CustomerSource Access Frequently Asked Questions

CustomerSource provides you with access to resources such as self-help tools, product updates, community forms, 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. This document provides the most common questions and answers related to using your Microsoft Account with CustomerSource.

If your question isn't found below, please visit the Microsoft Account site or e-mail itmbssup@microsoft.com. CustomerSource uses Microsoft Account for authentication. This is a Web-based service designed to make signing in to Microsoft Web sites fast and easy. Formerly known as "Windows Live ID," Microsoft Account 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.

I am able to use CustomerSource. How do I get the rest of my colleagues set up to use it?
Setting up new users for CustomerSource access is easy and extremely beneficial. Learn how you can invite individuals in your organization to receive access to this valuable online wealth of resources. If they don't have a Microsoft Account, they should visit the Microsoft Account Services site, and follow the instructions given.

What if I forget my Microsoft Account password?
Visit the password help page.

Every time I go to CustomerSource, I am automatically logged into my Microsoft Account. Is this secure?
When you sign into Microsoft Account, 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 Microsoft Account 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 Microsoft Account credentials when you access CustomerSource, you may have selected that checkbox. Alternatively, you may have already signed into Microsoft Account 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 Microsoft Account to all of these profiles; just click the link included in each one of the e-mails.

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

What is the purpose of the Multiple Accounts page?
The Multiple Accounts page will display all of the CustomerSource and PartnerSource accounts that an end user's Microsoft Account is associated to. While logging into some of the applications within either CustomerSource or PartnerSource the Multiple Accounts page will be rendered allowing the end user to select the company/account they would like to use.

When will the Multiple Accounts page be displayed?
The Multiple Accounts page will only display if the end user's Microsoft Account is associated to more than one CustomerSource and /or PartnerSource accounts. If the end user's Microsoft Account is only associated to one CustomerSource or PartnerSource account the page will not display when logging into CustomerSource or PartnerSource.

I've already associated one Microsoft Account with my Microsoft Dynamics extranet profile. How can I switch my CustomerSource profile to use a different Microsoft Account?
In the upper right-hand side of CustomerSource, click on the User menu (typically has name of user in title of menu) and then choose My Profile from the dropdown menu. On this page, verify that your e-mail address is correct; if it is, click on the button at the bottom that says Send Invite E-mail.

If the e-mail address is not correct, select the Edit button at the bottom of the page,, enter the correct e-mail address, click Send Invite E-mail, and then click the Save button. After receiving this e-mail, sign into the Microsoft 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.