Dynamics 365 Operations Sandbox

Last Modified on 02/19/2019 6:07 pm EST

Dynamics 365 is a Microsoft umbrella product that contains a number of office suite, ERP, and other MS Business Suite products together in a cloud environment.

Dynamics 365 CRM is a popular solution for Customer Relationship Management. However, standard Dynamics CRM subscriptions do **NOT** contain access to the Financials and Operations modules for managing Accounts Payable or Accounts Receivable data. To purchase a license for the operations modules can be quite expensive due to minimum user license requirements.

Luckily, Microsoft has a **partner program** geared towards users who are only interested in developer type of access.

The most cost effective way to gain access to Dynamics 365 for Operations is through a Microsoft Application Development Silver Level Partnership
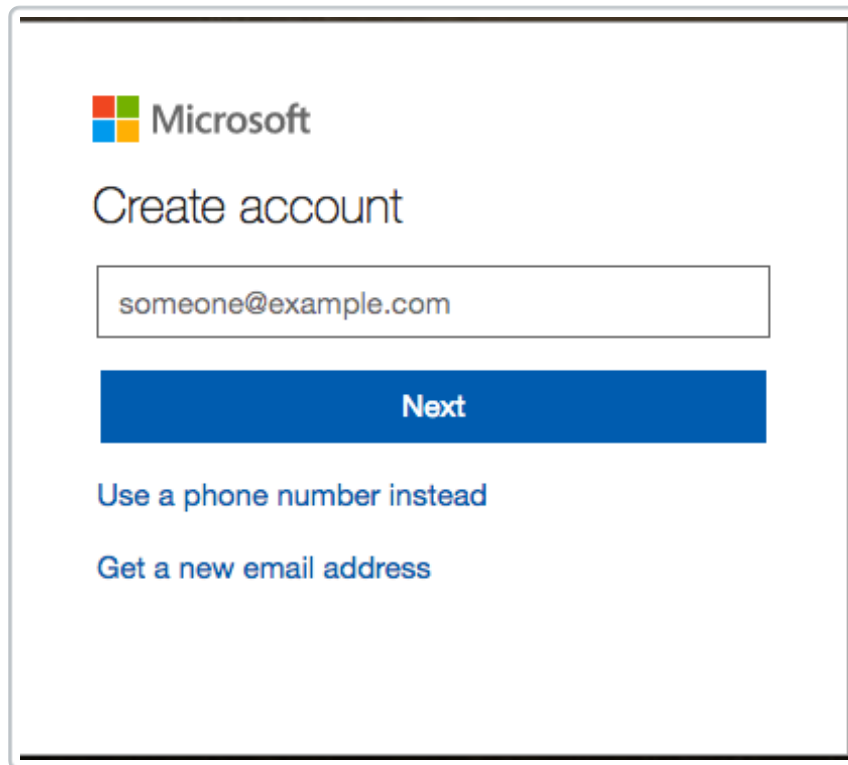
Steps towards developing a Microsoft Application Development Silver Level Partnership

1. Create a Microsoft Account (if you have a Microsoft account to use for your business, you may skip this step): https://signup.live.com/

2. Create a Microsoft Partner Account (you may log in with an existing Microsoft account): https://partner.microsoft.com/en-us/membership

3. Complete the Competency Requirements: https://partner.microsoft.com/en-us/membership/application-development-competency#simple-tab-content-2

- Two Employees of your organization must pass Microsoft Certified Professional Exams
- Three Customer References of your customers who are using solutions built with Microsoft services included in the Application Development Competency
- Complete your Organizations Profile (relevant business contact info) in the **Partner Portal**
- Pay the Competency Fee: $1,670/yr

Step 1: Create a Microsoft Account

A Microsoft account is required before we can raise it's level to partner status, if you do not already have a Microsoft Account for use with your business you may sign up here: https://signup.live.com/


Step 2: Create Microsoft Partner Account

After you have created a generic Microsoft Account, the next step is to associate that Microsoft Account with a Microsoft Partner Account. To enroll in the most basic level of the Microsoft Partner Network there is no cost. To enroll an existing Microsoft Account into the Microsoft Partner Network visit: https://partner.microsoft.com/en-us/membership.

1. On this page, look for the **Enroll Now** button.

Three paths to partnership

See why 94 percent of our partners are satisfied with their vendor relationships. Join MPN at a level that best suits your budget and business goals.
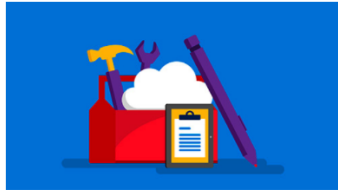
Network
Connect with the community and access valuable resources, including training.

Action Pack
Subscribe to developer tools, support, training, and software.

Competency
Be recognized for your success with increased support, software, and training.

Enroll now >

2. Next we'll need to **Enroll an Organization.** Select the bubble and fill out the form.

What would you like to do?

◉ **Enroll an organization**   ○ **Join an existing organization**

Your contact information

First Name*
Kelly

Last Name*
Gold

Country*

Postal Code (optional)

3. After completing the form, **Check the box** *I agree to the terms and conditions of the MPN Agreement* and click **Submit.**

A few words from our friendly legal team

The Microsoft Partner Network (MPN) requires you to abide by the terms and conditions of the MPN Agreement

☐ **I agree to the terms and conditions of the MPN Agreement**

Submit

By now you should have access to the Microsoft Partner Portal.

Step 3a: Complete Competency Requirements

Two members of your company must pass Microsoft Certified Professional Exams

The exam list can be found here: https://partner.microsoft.com/en-us/membership/application-development-competency#simple-tab-content-2

At least **Two** employees must hold at least **One** Microsoft Certification, it can be the same certification.

- Log in to https://partners.microsoft.com/ and click your organization (ex. SAP Cloud Platform Open Connectors)

Manage Your Existing Organization

The Organizations you administer are shown below. To manage an Organization, click the Organization name.

Organization	Address	Location Name	City	Status	Program Level
Cloud Elements	3001 Brighton Blvd, Denver, Colorado, 80214, United States	Cloud Elements	Denver	Active	Network Member

- From the **Requirements & Assets** dropdown, click **Associated People**

Partner Membership Center

Cloud Elements

Home   Membership Status   Requirements & Assets   Organization Information   Orders & Benefits   Administration

Manage People

Associated People

Home > Associated People

Manage Microsoft Certified Professionals

Manage People - C

Invite People to Associate

Assign Contact Roles

Associated People   Add New   Assign Privileges   ...ofessionals   Program Contacts   Privileges

Accept/Reject Pending People

- Fill out the form with the employee's info. who will take the exams and click **Send Invitation**

Manage People

Associated People | **Add New People** | Pending People | Microsoft Certified Professionals | Program Contacts | Privileges

Add New Person | **Invite Multiple People**

Select Location

Cloud Elements (HQ) (Denver) ⌄ | **Select**

Add New Person - Cloud Elements (Denver)

To send an invitation to an individual to associate with Cloud Elements (Denver), use this form.

* Indicates an answer is required.

*Select Country/Region: [Please select... ▾]

Preferred First Name [ ]

* First Name [ ]

* Last Name [ ]

*E-mail: [ ]

MCP ID (not required): [ ]

Contact Role (none assigned if none specified): [Please select... ▾]

*Language for invitations: [English (United States) ▾]

To view a sample content of the email that will be sent, please click here. (You will be taken to the partner portal in a new window).

To send the invitation, click Send Invitation. Track Individuals who have accepted your invitation from the Invited People tab.

The Partner Membership Center may take up to one hour to process and reflect the changes made to your account.

Send Invitation

- Your employee will receive a welcome email, have them follow the steps to create or associate a Microsoft Account to your Microsoft Partner Account
- After your employee has created an account, they are ready to **Take and Complete The Competency Exam**

Step 3b: Complete Competency Requirements

Invite employee who has completed the Microsoft Competency Exam to your Microsoft Partner Account

In some cases the MCP ID (Microsoft Certified Professional ID) will auto-populate in your Microsoft Partner Account. Visit the Manage People Page from 3a to find this page.

- If your employee does not show an MCP ID, head to **Requirements & Assets > Manage Microsoft Certified Professionals**

- On the **Manage Microsoft Certified Professionals** page, click **Invite New MCP** (lower right)

- Scroll to the **Lower Half** of the page, fill out the **Invite Individuals - {Your Org}** and click **Send Invitation**

Invite Individuals - Cloud Elements (Denver)

Invite a new Individual to Cloud Elements (Denver) and optionally assign him or her a non-administrative role with the form below.

Please note that if you have chosen to include Associated Locations in the Location Selector, your Individuals will be invited to the Location, not to any associated Locations.

* Indicates an answer is required.

*Select Country/Region:	Please select... ⬍
Preferred First Name	
* First Name	
* Last Name	
*E-mail:	
MCP ID (not required):	
Contact Role (none assigned if none specified):	Please select... ⬍
*Language for invitations:	English (United States) ⬍

To view a sample content of the email that will be sent, please click here. (You will be taken to the partner portal in a new window).

To send the invitation, click Send Invitation. Track Individuals who have accepted your invitation from the Invited People tab.

The Partner Membership Center may take up to one hour to process and reflect the changes made to your account.
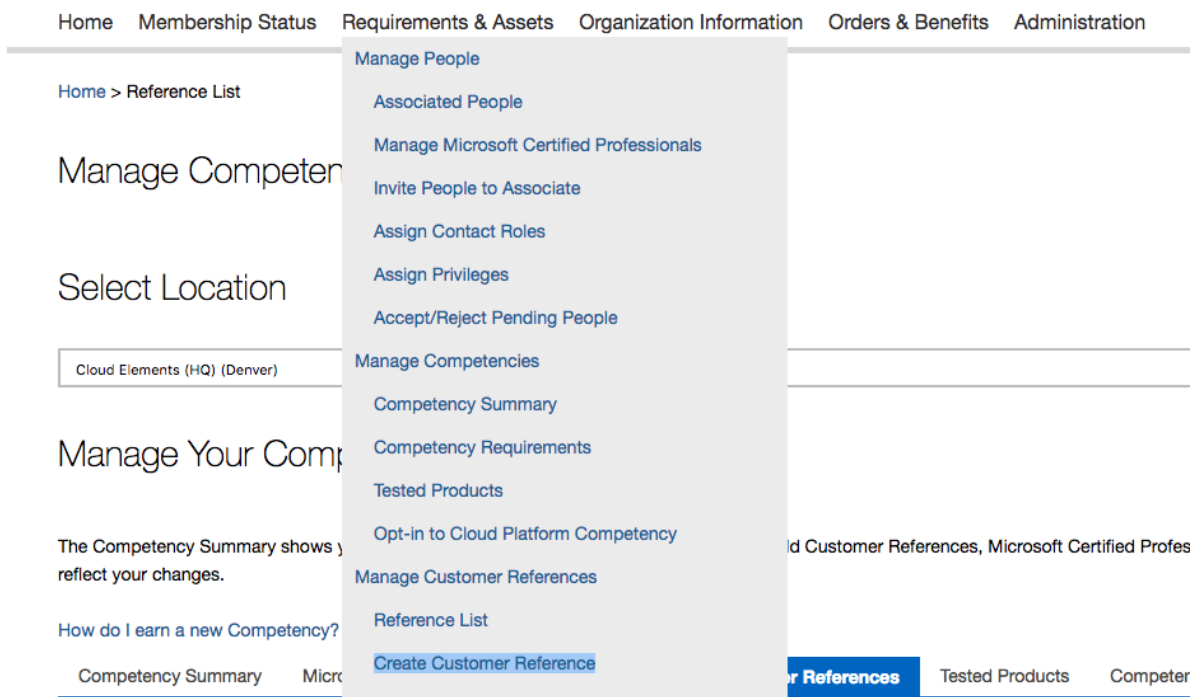
Send Invitation

3c. Complete Competency Requirements

Add Three Customer References

> Customer References must be customers you have provided a solution to that leverages Microsoft Products and Services

- To add a reference, visit **Requirements & Assets > Create Customer Reference**

- Fill out the form completely and **Next**

> Uh Oh! Ready for the next steps? We are working hard to complete our partnership as we speak! We will update this article as we have new information.

—Author Kelly Gold