and regulations appropriately. Our Sales & Support Guides are not qualified or authorized to provide regulatory/compliance advice. The following pages can be sent to customers to help them get started at looking at Microsoft 365 security and compliance capabilities: [Microsoft 365 Compliance](#) / [Microsoft 365 Security & Compliance Center](#)

✓ What is "online document collaboration"?

With our Online Essentials, Business Premium plans, documents created or stored in your OneDrive for Business cloud storage can be simultaneously edited with others inside

or outside your company - anyone with a link to a document can make edits at the same time as you. You can even see each other's edits as you go, so you'll always be on the same page with the latest version, all without having to send documents back and forth via email.

✦ What is "the cloud"?

Working or storing files in 'the cloud' means that your programs and documents are stored securely on the Internet — not on your hard drive - so you can access them anytime, anywhere, from almost any device connected to the Web. You don't need to buy additional software and you're not dependent on your computer to get work done. Plus, since your documents are stored on secure servers, you have peace of mind knowing that, even if your hard drive crashes, your documents and programs are safe and accessible from any web browser.

✦ What are the benefits of having domain-based email addresses?

A domain-based email address, like info@your-business-name.com, helps you look more professional with customers and promotes your website and company. In fact, customers are 9 times more likely to choose a company with a professional email address\*. Every time you send an email from a domain-based address, you're putting your domain name in front of customers and encouraging them to visit your website. And with each plan, you can create free 'alias' addresses - like one using your first name (keith@your-business-name.com) and others for different departments (sales@your-business-name.com) -- that all feed into a single inbox and make you look even more professional.

✦ How many emails can I send per day?

Check out the [Microsoft 365 Email Limitations](#) article.

✦ When searching in OWA, what's the maximum number of results that will be displayed?

250 results ([as mentioned here](#)).

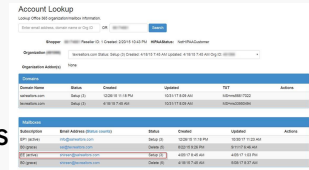
✦ Why does our Microsoft 365 admin center look different than the Microsoft direct admin center?

With the release of the new [admin center](#), there are fewer gaps between what our customers can do in the admin center vs. what Microsoft direct customers can do. The main differences between our version of the Office Admin Center (OAC) is that the customer is redirected back to our panel for certain items like adding seats, adding domains, password management and Support. Our customers also can't add any Microsoft cloud services to their tenant that are not sold by us. There are also some advanced security and reporting features that are available in AAD that these customers can't access. Our Microsoft 365 admins also have access to the other MSFT admin centers like the exchange admin center where they are able to do everything a MSFT customer can do.

Why can't I upgrade an Email Essentials plan to Email Plus sometimes?

Originally, Email Essentials customers received OneDrive and allowing upgrades would cause the customer to lose their content in their OneDrive. That's why these upgrades are blocked.

The easiest way to see if the customer is on legacy Email Essentials is to look at the WOPR support tool and see what the subscription says. If it says BO, it's old and if it says EE, it's new.



The screenshot shows the 'Account Lookup' interface. It includes a search bar with a 'Go' button. Below the search bar, there are two tables. The first table, titled 'Subscription', has columns for 'Subscription Name', 'Status', 'Created', 'Updated', and 'Address'. The second table, titled 'Licenses', has columns for 'Subscription', 'Email Address', 'Status', 'Created', 'Updated', and 'Address'. Both tables contain several rows of data.

## Office suite questions

Why should I buy Microsoft 365 from you if I already have Office on my desktop?

If you purchase our Business Premium plan, you'll get the latest version of the Office desktop applications you know and love: Excel, Word, Outlook, PowerPoint, OneNote, and Publisher. And whenever Office is updated, you will automatically receive the latest upgrade at no additional charge so that you're always on the current version of Office. Our Microsoft 365 plans give you the ability to easily and securely share and collaborate on documents using [OneDrive for Business](#) and Office Online. With Online Essentials, Business Premium, you can also create a domain-based email address and share calendars and contacts with people inside and outside of your company. Finally, unlike the Office you currently have, Microsoft 365 gives you the ability to have real-time online meetings and screen sharing using Lync.

Which desktop applications come with the Business Premium?

This depends on which plan you choose and whether you're using a PC or Mac. PC users who choose the Business Premium plan can download the latest versions of [Word](#), [PowerPoint](#), [Excel](#), [Outlook](#), [OneNote](#) and Publisher. If you choose the Business Premium plan, you get all of those programs, plus Lync. And if you're a Mac user, you'll receive the latest desktop versions of [Word](#), [PowerPoint](#), [Excel](#), [OneNote](#) and [Outlook](#) for either plan.

Will the latest version of Microsoft Office work on my computer?

To use the 5 desktop downloads you get with the Business Premium plan, you must be on one of the operating systems found on Microsoft's Office System Requirements page:

- [Office System Requirements](#)

If you are running a different operating system, remember that you can still work online with Office Online, browser-based versions of your favorite Microsoft tools like Excel, Word or PowerPoint, which are included with the Online Essentials, Business Premium plans.

What is Office Online?

Office Online features easy-to-use versions of [Word](#), [Excel](#), [PowerPoint](#) and [OneNote](#) that you use within a Web browser. You can access Office Online from your cloud storage to create new files, edit existing files, share and collaborate online with clients or colleagues.

- ✦ With the Business Premium plan, can I download the 5 installs of Office on my employees' computers?

The desktop Office licenses that come with the Business Premium plan are associated with an individual user's account. This makes it easy to connect Office desktop applications with the online services and cloud storage that allow you to work anywhere. Downloading a copy onto another user's computer may keep that second user from experiencing these benefits. To get the most out of Microsoft 365, we highly recommend ensuring that anyone needing the latest desktop version of Office be associated with a Business Premium account.

- ✦ Will the Excel, PowerPoint, and Word programs I already have installed on my computer work with my cloud storage and Office Online?

OneDrive for Business cloud storage and Office Online work best with the latest version of Microsoft Office, allowing you to select files stored in the cloud and edit them using your desktop applications instead of Office Online. Simply open the file you wish to edit, click 'Edit in [Word/Excel/PowerPoint](#)' and when you click 'Save' within those applications, your document will sync back to your storage.

- ✦ Does Business Premium include Access?

Before January 31, 2017, there were restrictions on Access. If they had a license, ATS could add it to the cart for them. If not, we wouldn't. Post January 31<sup>st</sup>, if they have Business Premium and download Office 2016, it will include Access.

## Mac questions

- ✦ I have a Mac. Can I still use Microsoft 365? What about Business Premium?

Yes. Office Online is compatible with Mac OS X 10.5 and later with Safari 5 and later. And if you choose the Business or Business Premium plan, you'll be able to download Office for Mac 2011 Service Pack 3, which is fully compatible with Mac OS X 10.6.

- ✦ What is Office for iPad?

[Office for iPad](#) features full, touch-friendly versions of the most popular Office apps: [Word](#), [Excel](#) and [PowerPoint](#). While the free iPad apps allow you to read Word documents, use Excel data and present with PowerPoint, only [Office for iPad](#) lets you create and edit documents in each app. [Office for iPad](#) is available with the Business

Premium plan, both of which include a license that's valid for up to 5 iPads or Windows tablets, as well as up to 5 PCs or Macs, for a single user.