Invite Fellow Users in Your Organization to CustomerSource

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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.

Would you like the individuals in your organization to be more informed, more productive, and more self-efficient? One of the simplest ways to improve the efficiency of your organization is by inviting other users to access CustomerSource.

CustomerSource provides **24 hours-a-day, password-protected access to a searchable technical database, product forums, news, a subscription service, and more**—all of which are available to you as long as you remain current on your service plan.

Taking advantage of the invaluable pool of resources within CustomerSource helps you and your organization get the most value out of your Microsoft® Business Solutions investment. You'll find self-help tools, product updates and downloads, business news, helpful documentation such as how-to articles and white papers, support resources, and training information. You'll also receive access to valuable community tools like product forums and Knowledge Base for quick answers to your support questions.

Take a moment to extend the great benefits of CustomerSource to other individuals in your organization.
We've outlined the important steps you'll need to take to invite additional users to take advantage of CustomerSource access:

> **Is there a way for our organization to administer our own accounts?**
> Yes. Microsoft Account allows individuals to access CustomerSource without having to share login credentials. Therefore, an individual CustomerSource profile must be set up for each of your colleagues who would benefit from accessing the site. In each organization, at least one person can create, modify, and delete other professional profiles within the organization's CustomerSource account– they are considered an administrator for the organization. The main contact (sometimes called the 'Bill To' contact) is the initial administrator for CustomerSource.

The administrators sign in to CustomerSource, click on the User Menu in upper right-hand side of the page, and then choose Our CustomerSource Accounts from the dropdown User menu where they can modify profiles and create new ones. This includes the ability to send an invitation e-mail to a fellow employee who is having difficulty associating their Microsoft Account to their CustomerSource profile.

Within the profiles, the administrator can also make other individuals administrators. To do this, while editing a profile, select the checkbox for Administrator and save the profile. This individual now has the same rights.

Who do I contact if our Administrator is no longer with our organization?
If your administrator is no longer with your organization, contact itmbssup@microsoft.com or your Partner for assistance in declaring a different individual as the administrator.

To invite another user to CustomerSource, please follow these steps:

1. Sign in to CustomerSource.
2. Navigate to and click on the User Menu (commonly containing the name of CustomerSource User) found in the upper right-hand side of the page.
3. Select Our CustomerSource Accounts from the User dropdown menu
4. Click the **Add New Professionals button**.
5. Enter the required profile information.
6. Check the box at the bottom of the form to **send invitation e-mail to this CustomerSource user** to associate their Microsoft Account to this profile.
7. Click **Save**.

If an individual in your organization didn't receive the invitation e-mail to associate their Microsoft Account, review their profile again to verify that the e-mail address is correct. If you edit the e-mail address check the Send invitation e-mail to this CustomerSource user to associate their Microsoft Account to this profile option before saving the profile. This will generate another email invitation. If the individual has still not received their invitation have them check their junk mail folder.

Once they receive the e-mail inviting them to CustomerSource they will be instructed to sign in with the Microsoft Account he/she would like to use, then click on the association link within e-mail invitation.

Please e-mail itmbssup@microsoft.com if you have any further questions.