

## Step by step guide

### Planning Services

Planning Services provide structured, on-site consulting engagements from Microsoft partners to enable efficient deployments. You get on-site deployment planning help from Whistlebrook (a qualified Microsoft Partner) through a straight-forward voucher creation and redemption process.

- Sign in to the VLSC (<https://www.microsoft.com/licensing/servicecenter>).
- Select **Software Assurance** from the top menu.
- Click on **Planning Services**. This will take you to the Manage Software Assurance Benefits Page.
- Click on the **Licensed** for which you want to manage Planning Services. This will take you to the Benefit Summary page.
- Select **Planning Services**.
- Select the voucher type and service level (length of the engagement in days).
- Assign the Planning Services voucher to a project manager within your organization by entering their name and email address, and any special instructions.
- Click on **Confirm Voucher Assignment**.
- Once the voucher is created, click **Assign Voucher**. This takes you to a benefit details page confirming voucher information, including voucher status and expiration date.

The project manager will receive an email message that provides information about the benefit. The project manager can then schedule the Planning Services engagement with Whistlebrook.

When Whistlebrook confirms the engagement, the Planning Services voucher will show as "Reserved" in VLSC. When the engagement ends, Whistlebrook works directly with Microsoft to redeem the Planning Services voucher and receive payment.

**TIP:** You may increase the number of engagement days for Planning Services by converting unused Training Vouchers on a 3 -to-1 basis.

### Converting unused Training Voucher Days into Planning Services Days

You can easily convert your unused Training Voucher Days and use them to extend your Planning Services engagements. Simply use VLSC and follow these three basics steps:

#### Activate Training Vouchers

- Sign in to the VLSC (<https://www.microsoft.com/licensing/servicecenter>).
- Select **Software Assurance** from the top menu.
- Click on **Training Vouchers**. This will take you to the Manage Software Assurance Benefits Page.
- Click on the LicenseID for which you want to manage Training Vouchers. This will take you to the Benefit Summary page.
- Click on **Training Vouchers**.
- Select **Activate**.
- VLSC will report the number of Training Voucher Days available and confirm your Training Voucher Days (Benefits status) as "Active."

#### Convert Training Days to Planning Services Days

- From the Training Voucher Benefit Detail Page, select **Convert Training Days**.
- VLSC will prompt you to choose the number of Training Days you wish to convert and confirm the conversion action.
- Once the Training Days are converted, you may use VLSC to assign Planning Services Days to a project manager within your organization following the instruction below.

#### Assign Planning Services Days as outlined above.



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