Microsoft

FY23 Partner Incentive experience in Partner Center, Demo

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Agenda : FY23 Partner Incentive experience in Partner Center, Demo

- *Demo on Incentives overview and engagements*
- *Coop claims*
- *Workshop claims*

Co-op Claim Process

Co-op Overview

What is Co-op:

Cooperative Marketing Funds (Co-op) provide reimbursement of earned funds to participating partners to help differentiate and build channel awareness and preference for Microsoft products.

Participating programs:

- Mixed Reality ADD
- Mixed Reality ADR & DMP
- Surface PC and Surface Hub Authorized Device Distributor (ADD)
- Surface PC and Surface Hub Reseller
- Hosting
- Cloud Solution Provider (CSP) Indirect Provider
- Cloud Solution Provider (CSP) Indirect Reseller
- Cloud Solution Provider (CSP) Direct Bill Partner
- Microsoft Commerce Incentives (MCI)

Qualifying activities:

	Definition	**Qualifying activities**		
Demand Generation	Traditional advertising with broad reach that furthers the marketing and promotion of Microsoft offerings. Results and audience size are measurable.	• Print advertising • Migration Services • Best Practice Development • Solution Building with Third Parties	• Digital advertising • Direct mail/email/mobile SMS • Partner website and SEO • Microsoft syndicated content	• Multi-touch digital campaign • Social media marketing
Market Development	Marketing activities designed for a specific customer audience that support the sale of Microsoft software licenses.	• Telemarketing • Customer seminars and bootcamps • Tradeshows and expositions • Customer offers	• GTM Services • Internal incentives and SPIFFs • On-site champs • Proof of concept	• Employee purchase web set-up for customers
Partner Readiness	Expenses related to Microsoft training, technical certification, and program fees for internal partner personnel that promote the development of Microsoft technology expertise.	• Microsoft Cloud Partner Program participation • Microsoft exams and tuition • Internal training and floor days	• On Demand Training • Microsoft hosted conferences • Product seeding and demo units	

Co-op Overview

Earning and accruing Co-op:

Funds are earned and accrued semesterly through participating incentive programs to be used the following six-month period on eligible demand generation, market development, and partner readiness activities. The accrued funds must meet a minimum co-op earning threshold to be available for use.

Earning/Accrual Period	Usage Period	Claim Period Deadline
FY23 H1 July 2022 – December 2022*	January 2023 – June 2023	August 15, 2023
FY23 H2 January 2023 – June 2023	July 2023 – December 2023	February 15, 2024
FY23 H1 July 2023 – December 2023	January 2024 – June 2024	August 15, 2024

* Microsoft Commerce Incentives (MCI) program begins accruing FY23 H1 co-op funds in November 2022 for a total of November and December 2022 earnings.

At the close of each six (6) month earning period, for partners exceeding the minimum co-op earning threshold, Microsoft will deposit the funds into the Partner Center claims tool for use in the upcoming fiscal semester. Partners that do not exceed the co-op threshold will not qualify to use funds and will receive the withheld co-op funds as part of their rebate payment in the following payment cycle.

Minimum Threshold:

Threshold	Programs
$1,500 USD	Mixed Reality ADD, Mixed Reality ADR & DMP, Surface PC and Surface Hub Authorized Device Distributor (ADD), and Surface PC and Surface Hub Reseller, Hosting
$10,000 USD	Cloud Solution Provider (CSP) Indirect Reseller, Cloud Solution Provider (CSP) Direct Bill Partner, Cloud Solution Provider (CSP) Indirect Provider, Microsoft Commerce Incentives (MCI) – new commerce CSP engagements

Bank and Tax:
Partners must [complete a bank and tax profile](#) for the incentive program(s) co-op earning type in Partner Center. (Note, this is separate from rebate earnings.)
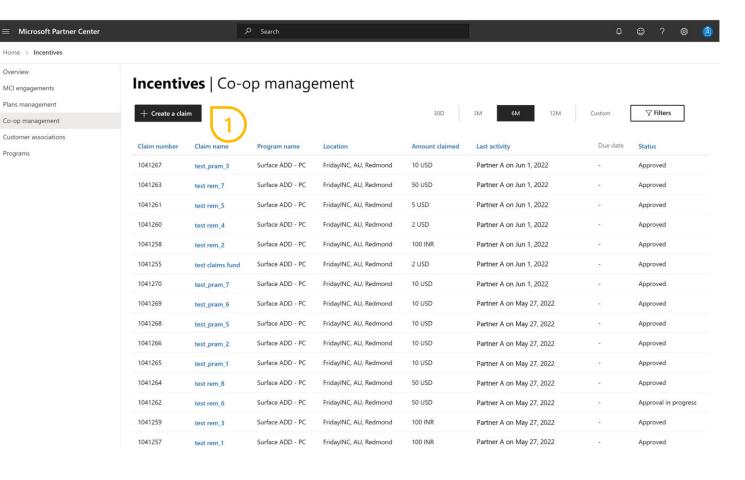
Co-op Claim Process

Making a Claim:

Once eligible activities have been executed and POE requirements gathered, co-op claims should be made within 45 days of activity completion and must be submitted by the period claim deadline.
- To assist in the claiming process:

  - Reference the Co-op Claiming Experience in Partner Center deck which outlines the claiming process.

    - *Starting June 1, 2022, Microsoft is simplifying POE requirements once more by reducing the requirements to submit POE for low dollar claims. During the claim submission in Partner Center, if your claim does not require POE for submission, you will be notified within the tool. This update aims to reduce, simplify, and streamline POE requirements and processes, while ensuring that we maintain the same level of protection for Microsoft and our partners.*
    - DO NOT create test claims as this is a production environment and will be applied against your existing co-op balance.

  - Manage your co-op claim(s) to resolution.

    - Partners have 45 days after the co-op claiming deadline to close out any claims with a status of "Pending POE," "Request More Proof," or "Action required."
      - Remember to resubmit the claim after updating. If not resubmitted, will not be sent back to POE validation team.
    - If any such claims are not closed out, the claim will be moved to a status of "Non-compliant" and payment will not be processed.
    - Unsuccessful co-op claims and unused funds will be forfeited at the end of the grace period for claims submission (45 days after the end of the usage period).

Earning/Accrual Period	Usage Period	Claim Period Deadline	Claim Resolution Deadline
FY23 H1 July 2022 – December 2022*	January 2023 – June 2023	August 15, 2023	September 30, 2023
FY23 H2 January 2023 – June 2023	July 2023 – December 2023	February 15, 2024	March 31, 2024
FY23 H1 July 2023 – December 2023	January 2024 – June 2024	August 15, 2024	September 30, 2024

Creating a claim

To create a claim, partners need to follow these steps:
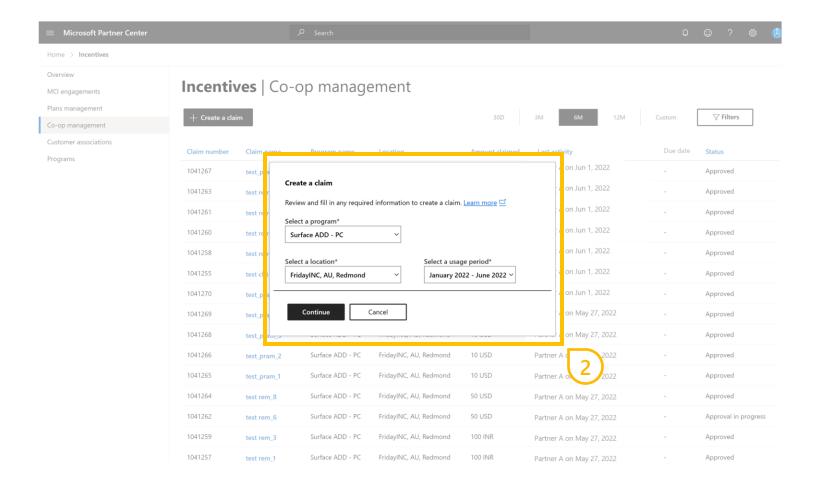
1. Select **Create a claim.**

Creating a claim

To create a claim, partners need to follow these steps:

2. A new window opens.
    Filling out these details will help to determine what your available co-op is for the specific activity.

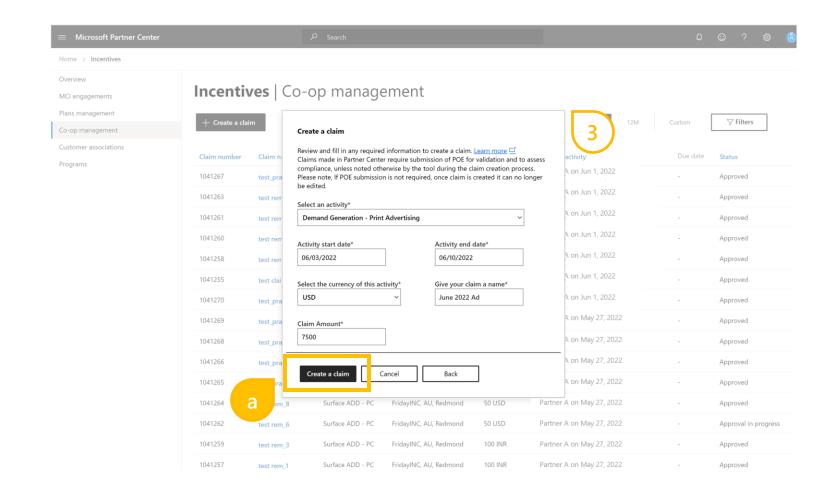   Once you complete all the required information correctly, the **Continue** button becomes available.

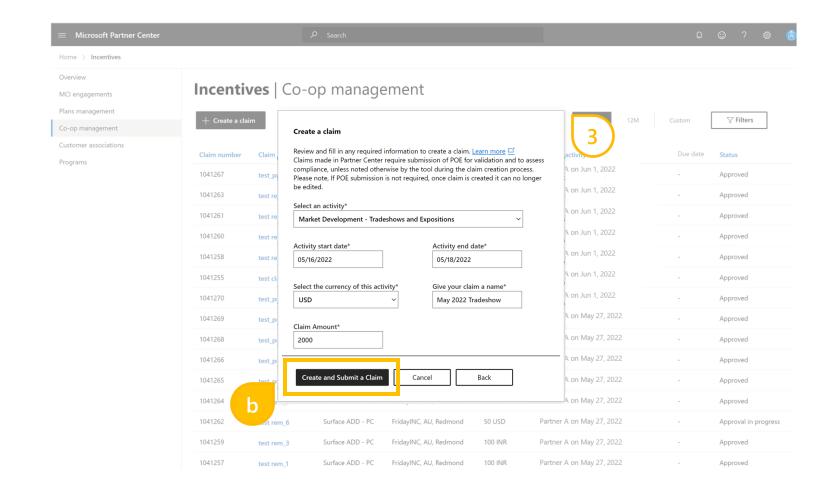# Creating a claim

To create a claim, partners need to follow these steps:

3. A new window opens.
   Select your activity, activity dates, partner currency, name your claim, and enter claim amount in selected currency.

   A. Once you complete all the required information, the **Create a claim** button becomes available.

   B. If the button **Create and Submit a Claim** becomes available, proof of execution (POE) is not required to submit the claim. (See slide 14).

4. Select **Create claim** to proceed.
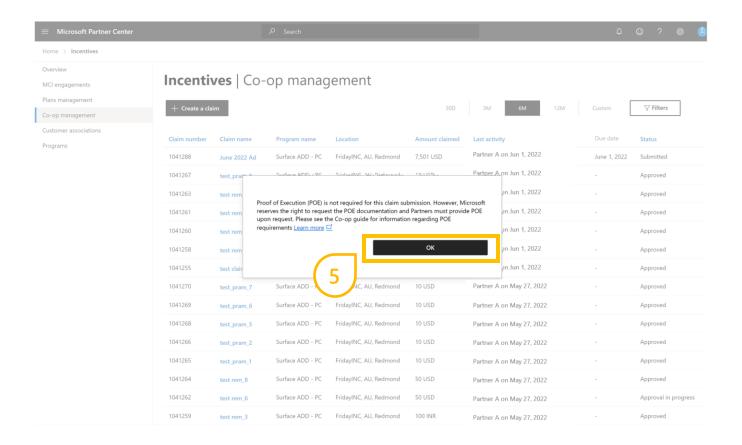
Creating a claim

Continued from slide 11. To create a claim, partners need to follow these steps:

3. A new window opens.
   Select your activity, activity dates, partner currency, name your claim, and enter claim amount in selected currency.

   A. Once you complete all the required information, the **Create a claim** button becomes available.

   B. If the button **Create and Submit a Claim** becomes available, proof of execution (POE) is not required to submit the claim.

4. Select **Create and submit a Claim** to proceed.

Submitting a claim

To submit a claim follow these steps:

5. Once the claim has been submitted and **OK** button selected, you will be returned to the main landing page. The status of the claim will be updated to **Approval in Progress.**

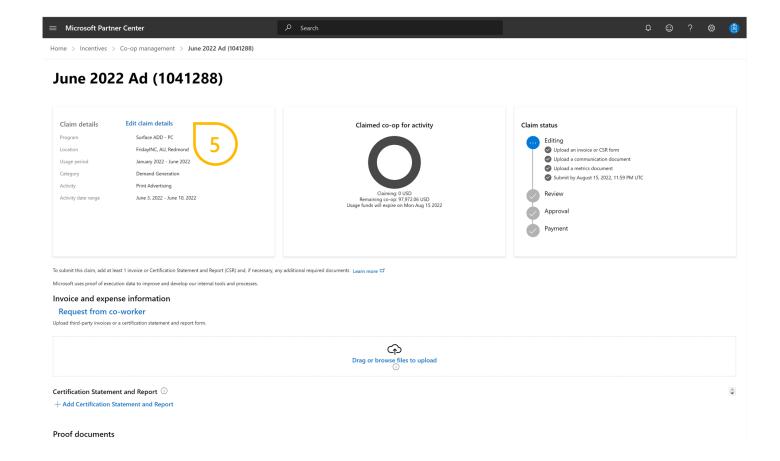   Once the **OK** button has been selected, claim is no longer editable.

Creating a claim

To create a claim, partners need to follow these steps:

5. The new claim page displays. You can see all the information you have just entered related to the claim.

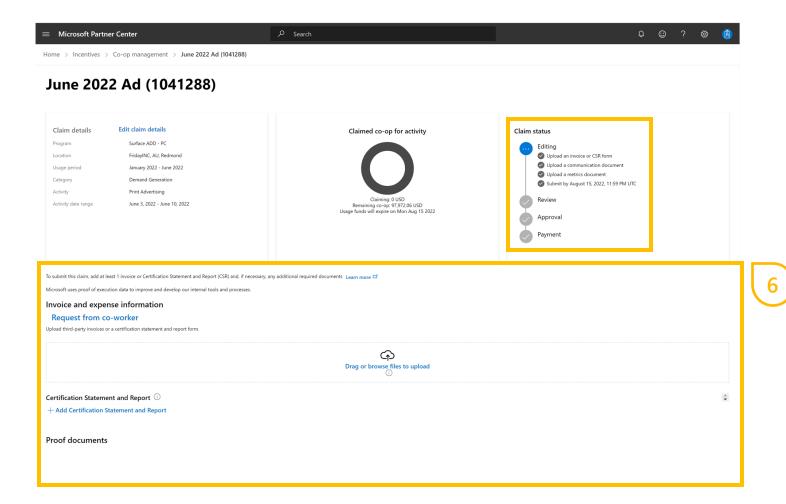   If you select **Edit** you can change some details of your claim like:

   - Name of the claim
   - Activity
   - Activity date range

Creating a claim

To create a claim, partners need to follow these steps:

6. You can now upload the supporting documentation for the claim.

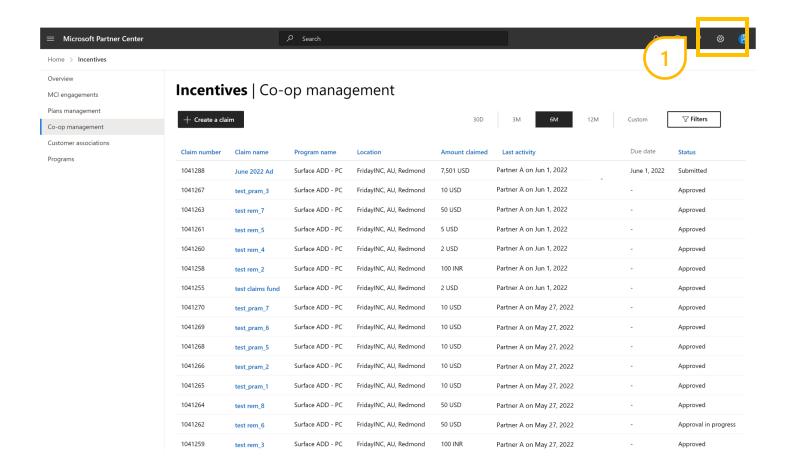   The **Claim Status** diagram on the top right, tells you what stage your claim is at.

Managing a claim

To manage a claim follow these steps:

1. At the top right hand side, notification icons will alert you on required actions for a claim.

   For example:
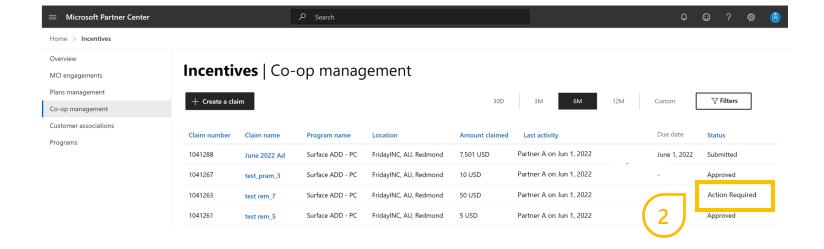   - When a draft claim is due to expire soon.
   - When action is required on an already submitted claim.

Managing a claim

To manage a claim follow these steps:

2. Within the status column, you will also be alerted of any action to be taken in regards to an individual claim.
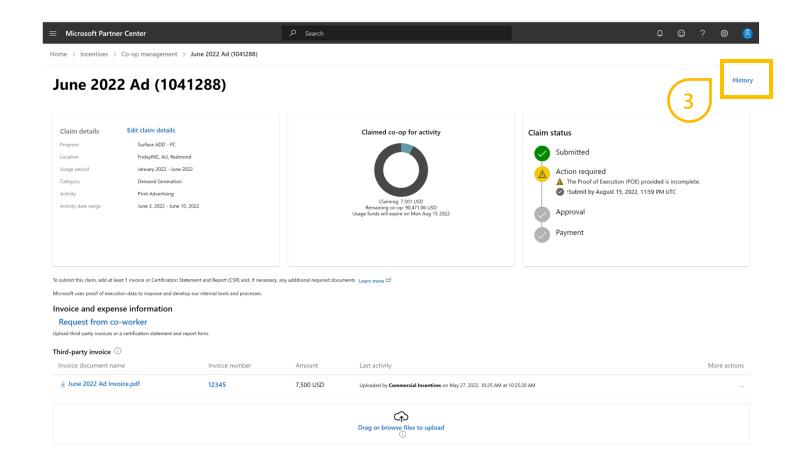Selecting the claim name will offer more information.

Managing a claim

To manage a claim follow these steps:

3. The claims status section and the history section will show what action is required.

   You are now able to see the action you need to take to continue with the claim. Once the required action is complete, the claim will be available to resubmit.

Thank you!