

## **Frequently asked questions for Windows Live ID for CustomerSource**

### **Microsoft Windows Live ID Implementation FAQ**

The implementation of Microsoft® Windows Live ID for authentication to Microsoft Dynamics extranet, CustomerSource was completed the evening of August 19, 2006.

When you visit this site after this implementation, you will need to sign in with your Windows Live ID

Following are the most commonly asked questions related to the transition to Windows Live ID.

Please visit this page for the latest updates and information as it will be periodically updated. Please write to [voice@microsoft.com](mailto:voice@microsoft.com) if your questions are still unanswered.

### **About Microsoft Windows Live ID:**

#### **What is Microsoft Windows Live ID and why am I required to use it to enter CustomerSource?**

Microsoft® Windows Live ID is a Web-based service designed to make signing in to Web sites fast and easy. Windows Live ID enables participating sites to authenticate a user with a single set of sign-in credentials, eliminating the need for users to remember numerous passwords and sign-in names. For more information, visit <http://www.microsoft.com/NET/default.aspx>.

We have implemented Microsoft Windows Live ID on the Microsoft Dynamics extranets to align with Microsoft's Trustworthy Computing initiatives of security and privacy. As other Microsoft sites also use Windows Live ID you will be able to use a single log in and password to access all of our sites.

#### **How do I create a Windows Live ID?**

If you have an e-mail address that ends with @hotmail.com, @msn.com, @microsoft.com and so on, you already have a Windows Live ID.

You can use that e-mail address to sign in to Windows Live ID -participating sites and services. You may choose to use your existing Windows Live ID to access the Microsoft Dynamics extranets.

To register for a new Windows Live ID follow these steps:

1. Go to [Registration https://accountservices.passport.net/reg.srf?vv=30&sl=1&lc=1033](https://accountservices.passport.net/reg.srf?vv=30&sl=1&lc=1033)
2. Enter your email address. Your e-mail address must include the @ symbol and the domain (example: someone@microsoft.com). The portion before the @ symbol can contain letters, numbers, and underscores (\_), but no spaces or other symbols.
3. Enter your Windows Live ID password.
4. Reenter the above password to confirm.
5. Select the **Secret Question** from the dropdown list.
6. Provide the answer to the above question in **Secret Answer**. Please remember this information, as this will be useful in reminding your password.
7. Enter the characters you see in the picture.
8. Click **Continue** to register yourself.

### What do I do if I forget my Windows Live ID password?




If you forget your Windows Live ID, you will have to reset it. To reset your Windows Live ID:

1. Visit <https://accountservices.passport.net/uiresetpw.srf?lc=1033>. The Sign in page opens as shown below.

**Match the Characters in the Picture** Help


To start resetting your password, type your e-mail address and the characters shown in the picture below. [Why?](#)

**E-mail address:**

**Picture:**     
The picture contains 6 characters.

**Characters:**

**Continue** **Cancel**

 **Windows Live ID**  
Works with Windows Live, MSN, and Microsoft Passport sites  
Account Services

2. Enter your email address to receive email instructions.
3. Enter the characters you see in the picture.
4. Click Continue to register yourself. The following page appears. Click **Send Message**. An email will be sent to your alternate email address with instructions on how to reset your password.

Microsoft  
Passport  
Network

Sign In

Account Services

Return to: Passport Network website

**Reset your password by e-mail**

To send an e-mail message to **youremail@msn.com**, click Send Message. The message will contain instructions to help you reset your password.

[How can I get e-mail at my Hotmail or MSN inbox if I forgot my password?](#)

Send Message Cancel

If you are unable to reset your Microsoft Windows Live ID, contact the Microsoft Windows Live ID support at [http://support.msn.com/eform.aspx?productKey=passport&page=support\\_home\\_options\\_form\\_byemail&ct=eformts](http://support.msn.com/eform.aspx?productKey=passport&page=support_home_options_form_byemail&ct=eformts)

**I do not recall registering for a Windows Live ID. However, when I try to register my e-mail address, it says that it is already registered. What should I do?**

Please follow the procedure below to resolve this issue:

1. Visit <https://accountservices.passport.net/uiresetpw.srf?lc=1033>
2. Reset your Microsoft Windows Live ID password by following the process mentioned in the previous answer.
3. Provide the Secret Answer to reset your Microsoft Windows Live ID

If you're not able to reset your Windows Live ID please do one of the following:

- You can either set up a new Windows Live ID
- Request further assistance from the Windows Live ID team.

When creating a new Windows Live ID account, it is recommended to use your valid e-mail address. Please note that it is not mandatory that the email address given by you matches with the email address given by you in your Microsoft Dynamics profile.

Please contact the Windows Live ID team at:

[http://support.msn.com/eform.aspx?productKey=passport&page=support\\_home\\_options\\_for\\_m\\_byemail&ct=eformts](http://support.msn.com/eform.aspx?productKey=passport&page=support_home_options_for_m_byemail&ct=eformts).

### **Can I view a list of my current Windows Live ID accounts?**

**No.** While you can set up several Windows Live ID accounts, these accounts are not linked together per person; therefore, the service does not offer the ability to view all Windows Live ID accounts you've created..

It is recommended to create only one Windows Live ID. With one Windows Live ID, you have a single e-mail address and password that you can use to sign in to participating sites and services.

You can create more than one Windows Live ID, however, each one must have a different e-mail address.

### **I created a new Windows Live ID to access my Microsoft Dynamics profile, but it does not appear in my drop-down list when I sign in to Windows Live ID. However, if I try to create it again, it says it's already been created. What now?**

The account name will not appear in the drop-down list on the sign-in page immediately after creating a Windows Live ID account.

You will have to enter you account information on first use of your account or any other time your account name doesn't appear in the sign-in page.

### **Every time I go to the Microsoft Dynamics extranet, I am automatically logged into my Windows Live ID. Is this secure?**

When you sign in to Windows Live ID, 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 Windows Live ID and any participating sites or services until you click **Sign Out**, even if you close the browser window or turn off the computer.

Microsoft recommends that you use this option only if you are the only person using the computer.

If you are not prompted for your Windows Live ID credentials when you access CustomerSource, you may have selected that checkbox. Alternatively, you may have signed into Windows Live ID through a different site or application.

## Associating Your Windows Live ID Account with your Microsoft Dynamics Profile

### 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 Windows Live ID account to all of these profiles; just click the link included in each one of the e-mails.

After you've associated your Windows Live ID to more than one Microsoft Dynamics profile, you will need to select which profile to use upon each visit to this extranet site. To switch between profiles, close your browser and open a new browser or sign out of Windows Live ID and sign in again.

### I've already associated one Windows Live ID account with my Microsoft Dynamics extranet profile. How can I switch my profile to use a different Windows Live ID account?

#### When in CustomerSource:

- a. Select the **My Account** tab from the left navigation pane,
- b. Select **Account Information**
- c. Select **Personal Profile**. Your personal profile is displayed.
- d. Verify that your e-mail address is correct.
- e. Click **Send Email Invite** to send yourself an invitation to CustomerSource.
- f. If you are editing this page, verify your e-mail address, save the profile, go back to the profile, and click on the button to **Send the invitation e-mail**. After **receiving** this e-mail, sign in to the Windows Live ID. You can also click on the link provided in the invitation e-mail.

### Is there a way for our organization to administer our own accounts?

Yes. With the implementation of Windows Live ID, individuals will no longer share login credentials and must set up individual accounts. In each organization, at least one person can create, modify, and delete other professional profiles – they are considered an administrator for the organization. With the implementation of Windows Live ID, the main contact (sometimes called the 'Bill To' contact) is the initial administrator.

The administrators sign in to CustomerSource and go to **My Account > Account Information > Our CustomerSource Accounts** where they can modify profiles and create new ones. They can also send invitation e-mail to fellow employees who are having difficulty associating their Windows Live ID to their CustomerSource profile.

Within the profiles, the administrator can also make other individuals administrators. While editing a profile, select the checkbox for **Can set up other professionals** and save the profile. This individual will now have the same rights.

### **I would like to associate my CustomerSource account with a different Windows Live ID account, how do I do this?**

To reset your CustomerSource account so it's the same as the Windows Live ID account you use for other websites, do the following:

1. Contact your CustomerSource administrator for your firm.
2. They need to login to CustomerSource, <https://mbs.microsoft.com/customersource>
3. Click **My Account** tab
4. From the left frame select **Account Information > CustomerSource Accounts**
5. Click **All Professionals**
6. Click on the link to your name.
7. Click the **Send invite E-mail** . An email invite with the subject 'Microsoft Dynamics PartnerSource Invitation' will be sent to you.
8. Click on the last link in the email to associate your Windows Live ID account to your VOICE account. Enter the appropriate Windows Live ID account that you use for other websites

Contact [voice@microsoft.com](mailto:voice@microsoft.com). If you have any problems or questions with this process.

### **Who do I contact if our Administrator is no longer with our organization?**

If your administrator is no longer with your organization, contact Synergy assistance in declaring a different individual as the administrator.

### **I set up a new professional for my organization, but they did not receive a user name/password. What do I do?**

Individuals will no longer receive a specific user name and password. Instead, every individual must be set up as a CustomerSource user and receive an invitation to access the site.

When this happens they will receive an e-mail with a personalized link for associating their Windows Live ID account to their Microsoft Dynamics profile.

If an individual in your organization didn't receive the e-mail to associate their Windows Live ID, review their profile again to verify that the e-mail address is correct.

If you edit the e-mail address, save the profile, go back to the profile, and click **Send the invitation e-mail**. The individual will receive an e-mail inviting them to CustomerSource and will be instructed to sign in to the Windows Live ID. They can also click on the link provided in the invitation e-mail.

### **I used to be able to setup other professionals at my firm, but now I can't. Why is that?**

You still have rights to setup other professionals just as you did before. However, the process has changed a little bit.

When you setup a professional you'll follow all the same steps, but then at the bottom of the profile screen you'll need to click **Send the invitation e-mail**.

The individual will receive an e-mail inviting them to CustomerSource and will be instructed to sign in to the Windows Live ID. They can also click on the link provided in the invitation e-mail.

### **How do I un-associate a Windows Live ID account from a VOICE or CustomerSource profile?**

In order to unassociate someone you'll need to update the incorrect profile in CustomerSource with the correct email address and then send the Windows Live ID Invite again by clicking on the Link **Windows Live ID** button after updating and saving the professional profile.