



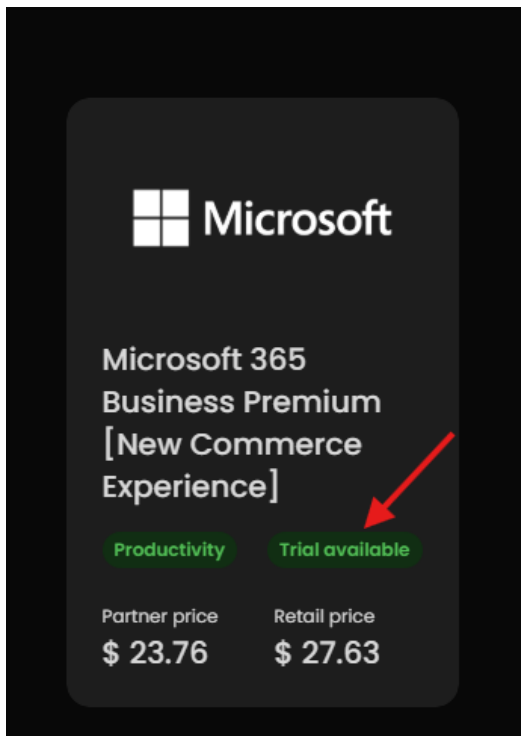
Pax8 Marketplace Trial Functionality

Microsoft



Trials in the Pax8 Marketplace

- Microsoft trials are available in the Pax8 Marketplace
 - Note, we can only offer trials that Microsoft publishes to Pax8 via the CSP Program on the monthly price file
- Microsoft Trials are for a 30-day period, and default to a quantity of 25 licenses
- If a product has an applicable trial, there will be a “trial available” tag on the product tile in the Pax8 Marketplace Catalog
 - Example:



- To provision a trial, partners will select the product accordingly in the Pax8 Marketplace Catalog, and under billing term during checkout, select the “trial” option

Trial Configuration

- Partners have 2 options when provisioning a trial:
 - Cancel at trial end
 - This means the trial will expire after the 30-day period, and there will be no conversion to a paid subscription
 - Convert to subscription after trial
 - This means that after the trial period, the trial will be converted to a **paid** subscription
 - Partners can select the billing term, commitment term, and quantity that the paid subscription will convert to after the trial period

The screenshot displays the 'Product configuration' interface. At the top, the 'Price' is set to '\$ 0.00' with a note 'Add a price override to adjust'. Below this is a summary table:

Margin (%):	0.0%	Client subtotal:	\$ 0.00
MSRP:	\$ 0.00	Partner subtotal:	\$ 0.00
Cost:	\$ 0.00		

Under the 'Trial auto-convert*' section, two radio buttons are present: 'Cancel at trial end' (unselected) and 'Convert to subscription after trial' (selected). Red arrows point to these options. Below, the 'Post trial subscription' section contains three dropdown menus: 'Billing term*' (set to 'Monthly'), 'Commitment term*' (set to 'Monthly'), and 'Quantity*' (set to '1'). Red arrows also point to these dropdowns.

- After configuration, partners can proceed to complete the order in the Pax8 Marketplace as normal

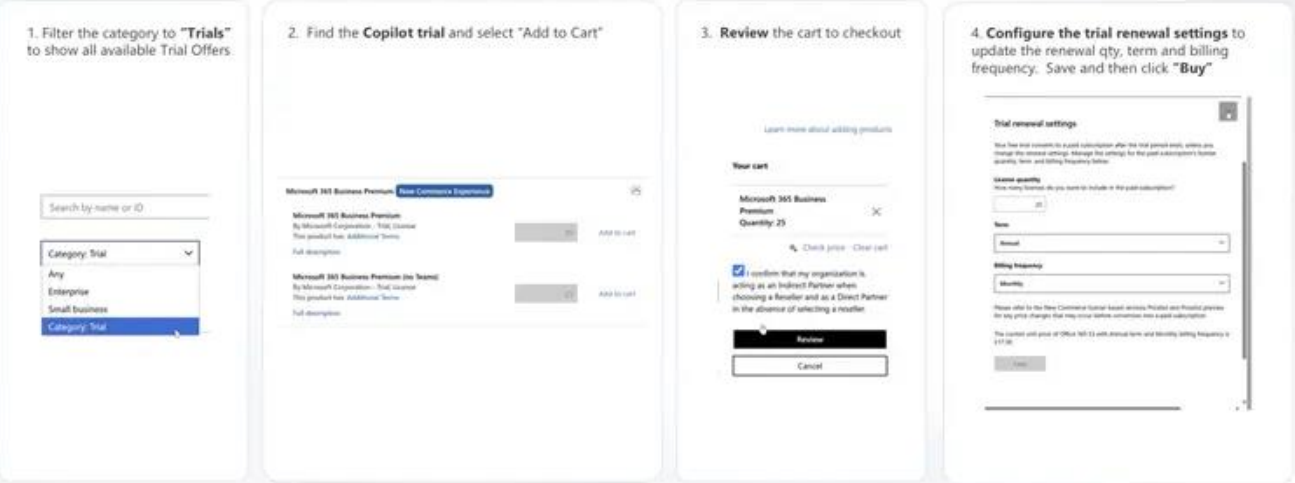
Stating configuration in Partner Center

TRIAL SETUP

Quick steps to transact the trial

Within Partner Center, select the customer you want to transact a trial offer with and add a new subscription.

1. Filter the category to "Trials" to show all available Trial Offers.
2. Find the **Copilot trial** and select "Add to Cart"
3. Review the cart to checkout
4. Configure the trial renewal settings to update the renewal qty, term and billing frequency. Save and then click "Buy"



The screenshot displays the 'TRIAL SETUP' section of the Partner Center interface. It features a large heading 'Quick steps to transact the trial' and a subheading 'Within Partner Center, select the customer you want to transact a trial offer with and add a new subscription.' Below this, four numbered steps are presented in a sequence of panels:

- Step 1:** 'Filter the category to "Trials" to show all available Trial Offers.' The panel shows a search bar and a dropdown menu with 'Category: Trial' selected.
- Step 2:** 'Find the Copilot trial and select "Add to Cart"'. The panel shows a list of trial offers, including 'Microsoft 365 Business Premium' and 'Microsoft 365 Business Premium (no Teams)'. The 'Add to cart' button is highlighted for the 'Microsoft 365 Business Premium' offer.
- Step 3:** 'Review the cart to checkout'. The panel shows a 'Your cart' section with the 'Microsoft 365 Business Premium' trial added. It includes a checkbox to confirm the organization is acting as an Indirect Partner.
- Step 4:** 'Configure the trial renewal settings to update the renewal qty, term and billing frequency. Save and then click "Buy"'. The panel shows the 'Trial renewal settings' section, including fields for 'License quantity', 'Term', and 'Billing frequency'.