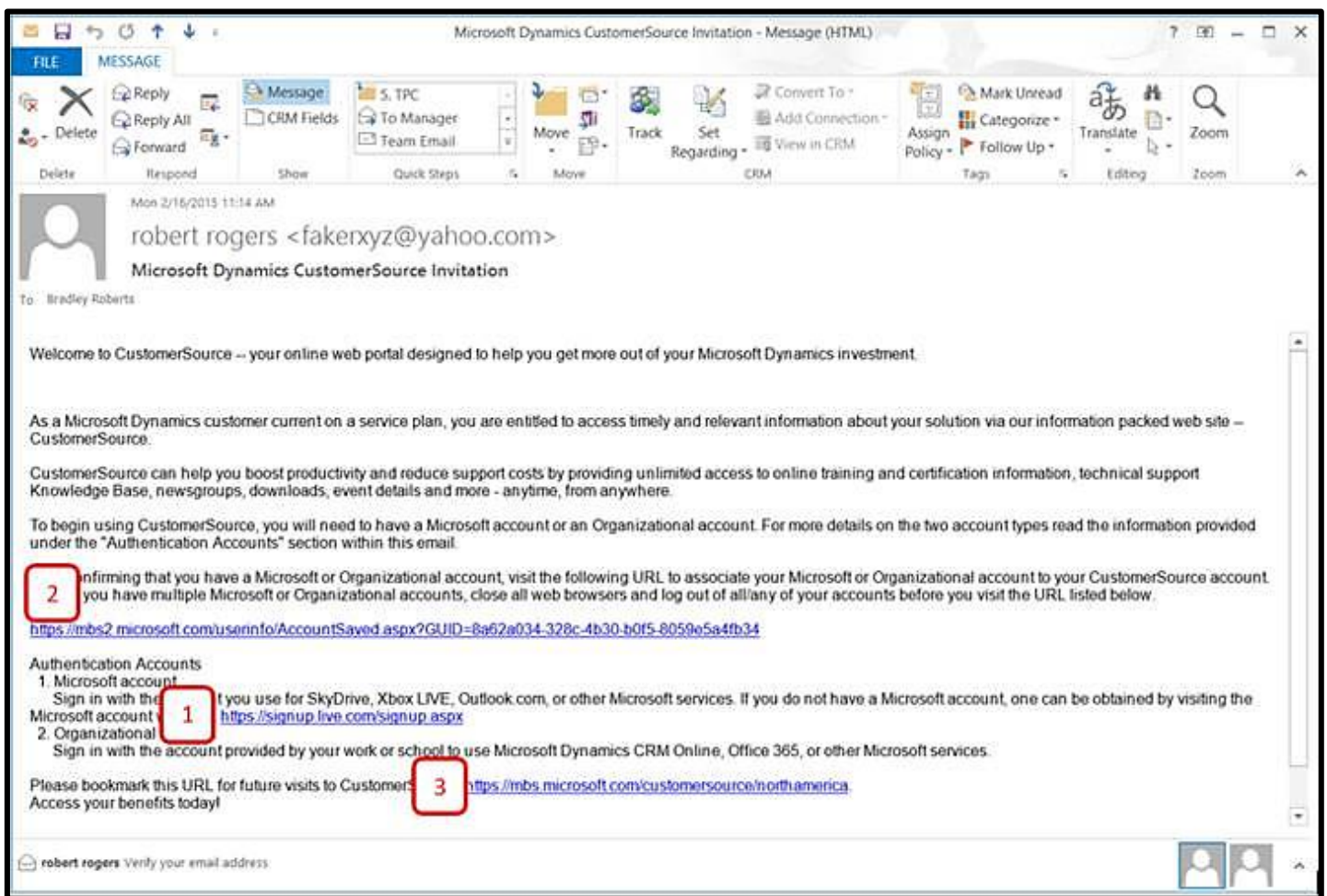# Microsoft CustomerSource Access

If you cannot get access to Microsoft CustomerSource or you are struggling with the initial setup process, don't worry – **you are not alone!** Although the Microsoft CustomerSource invitation email is totally accurate, it can be tricky to decipher. For a customer eager to get started learning about their brand new ERP system, this can be a frustrating experience. Please note that the following instructions are intentionally simplified – that is, these instructions are not intended to be exhaustive.

The primary confusion found with the Microsoft invitation email is that the critical steps are not particularly clear, and the URL links provided are not listed in the order most users will need to use them.

From the Microsoft invitation email, most users will want to click on the provided links in the order shown below.


A super simplified (and clearer) version of the Microsoft CustomerSource invitation email might read something like the following:

The Short Version - Microsoft Dynamics CustomerSource Invitation Email

Welcome to CustomerSource. Here's how to finalize your access:
1. Setup a new Microsoft account.
   - Use the following link to start setup: https://signup.live.com/signup.aspx.
   - After setting up your new account, close all instances of your browser.
2. Connect your new Microsoft account to your CustomerSource account.
   - Use the following link to do so: **See the Note provided below.**
   - Again, close all instances of your browser.
3. Bookmark the following URL and use it to open CustomerSource:
   https://mbs.microsoft.com/customersource/northamerica

Note: I cannot provide this link. This is a unique, user specific link Microsoft generates and sends to each new user. In the invitation email Microsoft sends, it will be similar to the circled link in the screenshot below.
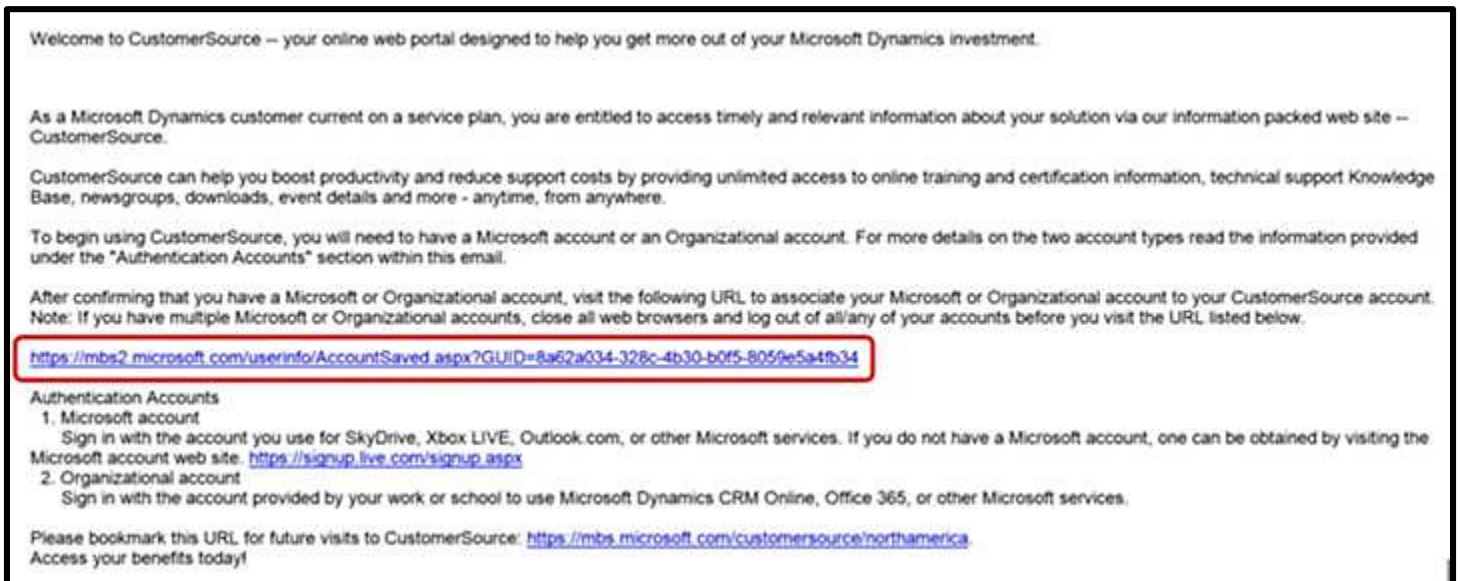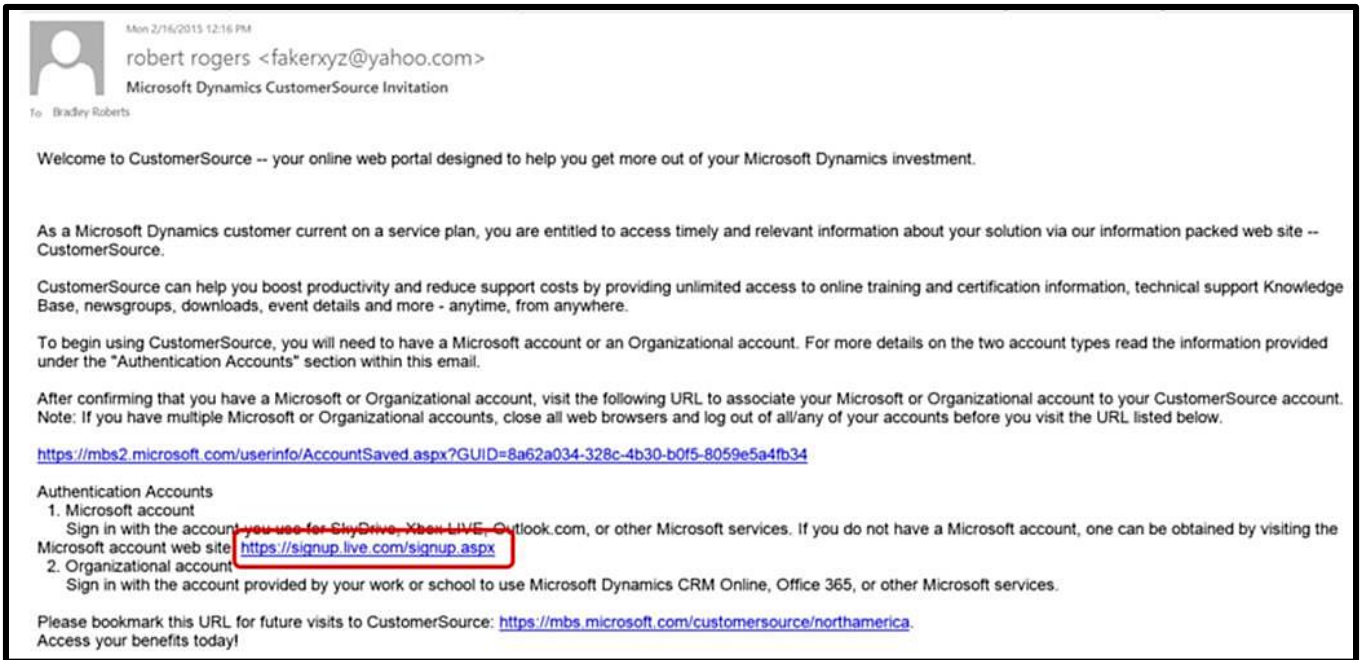

The Long Version - Microsoft Dynamics CustomerSource Invitation Email

Important Note: Before a user can setup a CustomerSource account, they MUST receive the "Microsoft Dynamics CustomerSource Invitation" email directly from Microsoft. This email must come from Microsoft; it will not work if it is forwarded from a coworker. Without this email from Microsoft, users will not be able to get access to CustomerSource.

There are two primary steps necessary to get access to CustomerSource: (1) setup a new Microsoft account, and (2) connect your new Microsoft account to your CustomerSource account.
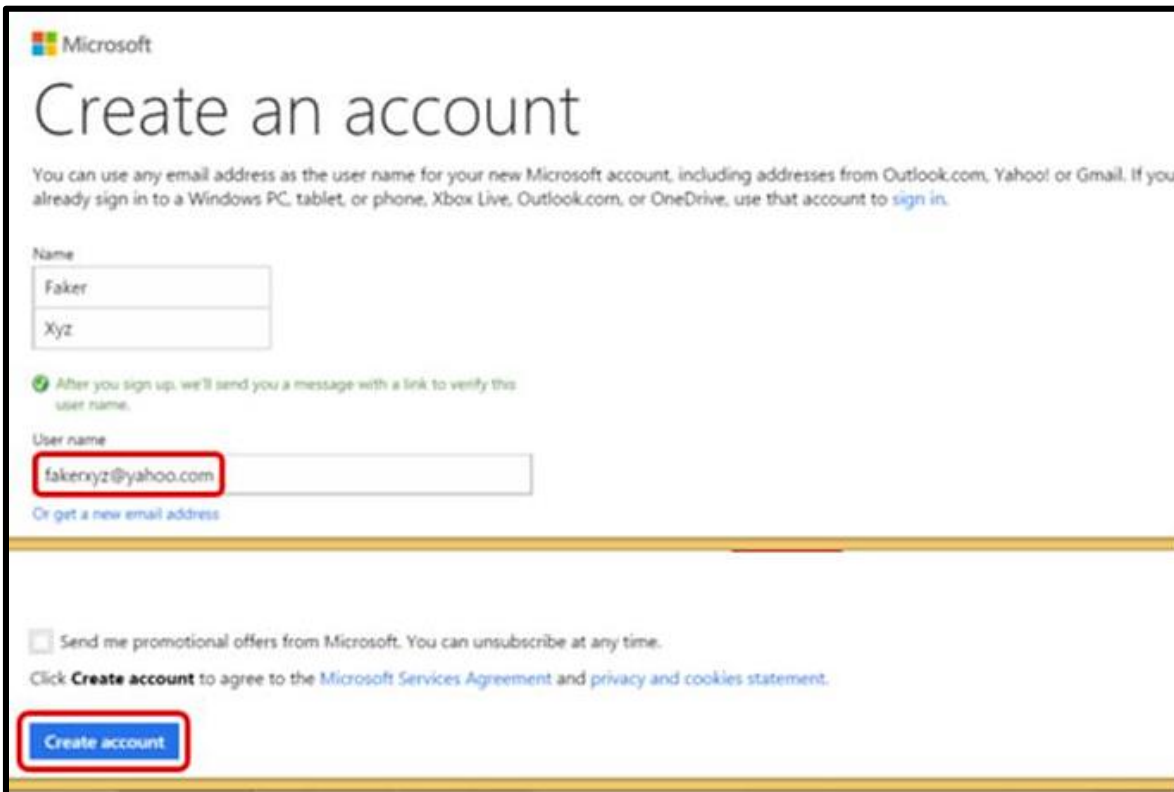
Setup a New Microsoft Account:

1. In the standard Microsoft CustomerSource invitation email, click on the signup link circled below to open the "Create an account" page.

Mon 2/16/2015 12:16 PM

robert rogers <fakerxyz@yahoo.com>
Microsoft Dynamics CustomerSource Invitation

To Bradley Roberts

Welcome to CustomerSource -- your online web portal designed to help you get more out of your Microsoft Dynamics investment.

As a Microsoft Dynamics customer current on a service plan, you are entitled to access timely and relevant information about your solution via our information packed web site -- CustomerSource.

CustomerSource can help you boost productivity and reduce support costs by providing unlimited access to online training and certification information, technical support Knowledge Base, newsgroups, downloads, event details and more - anytime, from anywhere.

To begin using CustomerSource, you will need to have a Microsoft account or an Organizational account. For more details on the two account types read the information provided under the "Authentication Accounts" section within this email.

After confirming that you have a Microsoft or Organizational account, visit the following URL to associate your Microsoft or Organizational account to your CustomerSource account. Note: If you have multiple Microsoft or Organizational accounts, close all web browsers and log out of all/any of your accounts before you visit the URL listed below.

https://mbs2.microsoft.com/userinfo/AccountSaved.aspx?GUID=8a62a034-328c-4b30-b0f5-8059e5a4fb34

Authentication Accounts
  1. Microsoft account
     Sign in with the account you use for SkyDrive, Xbox LIVE, Outlook.com, or other Microsoft services. If you do not have a Microsoft account, one can be obtained by visiting the Microsoft account web site https://signup.live.com/signup.aspx
  2. Organizational account
     Sign in with the account provided by your work or school to use Microsoft Dynamics CRM Online, Office 365, or other Microsoft services.

Please bookmark this URL for future visits to CustomerSource: https://mbs.microsoft.com/customersource/northamerica.
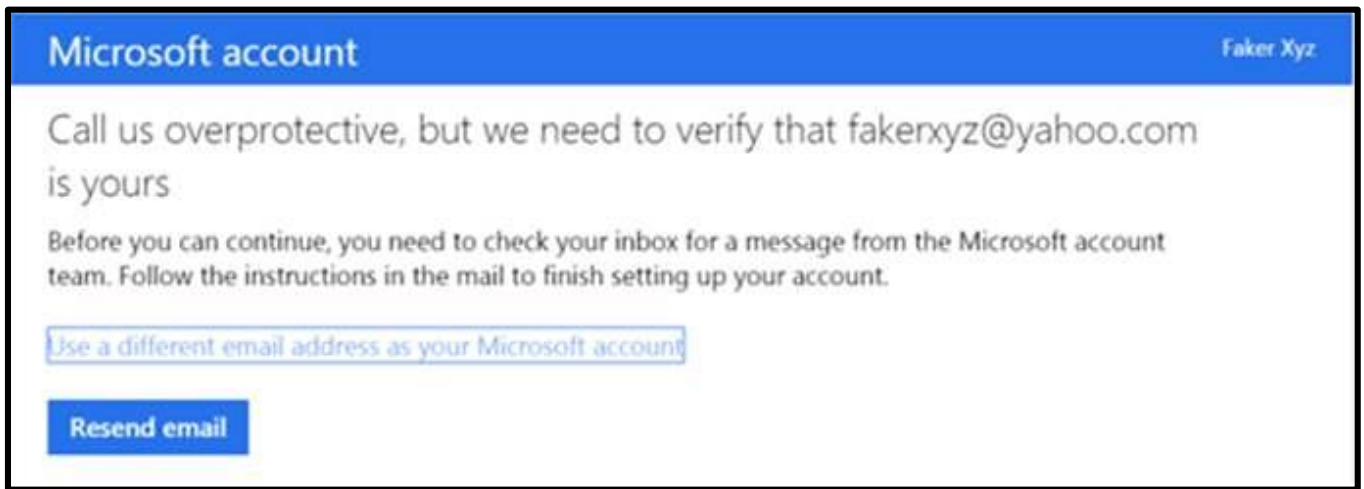Access your benefits today!

2. Create a new Microsoft Account. Fill in all the required fields and click on the "Create account" button found on the bottom of the page. Of course, you'll need to remember your user name and password for future access.

    Note: (1) I've used an organizational account as the user name, (2) a number of the required fields are not shown in the following screen shots, and (3) you also might want to uncheck the "Send me promotional offers…" check box, found right above the "Create account" button.
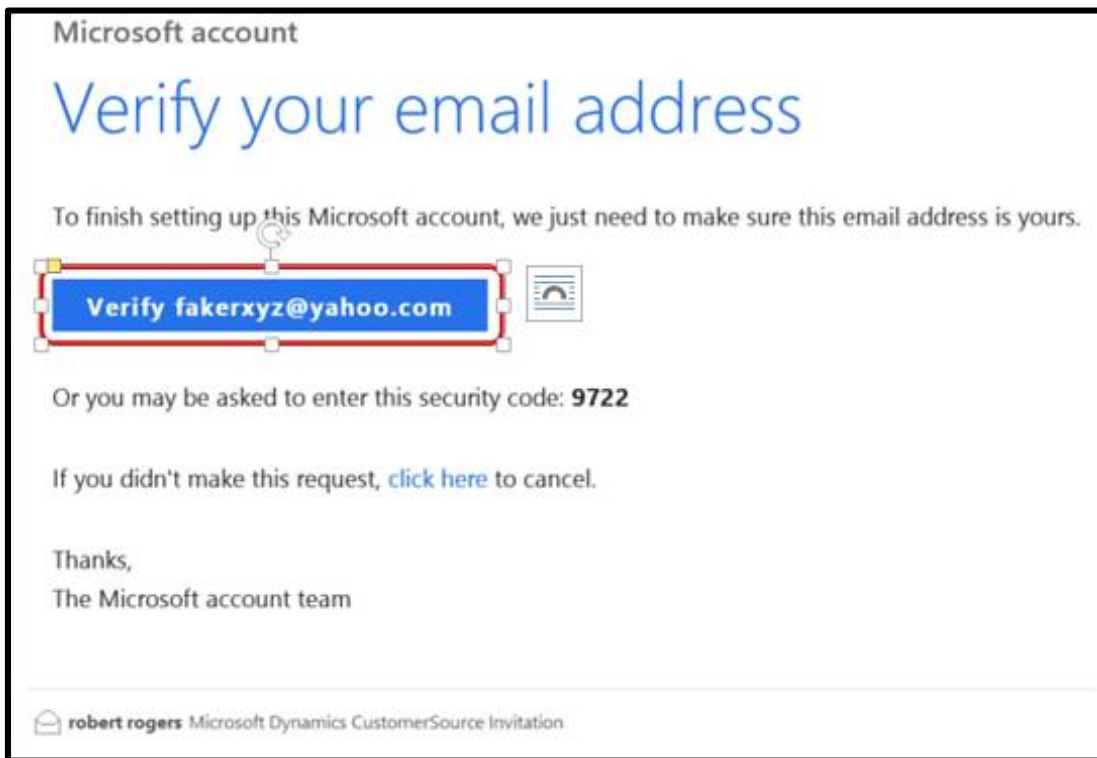
    Example Scenario Email Account: fakerxyz@yahoo.com.

Microsoft

Create an account

You can use any email address as the user name for your new Microsoft account, including addresses from Outlook.com, Yahoo! or Gmail. If you already sign in to a Windows PC, tablet, or phone, Xbox Live, Outlook.com, or OneDrive, use that account to sign in.

Name

| Faker |
| Xyz |

✓ After you sign up, we'll send you a message with a link to verify this user name.

User name

| fakerxyz@yahoo.com |

Or get a new email address

☐ Send me promotional offers from Microsoft. You can unsubscribe at any time.

Click **Create account** to agree to the Microsoft Services Agreement and privacy and cookies statement.

Create account

BOYER & Associates

3. You will then receive the following message, which requires no action.

Microsoft account   Faker Xyz

Call us overprotective, but we need to verify that fakerxyz@yahoo.com is yours

Before you can continue, you need to check your inbox for a message from the Microsoft account team. Follow the instructions in the mail to finish setting up your account.

Use a different email address as your Microsoft account

Resend email

4. Find the verification email Microsoft just sent you, which will look like the following screen shot. Click on the blue "Verify…" button circled below.

Note: The verification email will be sent to the email account used in step two above.

Microsoft account

Verify your email address

To finish setting up this Microsoft account, we just need to make sure this email address is yours.

Verify fakerxyz@yahoo.com

Or you may be asked to enter this security code: **9722**

If you didn't make this request, click here to cancel.

Thanks,
The Microsoft account team

robert rogers Microsoft Dynamics CustomerSource Invitation

5. This will take you to a "Sign in" screen. Enter the password you used to setup the Microsoft account in step two above, and click "Sign in."

Note: The email address has been automatically populated for you.
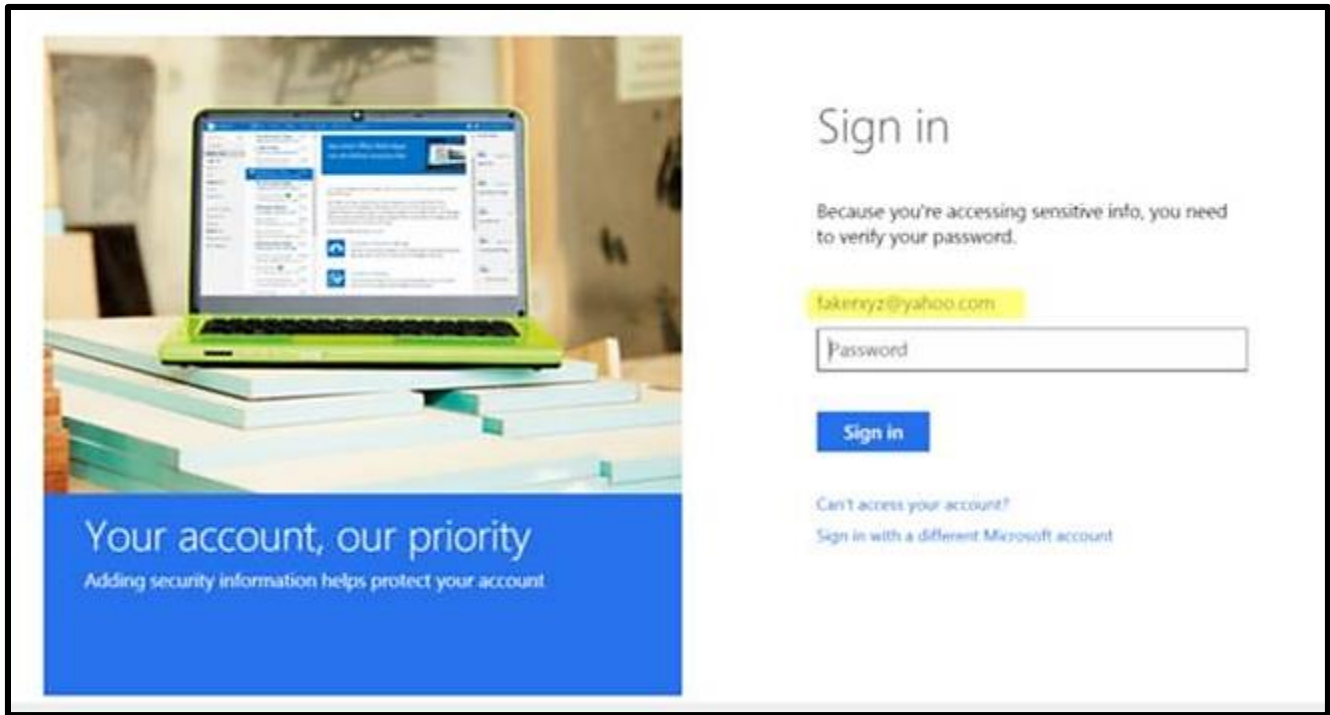
6. You will then receive the following message, which requires no action.
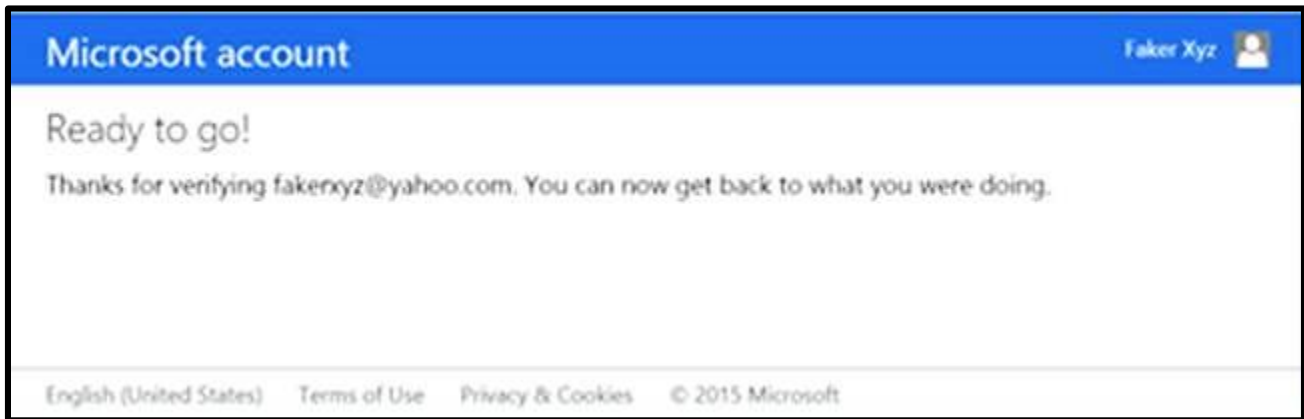

7. Close all browsers. This may not sound like an important step, but don't skip it!

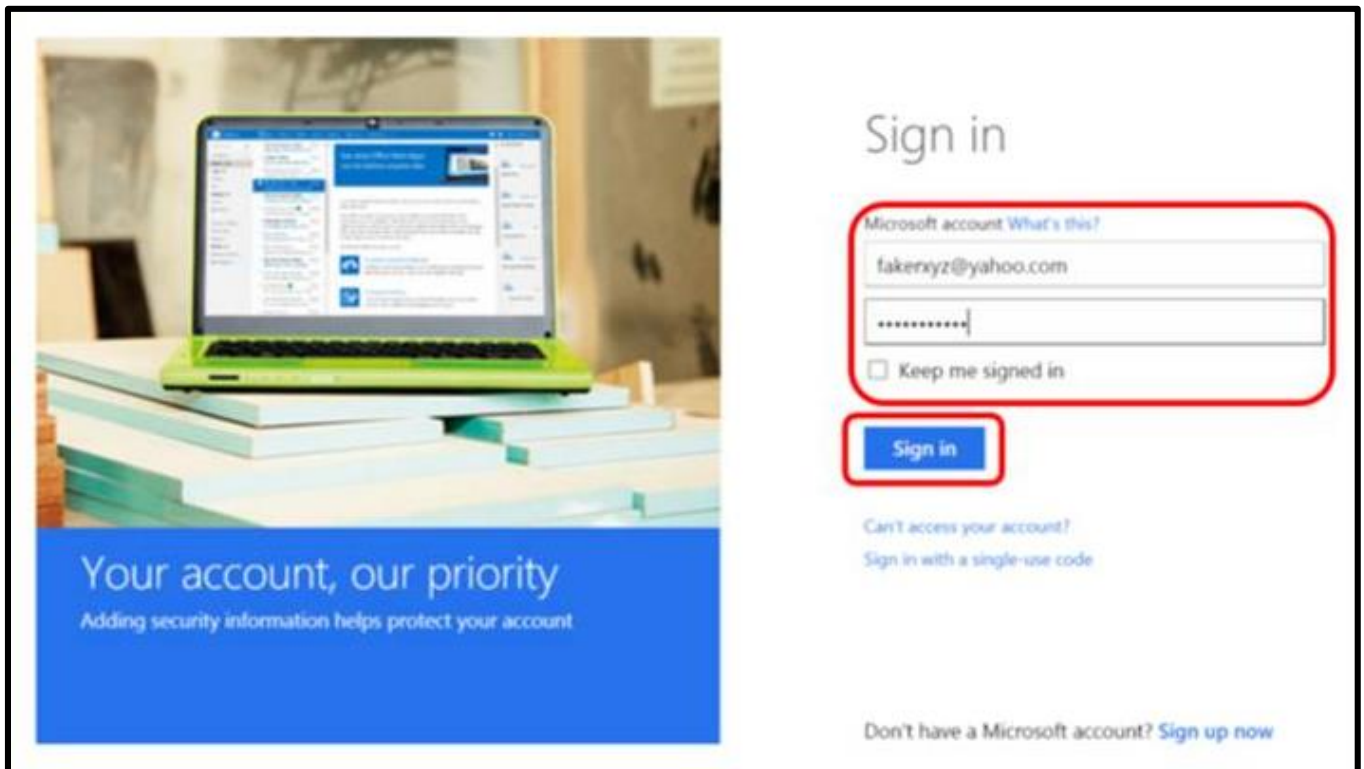## Connect Your New Microsoft Account to Your CustomerSource Account:

1. Go back to the standard Microsoft CustomerSource invitation email you received at the beginning of this process, and click on the link circled in the invitation email screenshot shown below.

   Note: This is the link that is user specific and that will not work properly if a user is forwarded this email from a coworker.
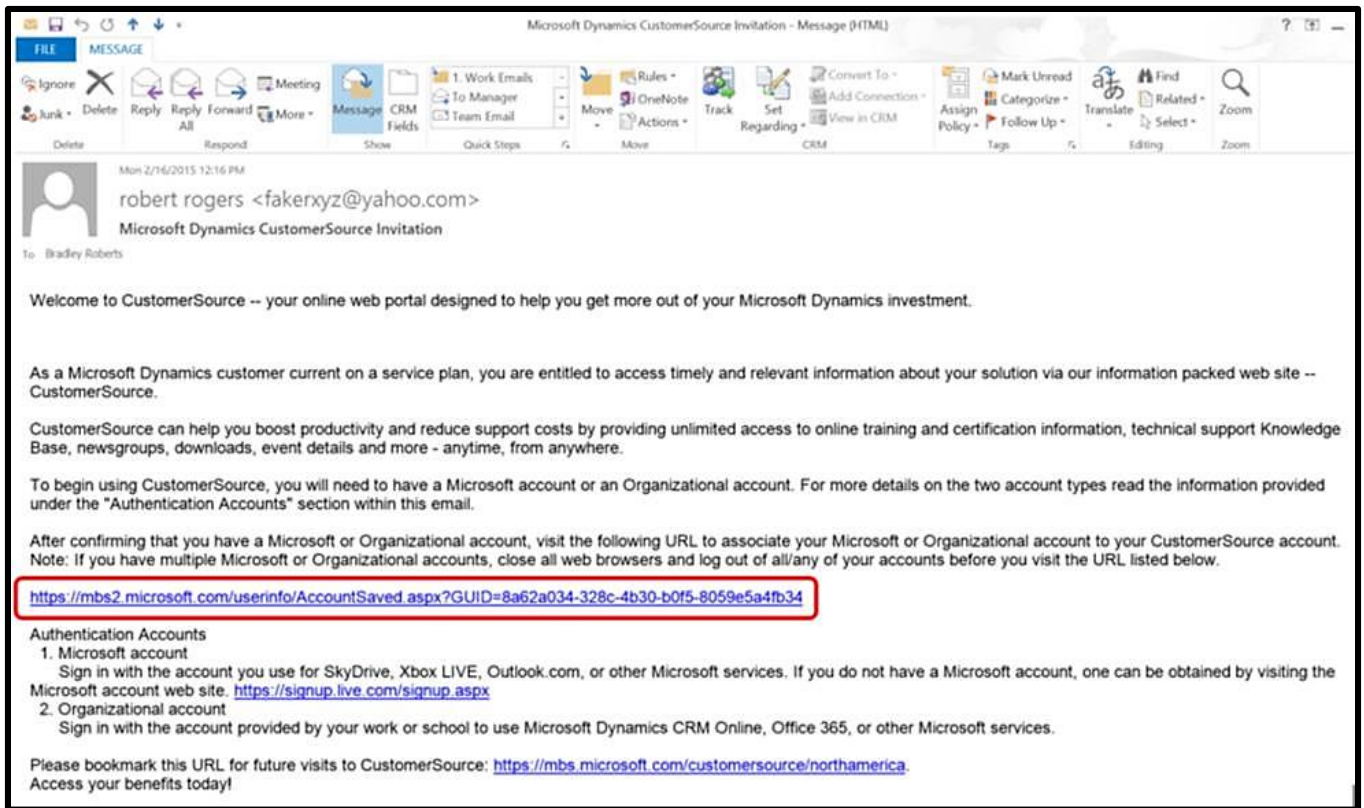
2. Input your email account and password and click "Sign in."

    Note: Use the email address and password specified during step two of the "Setup a New Microsoft Account" section above.

3. If you have done everything correctly, you will receive the following message, which requires no action.

> ▲▲ Microsoft Dynamics
>
> **Thank You**
>
> We have successfully associated your Windows Live™ ID with your Microsoft Dynamics profile. You will now be able to use your Windows Live ID to access the Microsoft Dynamics extranets.
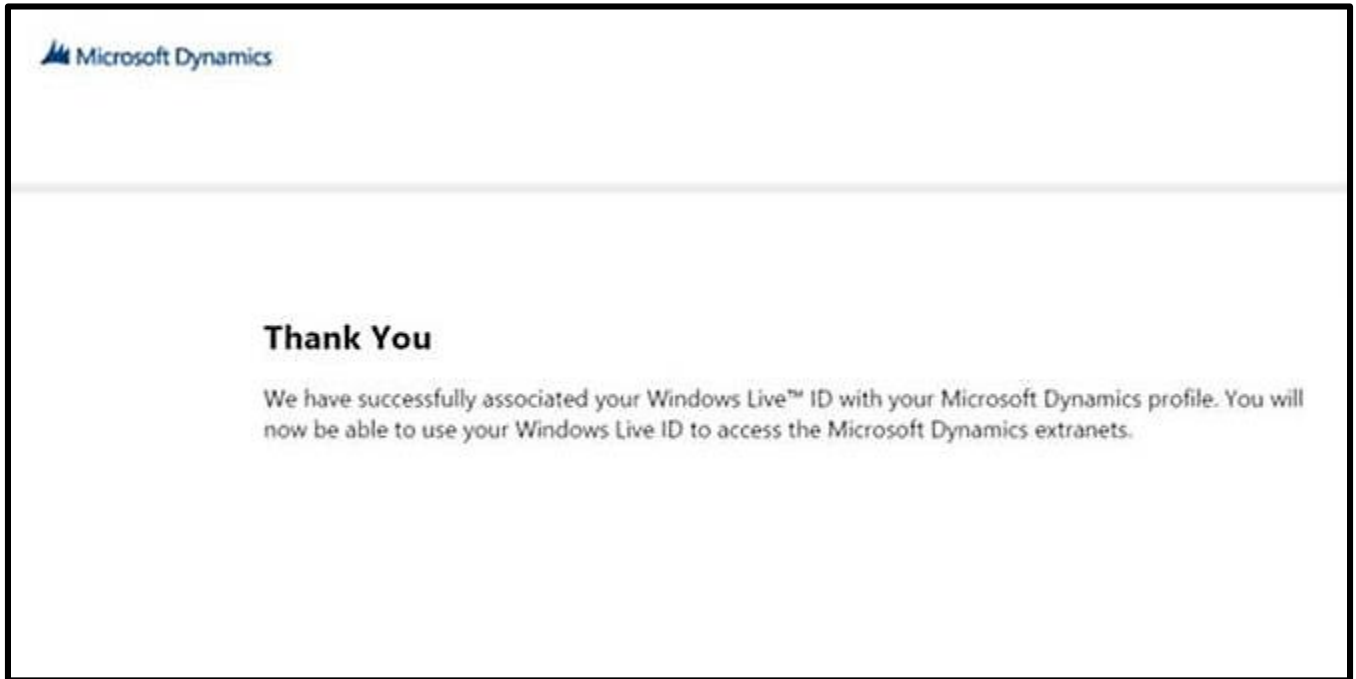
4. Close the browser window.

Logging Into CustomerSource:

Now that your new Microsoft account has been connected to your CustomerSource account, you can now log into CustomerSource. To do so, do the following:

1. Use the following address to open the CustomerSource page (or use the link found at the bottom of the original Microsoft CustomerSource invitation email): https://mbs.microsoft.com/customersource/northamerica

   Note: It is recommend you save this address using your browser's method of saving web addresses
   (i.e., favorites, bookmarks, etc.).

2. From the CustomerSource (North America) page, click on the "Welcome User" button at the top right of the page, and click "Sign In."
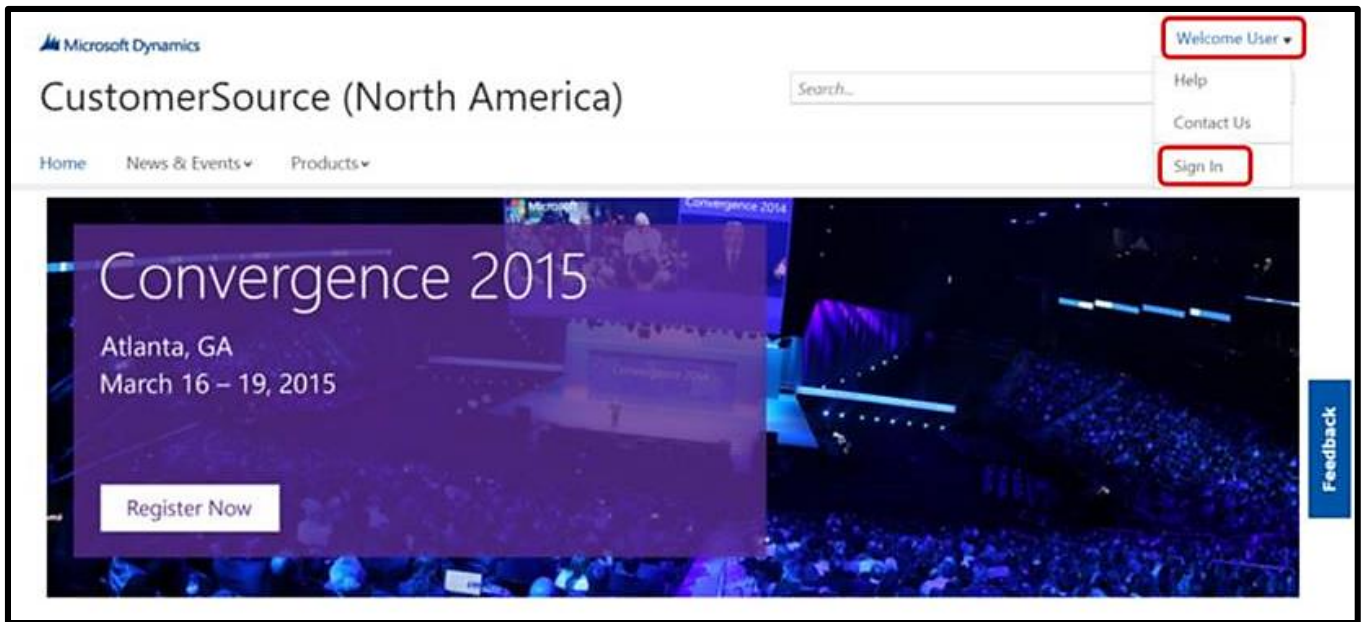
When I clicked on this link, I was automatically logged in, as shown in the screen shot below. You might need to enter your email account and password in order to gain access. When your email address is shown in the field circled below, you've successfully logged into CustomerSource.
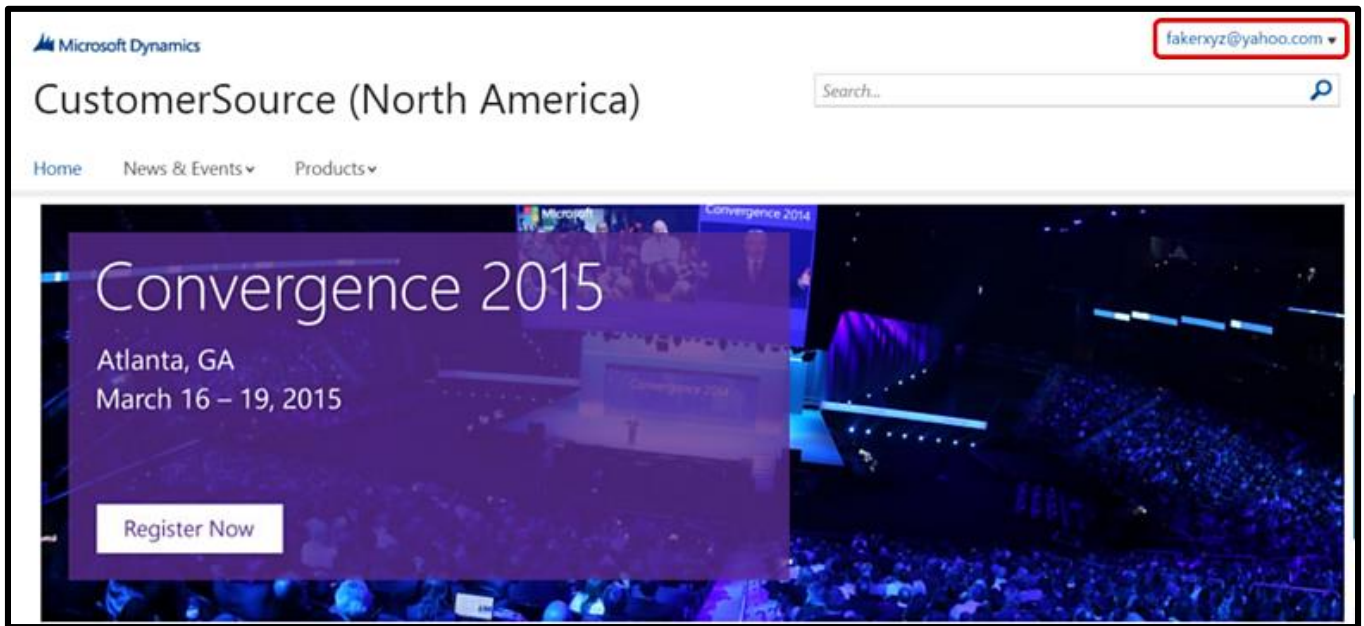
3. You are now logged into CustomerSource and can access training material and other resources to help you learn about your new application.

   Note: This is a large site, with lots of resources available. You'll likely need some time to figure out how to get around and find the training material and other resources you're looking for--so be patient with yourself.

   If you're looking for different Dynamics applications, you can use the "Products" button to see links to Microsoft's various applications.