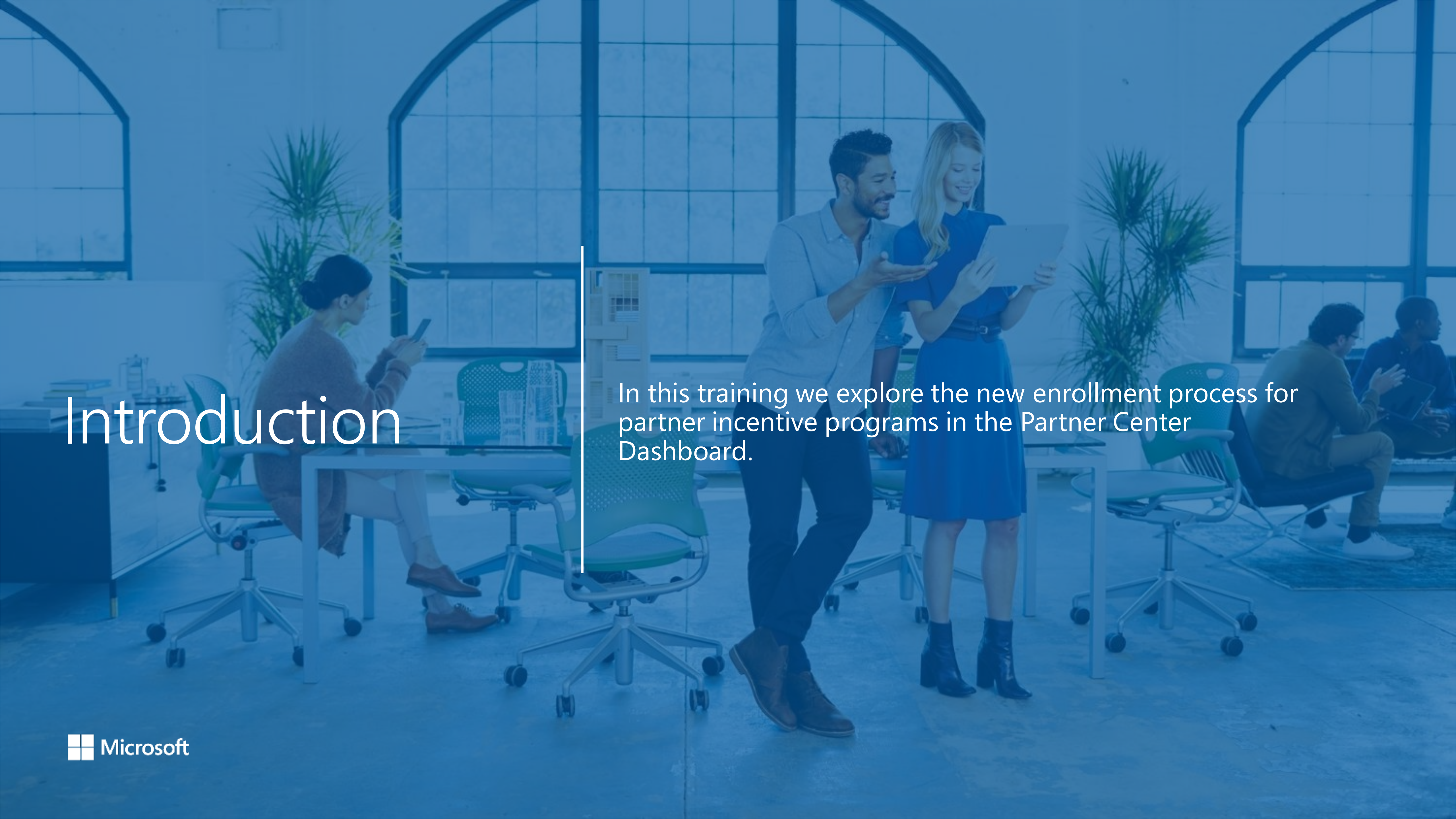
Microsoft

Modern enrollment

Enrollment in incentives programs in Partner Center



Introduction

In this training we explore the new enrollment process for partner incentive programs in the Partner Center Dashboard.

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Objectives

By the end of this training, you will be able to carry out the:

- Creation of Incentive Administrator(s) and Users.
- Completion of incentive program enrollment.
- Access help and support.

Contents

A new incentive experience

Why a new incentive experience?

In Microsoft's efforts to make your incentives experience easier, we are moving all incentive programs to a single platform called the **Partner Center Dashboard**.

This will be a centralized location where you can:

- View all your incentives earnings and payments.
- Discover new eligible incentive opportunities where applicable.
- Manage your claims where applicable.

As part of this, partners enrolling in a new incentive program will have a new and more streamlined experience through Partner Center Dashboard.

The modern enrollment process

Microsoft

The modern enrollment process

There are two steps involved in the modern enrollment process that require action on your part:

1. User management. This includes the set-up of the Incentive Administrator and user permissions in the Partner Center Dashboard.
2. Receiving your invite and enrolling in your incentive program.

Please note that in order to experience modern incentives on the Partner Center Dashboard, you must either:

- Migrate your existing Microsoft Partner Network (MPN) membership from Partner Membership Center (PMC) to Partner Center.
- Set up a new membership in Partner Center.

Step 1 – User management

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User management

To enroll in an incentive program in the Partner Center Dashboard, the Global Administrator or Account Administrator needs to set up your company users. They must assign an Incentive Administrator(s) and grant Incentive User permissions.

User management is fully integrated into the Partner Center Dashboard. This allows for the:

- Addition of both the Incentive Administrator and user roles.
- Editing of permissions.
- Deletion of user profiles.

For more details on partner accounts, roles, and permissions – see the "Learn more" articles on the Partner Center Dashboard.

The Global Administrator can also set up your company users through the Azure Active Directory (AAD).

User management

Once your organization is eligible for incentives, the following users will receive an incentive enrollment invite:

- Global Administrator
- Account Administrator
- Incentive Administrator

The Incentive Administrator is the only user who can enroll in incentive programs. If there is no Incentive Administrator for your particular location, the Global Administrator and Account Administrator must assign one. The Incentive Administrator must be assigned for the location MPN IDs.

The Global Administrator or Account Administrator can also be assigned as the Incentive Administrator.

We will run through the process for assigning an Incentive Administrator in the next slides.

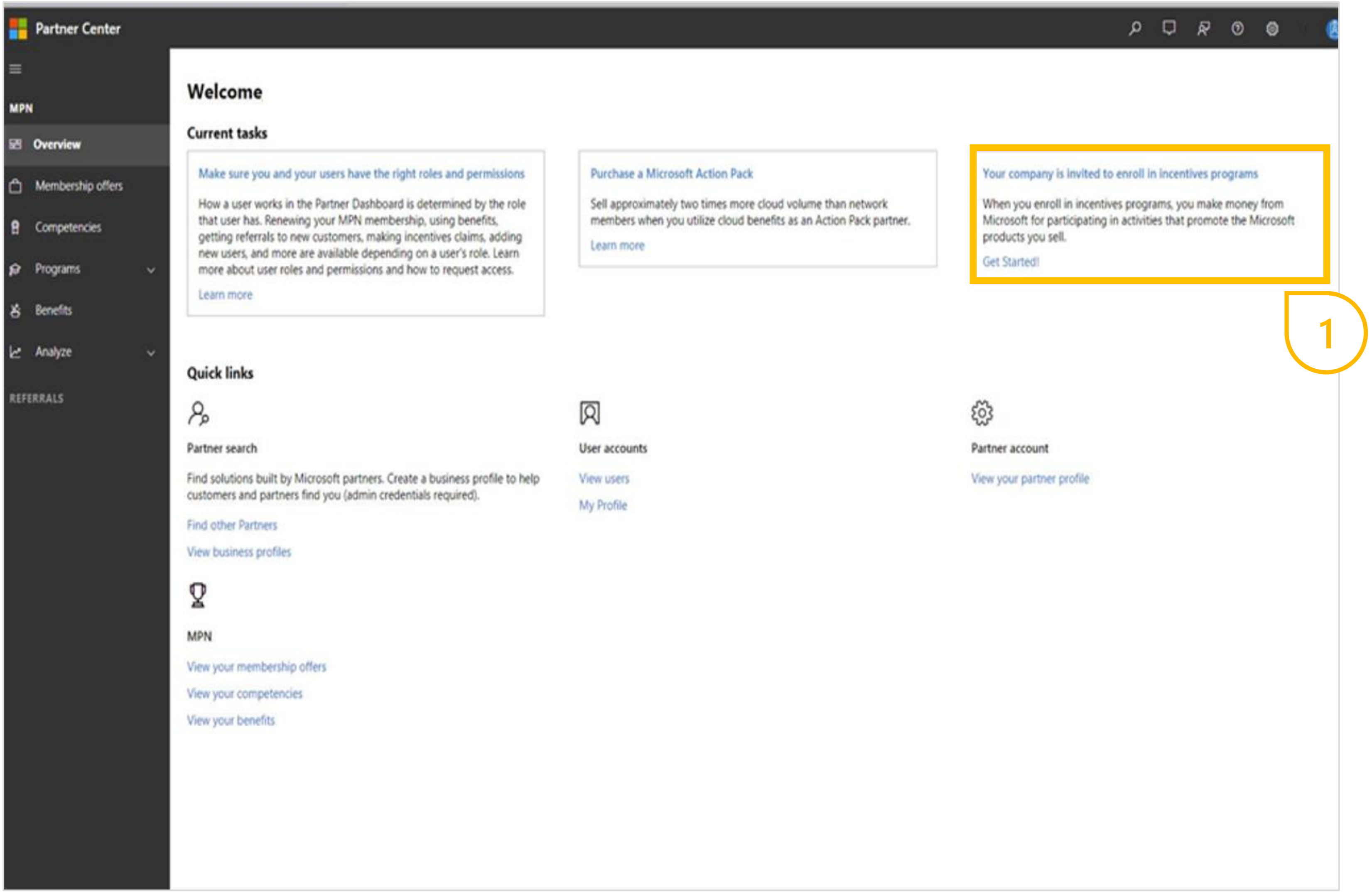
User management

To manage users within the Partner Center Dashboard, you need to follow these steps.

When the organization is invited to enroll ***in an incentive program for the first time*** within Partner Center Dashboard, the Global Administrator or Account Administrator sees an action in the Current Tasks section of the dashboard.

(Please note that this section will disappear once it has been selected.)

1. Select **Get Started** to open the **User management** screen.



Note

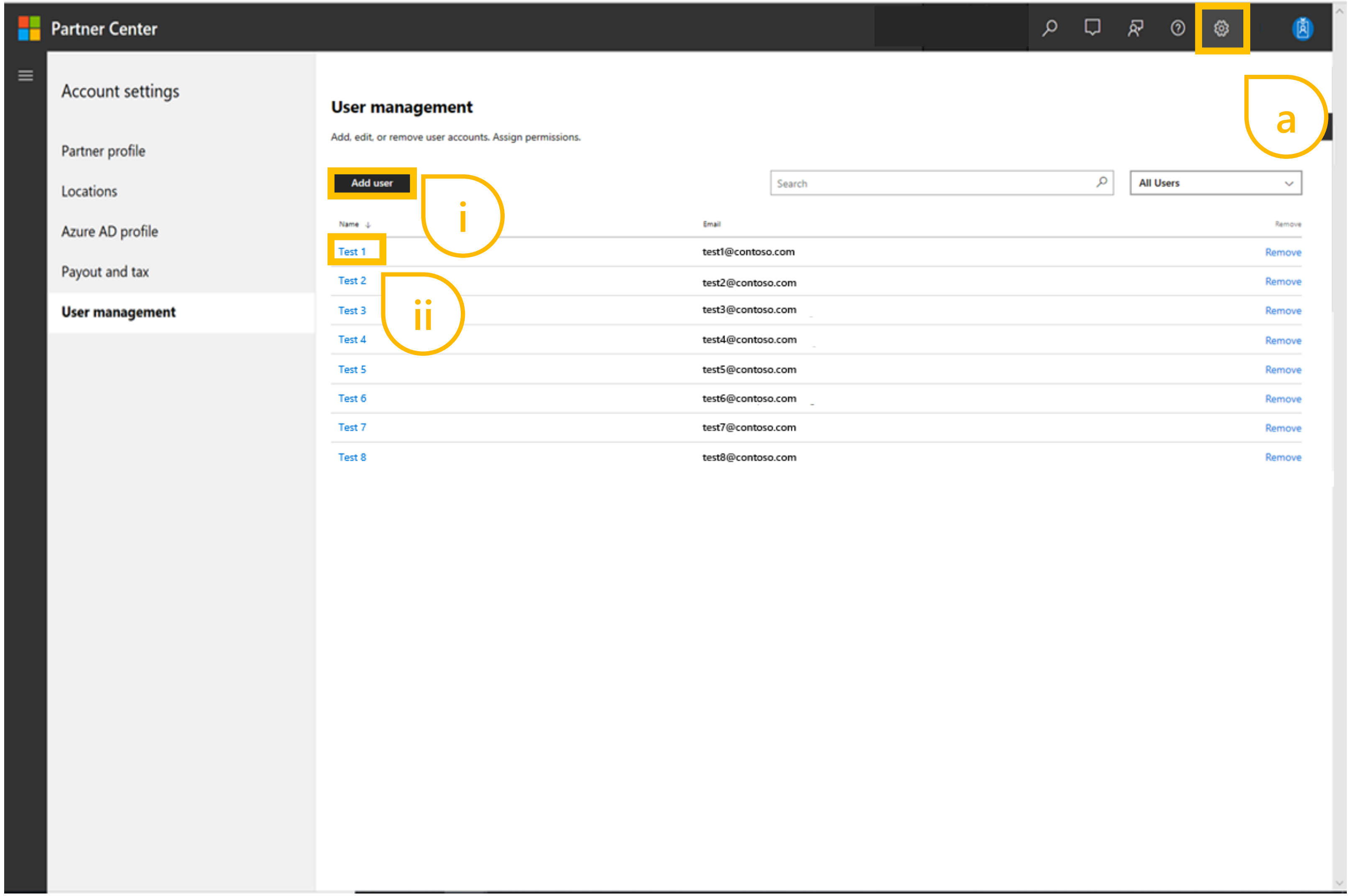
Only users with the permissions of an "Incentive Administrator" can enroll in an incentive program. The Global Administrator must assign these permissions to either existing or new users.

User management

To manage users within the Partner Center Dashboard, you need to follow these steps.

- The User management screen opens.
- Here, the Global Administrator can either:
    1. Add a new user or
    2. Edit the roles and permissions of existing users by selecting a hyperlinked name.

a. The **User management** screen can be accessed at any time by selecting the cog wheel icon at the top right of the screen, selecting **Account settings** and then **User management.**



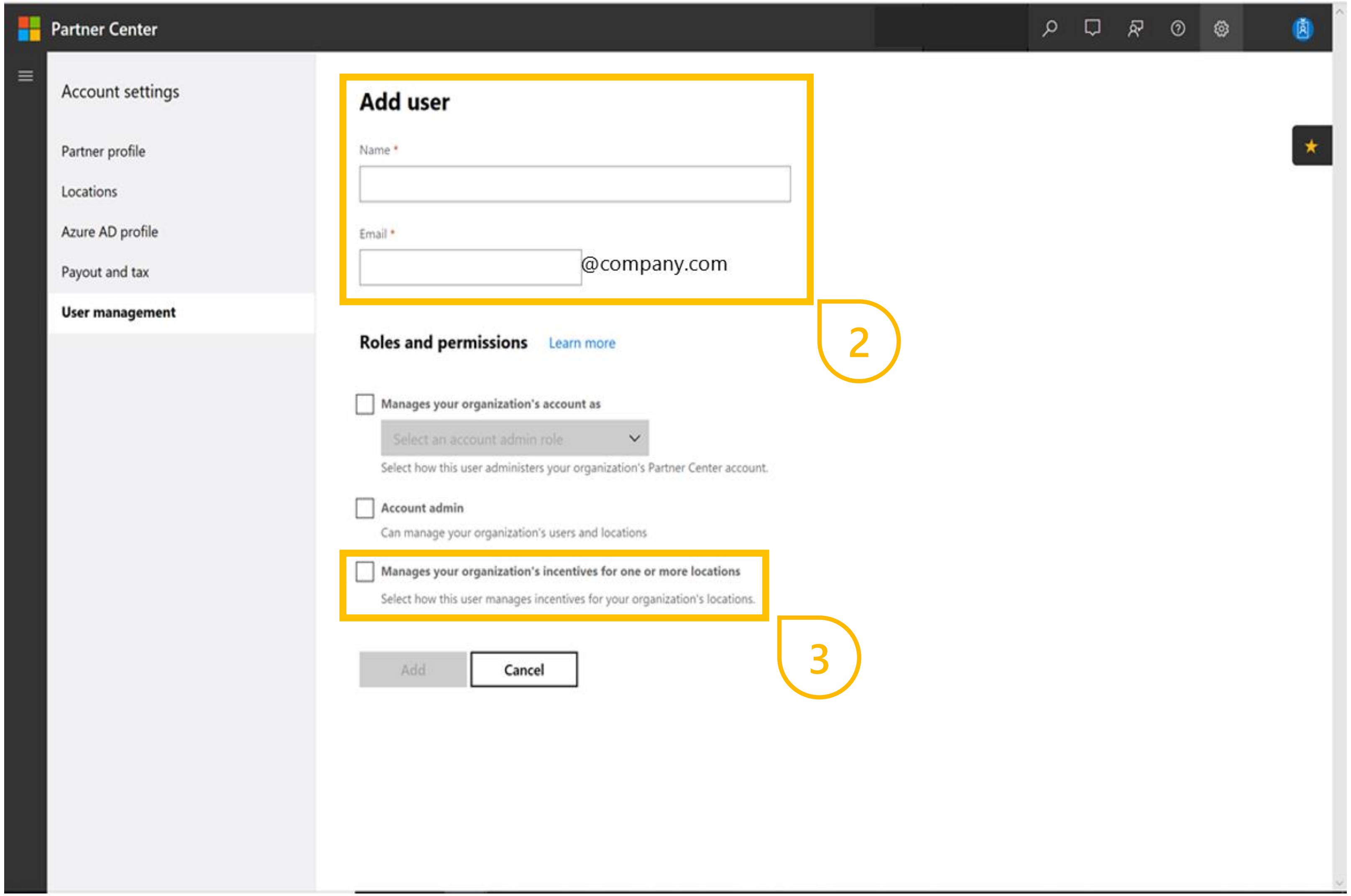
User management

To manage users within the Partner Center Dashboard, you need to follow these steps.

2. To add a new user – enter the name and email address. The domain is prepopulated.

- Once the users details are entered, their incentive permissions can then be defined.

3. To do this the Global Administrator selects **Manage your organization's incentives for one or more locations.**



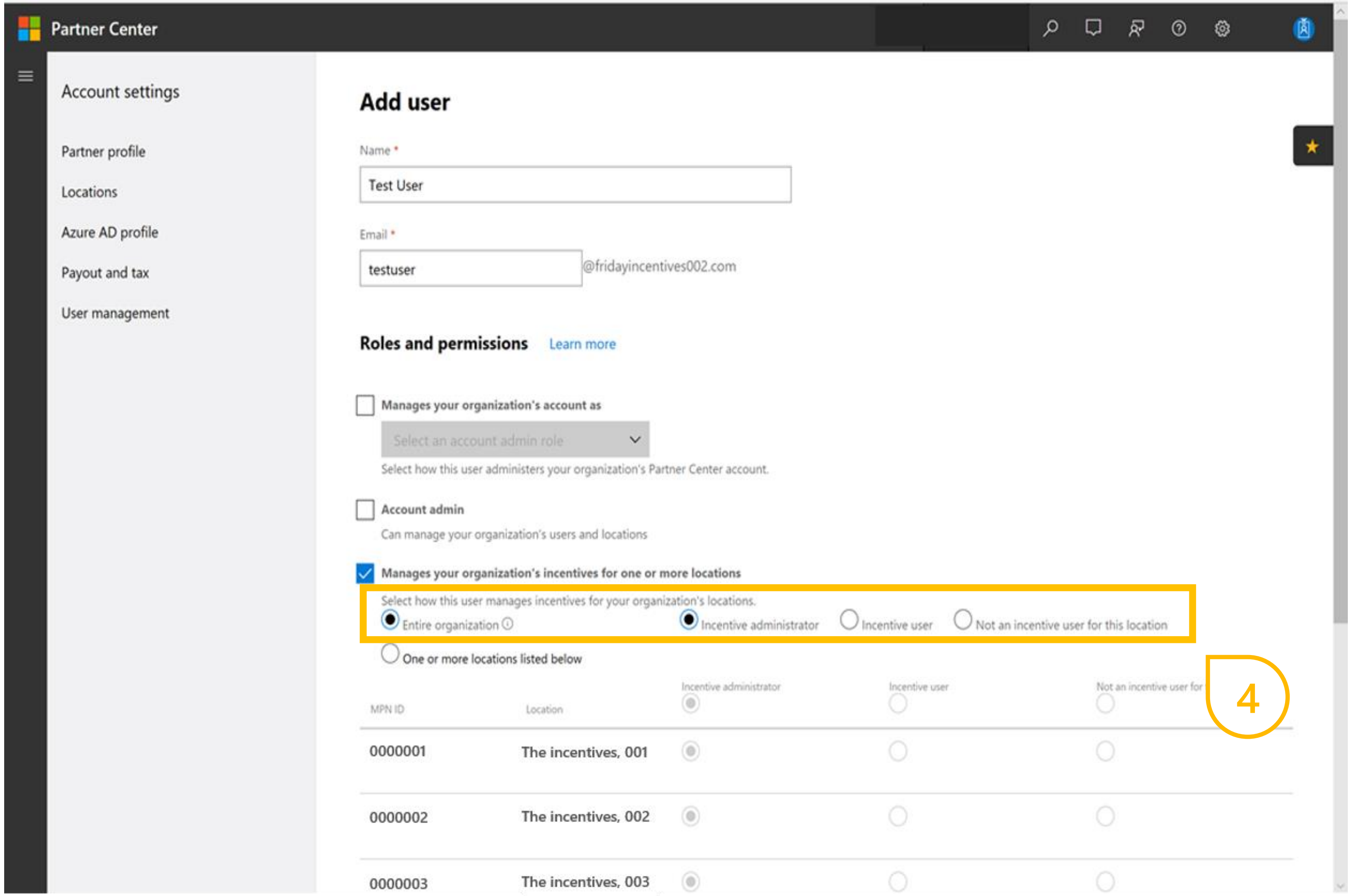
User management

To manage users within the Partner Center Dashboard, you need to follow these steps.

The screen expands allowing the incentive permissions to be applied.

4. A user can be given either Incentive Administrator or Incentive User permissions at:
   - An entire organization level.
   - At a location level.
   - At a program level.

To apply a permission level, the Global Administrator selects the radio button next to the applicable option.



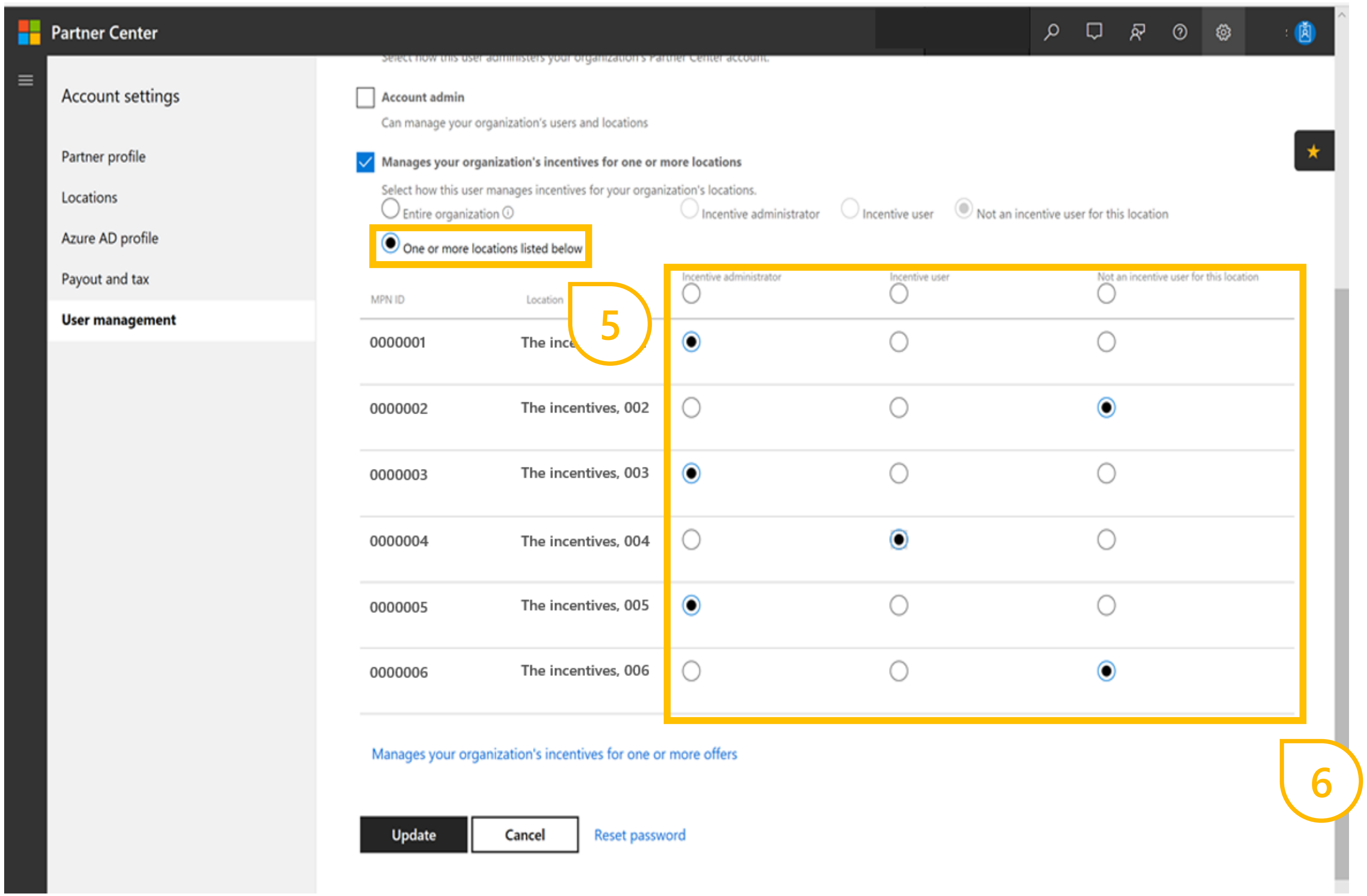
Note

For more information on the various user permissions visit the "Learn More" articles.

User management

To manage users within the Partner Center Dashboard, you need to follow these steps.

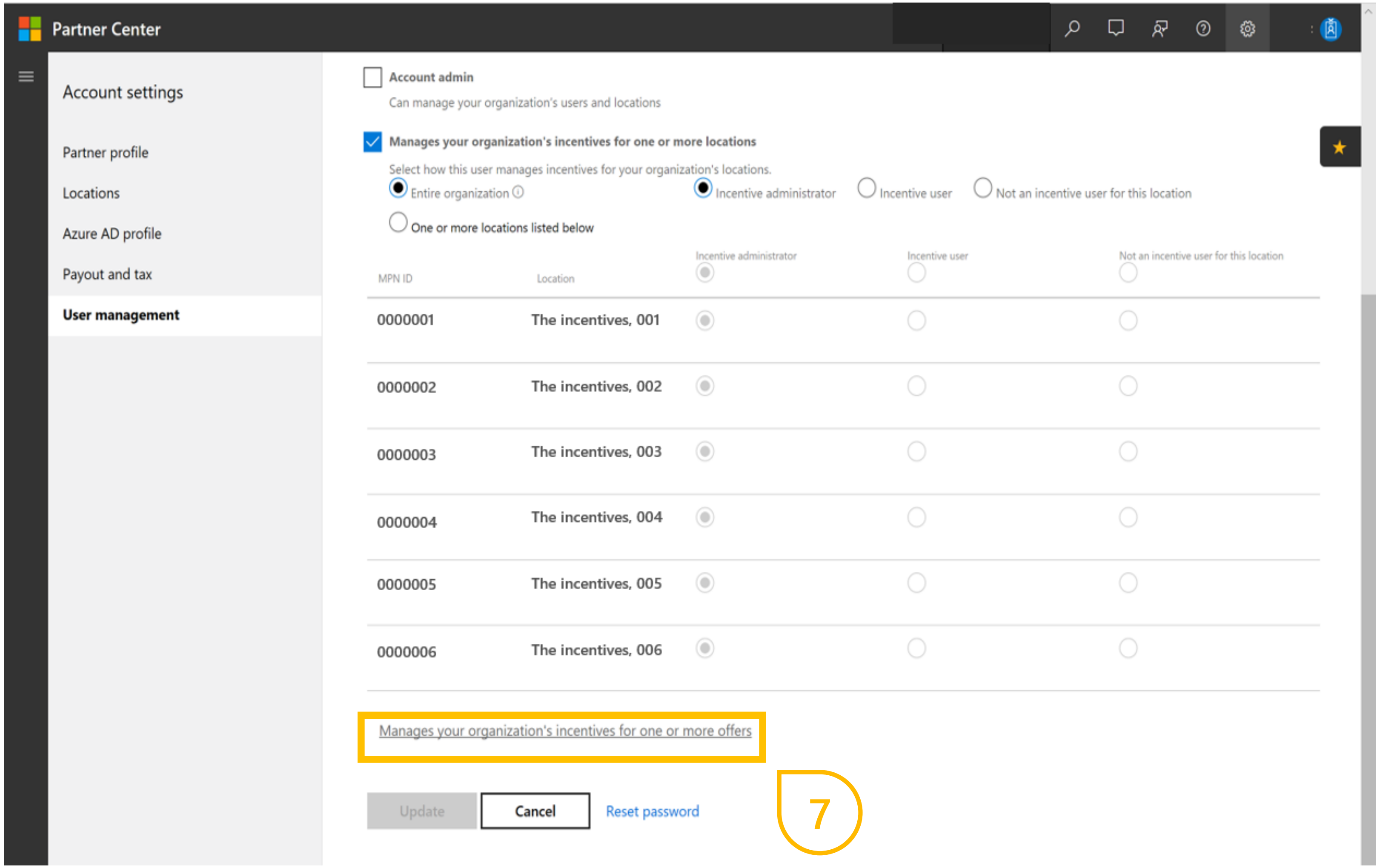
5. The functionality to offer permissions for one or more locations is also supported.
    - To apply a permission level select the radio button next to **One or more locations listed below.**
6. Then select the relevant role next to each location.



User management

To manage users within the Partner Center Dashboard, you need to follow these steps.

7. Further customization of how your incentives are configured at a program level is also available from the **Manage your organization's incentives for one or more offers**.



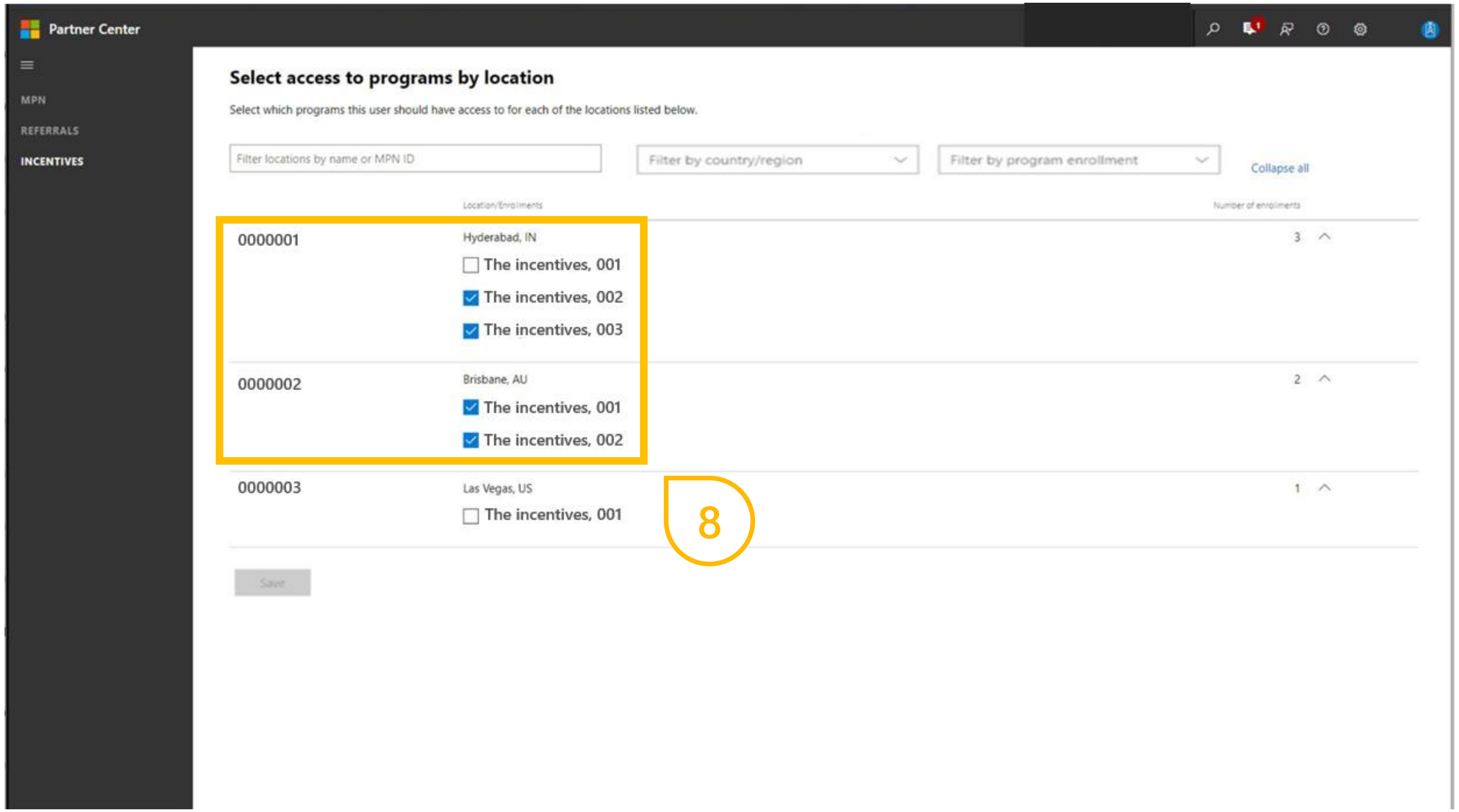
Note

Locations need to be saved before you can update the program details.

User management

To manage users within the Partner Center Dashboard, you need to follow these steps.

8. This functionality allows the Global Administrator to restrict the incentive programs within the locations that the Incentive Administrator or User should access.



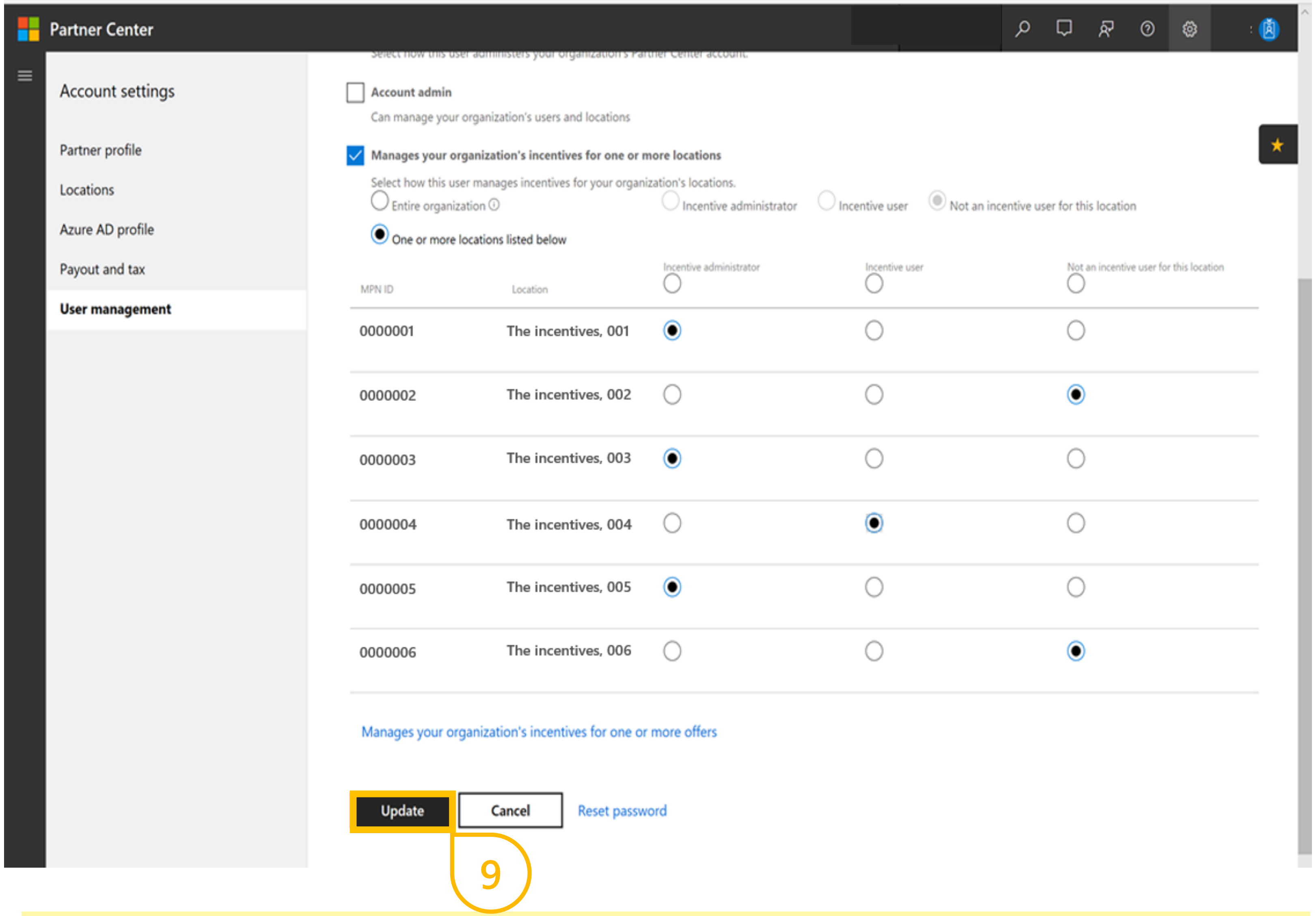
Note

Locations need to be saved before you can update the program details.

User management

To manage users within the Partner Center Dashboard, you need to follow these steps.

9. Select **Update** to save the changes.
    - If these changes are being applied to an existing user – there is no further action required and within a few minutes the changes will be applied.



Note

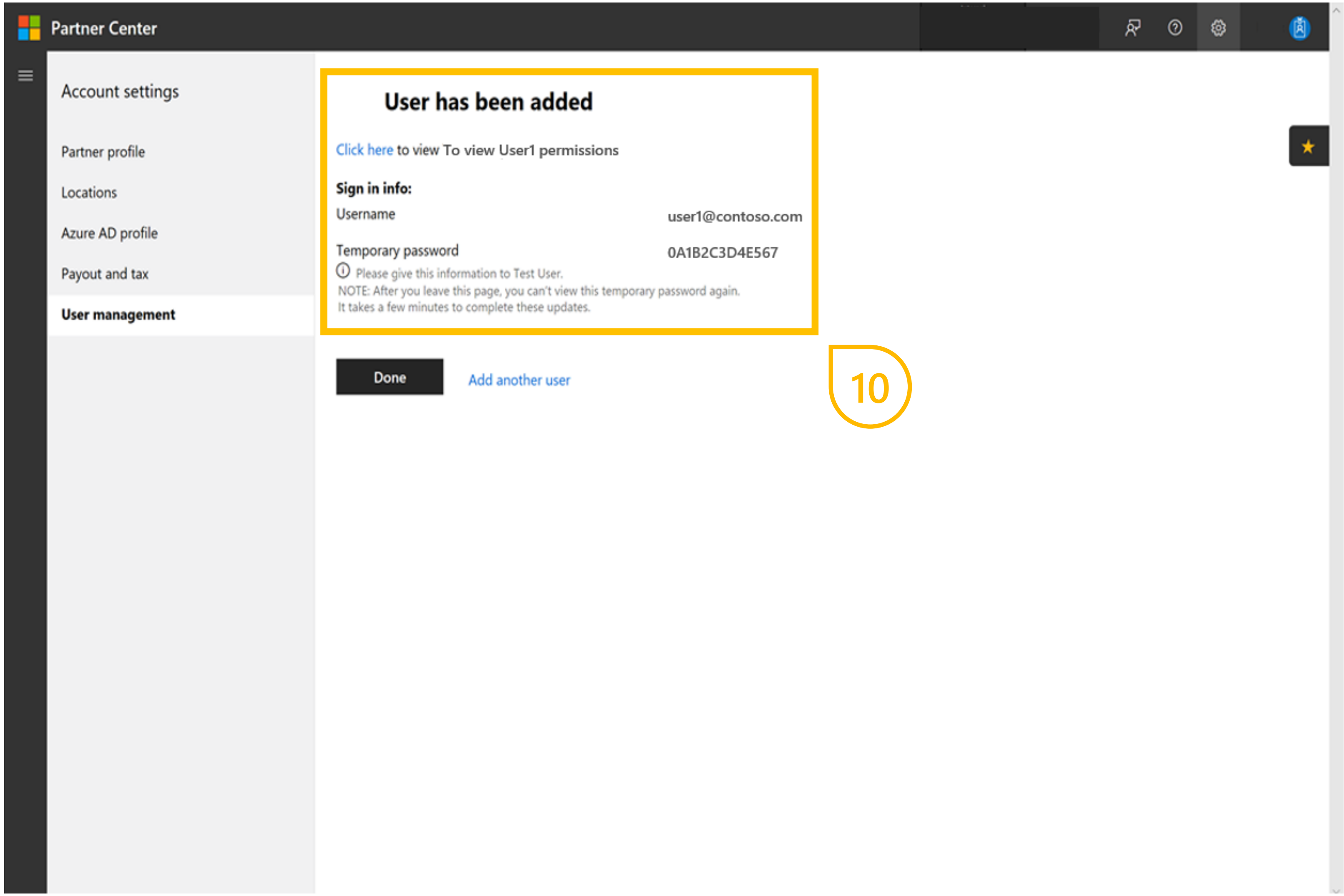
In the above screen, if a new user is being added – **"Update"** will be replaced with the word **"Add".**

User management

To manage users within the Partner Center Dashboard, you need to follow these steps.

If a new user is added, an additional screen is shown.

10. This screen will detail confirmation of the user being added and a temporary password. This will need to be copied and sent to the user.
    - The new user would use this temporary password when logging in to Partner Center Dashboard for the first time. They will then be prompted to create a new password.



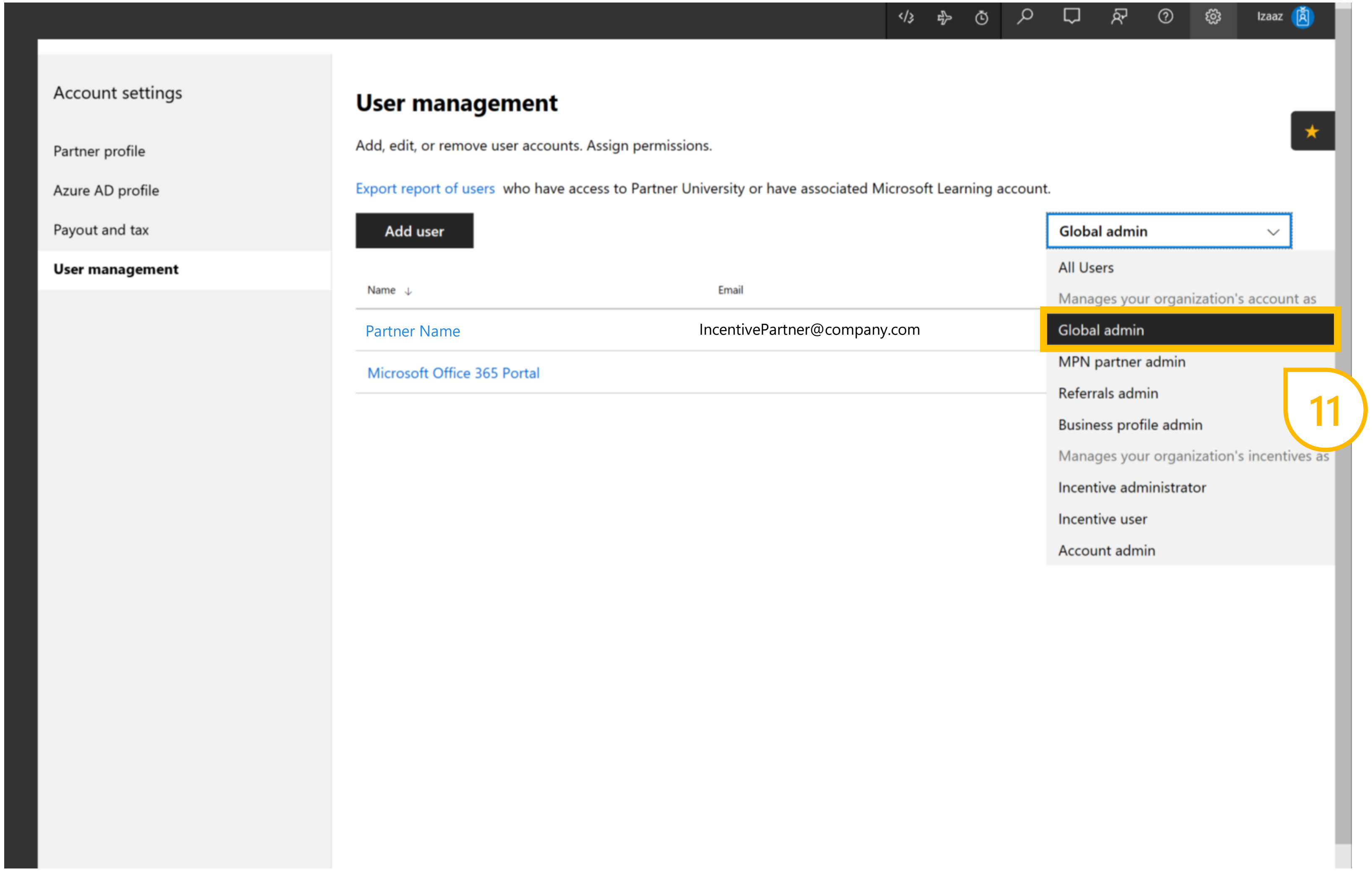
Note

After you leave this page, the temporary password cannot be viewed again.

User management

To manage users within the Partner Center Dashboard, you need to follow these steps.

11. You can search for a user by their permission type. Use the dropdown arrow to select and view the **Global admin** for your organization.



Step 2 - Incentive program enrollment

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The enrollment process

The Incentive Administrator is the only user that can enroll in an incentive program. They will receive an invite to enroll once they are eligible for incentives.

The Incentive Administrator should select Get Started from their invite. This will direct them to the Partner Center Dashboard.

To enroll in an incentive program, an Incentive Administrator needs to follow the steps on the following slides.

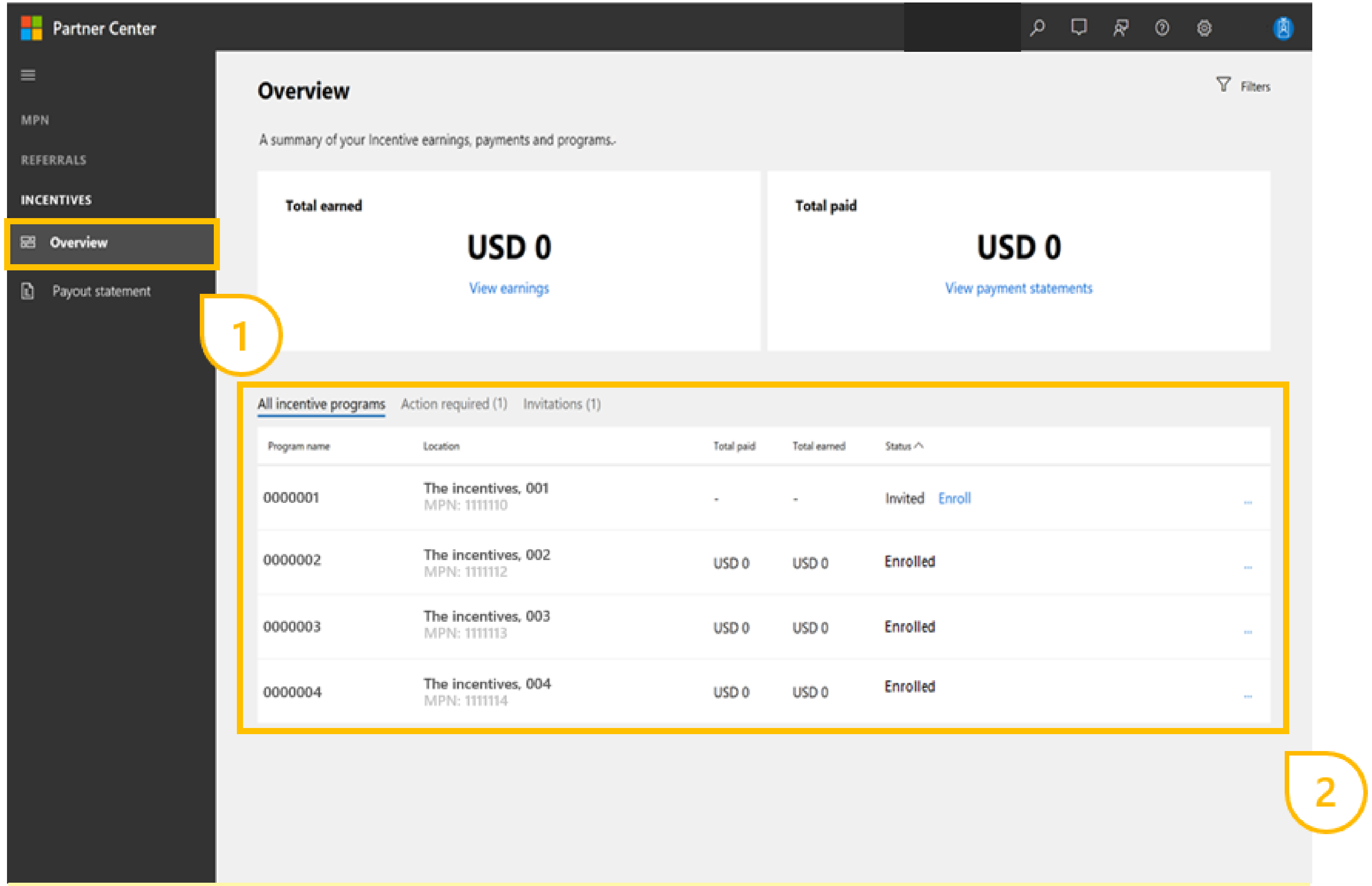
Note

You must use Partner Center credentials to login and get started.

The enrollment process

To enroll in an incentive program, an Incentive Administrator needs to follow these steps.

1. Log into the Partner Center Dashboard and navigate to the **Incentives** section on the left navigation bar. Select **Overview** to show all incentive program invitations.
2. The dashboard will also show any existing enrollments (if there are any).



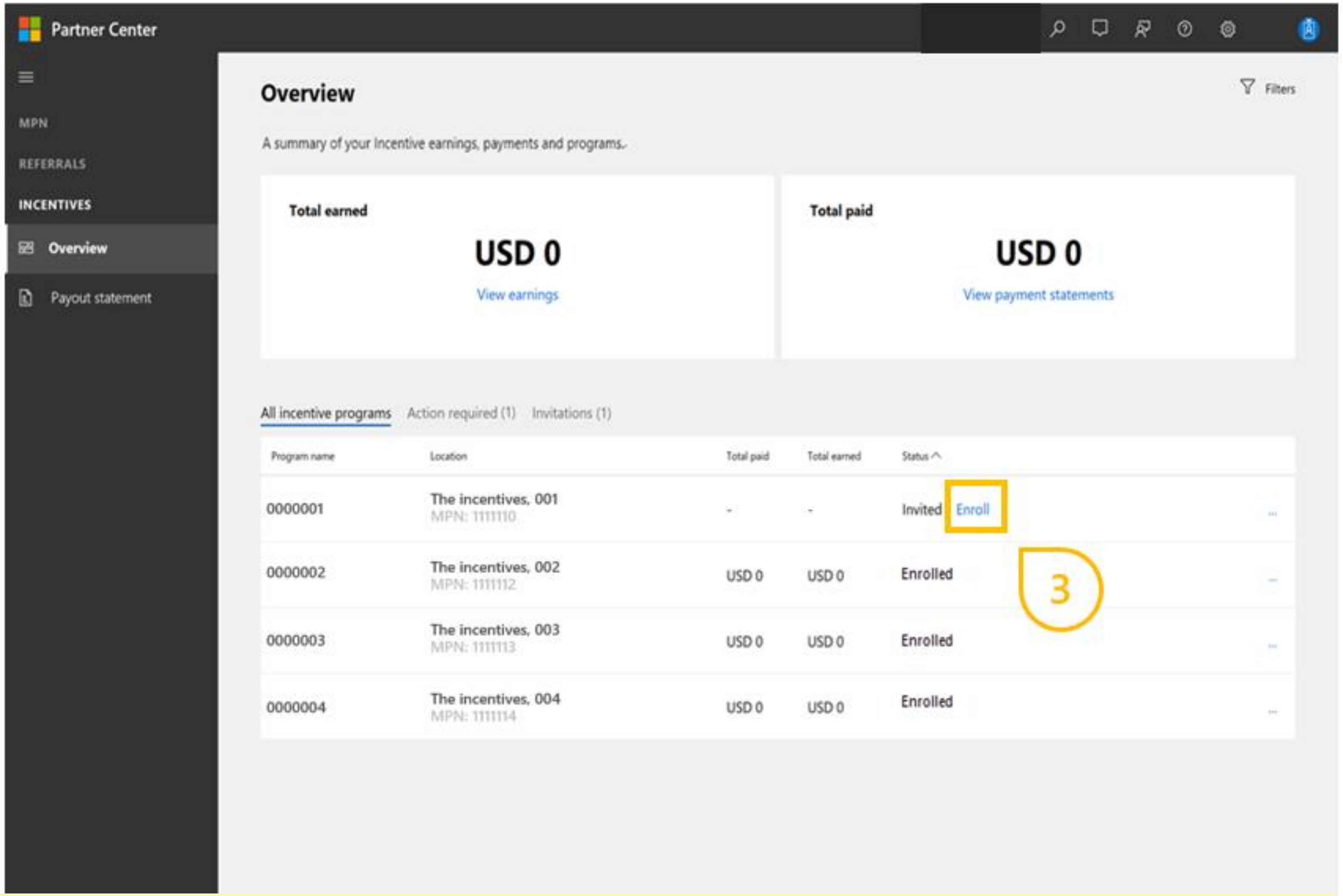
Note

The Incentives section in the navigation menu will only be visible to Incentive Administrators and Incentive Users. They will also see a Payout Statement tab that offers incentive reporting. This will be divided into three sections; Summary, Earnings, and Payments.

The enrollment process

To enroll in an incentive program, an Incentive Administrator needs to follow these steps.

3. To start the enrollment process, select the **Enroll** option for the specific program you wish to enroll in.



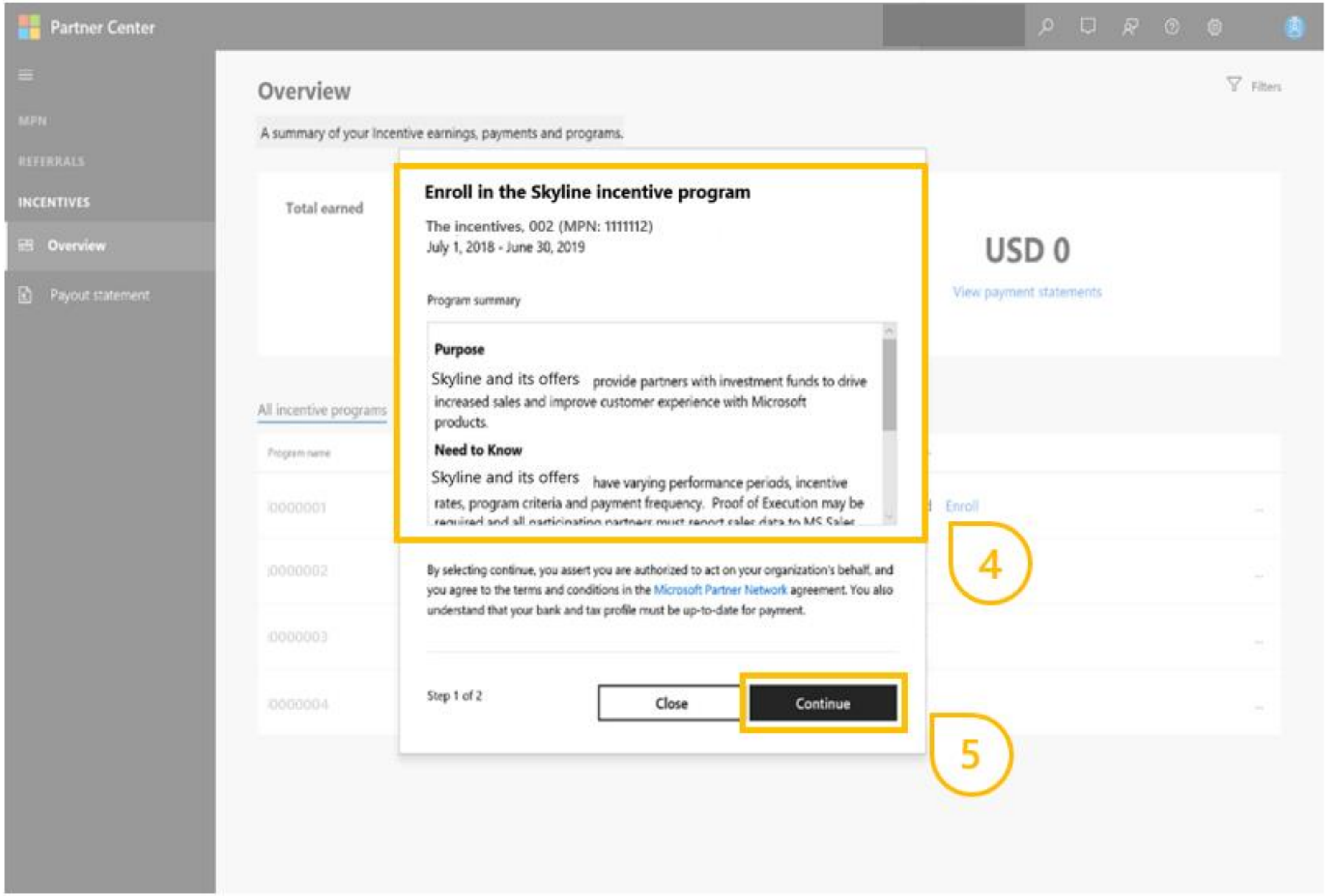
Note

A program not yet enrolled will hold the status of invited and an **Enroll** hyperlink will be available. This link will remain until the Incentive Administrator has started the enrollment process.

The enrollment process

To enroll in an incentive program, an Incentive Administrator needs to follow these steps.

4. You will be presented with a confirmation of the incentive program, purpose, and a program summary.
5. Select **Continue** to proceed with the enrollment.



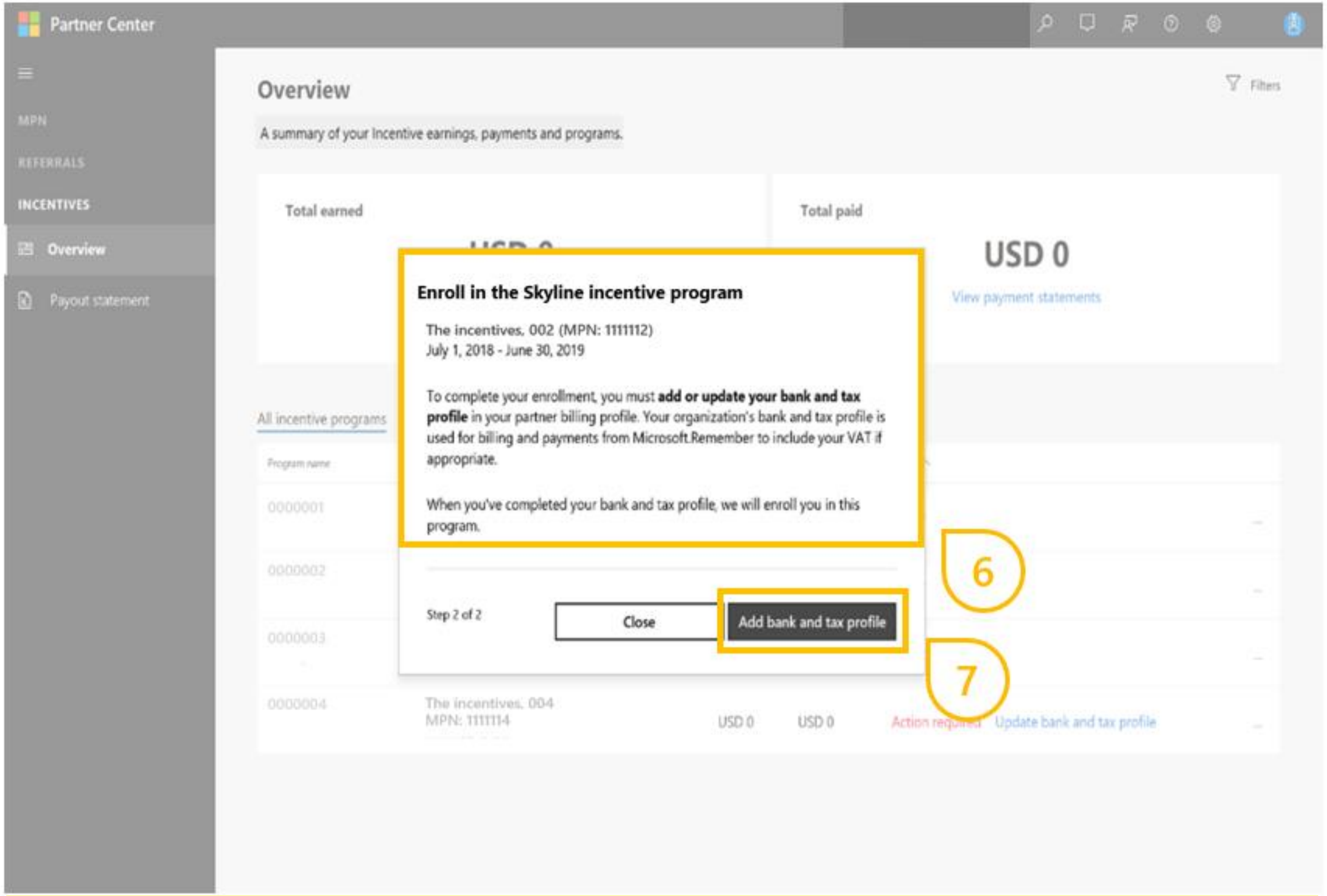
The enrollment process

To enroll in an incentive program, an Incentive Administrator needs to follow these steps.

6. Additional information about the requirement for adding/updating bank and tax details is given.

   This is a requirement for enrollment completion.

7. Select **Add bank and tax profile** to progress to the next step.



Note

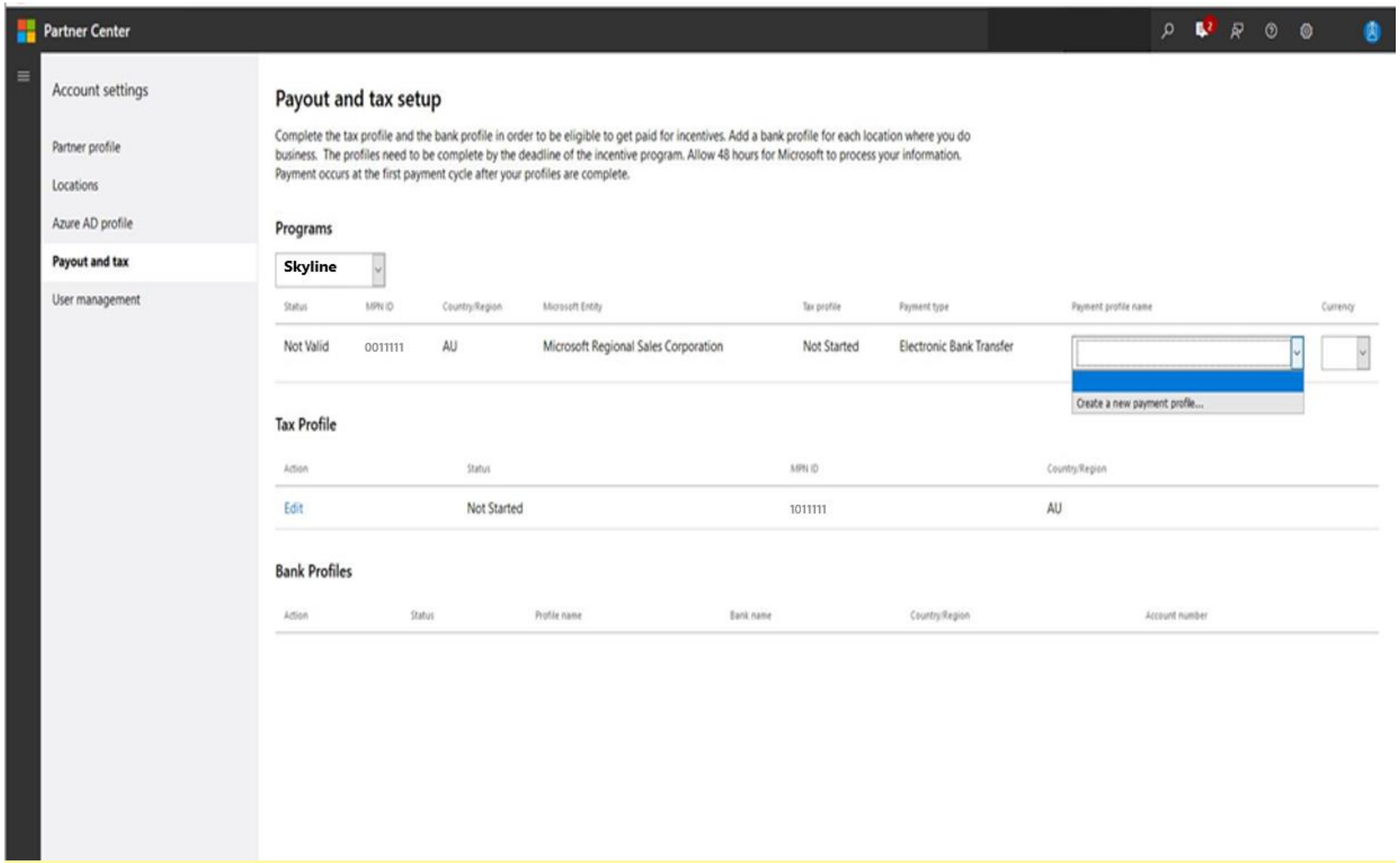
Selecting **"Close"** without completing bank and tax details will take the user back to the overview page, displaying the prompt to "Update bank and tax profile".

The enrollment process

To enroll in an incentive program, an Incentive Administrator needs to follow these steps.

You will be directed to the bank and tax setup page. You can assign both bank and tax profiles to a program from this page.

The steps to create/use an existing payment profile are covered in detail in the next two sections.



Note

If you are required to make an update in the bank and tax for a particular program and location, **“Action Required Update Bank and Tax Profile”** will be shown under "Status" on the overview page available from the left navigation bar.

Banking profiles

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Banking profiles

Remember:

Banking profiles are created at an organization level and can be assigned across multiple MPN ID’s within the same organization.

This allows for the same banking profile to be used. There may be exceptions when applying the banking profile to different countries, as different banking and tax rules may apply.

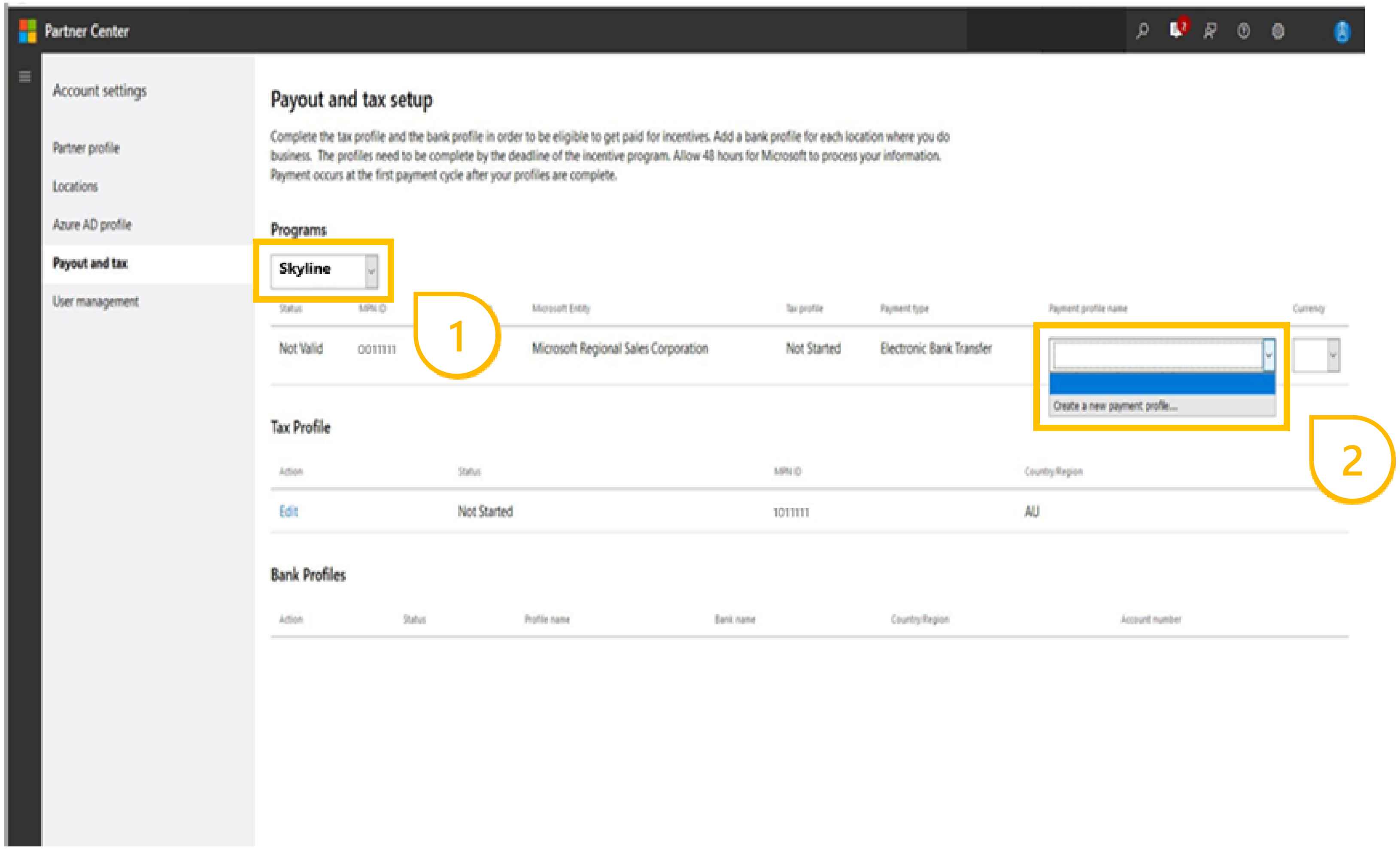
The enrollment process

To enroll in an incentive program, an Incentive Administrator needs to follow these steps.

1. Select the relevant program from the drop-down menu.
2. Create a new payment profile or select an existing preapproved profile (if one exists) for each MPN separately. If a payment profile that is already created for other locations is to be used for the newly onboarded program, choose this from the drop-down menu instead of creating a new profile.

Do not create duplicate bank profiles.

To return to the overview page – select **Overview** under **Incentives** on the left navigation bar.



Note

If you are required to make an update in the bank and tax for a particular program and location, **"Action Required Update Bank and Tax Profile"** will be shown under "Status" on the overview page available from the left navigation bar.

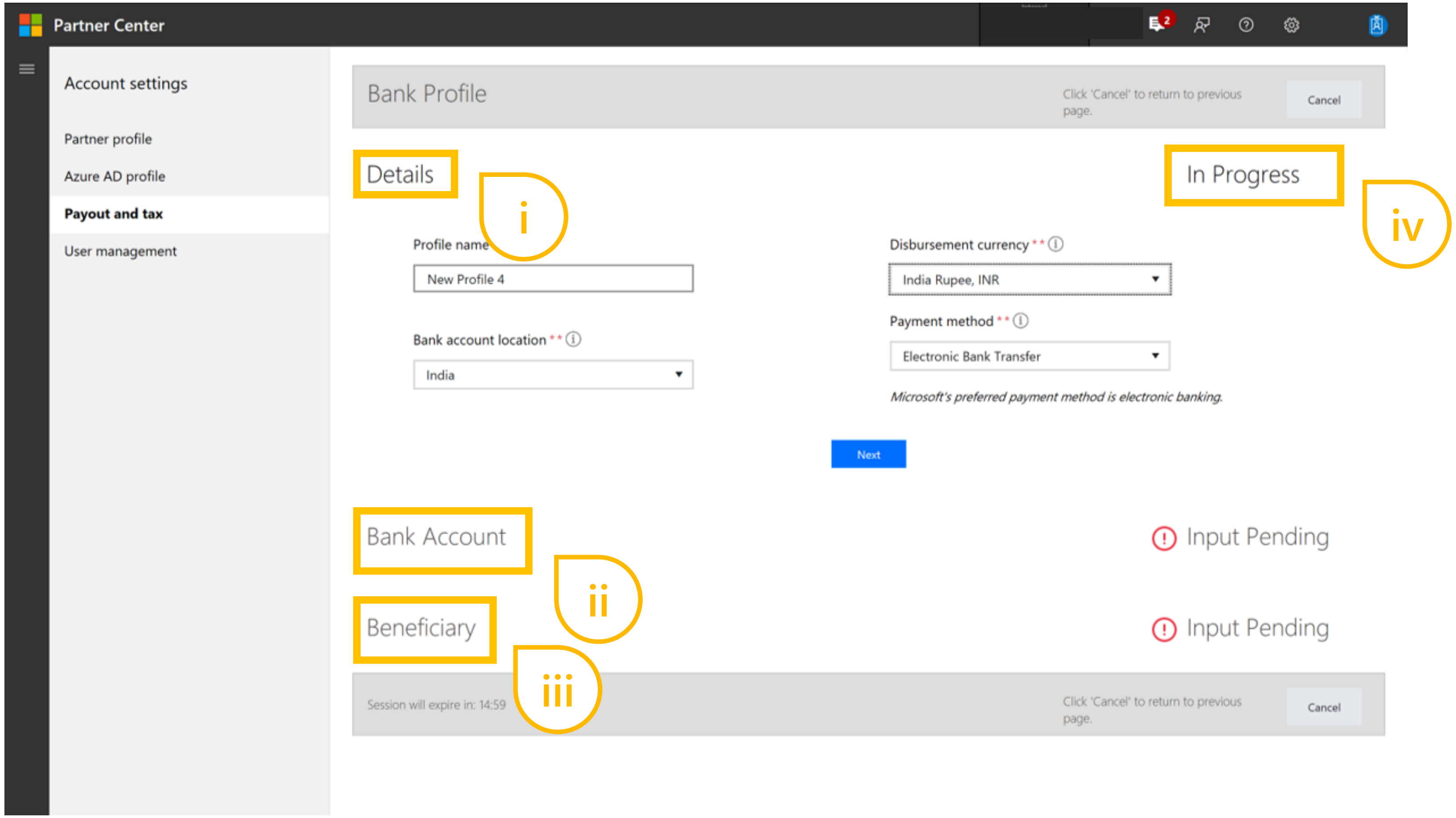
The enrollment process

To enroll in an incentive program, an Incentive Administrator needs to follow these steps.

Selecting **Create a new payment profile**, opens the setup pages.

Bank profile information is organized under three sections:

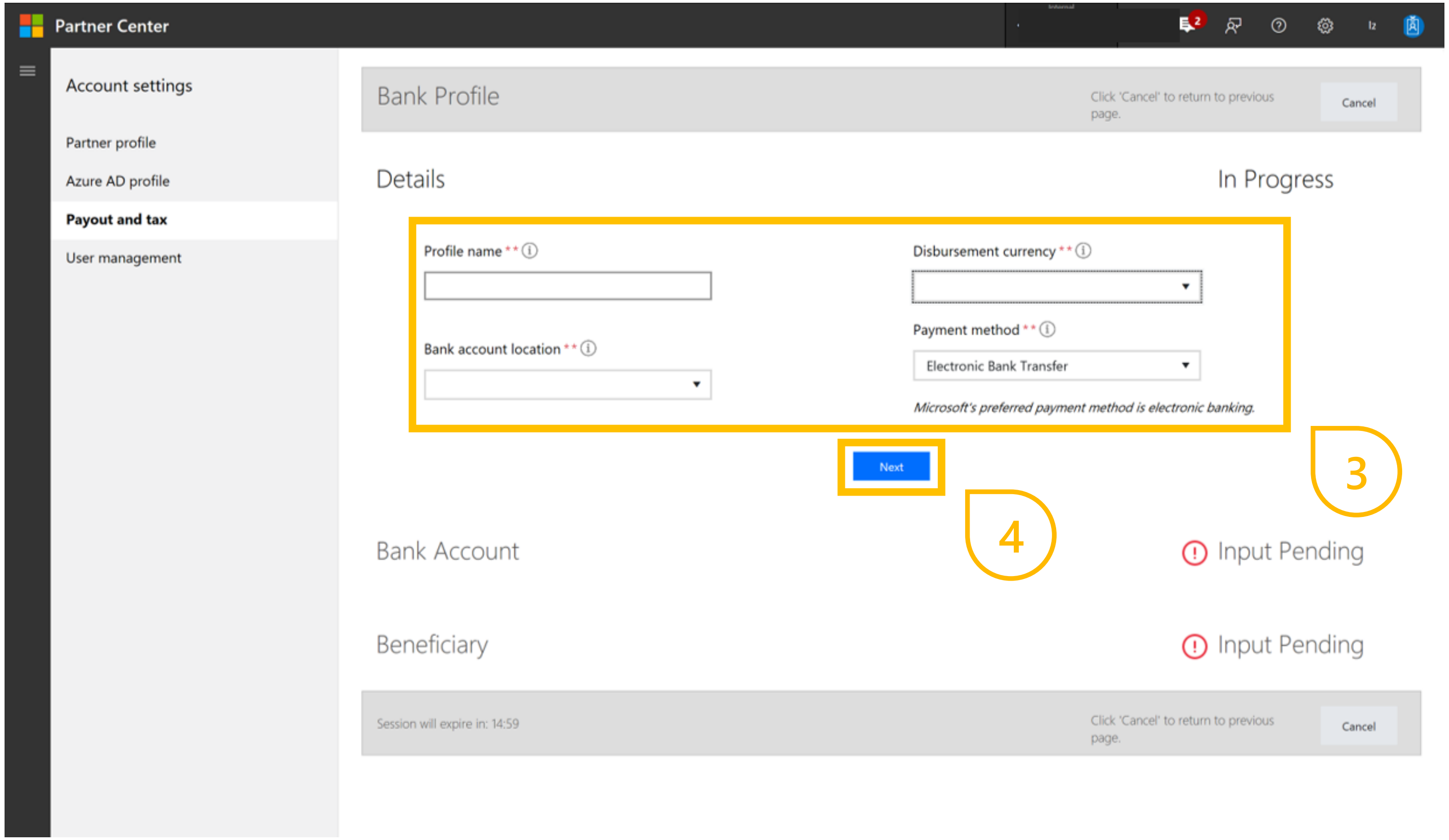
i. Details.
ii. Bank Account.
iii. Beneficiary.
iv. Progress status is tracked and displayed towards the right of the input section.



The enrollment process

To enroll in an incentive program, an Incentive Administrator needs to follow these steps.

3. Enter the payment details in the **Details** section.
    - **Profile name**
      Enter a unique name to identify this payment profile.
    - **Bank account location**
      The country in which your company's bank is located.
    - **Disbursement currency**
      The currency in which Microsoft will pay you. Depending on the partner's bank account location this may be set or another currency can be selected from the drop down.
4. Select **Next** to save these details and move to the **Bank account** section.



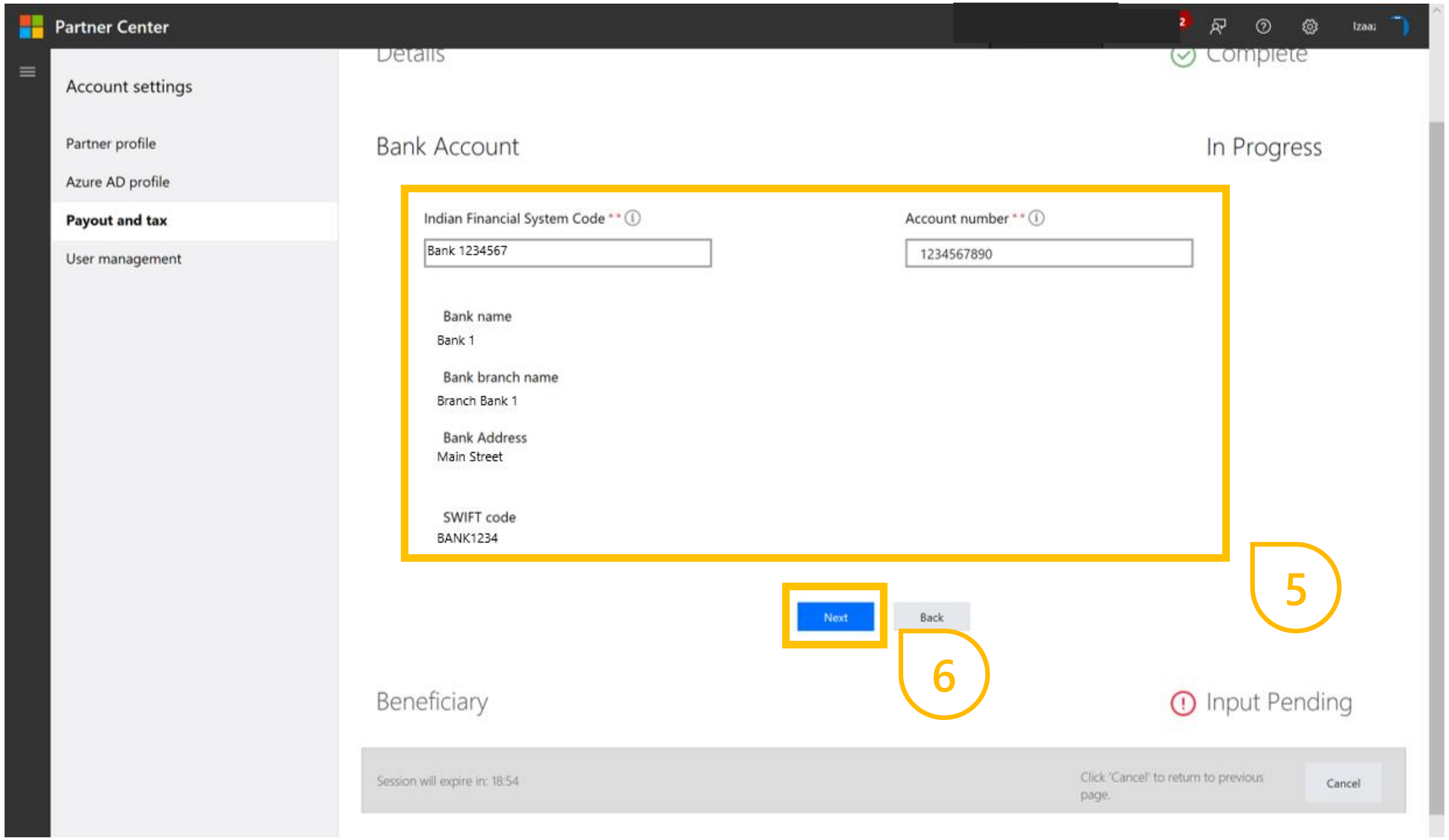
The enrollment process

To enroll in an incentive program, an Incentive Administrator needs to follow these steps.

5. Under Bank account, enter the bank identifier such as IBAN, BSB or SWIFT/BIC. The fields shown in this section will vary by country.

   The bank account information that relates to this identifier then appears on the page below. Next, enter additional details such as account number if they are not already shown.

6. Select **Next** to save these details and move on to the Beneficiary section.



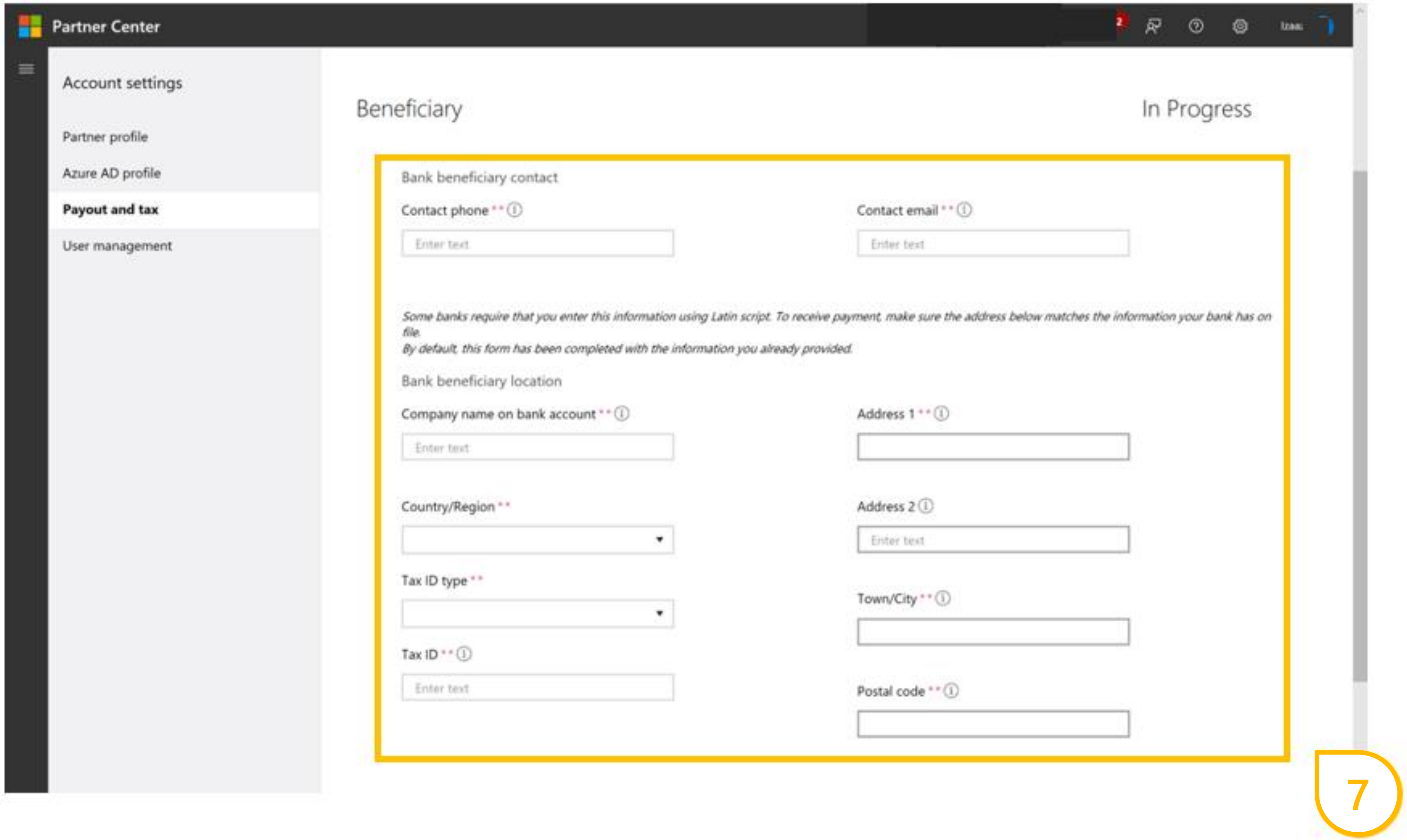
The enrollment process

To enroll in an incentive program, an Incentive Administrator needs to follow these steps.

7. Next, complete the beneficiary information.

   Beneficiary is the person in your company that the bank would contact if they need to discuss your account.

   Complete all details. This includes entry of tax type and tax ID.



The enrollment process

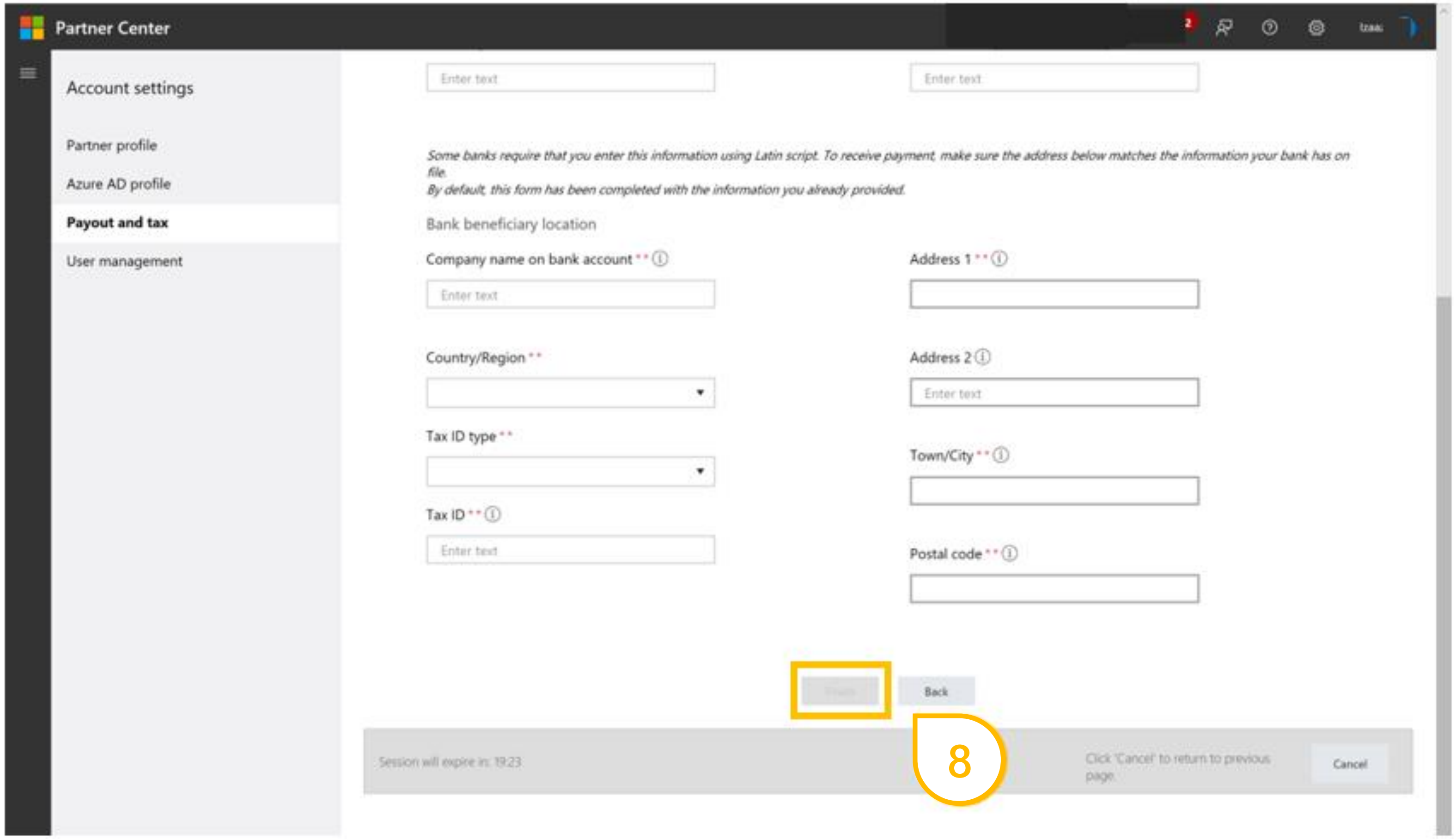
To enroll in an incentive program, an Incentive Administrator needs to follow these steps.

8. Once all the beneficiary information has been entered, the Finish button will be available.

   Select Finish to save.

   A confirmation message appears. Select Confirm to agree to the validation and creation of a payment profile.

   At this point you are taken back to the Payout and tax setup page.



Tax pages

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Tax pages

Remember:

Taxes is a dynamic section. Depending on the details you enter under Setup (that is, the incorporation country of your company), Partner Center Dashboard will request you to enter the relevant tax information for that country.

Please reference official sources of tax information for your country if you require guidance regarding specific tax details to provide.

Only company details are to be entered on the taxes page. Personal details should **NEVER** be entered.

For partner companies in the Americas, if you require information on completing the W8 or W9 forms, the following addresses take you to the IRS site:

http://www.irs.gov/pub/irs-pdf/iw8.pdf

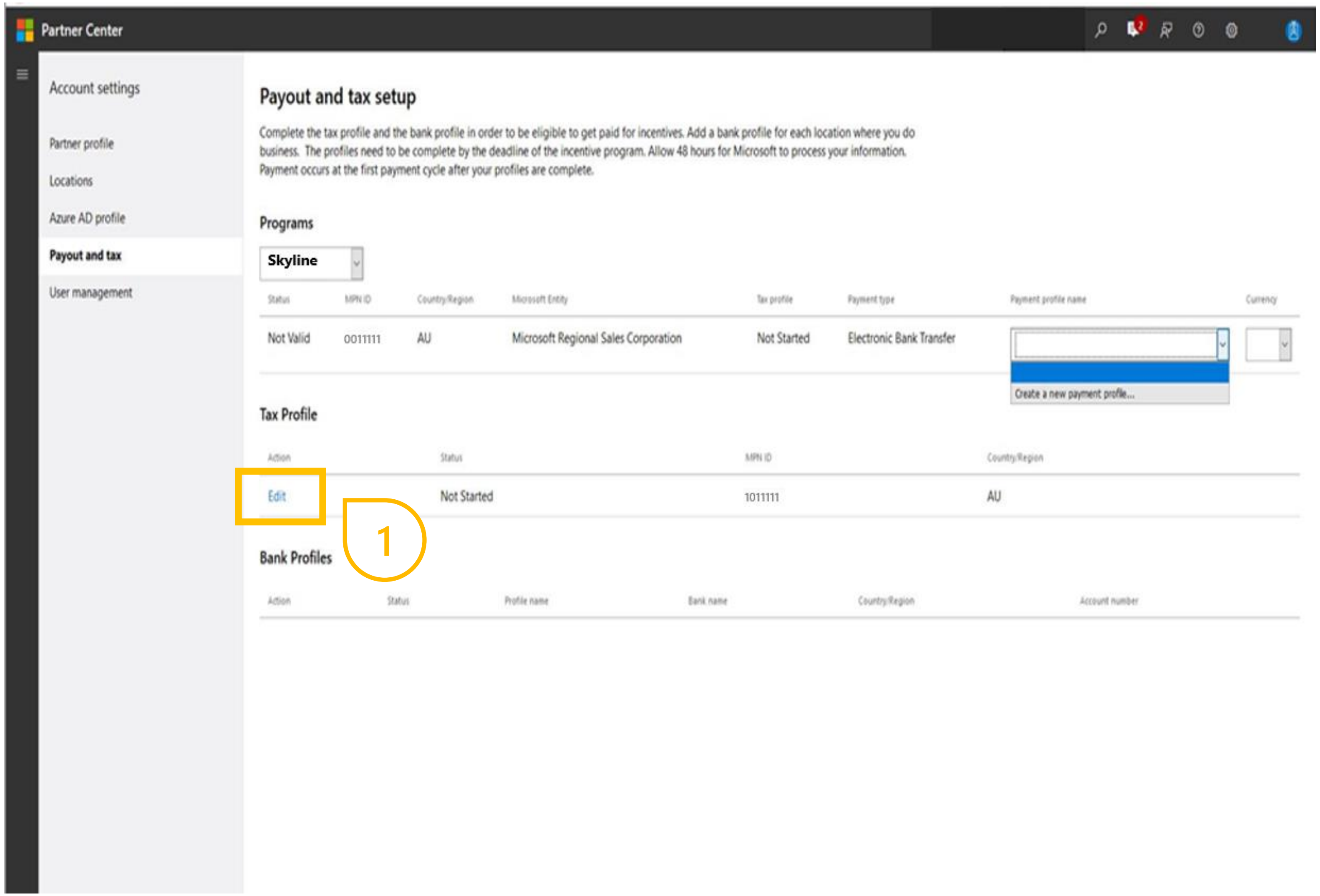
http://www.irs.gov/pub/irs-pdf/iw9.pdf

The enrollment process

To enroll in an incentive program, an Incentive Administrator needs to follow these steps.

If a new payment profile is being set-up the next step, having entered the banking details, is to add the tax profile.

1. To start the tax profile association, select **Edit.**



The enrollment process

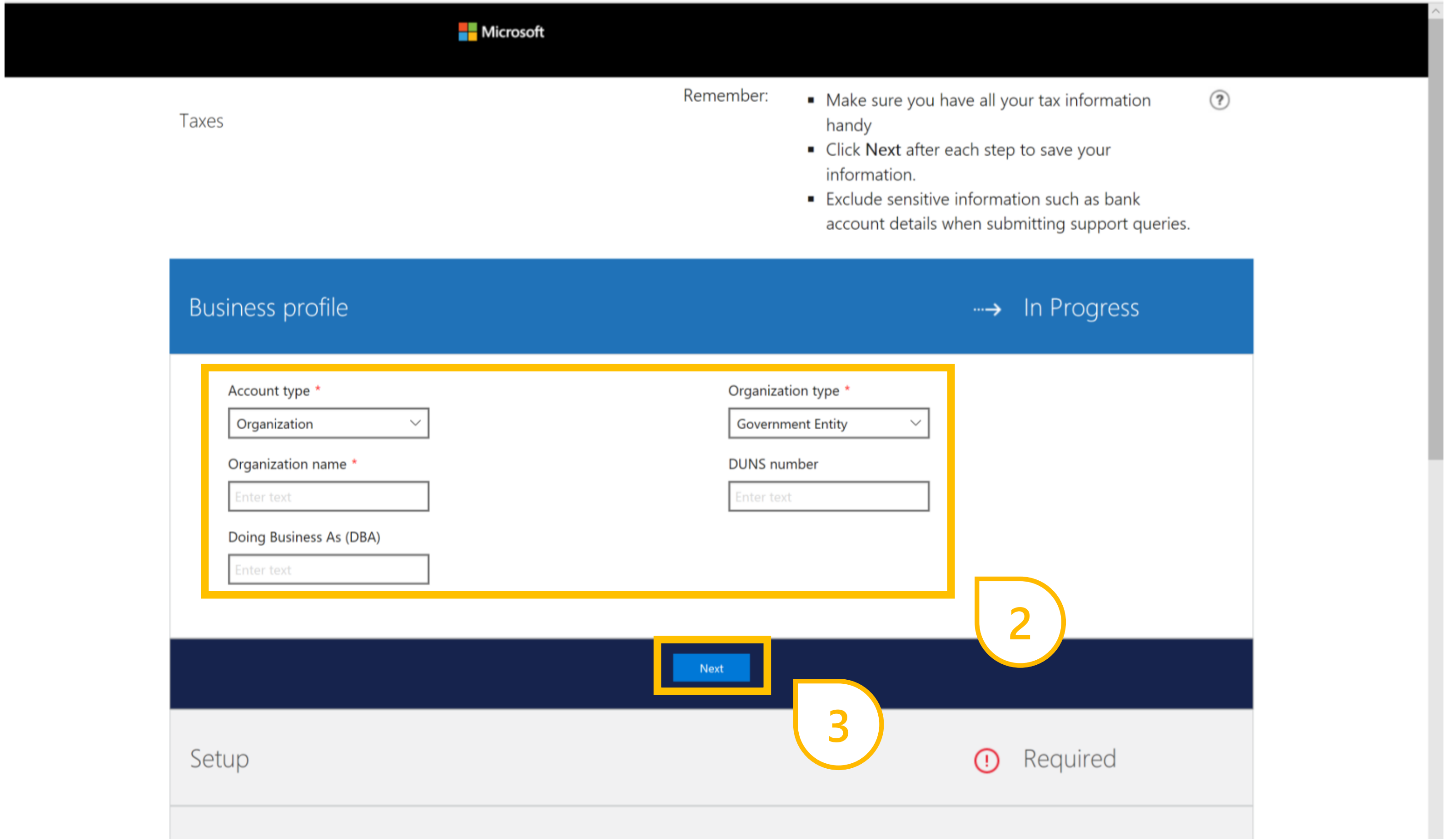
To enroll in an incentive program, an Incentive Administrator needs to follow these steps.

The online tax form is dynamic and adjusts to the tax requirements of the country that the organization is incorporated within.

The form contains a minimum of four sections:

- Business Profile
- Setup
- Tax status
- Additional documentation

2. In the **Business profile** section, add organization details such as names(s) and business numbers.
3. Select **Next** to continue.



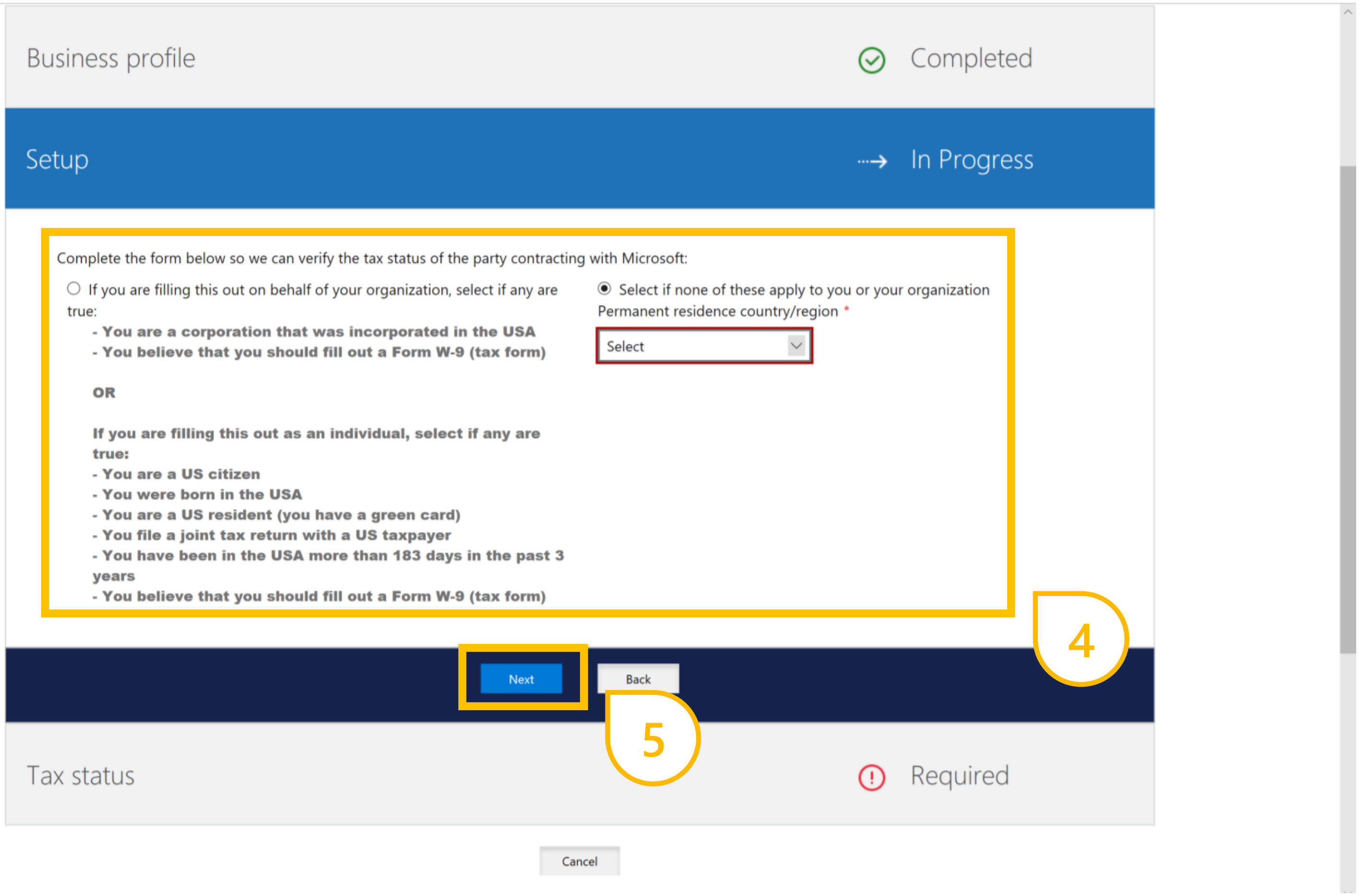
Note

1. You may not need to complete all sections, as this depends on the country of company incorporation.
2. The system alerts partners to the requirements in each section. A section may not appear if it is not required.

The enrollment process

To enroll in an incentive program, an Incentive Administrator needs to follow these steps.

4. In the **Setup** section, select the option that applies to your company:
    - The option on the left, relates to USA-incorporated companies only. If that status applies to your company, select this option.
    - If that status does not apply to your company, select the right hand option and choose the country/region of permanent residence of your company.
5. Select **Next** to continue.



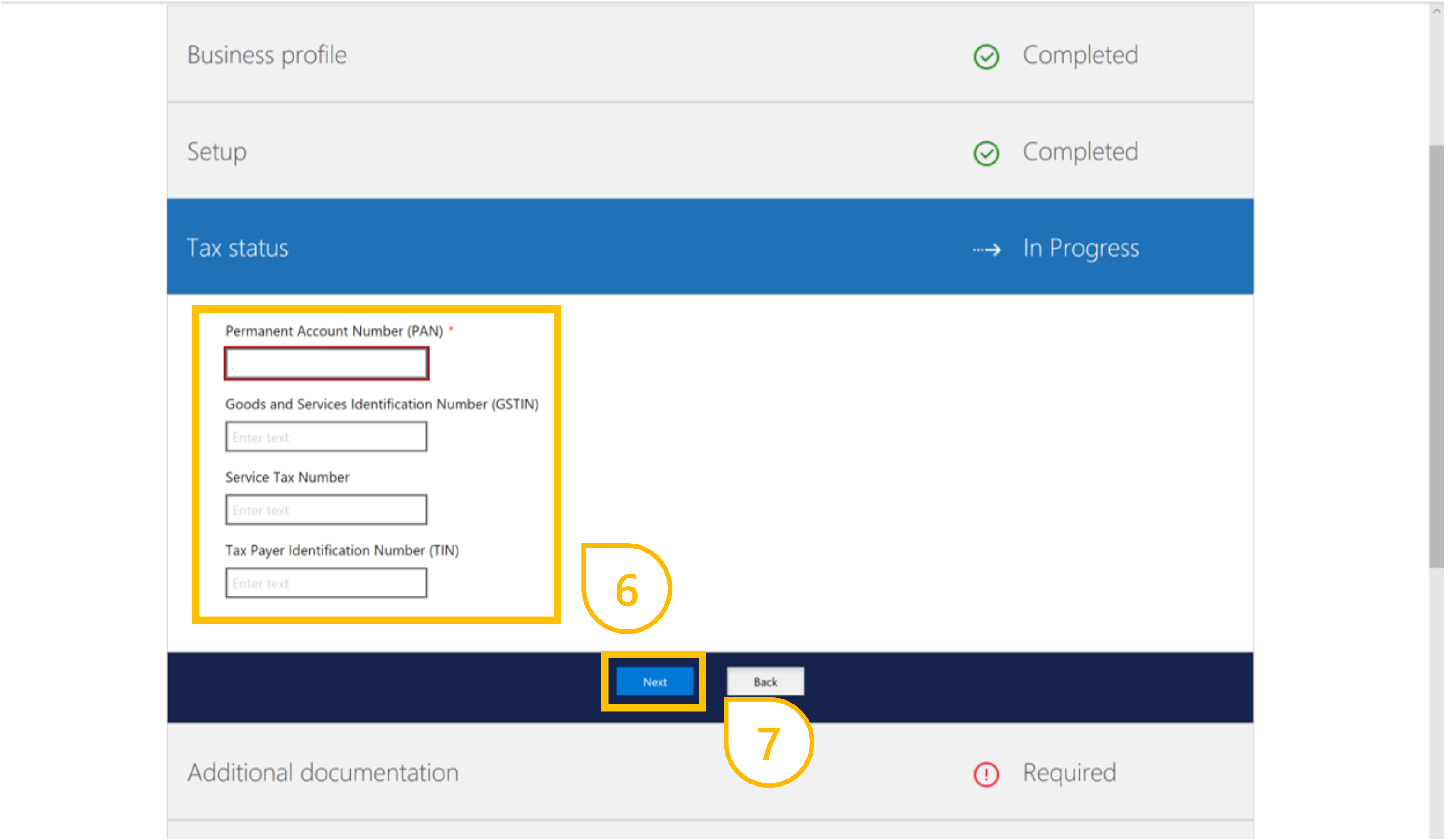
The enrollment process

To enroll in an incentive program, an Incentive Administrator needs to follow these steps.

6. In the **Tax status** section, enter your details.

   The information required is specific to the country of incorporation.

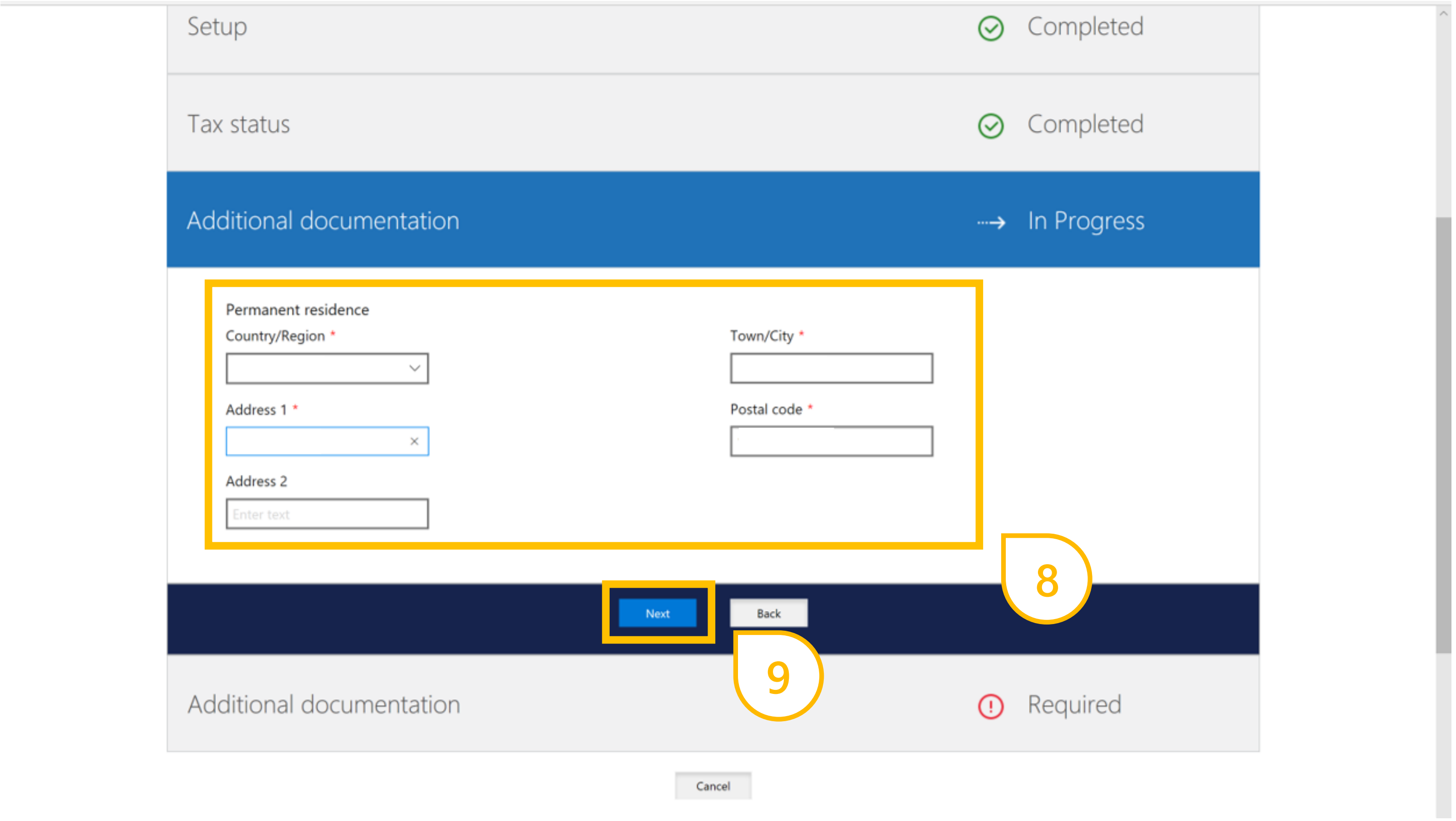
7. Select **Next** to save these details and continue.



The enrollment process

To enroll in an incentive program, an Incentive Administrator needs to follow these steps.

8. In the additional documentation section, complete the required fields.
9. Select **Next** to continue.



The enrollment process

To enroll in an incentive program, an Incentive Administrator needs to follow these steps.

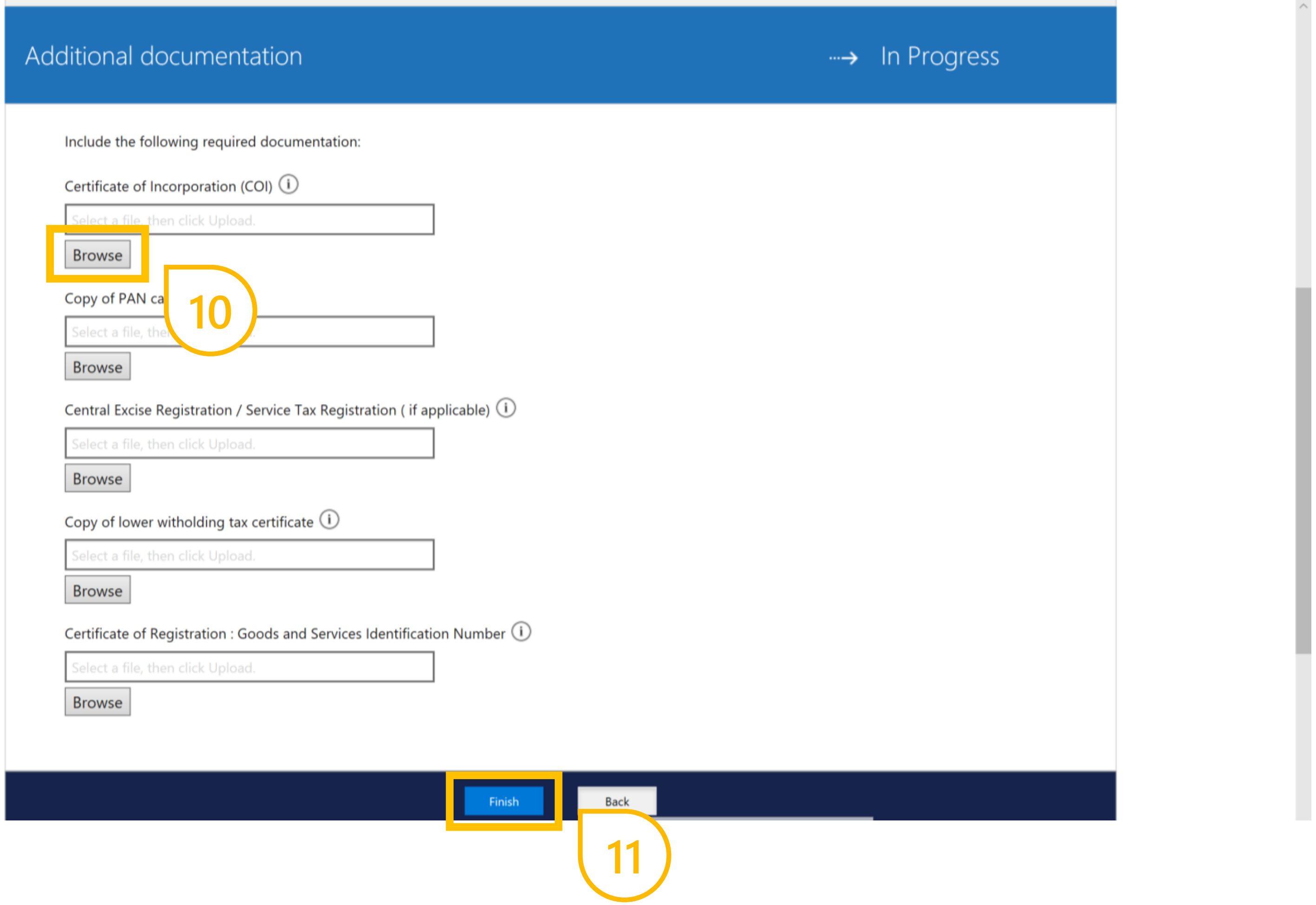
Based on the country of incorporation additional documents may be required.

10. Select **Browse** to add each document. When the document name is shown, select **Upload** to complete the submission.

    When you successfully upload a document, the **Remove** button is shown while the **Browse** and **Upload** buttons will no longer be shown.

11. Select **Finish** to save data and continue.

    A pop-up message appears. If you select **Confirm,** the system redirects you back to the Payout and tax setup page.



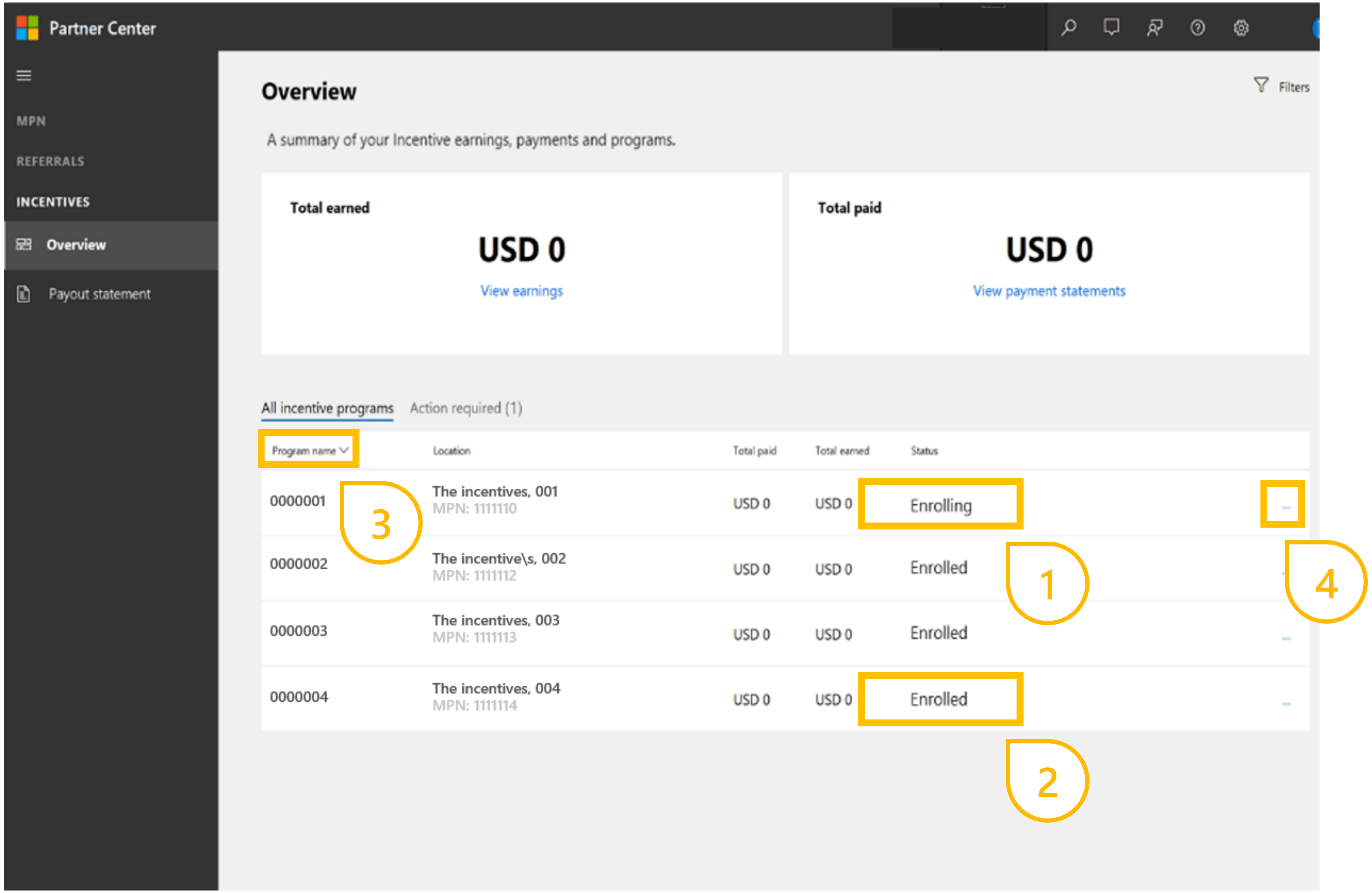
Review your incentive program enrollment

Microsoft

The enrollment process

Once the bank and tax details have been added, you can navigate back to the incentive overview page.

1. You can see the **Enrolling** status from the incentive programs dashboard.
2. After the bank and tax details have been approved by Microsoft, the status changes to **Enrolled.**
3. At this point, the program's details page can be accessed by selecting the relevant program under **Program name.**
4. Selecting the indicator dots on the right for each program offers the option to download the program incentive guide.

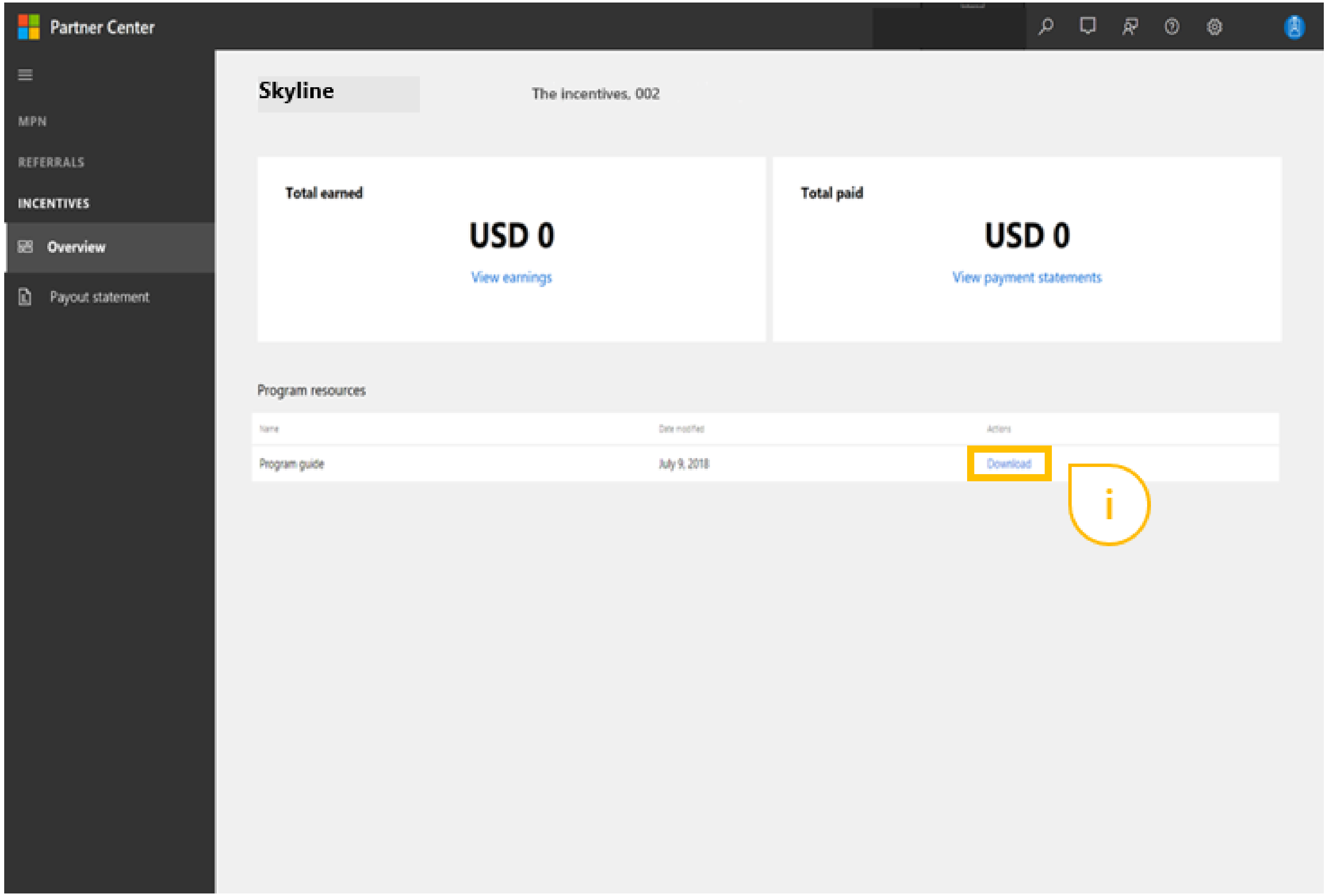


The enrollment process

Once bank and tax details have been successfully added, you can navigate back to the incentive overview page.

From the program's details page of a program with no claiming element, the following information is available:

i. The program Incentive Guide.

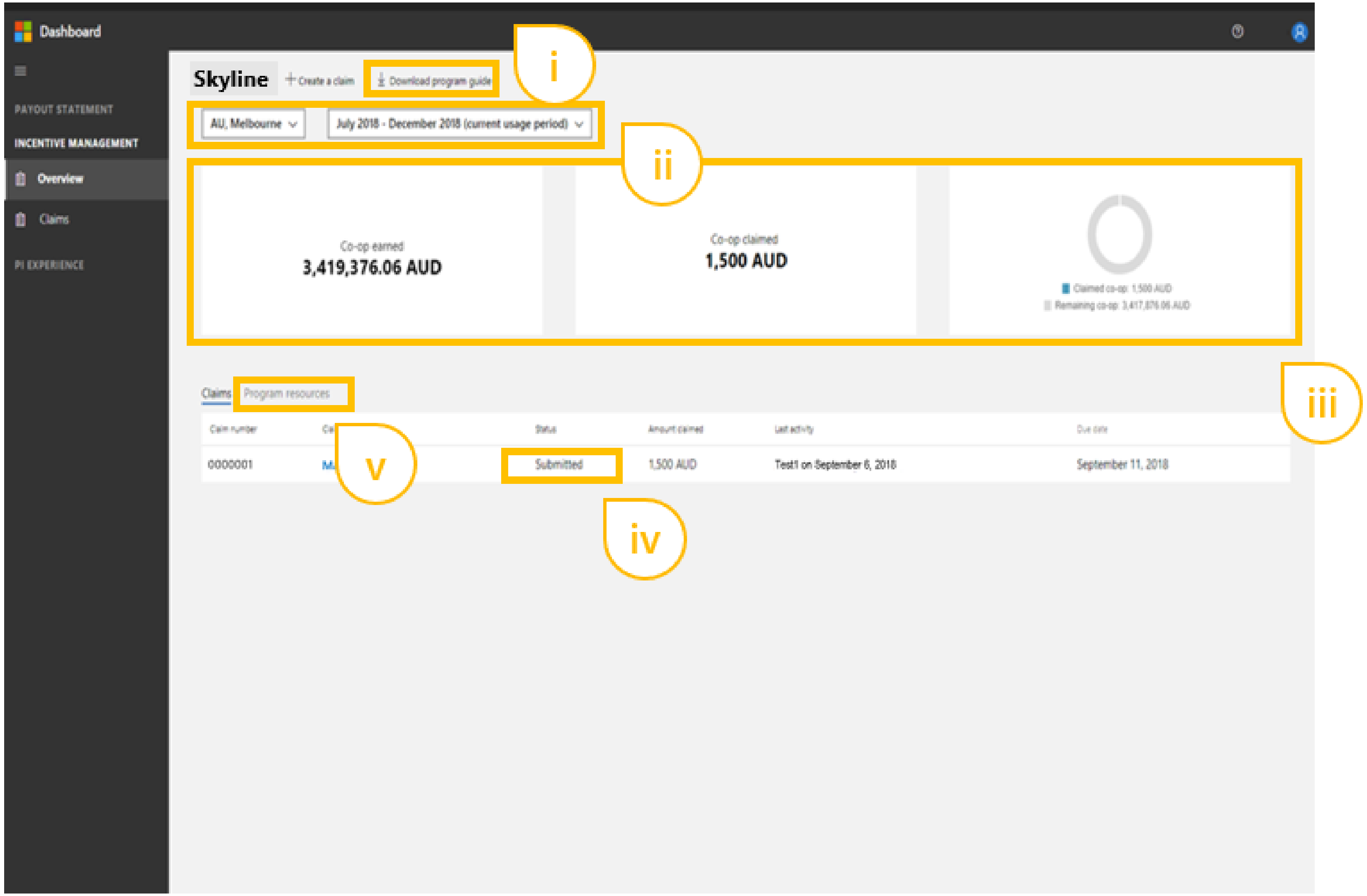


The enrollment process

Once bank and tax details have been successfully added, you can navigate back to the incentive overview page.

From the program's details page of a program with a claiming element, the following information is available:

i. The program Incentive Guide.
ii. Filtering on usage periods, location and date ranges.
iii. A summary of "co-op earned" and "co-op claimed" based on selected location and date ranges.
iv. Claims status.
v. Additional program resources.



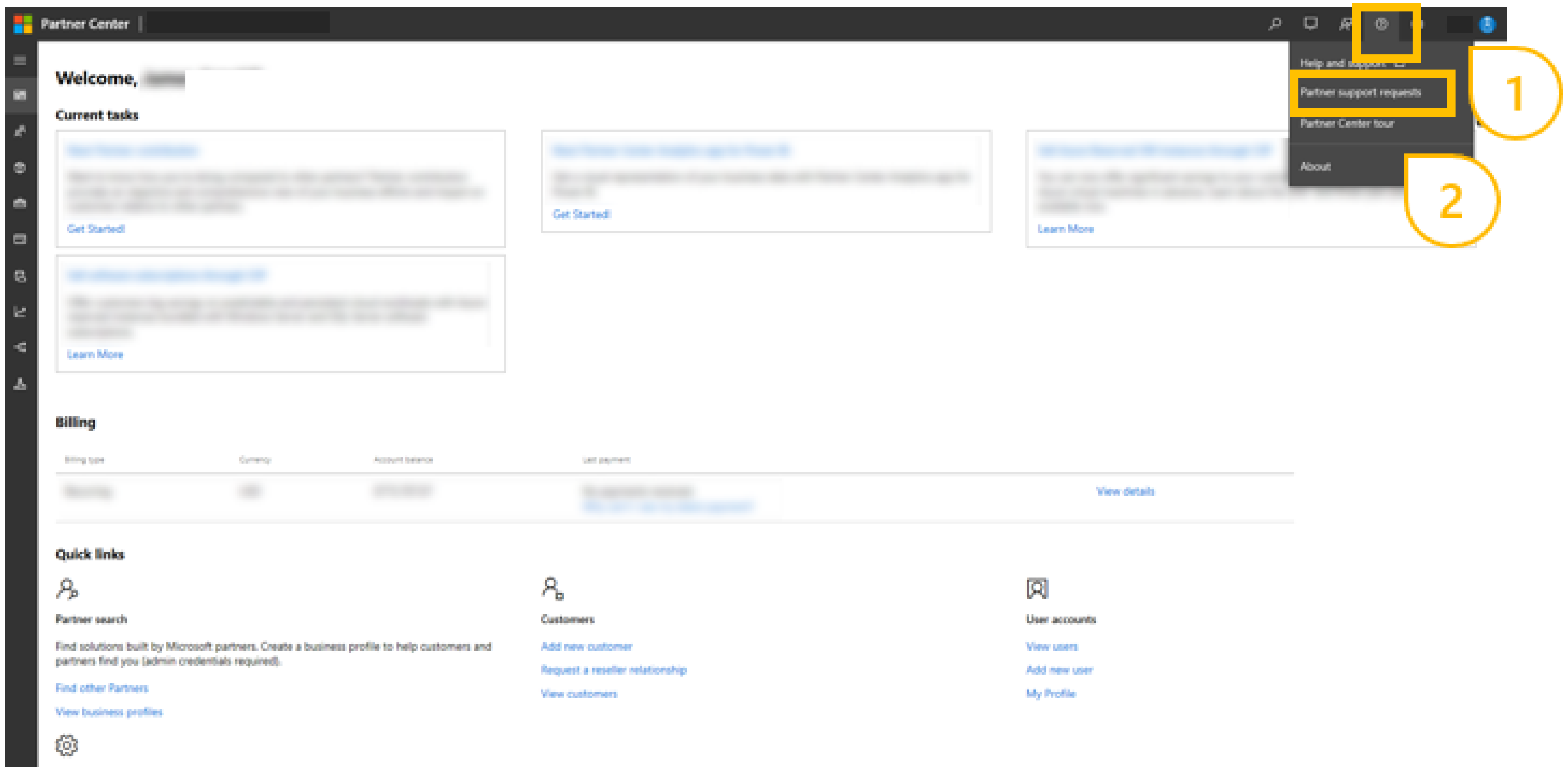
Support and resources

Microsoft

Support

To access support follow these steps.

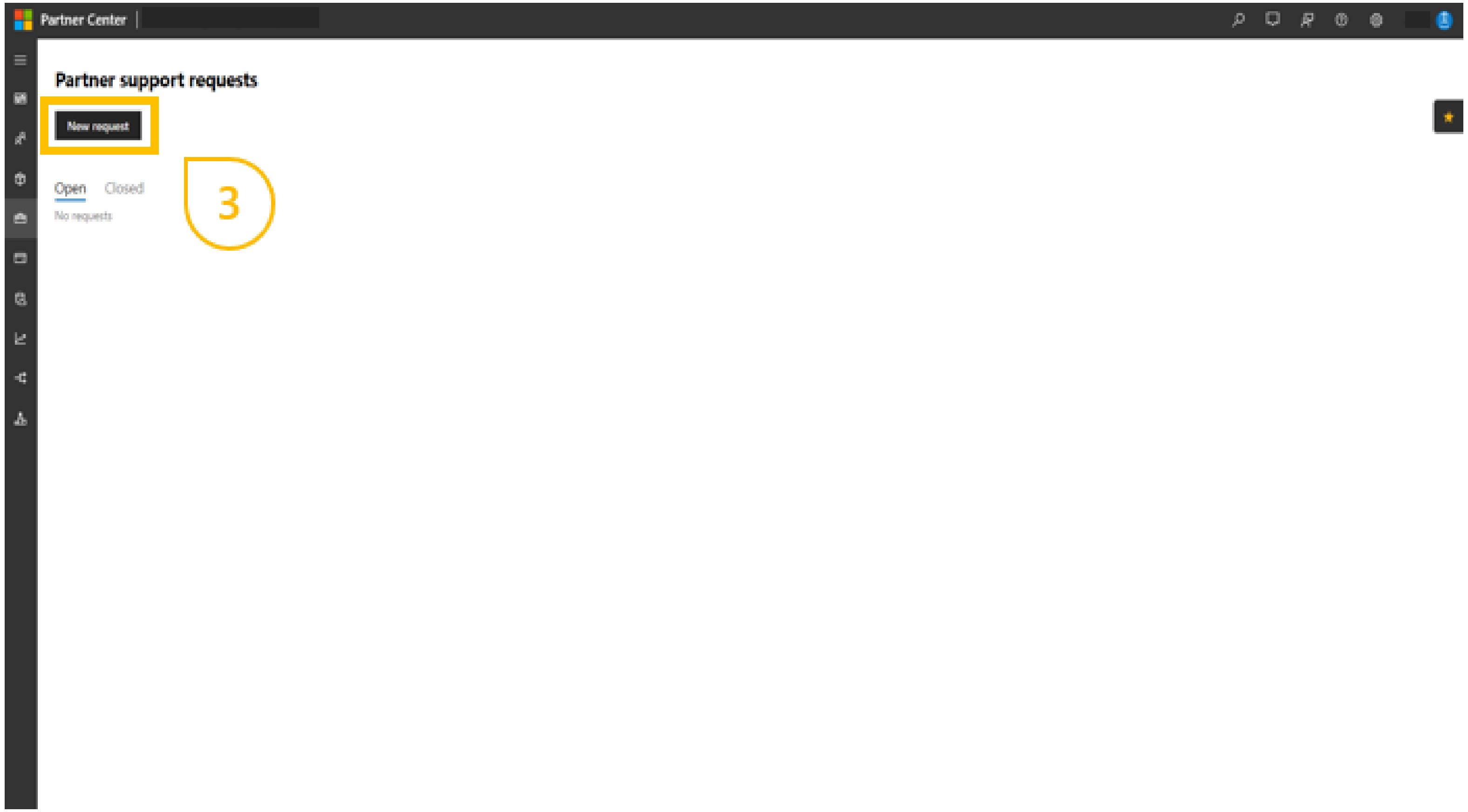
1. Select **?** from the top navigation bar.
2. Select **Partner support requests**.



Support

To access support follow these steps.

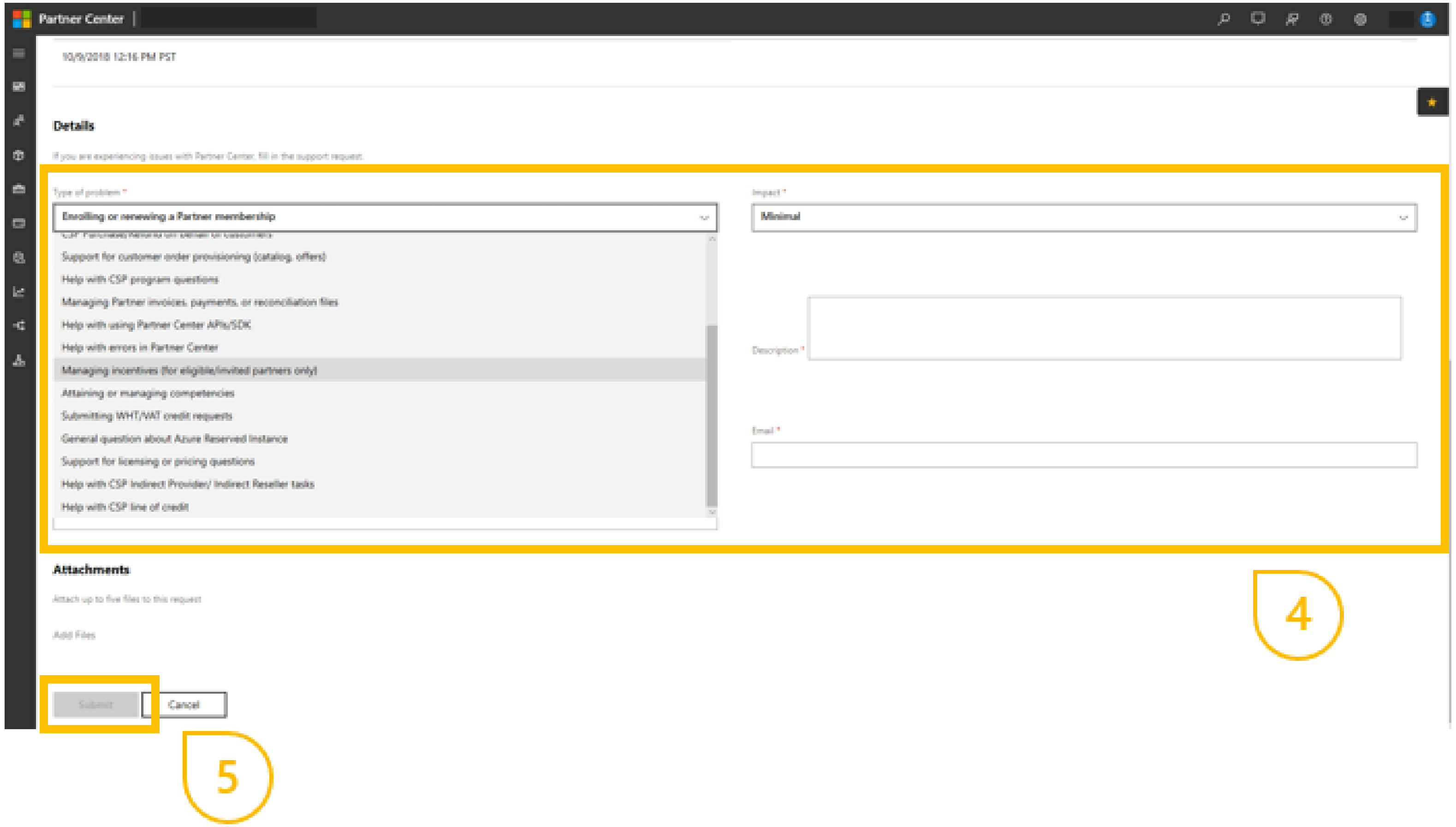
3. Select **New request**.



Support

To access support follow these steps.

4. From the **Type of problem** drop down, select **Managing incentives (for eligible/invited partners only)**.
5. Provide all other information requested and select **Submit**.



Summary

Microsoft

Summary

You should now be able to carry out the:

- Creation of Incentive Administrators and Users.
- Completion of incentive program enrollment.
- Access help and support.

Microsoft

Thank you.