

OEM Reseller Incentives Program

PARTNER GUIDEBOOK

FY14 H2

**MICROSOFT
OEM RESELLERS**

Overview

Microsoft, together with our global Partners, wants to deliver solutions that enable people around the world to work, play and live using Microsoft software and Windows Devices. The goals of the Local OEM Incentives Program are to:

- Enable Partners to develop marketing activities to increase attach and sell through of Microsoft products
- Grow Microsoft and Partner presence in global markets
- Positively compete with non-Microsoft products

Eligible Partners who opt to participate in this program and conduct approved activities are eligible to receive program Incentive Funds.

This guidebook provides the information necessary for OEM Resellers to understand the program requirements and details, and to properly submit claims under the program. Please contact oem incentives@microsoft.com for customer support.

This guide is provided as a resource to be used with the OEM Reseller Incentives Program Agreement. The marketing program referenced herein is subject to the terms contained in that agreement with Microsoft. That agreement is hereby incorporated by reference. Nothing in this guide shall be deemed to modify or amend the terms and conditions of that agreement, unless specifically stated in that agreement. Capitalized terms not defined in this guide have the meanings in that agreement. This guide does not constitute an offer on the part of Microsoft.

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What's New or Different in FY14 H2

This is a summary of key changes for FY14 H2—please note that additional requirements may have been previously communicated in FY14 H1 and there may be additional requirements communicated post publication. Partners should review the relevant page(s) of the guidebook and use the hyperlinks (where provided) to ensure full program compliance.

Category	Change	Summary Details	Location
Eligibility	Addition of Device Incentives	Read and understand the Tier 1 and Tier 2 Device Incentives Eligibility requirements that must be met to be able to participate and earn Incentive Funds under this Incentives Program.	Page 9-10
Channel Incentives Platform (CHIP)	Bank Payment Profile change	Payment profile must be set up in order for Partners to begin submitting claims.	Page 11
Core Requirements	Taglines and content requirements updated	Taglines have been updated to align with Microsoft branding principles. Partners should begin to use these taglines for all FY14 H2 marketing activities. Beginning 1 July 2014, Partners will be required to use these taglines in order to be eligible for reimbursement. Content requirement has been updated to include Windows Devices. Go to page 13 for more details.	Page 13
Activity Guidelines	Updated marketing guidelines	Partners marketing Windows (including Windows 8 and Windows 8.1) must follow the updated marketing guidelines to be eligible for reimbursement.	Page 15-16
Market Development	Telemarketing scope updated	Telemarketing activities may be used to make sales calls, build a sales pipeline or communicate with both new and existing Partners/customers.	Page 33
Partner Readiness	Demo units spend limit revised	Partners will be reimbursed on eligible demo units up to \$2,400 USD or 5% of total accrued OEM Co-op Incentive Funds per program period, whichever is greater.	Page 36
Appendix	Glossary terms added and updated, CSR form updated, and updated activity examples	Glossary term additions and updates. CSR updated to reflect key changes mentioned above. Activity examples updated to reflect the latest Microsoft software and Windows Devices core requirements.	Page a Page c Page e-j

Program Periods, Accruing Funds and Enrollment

Incentives Program Periods

Incentives Program periods operate on a 6 month fiscal half calendar as follows:

FY H1: 1 Jul - 31 Dec

FY H2: 1 Jan - 30 Jun

OEM Resellers must meet eligibility and purchase requirements for each Incentives Program period.

Accruing Funds

Eligible OEM Resellers accrue funds in U.S. dollars based on the number of Eligible Products for each product family or Windows Device where the minimum purchase requirement is met. Qualifying purchases must be through a Microsoft Authorized OEM Distributor¹ and/or OEM Channel Distributor² in the 6 month eligibility/purchase period.

Enrollment

Resellers must enroll in the Channel Incentives Platform (CHIP) in order to claim funds for reimbursement ([page 11](#)). It is recommended that enrollment be completed well in advance of the FY H1 and FY H2 period ending dates to allow plenty of time to claim funds before they expire.

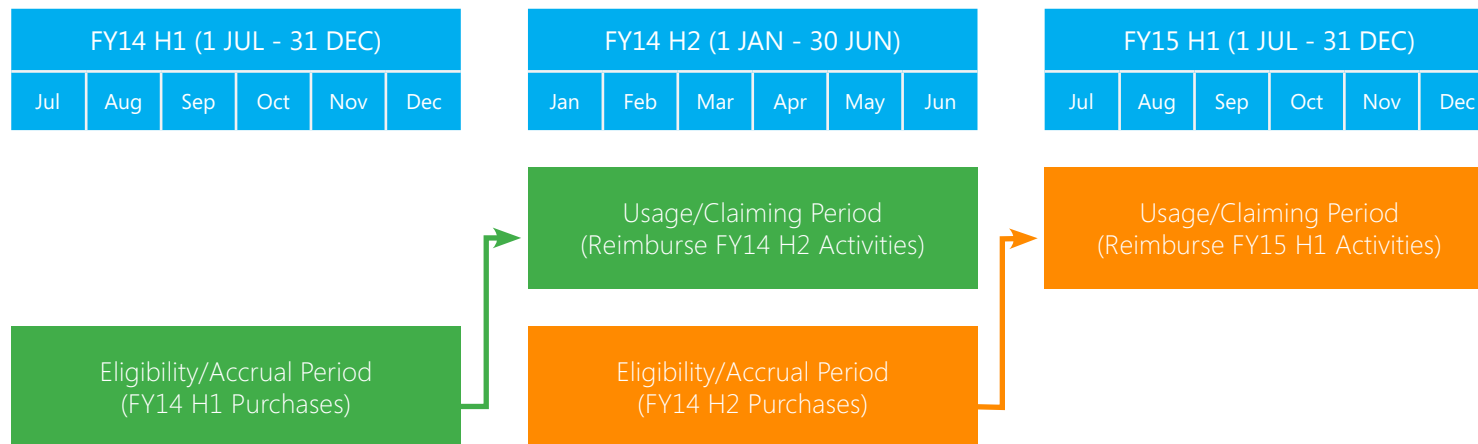
Incentives Funds Allocation

Accrued Incentives Funds are allocated between OEM Co-op Funds and OEM Rebate Funds, with the allocation rate determined by Reseller Tier level and country prior to the start of the Program Period. Incentive Funds will be capped at \$100,000 USD per program period.

OEM Co-op Funds can be used on co-marketing and training activities. These activities can be claimed in Demand Generation, Market Development, and Partner Readiness claim categories.

OEM Rebate Funds can be claimed for cash rebates with no proof of execution, or can be claimed for reimbursement for qualified co-marketing activities.

Incentives Program Period



Eligibility Period/Accrual Period – 6 month period where OEM Reseller meets eligibility requirements, purchases Eligible Products from an Authorized OEM Distributor or OEM Channel Distributor, and accrues funds based on the number of Eligible Products purchased.

Usage Period/Claiming Period – 6 month period where OEM Reseller uses their accrued funds earned in the prior 6 month Eligibility Period to conduct activities and submit claims.

¹ For a list of Microsoft Authorized OEM Distributors, visit: <http://oem.microsoft.com/script/distributorpage.aspx>.

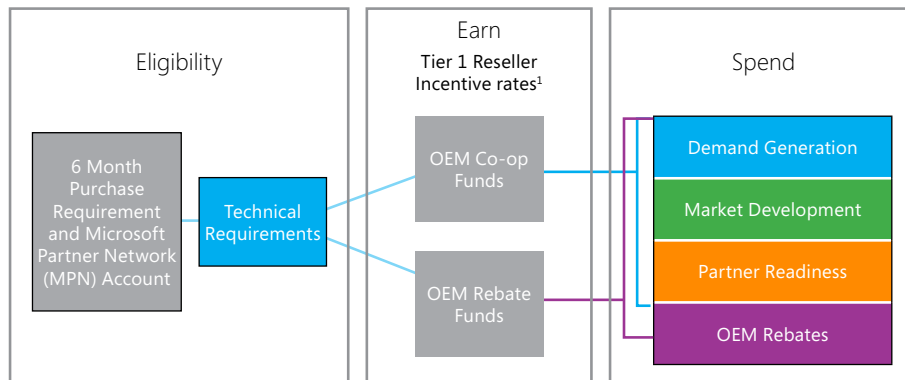
² For a list of OEM Channel Distributors, contact oem incentives@microsoft.com.

Software - Reseller Tiered Program

The OEM Reseller and Breadth Reseller Incentives Programs are now consolidated under one program. The OEM Reseller Incentives Program offers a tiered level of participation depending on a Reseller's level of software requirements and technical certification standing with Microsoft. Incentive Funds earned will vary based on these two factors.

Below is a high level overview and comparison chart of the tiered program for software. Please note, all Resellers in Tier 2 are eligible to move up to Tier 1 as long as the Reseller can meet the eligibility requirements detailed in the following pages.

Tier 1: Earn both OEM Co-op Funds & OEM Rebate Funds



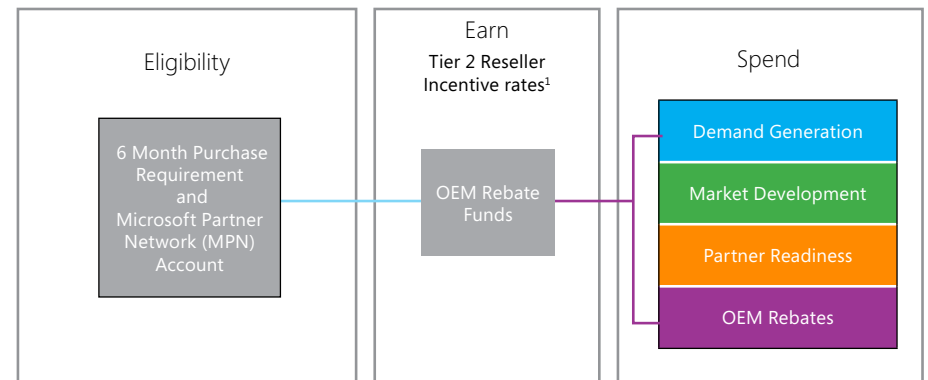
REQUIREMENTS:

1. Must meet purchase requirements
2. Must have active Microsoft Partner Network (MPN) Account
3. Must meet one of the technical requirements defined herein

BENEFITS:

1. Higher purchase requirements = higher Incentive Funds
2. MPN offers resources to extend your market reach
3. Technical requirement entitles Resellers to technical support, access to helpful tools, and recognition as a Microsoft Certified Professional
4. Spend earned OEM Co-op Funds and OEM Rebate Funds to drive business growth in your local market when promoting Microsoft products

Tier 2: Earn only OEM Rebate Funds



REQUIREMENTS:

1. Must meet purchase requirements
2. Must have active Microsoft Partner Network (MPN) Account

BENEFITS:

1. Lower purchase requirements
2. MPN offers resources to extend your market reach
3. Spend earned OEM Rebate Funds to drive business growth in your local market when promoting Microsoft products

¹ Please go to Program Resources found on the [Channel Incentives Resources](#) site to view Incentive rates on Program Flyers.

Software - Tier 1 Reseller Eligibility

Tier 1 Resellers (same as the OEM Reseller Incentives Program) will receive higher rates of accrual based on purchases from Authorized Distributors on Windows Client, Microsoft Office, and Windows Server products. Incentive Funds will be allocated between OEM Co-op Funds and OEM Rebate Funds. Please refer to the Claiming section ([page 21](#)) in this guidebook on how to spend your Incentive Funds on qualifying marketing and training activities or how to claim OEM Rebate Funds.

Tier 1 Requirements

- Purchase Requirements:** OEM Reseller must meet the minimum 6 month purchase requirement in at least one product family by: 30 Jun for FY H1 and by 31 Dec for FY H2. See chart below, "Tier 1" column.
- Active Microsoft Partner Network (MPN) Account:** OEM Reseller must have an active status in MPN and a valid MPN Partner ID number associated to the Channel Incentives Platform (CHIP) account by 30 Sept for FY H1 and 31 Mar for FY H2 in order for OEM Resellers to be eligible to earn and accrue Incentive Funds. To enroll in MPN, visit: <https://msPartner.microsoft.com/en/us/pages/membership/enroll.aspx>.
- Technical Requirements:** OEM Reseller must meet one of the technical requirements defined below by 30 Sept for FY H1 and 31 Mar for FY H2 in order to be eligible to earn and accrue Incentive Funds. uemincentsives@microsoft.com must be contacted prior to the 30 Sept deadline for linking their MPN ID in CHIP and/or if they have completed their technical requirements in order for OEM Resellers to be eligible to receive the appropriate incentive accruals within the current program period.

Tier 1 Purchase Requirements			Technical Requirements
Product Family	Market(s)	Tier 1: 6 Month Unit Purchase Requirement July - December	<p>OEM Competency: Entitles you to technical support and internal-use software to help you differentiate and build your business. (http://www.microsoft.com/OEM/en/community/mpn/Pages/oem_competency.aspx)</p> <p>To read more details based on your competency level, go to:</p> <ol style="list-style-type: none"> Gold OEM competency requirements page: https://mspartner.microsoft.com/en/us/Pages/Membership/oem-competency.aspx Silver OEM competency requirements page: https://mspartner.microsoft.com/en/us/Pages/Membership/oem-competency.aspx <p>Windows Hardware Certifications: Provides you with tools, guidance, and support to help ensure your product is reliable and compatible with Windows. (http://msdn.microsoft.com/en-us/windows/hardware/gg463010.aspx)</p> <p>Microsoft Certified Professional (MCP) status by employing or contracting with an individual who has passed any one of the following MCP Exams: Exam 70-684, 70-410, 70-411, 70-412, 70-413, 70-417, 70-577, 70-642, 70-643, 70-680, 70-681, 70-683, 70-687, 70-688, 70-689, 74-324, 74-697; or has passed MPN Device Selling Assessment. For more information about the MCP Exams, go to http://microsoft.com/learning.</p>
Windows Client	A/B	500	
	C	300	
Microsoft Office	A/B	400	
	C	100	
Windows Server	A/B	70	
	C	30	

Markets By Country¹

Market A	Market B							Market C
United States ² Japan	Australia Austria Belgium Brazil Bulgaria Canada China Croatia	Cyprus Czech Republic Denmark Estonia Finland France Germany	Greece Hong Kong Hungary Iceland India Ireland Israel	Italy Korea Latvia Liechtenstein Lithuania Luxembourg Malaysia	Malta Monaco Netherlands New Zealand Norway Poland	Portugal Romania Russia Slovakia Slovenia South Africa	Spain Sweden Switzerland Taiwan United Kingdom	All others

¹Incentive Funds will be capped at \$100,000 USD per program period for each market.

²Not currently participating in the Incentives Program.

Software - Tier 2 Reseller Eligibility (formerly Breadth Reseller)

Tier 2 Resellers (formally known as the Breadth Reseller Rebate Program) will receive lower rates of accrual based on purchases from Authorized Distributors on Windows Client, Microsoft Office, and Windows Server products. Incentive Funds will be offered as OEM Rebate Funds. Please refer to the Claiming section ([page 21](#)) in this guidebook on how to spend your Incentive Funds on qualifying marketing and training activities or how to claim OEM Rebate Funds.

Tier 2 Requirements	
1. Purchase Requirements:	OEM Reseller must meet the minimum 6 month purchase requirement in at least one product family by 30 Jun for FY H1 and by 31 Dec for FY H2. See chart below, "Tier 2 column".
2. Active Microsoft Partner Network (MPN) Account:	OEM Reseller must have an active status in MPN and a valid MPN Partner ID number associated to the Channel Incentives Platform (CHIP) account by 30 Sept for FY H1 and 31 Mar for FY H2 in order to be eligible to earn and accrue Incentive Funds. To enroll in MPN, visit: https://msPartner.microsoft.com/en/us/pages/membership/enroll.aspx .

Tier 2 Purchase Requirements		
Product Family	Market(s)	Tier 2: 6 Month Unit Purchase Requirement ¹ July - December
Windows Client	A/B	250
	C	150
Microsoft Office	A/B	200
	C	50
Windows Server	A/B	40
	C	20

¹Note: As of FY13 H2, Tier 2 Reseller Eligibility is based on the 6 month unit purchase requirement only.

Markets By Country ²								
Market A	Market B							Market C
United States ³ Japan	Australia Austria Belgium Brazil Bulgaria Canada China Croatia	Cyprus Czech Republic Denmark Estonia Finland France Germany	Greece Hong Kong Hungary Iceland India Ireland Israel	Italy Korea Latvia Liechtenstein Lithuania Luxembourg Malaysia	Malta Monaco Netherlands New Zealand Norway Poland	Portugal Romania Russia Slovakia Slovenia South Africa	Spain Sweden Switzerland Taiwan United Kingdom	All others

²Incentive Funds will be capped at \$100,000 USD per program period for each market.

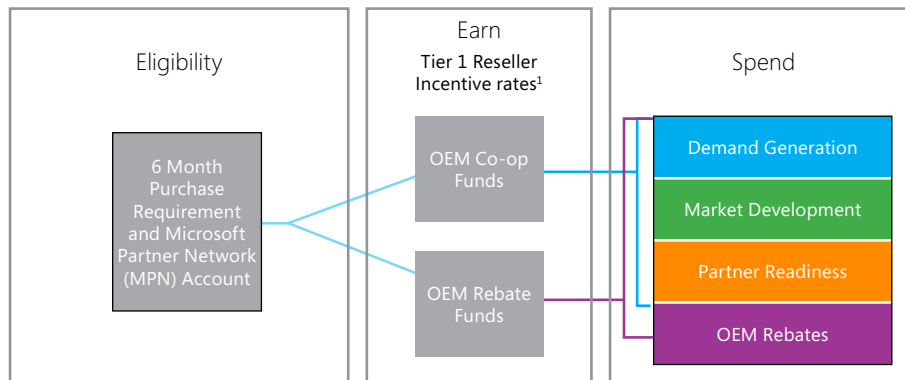
³Not currently participating in the Incentives Program.

Devices - Reseller Tiered Program

Beginning in FY14 H2, the OEM Reseller Incentives Program has added an Incentive Fund Allocation for Commercial TouchWins Devices. This program offers a tiered level of participation depending on a Reseller's level of device purchases.

Below is a high-level overview and comparison chart of the tiered program for Commercial TouchWins Devices. Please note, all Resellers in Tier 2 are eligible to move up to Tier 1 as long as the Reseller can meet the eligibility requirements detailed in the following pages.

Tier 1: Earn both OEM Co-op Funds & OEM Rebate Funds



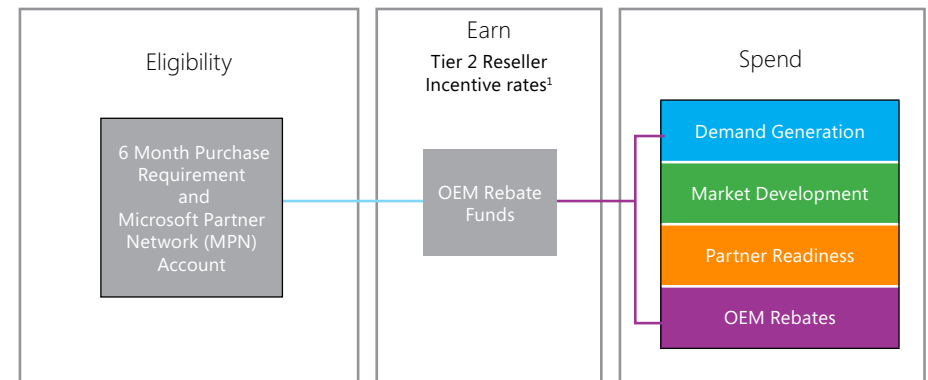
REQUIREMENTS:

1. Must meet purchase requirements
2. Must have active Microsoft Partner Network (MPN) Account
3. Enroll in CHIP to claim funds for reimbursement, allowing ample time to submit and have claims processed before Incentive Funds expire

BENEFITS:

1. Higher purchase requirements = higher Incentive Funds
2. MPN offers resources to extend your market reach
3. Spend earned OEM Co-op Funds and OEM Rebate Funds to drive business growth in your local market when promoting Microsoft products

Tier 2: Earn only OEM Rebate Funds



REQUIREMENTS:

1. Must meet purchase requirements
2. Must have active Microsoft Partner Network (MPN) Account
3. Enroll in CHIP to claim funds for reimbursement, allowing ample time to submit and have claims processed before Incentive Funds expire

BENEFITS:

1. Lower purchase requirements
2. MPN offers resources to extend your market reach
3. Spend earned OEM Rebate Funds to drive business growth in your local market when promoting Microsoft products

¹ Please go to Program Resources found on the [Channel Incentives Resources](#) site to view Incentive rates on Program Flyers.

Devices - Tier 1 Reseller Eligibility

Tier 1 Resellers will receive higher rates of accrual based on purchases of eligible Commercial TouchWins Devices from Microsoft Authorized OEM Distributors or OEM Channel Distributors. Incentive Funds will be allocated between OEM Co-op Funds and OEM Rebate Funds. Please refer to the remainder of this Guidebook for information on Co-op marketing activities, claiming, and other program details. OEM Rebate Funds may be claimed without proof of execution or to reimburse Co-op Marketing activities.

Eligibility and Enrollment

Tier 1 Resellers must complete the following by the specified deadlines to be eligible to accrue Device Incentive Funds:

Tier 1 Requirements		
1. Have an active Microsoft Partner Network ¹ (MPN) Partner ID associated with their Channel Incentives Platform (CHIP) account ² .	By 31 Mar 2014	
2. Meet OEM Reseller 6-month Purchase Requirements.	By 31 Dec 2013	
3. Enroll in CHIP to claim funds for reimbursement, allowing ample time to submit and process claim before incentive funds expire.	Before 30 Jun 2014	

Eligible Devices

OEM Resellers are eligible to accrue incentives on all PCs and Tablets that are touch-enabled and preinstalled with genuine Windows 8 Pro or Windows 8.1 Pro³, as well as all Commercial TouchWins Devices listed on the Microsoft Product Mapping File available on Channel Incentives Resources, as reported by Microsoft Authorized OEM Distributors and/or OEM Channel Distributors.

6-Month Featured Device Purchase Requirement		Tier 1 Reseller
Eligible Devices	Market(s)	
Eligible Commercial TouchWins PCs & Tablets	A	1000
	B	500
	C	300

Market A	Market B							Market C
United States ⁴ Japan	Australia	Cyprus	Greece	Italy	Malta	Romania	Spain	All others
	Austria	Czech Republic	Hong Kong	Korea	Monaco	Russia	Sweden	
	Belgium	Denmark	Hungary	Latvia	Netherlands	Slovakia	Switzerland	
	Brazil	Estonia	Iceland	Liechtenstein	New Zealand	Slovenia	Taiwan	
	Bulgaria	India	Lithuania	Luxembourg	Norway	South Africa	United Kingdom	
	Canada	Finland	Ireland	Poland				
	China ⁵	France	Israel	Malaysia	Portugal			
		Germany						

Device Incentive Rates, Fund Accrual, and Allocation

FY14 H2 Device Incentive Funds (in USD) are calculated based on FY14 H1 net purchases (1 Jul - 31 Dec 2013) of eligible Commercial TouchWins Devices from Microsoft Authorized OEM Distributors and/or OEM Channel Distributors as reported in their Microsoft Sales-Out Report. The \$100,000 USD limit per program for software license incentive funds **does not apply** to OEM Device Incentive Funds.

Per Unit Device Incentive Rates & Fund Allocation		Tier 1 Reseller
Incentive Fund Allocation		50% OEM co-op 50% OEM rebate
Incentive Rates	Eligible Commercial TouchWins PCs	\$3 USD
	Eligible Commercial TouchWins Tablets	\$7 USD

Key Dates for FY14 H2	
Program Period	1 Jan - 30 Jun 2014
Fund Accrual Period	1 Jul - 31 Dec 2013
CHIP Enrollment Deadline	30 Jun 2014
Funds Available	15 Jan 2014
Activity Deadline	30 Jun 2014
Claim Deadline	15 Aug 2014

Resources and Contacts

- [Channel Incentives Resources](#) for OEM Channel Incentives Program materials
- [OEM Incentives Support Team](#)
- Go to [Windows Device Marketing Hub](#) for device sales training and marketing materials
- Partner Sales Executives

¹Enroll in MPN via <https://mspartner.microsoft.com/en/us/Pages/Membership/enroll.aspx>

²OEM Resellers must contact the [OEM Incentives Support Team](#) by 31 March 2014 to link their MPN ID to their CHIP account.

³Excludes Surface Pro and Surface Pro 2 Retail SKUs.

⁴Partners in the U.S. may participate in the OEM Device Incentives Program through the U.S. Incentives Program instead of the OEM Incentives Program.

⁵The OEM Device Incentives Program is not available in China.

Devices - Tier 2 Reseller Eligibility

Tier 2 Resellers will receive lower rates of accrual based on purchases of eligible Commercial TouchWins Devices from Microsoft Authorized OEM Distributors or OEM Channel Distributors. Incentive Funds will be offered as OEM Rebate Funds only. OEM Rebate Funds may be claimed without proof of execution or to reimburse Co-op Marketing activities.

Eligibility and Enrollment

Tier 2 Resellers must complete the following by the specified deadlines to be eligible to accrue Device Incentive Funds:

Tier 2 Requirements	
1. Have an active Microsoft Partner Network ¹ (MPN) Partner ID associated with their Channel Incentives Platform (CHIP) account ² .	By 31 Mar 2014
2. Meet OEM Reseller 6-month Purchase Requirements	By 31 Dec 2013
3. Enroll in CHIP to claim funds for reimbursement, allowing ample time to submit and process claim before incentive funds expire.	Before 30 Jun 2014

Eligible Commercial Touchwins Device List

The Microsoft Product Mapping File (MPMF) lists all eligible Commercial TouchWins Devices. It is scheduled to change on 1 Jul 2013 (Back-to-School), 1 Oct 2013 (Back-to-School and Holiday), 1 Jan 2014 (Holiday) and 1 Apr 2014 (Spring). The most up-to-date list is available for download on [Channel Incentives Resources](#).

6-Month Featured Device Purchase Requirement		Tier 2 Reseller
Eligible Devices	Market(s)	
Eligible Commercial TouchWins PCs & Tablets	A	200
	B	100
	C	50

Market A	Market B							Market C
United States ³ Japan	Australia	Cyprus	Greece	Italy	Malta	Romania	Spain	All others
	Austria	Czech Republic	Hong Kong	Korea	Monaco	Russia	Sweden	
	Belgium	Hungary	Latvia	Netherlands	Slovakia	Switzerland		
	Brazil	Denmark	Iceland	Liechtenstein	New Zealand	Slovenia	Taiwan	
	Bulgaria	Estonia	India	Lithuania	Norway	South Africa	United Kingdom	
	Canada	Finland	Ireland	Luxembourg	Poland			
	China ⁴	France	Israel	Malaysia	Portugal			
		Germany						

Device Incentive Rates, Fund Accrual, and Allocation

FY14 H2 Device Incentive Funds (in USD) are calculated based on FY14 H1 net purchases (1 Jul - 31 Dec 2013) of eligible Commercial TouchWins Devices from Microsoft Authorized OEM Distributors and/or OEM Channel Distributors as reported in their Microsoft Sales-Out Report. The \$100,000 USD limit per program for software license incentive funds **does not apply** to OEM Device Incentive Funds.

Per Unit Device Incentive Rates & Fund Allocation		Tier 2 Reseller
Incentive Fund Allocation		100% OEM rebate
Incentive Rates	Eligible Commercial TouchWins PCs	\$1.50 USD
	Eligible Commercial TouchWins Tablets	\$3.50 USD

Key Dates for FY14 H2	
Program Period	1 Jan - 30 Jun 2014
Fund Accrual Period	1 Jul - 31 Dec 2013
CHIP Enrollment Deadline	30 Jun 2014
Funds Available	15 Jan 2014
Activity Deadline	30 Jun 2014
Claim Deadline	15 Aug 2014

Resources and Contacts

- [Channel Incentives Resources](#) for OEM Channel Incentives Program materials
- [OEM Incentives Support Team](#)
- Go to [Windows Device Marketing Hub](#) for device sales training and marketing materials
- Partner Sales Executives

¹Enroll in MPN via <https://mspartner.microsoft.com/en/us/Pages/Membership/enroll.aspx>

²OEM Resellers must contact the [OEM Incentives Support Team](#) by 31 March 2014 to link their MPN ID to their CHIP account.

³Partners in the U.S. may participate in the OEM Device Incentives Program through the U.S. Incentives Program instead of the OEM Incentives Program.

⁴The OEM Device Incentives Program is not available in China.

Channel Incentives Platform (CHIP)

CHIP is available for OEM Resellers to manage their Incentives Programs and funds. CHIP is used to enroll in the program, submit marketing plans and claims, upload proof of execution documentation, track payments, and view program resources.

CHIP URL: <https://channelincentives.microsoft.com>

Register in CHIP	Enroll in the OEM Reseller Incentives Program	Set Up Bank Payment Profile
<p>OEM Reseller will receive email invitations to register in CHIP from their Partner Sales Executive.</p> <ul style="list-style-type: none"> • First email will contain the invitation to CHIP with the log-in Web site • Second email will contain the OEM Reseller's invitation code <p>After receipt of these email invitations, log-in with a Windows Live ID (create one if necessary) and enter the invitation code ID.</p> <p>Note: OEM Reseller will receive more than one invitation if participating in multiple programs.</p>	<p>Eligible OEM Resellers who chose to participate must enroll in CHIP for each Incentives Program period in order to claim accrued Incentive Funds.</p> <ul style="list-style-type: none"> • Enroll by 31 December for FY H1 • Enroll by 30 June for FY H2 <p>Once you log into CHIP each program period, you will be directed to sign the program agreement. Once that is completed you will be able to view your current period funds and submit claims.</p> <p>It is recommended that OEM Resellers enroll well in advance of the FY H1 and FY H2 period end dates to allow plenty of time to submit claims for funds before they expire.</p>	<p>Enrolled OEM Resellers must set up their Bank Payment Profile before they are able to submit claims. There are 2 options for setting up their payment profile.</p> <ul style="list-style-type: none"> • For all Partners outside of Russia, Ukraine, China, and Brazil, Resellers set up a vendor ID called a ZCHIP Vendor ID. OEM Resellers will receive an email from Microsoft Accounts Payable requesting a New Vendor Authorization (NVA) form to be completed up to 3 business days after registration in CHIP. • For Russia, Ukraine, China (Server ROK) Partners only, set up Online Payment profile. OEM Resellers will need to log-in to CHIP and go to the "I need to" menu and select "Manage Company Profile". All banking details can be added directly in CHIP. <p>Contact oemincntives@microsoft.com for all payment profile questions.</p>

1 Action Items: View current action items.

2 Incentive Funds are based on how many Eligible Products are purchased from either an Authorized OEM Distributor or OEM Channel Distributor. This funding is allocated between OEM Co-op Funds and OEM Rebate Funds. Allocation is determined by region.

3 OEM Co-op Funds can be used on marketing and training activities. These activities can be claimed in the Demand Generation, Market Development, and Partner Readiness claim categories.

4 OEM Rebate Funds can be used for cash rebates claimed in OEM Rebates claim category in CHIP. These funds can also be used toward all marketing activity claim types.

5 "I Need To" links will allow you to submit claims, submit market development plans and manage users.

6 Quick Links: Find additional Channel Incentives Program information, marketing assets, training, recent announcements, and Frequently Asked Questions (FAQ) resources via the Channel Incentives Resources site (www.oemincntives.com).

CHIP Support: If you require access to CHIP please contact your Partner Sales Executive or send inquiries to oemincntives@microsoft.com.

CHIP Training: For further training modules on CHIP, please visit the [Channel Incentives Resources](http://www.oemincntives.com) site.

Activity Guidelines, Non-Microsoft Software, Ineligible Activities

Activity Guidelines

These guidelines apply to all Demand Generation and Market Development activities. Specific requirements for each activity are available in the following pages.

- Activities must be focused on eligible Microsoft software that has been officially released as part of General Availability (GA) or otherwise notified by the Incentives Program.
- Activities must only use approved Microsoft assets and logos found on the [Channel Incentives Resources](#) site or otherwise notified by the Incentives Program.
- Activities must be customer focused or targeted.
- Activities may include components and messaging from complementary vendors.
- Activities may not appear to be conducted by, on behalf of, or sponsored by Microsoft.
- Activities must adhere to all applicable international, national, regional, corporate, and local guidelines, laws and rules, and privacy policies.
- Activities must meet standards of good taste and must not be sexually oriented or otherwise offensive or inappropriate.
- Activities must be placed on media with content adhering to high standards of good taste.

Inclusion of Non-Microsoft Software or Devices

For Demand Generation and Market Development activities:

- Partners will be reimbursed at 100% for qualifying activities that promote only Microsoft operating system, productivity suite, server solution, collaboration suite software or Windows Devices.
- Partners will be reimbursed at only 30% for qualifying activities when a non-Microsoft operating system, productivity suite, server solution, collaboration suite software or a device running a non-Microsoft operating system are also present. All marketing activities must contain at least 30% content dedicated to promoting Microsoft software in order to be eligible for reimbursement.

The OEM Reseller should enter their claim in CHIP for 30% of the third-party invoice amount as claim amounts cannot be altered once the claim has been submitted.

For example: An OEM Reseller conducts a Direct Email activity that includes 5 systems for sale, one of which does not include a Microsoft operating system. The third-party agency used to design and deliver the email invoiced the OEM Reseller for 3,000€. The OEM Reseller should enter their Direct Mail/Email claim into CHIP, complete the invoice section for 900€, and upload the original third-party invoice and email.

OEM Resellers are allowed to include non-Microsoft operating system, productivity suite, server solution, collaboration suite software or a device running a non-Microsoft operating system in the following activities:

- Print: Catalogs ([page 23](#))
- Tradeshows ([page 34](#))

OEM Resellers may submit the Microsoft specific cost of these activities. Please see the specific activity page for further details on how to calculate your claim amount.

Ineligible Activities and Expenses

Incentive Funds may not be used to reimburse:

- Microsoft software, cash, cash equivalents, systems, store credits or service sold. This includes but is not limited to bank cards, commodities, and gift cards which can be redeemed at any store which potentially sells Microsoft software. See glossary ([page a](#)) for the definition. EXCEPTION:
 - Company may give away up to twenty (20) systems per program period. These systems must be preinstalled with Microsoft software and are eligible for reimbursement. See glossary ([page a](#)) for more information about systems
- Costs associated with the manufacture or distribution of customer systems, including costs related to bills of materials and costs of goods (packaging, shipping, freight etc.). This includes both operating expenses and customer offers on systems sold
- Giveaway items that include non-Microsoft operating system, productivity suite, server solution, collaboration suite software or a device running a non-Microsoft operating system
- Infrastructure (including domain name for main business site), overhead, database acquisition, depreciable asset expenses (e.g., vehicles, capital equipment, etc.), or real property
- VAT taxes, government fees, excises, tariffs, or any other taxes that would be solely the responsibility of the OEM Reseller
- Company's requirement to match or otherwise contribute to any marketing funds provided under a Microsoft joint marketing agreement or any other marketing program offered by Microsoft or any of its affiliated companies (e.g., Company may not use any Incentives Program funds to satisfy any marketing funds contribution requirement by Microsoft or its affiliates)
- Multiple claims for a single activity expense
- The same activity or expense for reimbursement in multiple Microsoft programs
- Travel expenses, including flights, meals, mileage, and any other travel costs (except as specified on [page 36](#))
- Costs associated with activities that appear to punish or retaliate
- Costs for an activity paid at more than fair market value for that activity
- Costs incurred by an entity other than the registered partner or wholly owned subsidiary

Core Requirements

To be eligible for reimbursement, Demand Generation and Market Development activities must include the three core marketing requirements:



Prominently display Incentives Program tagline

The Incentives Program tagline must be present in all Demand Generation and Market Development activities. Prominent display of the tagline ([page 14](#)) demonstrates commitment to marketing and promoting Microsoft software and Windows Devices.



These are the approved taglines that must be used when promoting Microsoft Software:

- [ABC Company] recommends Windows.
- We recommend Windows.
- [ABC Company] recommends [insert Office specific SKU].
- We recommend [insert Office specific SKU].
- [ABC Company] recommends Microsoft® Office.
- We recommend Microsoft® Office.
- [ABC Company] recommends Windows Server.
- We recommend Windows Server.

When promoting more than one Microsoft software products, use this tagline:

- [ABC Company] recommends Microsoft® software.
- We recommend Microsoft® software.

These are the approved taglines that must be used when promoting Windows Devices:

- [ABC Company] recommends Windows devices.
- We recommend Windows devices.

WARNING: The taglines have been revised from the previous versions. As of 1 January 2014, OEM Resellers should use only the above approved taglines. Beginning FY15 H1 (1 July 2014) OEM Resellers **must** use only these taglines or will be denied reimbursement.

REMINDER: As of 1 July 2012 the word "genuine" has been removed from the approved tagline(s). Activities occurring on or after 1 January 2013 using the word "genuine" in the tagline will be denied reimbursement.



Include Company/Brand name and contact information

Company/Brand name and contact information must be included in all Demand Generation and Market Development activities. Contact information must include at least one of the following:

- Your company address
- Your company Web site URL or phone number

Note: Partners will only be reimbursed for claims that are partner-branded, including wholly owned subsidiaries.



Include a minimum of 30% Microsoft content in support of the sale of Microsoft software and/or Windows Devices and/or fully assembled systems with preinstalled Microsoft software

Demand Generation and Market Development activities should include:

- A minimum of 30% content must be in support of the sale of a fully assembled system and/or Windows Device with preinstalled Microsoft products in the system specifications, where specifications are listed.
- An associated Partner software graphic, Windows Device graphic, campaign element, or other eligible logo for each page that is requesting reimbursement where applicable ([page 14](#)).

Note: Partners will be reimbursed at only 30% for qualifying activities when a non-Microsoft operating system, productivity suite, server solution, collaboration suite software or a device running a non-Microsoft operating system are also present ([page 12](#)).

Microsoft Content Guidelines: Tagline, Logo and Graphics Usage

Tagline Prominence

Clear Space. Keep a border of clear space around the Incentives Program tagline. The required border of clear space must be a minimum of the height of the letters.

Placement. The Incentives Program tagline must be prominently displayed in the activity. Typically, this is within the upper one-third of a print activity, or is otherwise easily identifiable. The Incentives Program tagline may not appear to be a part of another sentence or graphic.

Background. The Incentives Program tagline must appear on a background that adequately contrasts with the tagline text to make the tagline clearly legible.

Translation. The Incentives Program tagline may be translated, but the wording must not be changed. Translations of localized program taglines can be found at www.oeminentives.com.

Font. Fonts must be consistent with the core advertisement and text size. All words must be the same size and color. Do not mix typefaces or weights, or include graphics or logos.

For General Trademark Guidelines, visit:
<http://www.microsoft.com/trademarks>

Logo and Graphics Usage

Approved graphical elements must be used in Demand Generation and Market Development activities. Any use of logos must comply with logo usage eligibility. You may not use logos for which you have not met requirements.

Participation in the Incentives Program must not be construed as endorsement or approval of content by Microsoft, including but not limited to any brand, company name, product technology, or product execution claims.

Use of approved logos or graphics must follow the recently published guidelines. Inappropriate use of logos or unapproved graphics by Partners not qualified for their use may result in claim denial.

Partner Software Graphics

Microsoft provides Partner software graphics that may be used to create customized OEM marketing materials. Partner Software Graphics for OEM Partners (a few examples are shown below) help:

- Represent Microsoft software preinstalled on systems sold to customers
- Enhance advertising, Web sites, online banners, and other marketing materials
- Support hardware Partners' marketing efforts to drive sales of specific preinstalled product SKUs
- Assure customers that their systems are preinstalled with Microsoft software

Partner Software Graphics do not compete with existing logo programs or pose a risk to Microsoft brand equity. The graphics are for use ONLY in Partner-branded materials so they clearly show they originate from you and not in Microsoft branded materials provided to you by Microsoft.

Examples



Channel Incentives Resources

The Marketing tab on the Channel Incentives Resources site (www.oeminentives.com) is a centralized location for approved marketing materials (see [page d](#)):

- Partner-to-customer materials: Microsoft-branded materials which communicate Microsoft campaigns, products and branding with space to add Partner identifying information
- Links to additional approved assets: Partner software graphics, screenshots and more are linked for convenience
- Usage terms and guidelines: Documents to ensure successful marketing of Microsoft products

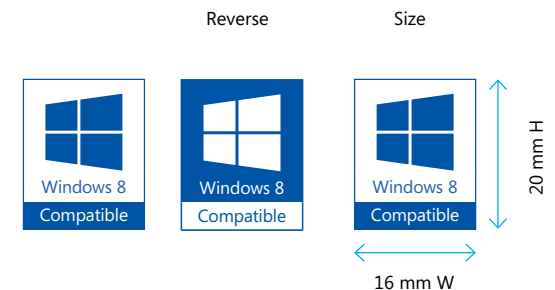
Template Usage

Partners using the template files are required to make modifications to ensure the creative meets Incentive Program core requirements and branding guidelines in order to be eligible for reimbursement.

Windows Logo Program for PCs

The Windows Logo Program graphic may be used only in conjunction with the system that has passed Windows Logo Program testing. Prior to using Windows Logo Program images in advertising, Partners must sign and accept the Logo License Agreement (LLA). All use of the graphic must follow the guidelines in the LLA. For general Certification information, go to: <http://www.microsoft.com/whdc>. For information on a LLA, go to <http://msdn.microsoft.com/en-us/windows/hardware/gg487403>.

Examples



Marketing Guidelines for Promoting Windows

PLEASE READ: These guidelines apply to resellers executing marketing activities for Windows that qualify for reimbursement from the OEM Reseller Incentives Program. The information here does not replace the reseller obligation to comply with the additional requirements documented in this guidebook and the Windows Brand Guidelines, both posted on www.oeminentives.com.

REMINDER: NEW WINDOWS ASSET USAGE GRACE PERIOD ENDED ON 31 DECEMBER 2013

As was done with the Windows 8 launch last October, a limited time "grace period" was offered in FY14 H1 to allow Partners time to implement and use the new Windows assets. This grace period ended on 31 December 2013. Starting 1 January 2014 (FY14 H2) all Partner marketing activities promoting the new Windows must adhere to these guidelines to avoid claim denial for reimbursement. Follow the BEST PRACTICES on the next page to help build compliant marketing activities.

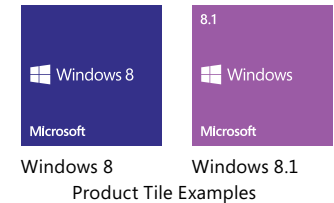
1

Properly use approved Windows product tiles and box shots:

- Windows-specific product tiles should be used when promoting systems preinstalled with Windows. Similarly, Windows box shots should be used when promoting FPP products (when a customer will receive the actual Windows product box).
- Product tiles and box shots are available on the [Channel Incentives Resources](#) site.

Product tile principles:

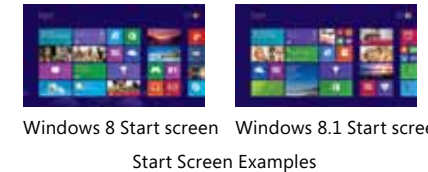
- The Windows tile should not be used in a sentence in place of text.
- The Windows product tiles may not be altered or distorted. The tiles should be large enough to ensure that the Windows logo is displayed accurately with the lines visible in the symbol.



2

Highlight the Windows Start screen:

- In all activities that promote Windows preinstalled, the first and/or most prominent screen must display the appropriate Start screen image.
- Only the 3-row screen may be used in marketing activities as a standalone asset or outside of a device display.
- The Application tiles may not be used outside of the Start screen or as an individual image.



The Windows Start screens and disclaimers are different:

- Partners must include an approved screenshot on every computer display, where a display is shown. The largest display in the ad must show the Start screen. If all displays are the same size, the Start screen must be placed on one of the first viewable displays in the ad. Subsequent displays may include the Microsoft provided Start screen or a secondary screenshot. Partners should choose the appropriate Windows 8 or Windows 8.1 Start screens for all displays, based on which Operating System (OS) is being advertised.
- Partners may use a Windows 8.1 Start screen on devices preinstalled with Windows 8 and must include the following disclaimer: "Some features require Windows 8.1. Update available through Windows Store. Internet access required; fees may apply".
- Partners should use the available Windows 8.1 Start screen assets as-is and must not modify the graphic before use (for example, do not manually change the background color or image of the Start screen for marketing activities).
- Partners now have Microsoft-approved secondary screens to select from to highlight apps and features in the Windows experience. Partners should only use the secondary screens on systems installed with Windows 8.1. Partners have an option to use the secondary screens on system installed with Windows 8 as long as the following disclaimer is included: "Some features require Windows 8.1. Update available through Windows Store. Internet access required; fees may apply".
- Windows 8 Start Screen or a secondary screen cannot be used on the devices preinstalled with Windows 8.1.
- For all marketing activities in which apps are being shown that are not preinstalled on the device with new Windows, this footnote is required: "Some apps sold separately; varies by market".
- Partners selling the Small Screen Touch SKUs now have a Microsoft approved 6 row vertical Start screen for Small Tablets, for both Windows 8 and Windows 8.1. To read more on Windows 8 Small Screen Touch Marketing Requirements, [click here](#).



Marketing Guidelines for Promoting Windows (continued)

Best Practices:

- **Comply with this guidebook** and understand what core program requirements must be met to be eligible for reimbursement.
- **Comply with the Windows Brand Guidelines** in this guidebook on [Page 15-16](#) and follow these marketing principles.
- Both of the above resources and more information can be found on the Channel Incentives Resources site (www.oem incentives.com)
- **Use only approved new Windows marketing assets** found on the Channel Incentives Resources site:
 - Activities that use new Windows assets found or provided from another source (e.g. another asset repository or created by the Partner) will not be reimbursed from the OEM Reseller Incentives Program.
 - If Partners are provided marketing templates by local Microsoft Subsidiary Account teams or non-OEM Reseller Incentives Program, ensure that the template only uses the Windows marketing assets from the Channel Incentives Resources site.
- **Leverage the Local OEM Incentives Preapproval Service team:**
 - Send creative materials to LOEMpre@microsoft.com prior to the execution of any marketing activity to have the materials reviewed. This service will provide guidance to ensure the Partner activity is eligible for reimbursement.
 - Submit preapproval requests at least three business days prior to the start of the activities and allow up to three business days for a response from the Preapproval team. Partners should leave ample time to make any required amendments to the materials before publication.

3

Protect the Windows product name:

Windows 8.1 is an update to Windows 8 – it is referred to as “the new Windows”, and will advance the bold vision set forward with Windows 8, as such:

- Partners must use the text “the new Windows” not “Windows 8.1” in headlines.
- Partners can use the text “Windows 8.1” in body copy type when outlining system specifications (i.e., within a Line List) or exclusive features.
- Partners may not alter the Windows name - including spacing, capitalizations, and abbreviations.

Clarifications	Correct example – DO!	Most common mistake(s) – DON'T!
Must contain all words in the specific product name as outlined in the Windows Brand Guide	Windows 8 <u>or</u> Windows 8 Pro	Windows Pro
Must include capitalizations	Windows 8 <u>or</u> Windows 8 Pro	windows 8 Windows 8 pro
Must include spaces between words	Windows 8 <u>or</u> Windows 8 Pro	Windows8 Windows8Pro
All words must be spelled out completely in all mentions, including pricelists/SKU chooser	Windows 8 <u>or</u> Windows 8 Pro	W8 Win 8 Pro
All words must be in the correct order	Windows 8 Pro	Windows Pro 8
Do NOT include Microsoft in the product name	Windows 8	Microsoft Windows 8

4

Select from the approved new Windows Update messaging text:

- “Update your Windows 8 PC to Windows 8.1 for free through the Windows Store when available.”
- “Get a new tablet or PC with the latest Windows, or update your Windows 8 PC to Windows 8.1 for free through the Windows Store when available.”
- “Buy a new Windows 8 PC or tablet at [add retailer] today. Update to Windows 8.1 for free through the Windows Store when available.”

This disclaimer is required for all three Update versions: “Some features require Windows 8.1. Update available through Windows Store. Internet access required; fees may apply.”

Marketing Guidelines for Promoting Office

PLEASE READ: These guidelines apply to resellers executing marketing activities for Office that qualify for reimbursement from the OEM Reseller Incentives Program. The information here does not replace the reseller obligation to comply with the additional requirements documented in this guidebook and the Office Brand guidelines, both posted on www.oeminentives.com.

- **Use only approved new Office marketing assets** found on the Channel Incentives Resources site (www.oeminentives.com)
 - Activities that use new Office assets found or provided from another source (e.g. another asset repository or created by the Partner) will not be reimbursed from the OEM Reseller Incentives Program.
 - If Partners are provided marketing templates by local Microsoft Subsidiary Account teams or non-OEM Reseller Incentives Program, ensure that the template only uses the Office marketing assets from the Channel Incentives Resources site.

- **Leverage the Local OEM Incentives Preapproval Service team:**
 - Send creative materials to LOEMpre@microsoft.com prior to the execution of any marketing activity to have the materials reviewed. This service will provide guidance to ensure the Partner activity is eligible for reimbursement.
 - Submit preapproval requests at least three business days prior to the start of the activities and allow up to three business days for a response from the Preapproval team. Partners should leave ample time to make any required amendments to the materials before publication.

1 Properly use approved Office logos, product tiles and box shots, available on www.oeminentives.com

The image displays three categories of approved Office marketing assets:

- Brand Logos:** Includes the Office symbol (a 3D cube) and the Office logotype (the word 'Office' in a sans-serif font). Below these, the Office 365 logo is shown, consisting of the Office symbol followed by the text 'Office 365'. Two examples of the Office 365 logo are shown: one in white text on an orange background, and another in white text on a dark blue background.
- Product Tiles:** Four examples of product tiles are shown, each featuring the Office logo and the product name: 'Home & Student 2013', 'Home & Business 2013', 'Professional 2013', and 'Office 365 Home Premium'. Each tile also includes the Microsoft logo.
- Box Shots:** Four examples of Office product boxes are shown, corresponding to the product tiles above: 'Office Home & Student 2013', 'Office Home & Business 2013', 'Office Professional 2013', and 'Office 365 Home Premium'.

2 Properly use the Office product name

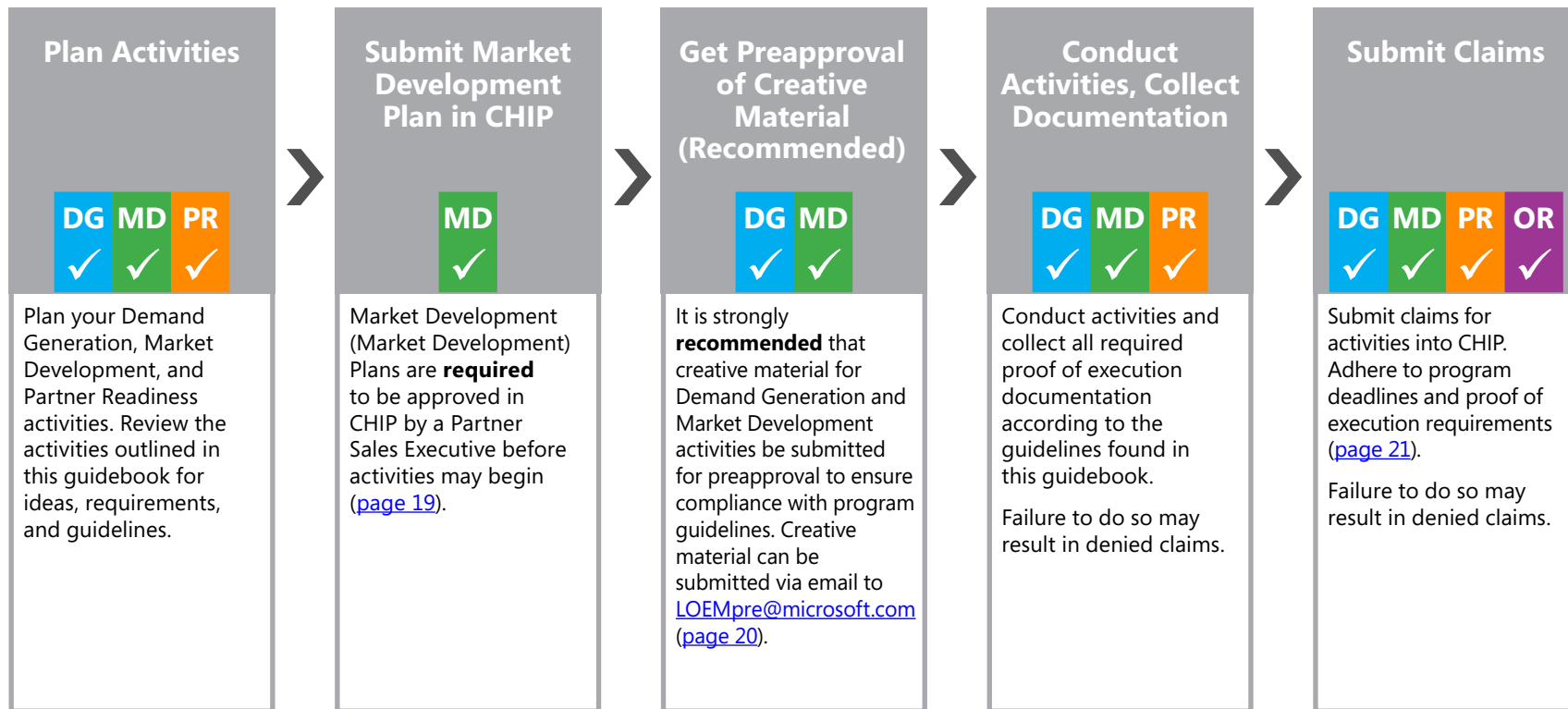
- Office Home & Student 2013
- Office Home & Business 2013
- Office Professional 2013
- Office 365 Home Premium
- Office 365 Small Business Premium
- Only official translations of the product name will be accepted. A list of the approved translation is posted on www.oeminentives.com.

Clarifications	Correct example – DO!	Most common mistake(s) – DON'T!
Must contain all words in the specific product name as outlined in the Office Brand Guide.	Office Home & Student 2013	Home & Student 2013
Must include capitalizations	Office Home & Student 2013	Office home & student 2013
Must include spaces between words	Office Home & Student 2013	Office Home&Student 2013
All words must be spelled out completely in all mentions, including pricelists/SKU chooser	Office Professional 2013 Office 365 Small Business Premium	Office Pro 2013 or Office 365 SBP
All words must be in the correct order	Office Home & Student 2013	Office 2013 Home & Student

Incentives Program Process

Demand Generation (DG)	Traditional advertising with broad reach that furthers the marketing and promotion of Microsoft software and Windows Devices. Results and audience size are measurable.
Market Development (MD)	Marketing activities designed for a specific customer audience that support the sale of Microsoft software and Windows Devices.
Partner Readiness (PR)	Expenses related to Microsoft training, technical certification, and program fees that promote the development of Microsoft technology expertise.
OEM Rebates (OR)	A cash rebate claim that requires no proof of execution. OEM Rebates claims will be capped at the total amount of OEM Rebate Funds available.

The Incentives Program Process follows the steps outlined below.



Market Development Plan

Market Development activities are designed for a specific customer audience and must have a well-defined strategy and a compelling return on investment. For this reason, a Market Development (MD) Plan is required and must be approved in CHIP (<https://channelincentives.microsoft.com>) by a Partner Sales Executive before activities begin. Please review the eligible Market Development activities on [page 26](#).



Overview

Submit Market Development plans in CHIP as early as possible before the planned activities are scheduled to begin. At a minimum, allow several days to a week for a Partner Sales Executive to review and render a decision on the plan. Notification of the decision will be sent via email to the Primary Program Admin listed in CHIP and will also be shown in CHIP under the Market Development Plan Summary page.

After approval of the plan, the Market Development activities associated with the plan may be conducted. Refer to [page 18](#) for details on the Incentives Program process.

Best Practices

- Plan your Market Development activities and estimate total plan expenses well in advance before the activities begin.
- Fill out the Market Development Plan in CHIP with accurate and complete information. Market Development Plans cannot be altered once submitted.
- Complete the "Description" box of the Market Development Plan with details pertaining to the planned activity(ies).
- Enter the estimated expenses for the total activity cost. Submitting a Market Development Plan does not commit Incentive Funds, however the approved plan amount will limit the resulting claim amount.
- Await decision on plan from Partner Sales Executive.
- Plan approval does not guarantee claim approval. Activities must meet the program guidelines outlined on the following pages in order to receive approval.
- Get creative material preapproved ([page 20](#)) to ensure compliance with the program guidelines.
- Submit an Market Development claim to request reimbursement of Incentive Funds before the claim deadlines below.

Last day to enter Market Development Plans into CHIP	
H1	31 Dec
H2	30 Jun

Creative Material Preapproval



Preapproval Recommendation for Creative Materials

It is strongly recommended that creative material for Demand Generation and Market Development activities be submitted for preapproval to ensure compliance with the Incentives Program guidelines. Creative material may be submitted for preapproval by email to LOEMpre@microsoft.com a minimum of 3 business days before the activity is scheduled to begin. The Local OEM Incentives Program Preapproval team will review the activities and approve or request changes/corrections within 3 business days.

Approved activities will be assigned a preapproval code which should be entered into the claim form on CHIP along with proof of execution at the time of claim submission. The activities must be conducted exactly as approved. Any deviation from the approved activities, with the exception of dates and pricing, will result in the activities being re-assessed and the claim may be denied. Activities that run repeatedly should receive a new preapproval number each usage period to ensure the activity continues to meet program requirements.

Preapproval Best Practices

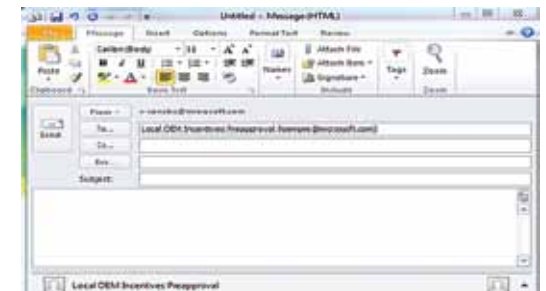
The following suggestions will assist in receiving a quick and accurate preapproval response:

- Include your OEM Reseller Program ID in the preapproval request. The Program ID can be found on the CHIP homepage following your company name.
- Include the activity type in which the creative material will be used. Including the activity type planned will assist the Preapproval team in accurately evaluating your activity.
- Leave ample lead time in order to make any necessary changes before the start of your activity. Recommended lead time is a minimum of 7 business days.
- Do not send Market Development plans for preapproval. Market Development plans must be entered into CHIP and are approved by your Partner Sales Executive. The Preapproval team is unable to assist in approving Market Development plans.

Submitting Preapproval Requests

- To submit a preapproval request, OEM Resellers can click "Submit a Preapproval Request" from the "I Need To" quick links menu in CHIP. This will open up an email that can be sent to the Preapproval team with the creative materials attached.
- Alternatively, OEM Resellers can bypass the quick links menu in CHIP and send an email directly to LOEMpre@microsoft.com with the creative materials attached.

Microsoft Channel Incentives



The Local OEM Incentives Program Preapproval team ensures the submitted creative materials meet program requirements and guidelines and will approve or request changes/corrections within 3 business days.

Effective 1 July 2013 - assigned preapproval codes are valid up to one year from the date of preapproval. If the activity is not completed within that time frame, the preapproval code expires and the activity will be re-assessed at the time of claim submission for compliance under the current program requirements.

Note: Preapproval codes assigned prior to 1 July 2013 are valid for activities completed by 30 June 2014.

Core Requirements (page 13)



Prominently display Incentives Program tagline.



Include Company/Brand name and contact information.



Include a minimum of 30% Microsoft content in support of the sale of Microsoft software and/or Windows Devices and/or fully assembled systems with preinstalled Microsoft software.

Claiming

Claim Requirements

Enrolled Partners may submit claims for qualifying activities conducted within the Incentives Program usage period.

Submit claims with proof of execution after the activity has been conducted and no later than the claim submission deadline.

Claim reimbursement will not exceed the following:

- The amount of funds available at the time of the claim submission.
- Individual activity or expense limits as detailed in this guidebook.
- Approved Market Development Plan amounts (see [page 19](#) for details).

Demand Generation Claims

The Incentives Program reimburses expenses for **Media Placement** and **Marketing Services**. Both can be claimed at the same time for an activity that has taken place within the usage period with proper documentation.

Market Development Claims

Market Development claims require an approved Market Development Plan in CHIP. Market Development activity claims may only be submitted after the plan has approval by a Partner Sales Executive ([page 19](#)). Approval of a Market Development plan does not guarantee reimbursement of claims as activities need to meet the Incentives Program core requirements and guidelines.

Market Development planned activities conducted in the usage period may be submitted up to the amount of the approved Market Development plan.

Partner Readiness Claims

Partner Readiness claims may be submitted for any qualifying readiness activity that has taken place within the Incentives Program usage period.

OEM Rebates Claims

OEM Rebates claims can be submitted for all available OEM Rebate Funds in CHIP and require no proof of execution.

Claim Status

The following table is an overview of the different claim statuses in CHIP. For more detailed information and training on how to use CHIP, please go to the “Training” section on the [Channel Incentives Resources](#) site.

Status	What does it mean?	Partner action needed
Pending POE	Claim is submitted, but no POE is uploaded	Open the claim and upload the POE needed based on claim type
Pending Approval	Claim and POE has been submitted to Microsoft for review	No action needed
Action Required	Claim has been reviewed, but is missing information	Open the claim, review what documents are missing and any notes from the Validation team. Gather information and upload it to the claim. Submit the claim for further review.
Non-Compliant	Claim is not eligible for reimbursement	Open the claim and review the reasons for claim denial to avoid issues with future claims
Compliant	Claim has been ruled eligible for payment	Ensure banking details are up to date to ensure timely payment

Proof of Execution

All Demand Generation, Market Development and Partner Readiness claims require proof of execution to be submitted for validation to assess program compliance. Invoices must be from a third-party unless otherwise specified. Incomplete or missing documentation may cause delays in processing and may lead to claim denial. Proof of execution documentation may be uploaded directly to CHIP (combined file size of 100MB, limit of 20MB for any single document) sent by email to oem incentives@microsoft.com, or sent by post (address on [page d](#)). For a list of accepted file types please see [page a](#). If Partners have any issues uploading proof of execution documentation, please contact oem incentives@microsoft.com.

The costs associated with sending and submitting proof of execution are not reimbursable through the Incentives Program.

Claim Timing and Deadlines	FY H1 Period (Jul – Dec)	FY H2 Period (Jan – Jun)
Activity completed by:	31 Dec	30 Jun
Claim and proof of execution submission deadline:*	15 Feb	15 Aug

*Microsoft reserves the right to request original proof of execution documents. You must retain all original documents for a period of 24 months from the activity date.

Certification Statement and Report

OEM Resellers who develop Incentives Program advertising and activities internally, instead of using a third-party agency must use the Certification Statement and Report (CSR) in lieu of a third-party invoice ([page c](#)). Use of the CSR to request reimbursement for costs incurred by the OEM Reseller must solely be in connection with the implementation of qualified Incentives Program marketing activities. The marketing activities covered are listed on the CSR form.

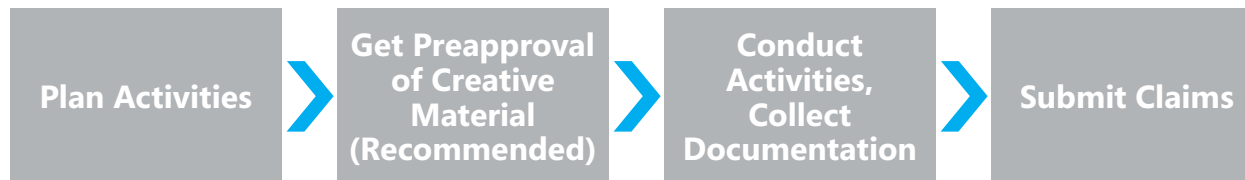
The CSR form:

- Must be completed in its entirety and only used when a third-party invoice is not available.
- Must not be used to claim expenses that are not eligible for reimbursement ([page 12](#)).
- Must be signed by a senior officer of Company. Choose one of these two methods to sign – 1) Print out the form, physically sign, and then scan 2) Sign electronically.
- Is subject to verification upon request from Microsoft (or Microsoft designated claim validation entity).
- Is available on CHIP under the Program Resource link and has further instruction for claiming.

Demand Generation: Overview

Demand Generation activities have a broad reach and a defined audience size. They are usually associated with traditional advertising methods such as print, direct mail/email/SMS, and online advertising.

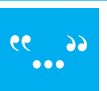
The Demand Generation process should be conducted as follows. Refer to [page 18](#) for details.



Eligible Activities

Activity Type	Required Proof of Execution Documentation
Print: Ads and Brochures Page 23	<ul style="list-style-type: none"> Tear sheets from the printed publication demonstrating compliance with core requirements Third-party invoices
Print: Catalogs Page 23	<ul style="list-style-type: none"> Tear sheets from the printed publication demonstrating compliance with core requirements Total number of pages in catalog and how many pages are being claimed Third-party invoices
Direct Mail, Email, and SMS Page 23	<ul style="list-style-type: none"> Mailed piece including postmarked shipping envelope from provider Original email with dated headers Transmitted communication piece (e.g. direct mail, email, SMS) Third-party invoices
Web/Online Advertising Page 24	<ul style="list-style-type: none"> Electronic file of the Web banner and link to the landing page Click-through report from third-party Third-party invoices
Outdoor Advertising Page 25	<ul style="list-style-type: none"> Final piece in electronic form Photographs showing detail and overall view of the live billboard placement Third-party invoices

Core Requirements (page 13)



Prominently display Incentives Program tagline.



Include Company/Brand name and contact information.



Include a minimum of 30% Microsoft content in support of the sale of Microsoft software and/or Windows Devices and/or fully assembled systems with preinstalled Microsoft software.

Print, Direct Mail, Email, and SMS

Print activities cover print ads, brochures and catalogs. **Direct mail** covers printed pieces that are mailed (via post) to customers or potential customers. **Email** is sent electronically to customers or potential customers. **SMS** stands for short message service and covers sending text messages from one cell phone to another cell phone or from the Web to another cell phone to potential customers.

» Core Requirements (page 13)



Prominently display Incentives Program tagline.



Include Company/Brand name and contact information.



Include a minimum of 30% Microsoft content in support of the sale of Microsoft software and/or Windows Devices and/or fully assembled systems with preinstalled Microsoft software.

Print: Ads and Brochures

Requirements

The complete ad must meet the requirement for 30% minimum Microsoft content. No proportional reimbursement will be allowed for pages that do not meet the program requirements.

Best Practices

Print ads should appear in publications with an established circulation rate.

Required Proof of Execution

Demonstrate the Incentives Program requirements have been met by submitting all that apply:

- Tear sheets from the printed publication demonstrating compliance with core requirements
- Third-party invoices

Print: Catalogs

Requirements

Resellers are allowed to include non-Microsoft operating system, productivity suite, server solution, collaboration suite software or a device running a non-Microsoft operating system in this activity. The claim may be submitted for the Microsoft proportional cost of this activity.

To calculate the cost of this activity, take the total cost of the catalog and divide by the number of pages of the catalog. This is your cost per page. Claim 100% of any page that is dedicated solely to Microsoft content. Claim 30% of the per page cost for any page that meets program requirements but also has a non-Microsoft operating system, productivity suite, server solution, collaboration suite software or a device running a non-Microsoft operating system present.

Best Practices

Catalogs delivered to an established list of new or existing customers. See definition of catalog in the glossary ([page a](#)).

Required Proof of Execution

Demonstrate the Incentives Program requirements have been met by submitting all that apply:

- Tear sheets from the printed publication demonstrating compliance with core requirements
- Total number of pages in catalog and how many pages are being claimed
- Third-party invoices

Direct Mail, Email, and SMS

Requirements

The core requirements must be present in the body of the email. Individual portions of an email sent on behalf of the OEM Reseller will not be eligible for reimbursement. If the OEM Reseller purchases limited advertising space in a third-party email, they will be able to claim only the portion of the email purchased.

Best Practices

- Execute through a third-party fulfillment house or email distributor.
- Deliver to an established list of new or existing Partners/customers.
- Add your organization's email address to the distribution list and provide as proof of execution.

Required Proof of Execution

Demonstrate the Incentives Program requirements have been met by submitting all that apply:

- Transmitted communication piece (e.g. direct mail, email, SMS)
- Postmarked shipping envelope from provider (direct mail) or other proof of mailing
- Original email with dated headers
- Third-party invoices

Web/Online Advertising

Web/Online Advertising may include Web banners or other advertising that is placed on an appropriate third-party Web site and is designed to drive traffic to an OEM Reseller's Web site or offer page.

» Core Requirements (page 13)



Prominently display Incentives Program tagline.



Include Company/Brand name and contact information.



Include a minimum of 30% Microsoft content in support of the sale of Microsoft software and/or Windows Devices and/or fully assembled systems with preinstalled Microsoft software.

Requirements

- Placed on a third-party site of which not more than 10% is Partner owned. Claims utilizing Reseller-owned engines should be reviewed under Market Development/E-Commerce activities and require a Market Development activity plan approval.
- Placed on a site with content adhering to high standards of good taste.

Required Proof of Execution

Demonstrate the Incentives Program requirements have been met by submitting all that apply:

- Electronic file of the Web marketing piece or activity with link to the landing page. For example:
 - Banner
 - Web advertisement
- Click-through report from third-party
- Third-party invoices

Note: Contact information may be omitted from web banner advertisements, if included on the landing page. All other core requirements must be present on the web banner.

Outdoor Advertising

Outdoor Advertising typically involves advertising on a billboard or similar outdoor venue.

» Core Requirements (page 13)



Prominently display Incentives Program tagline.



Include Company/Brand name and contact information.



Include a minimum of 30% Microsoft content in support of the sale of Microsoft software and/or Windows Devices and/or fully assembled systems with preinstalled Microsoft software.

Requirements

The core requirements must be proportionately sized in the activity to be clearly visible.

Best Practices

- Appear in an outdoor advertising space that has an established and measured advertising rate.
- Appear in outdoor advertising that is directed toward end users.

Required Proof of Execution

Demonstrate the Incentives Program requirements have been met by submitting all that apply:

- Final piece in electronic form
- Photographs showing detail and overall view of the live billboard placement
- Third-party invoices

Market Development: Overview

Market Development activities are designed for a specific customer audience and must have a well-defined strategy and a compelling return on investment.

The Market Development process should be conducted as follows. Refer to [page 18](#) for details.



Eligible Activities

Activity Type	Reimbursable Expenses			
Customer Offers Page 27	• Giveaway items	• Printed materials	• Agency fees	
E-Commerce, Mobile Commerce and Search Engine Placement Page 28	• Agency fees	• Programming and development fees		
Events and Seminars Page 29	• Facility fees • Event equipment rental	• Catering (excluding alcohol) • Printed promotional materials	• Signage and display fees • Giveaways	• Speaker fees • Agency fees
Internal Incentives/SPIFFs (Sales Performance Incentive Fund) Page 30	• Giveaway items	• Signage and displays	• Printed materials	• Agency fees
Promotional Retail Merchandising Page 31	• Agency fees	• Printed materials	• In-store and outdoor retail displays	• Permanent signage
Sponsorships Page 32	• Sponsorship fees	• Printed materials	• Signage and displays	• Agency fees • Giveaways
Telemarketing Page 33	• Call center charges			
Tradeshows Page 34	• Facility fees • Tradeshows equipment rental	• Catering (excluding alcohol) • Printed promotional materials	• Giveaways • Signage and display fees	• Agency fees • Registration fees
Web Marketing Syndication Page 35	• Agency fees	• Development costs	• Placement costs	

Core Requirements (page 13)



Prominently display Incentives Program tagline.



Include Company/Brand name and contact information.



Include a minimum of 30% Microsoft content in support of the sale of Microsoft software and/or Windows Devices and/or fully assembled systems with preinstalled Microsoft software.

Customer Offers

Customer Offers are directed to end users and are designed to create excitement and generate sales opportunities. They often involve a giveaway item to help drive sales. See example on [page e](#).

Core Requirements (page 13)



Prominently display Incentives Program tagline.



Include Company/Brand name and contact information.



Include a minimum of 30% Microsoft content in support of the sale of Microsoft software and/or Windows Devices and/or fully assembled systems with preinstalled Microsoft software.

Requirements

- Offers for Partners/customers only.
- Must not include a discount on a bundle which includes Microsoft software.
- Customer Offer claims should be limited to 40% of the total accrued OEM Co-op funds per Incentives period.

Allowable Expenses

- Giveaway items
- Printed materials
- Agency fees
- Customer Giveaway - Microsoft Hosted Event
- Customer Giveaway - Other

Eligible Activities

- Communication materials supporting the offer
- Giveaway items
 - May include up to twenty (20) systems per program period. The systems must be preinstalled with Microsoft software
 - Do not include Microsoft software (except as specified)
 - Must not include costs associated with the manufacture or distribution of customer systems, including costs related to bills of materials and costs of goods (packaging, shipping, freight etc.). This includes both operating expenses and customer offers on systems sold
 - Must not be used to provide cash, cash equivalent, store credit or service rebates of any kind. This includes but is not limited to bank cards, commodities, and gift cards which can be redeemed at any store which potentially sells Microsoft software. See glossary ([page a](#)) for the definition
 - Must not include giveaway items that include non-Microsoft operating system, productivity suite, server solution, collaboration suite software or a device running a non-Microsoft operating system
 - For a complete list of ineligible activities and expenses, see [page 12](#)

Best Practices

- Have a strong offer that is readily accessible, legible, and focused on the needs of the targeted customer.
- Offers that have a deadline encourage immediate action.
- Giveaway items that cannot physically contain the core requirements must include supporting communication material. The core requirements must be demonstrated with the communication material and the giveaway item. This piece can be an advertisement, direct mail piece, brochure, etc.

Required Proof of Execution

- Demonstrate the Incentives Program requirements have been met by submitting all that apply:
- Copies of printed/communication materials or tear sheets
 - Dated event photographs
 - Photographs of giveaway item
 - Third-party invoices

E-Commerce, Mobile Commerce and Search Engine Placement

E-Commerce, Mobile Commerce, and Search Engine Placement include activities involving marketing over the Internet and other computer networks, advertising or marketing on mobile devices, social media advertising, and search engine marketing to increase visibility of Web sites. See example on [page f](#).

Core Requirements (page 13)



Prominently display Incentives Program tagline.



Include Company/Brand name and contact information.



Include a minimum of 30% Microsoft content in support of the sale of Microsoft software and/or Windows Devices and/or fully assembled systems with preinstalled Microsoft software.

Requirements

- Include a prominently displayed Incentives Program tagline on the web banner, landing page and key product pages.
- Ensure that the landing page and key product pages contain your Company/Brand information. Contact information is implied if landing page and key product pages are on your company Web site.
- Result in an online experience that furthers the marketing and promotion of Microsoft software.

Eligible Activities

- Search Engine Optimization (SEO), Search Engine Marketing (SEM), Content Sponsorship
- Mobile commerce such as mobile web display advertising, in-app advertising, or mobile coupons
- Social media advertising
- Microsites

Allowable Expenses

- Programming and development fees
- Agency fees

Best Practices

- Placement fees for content hosted on a partner owned, or wholly owned, Web site are not reimbursable expenses.
- Configuration drop-down menus: Create up-sell or cross-sell opportunities by configuring drop-down menus with Microsoft products.
- Link to the Microsoft home page and product pages.
- For development, use a third-party vendor not affiliated with your company.

Required Proof of Execution

Demonstrate the Incentives Program requirements have been met by submitting all that apply:




- Screen shots of Web banner or Web site
- Screen shots of the Search Words Placement
- Link to the landing page in URL form
- Third-party invoices or CSR

Note: Contact information and taglines may be omitted from search words advertisements, if included on the landing page. Search words placement must still contain 30% Microsoft content.

Events and Seminars

Microsoft **Events and Seminars** include customer-facing training and sales events. See example on [page g](#).

Core Requirements (page 13)

-  Prominently display Incentives Program tagline.
-  Include Company/Brand name and contact information.
-  Include a minimum of 30% Microsoft content in support of the sale of Microsoft software and/or Windows Devices and/or fully assembled systems with preinstalled Microsoft software.

Overview

Microsoft events and seminars are customer-facing sales training events.

Requirements

- Event signage and materials must not mislead the audience that they are “sponsored by” or “provided by” Microsoft.

Eligible Activities

Event and seminar expenses include:

- Event signage
- Table-top signage and handouts
- Demonstration materials using an interactive display to communicate with customers
- Promotional materials
- Giveaways

Allowable Expenses

- Facility fees
- Event equipment rental
- Catering (excluding alcohol)
- Printed promotional materials
- Signage and display fees, including development, shipping, and setup
- Giveaways
- Speaker fees
- Agency fees

Best Practices

- Provide giveaways to attract attendees, increase participation, and collect customer information.
Note: Giveaways must not be used to provide cash, cash equivalent, store credit or service rebates of any kind.
- Include the program tagline, company name and contact information in the invitation to the event.

Required Proof of Execution

- Demonstrate the Incentives Program requirements have been met by submitting all that apply:
- Dated event photographs
 - Copies of printed/electronic communication materials
 - Event agenda and/or presentation deck
 - Third-party invoices

Internal Incentives/SPIFFs (Sales Performance Incentive Fund)

Internal Incentives/SPIFFs are activities in which prizes are awarded to OEM Reseller employees (e.g. sales staff) for achieving specific goals. See example on [page h](#).

Core Requirements (page 13)



Prominently display Incentives Program tagline.



Include Company/Brand name and contact information.



Include a minimum of 30% Microsoft content in support of the sale of Microsoft software and/or Windows Devices and/or fully assembled systems with preinstalled Microsoft software.

Requirements

- SPIFF incentive awards may only be determined based on overall achievement relative to a peer group of sales people.
- Microsoft will not reimburse for SPIFF incentive awards on a per-unit basis.*
- SPIFF Incentive awards must:
 - Not include Microsoft software, except as specified.
 - Not be used to provide cash, cash equivalent, or store credit.
 - Be no more than 25% of the total accrued OEM Co-op funds per Incentives period in this activity.

*In the EMEA region, SPIFF incentive awards may not be associated with specific volume targets or growth rates.

Eligible Activities

Internal Incentives/SPIFFs include:

- Giveaway items
- Communication/printed materials supporting the activity
- Catering (excluding alcohol) for sales day

Allowable Expenses

- Giveaway items
 - May include up to twenty (20) systems per program period. The systems must be preinstalled with Microsoft software
 - Do not include Microsoft software (except as specified)
 - Must not be used to provide cash, cash equivalent, or service rebates of any kind. This includes but is not limited to bank cards, commodities, and gift cards which can be redeemed at any store which potentially sells Microsoft software. See glossary ([page a](#)) for the definition
 - Do not include overhead expenses
- Signage and displays
- Printed materials
- Agency fees
- For a complete list of ineligible activities and expenses, see [page 12](#)

Best Practices

- Internal Incentives/SPIFFs are most effective when clear goals and time lines are set and the incentive is relevant to the goals.
- Giveaway items that cannot physically contain the core requirements must include supporting communication material. The core requirements must be demonstrated with the communication material and the giveaway item. This piece is usually the internal contest rules with the goals and the items to be awarded.
- Internal contest rules will suffice as contact information if Company/Brand name is included in the printed/communication or electronic material.

Required Proof of Execution

- Demonstrate the Incentives Program requirements have been met by submitting all that apply:
- Contest rules communication
 - Summary of results based on contest metrics
 - Dated photographs
 - Third-party invoices

Promotional Retail Merchandising

Promotional Retail Merchandising materials include displays, materials, signage, etc. that are displayed in a retail store and further the marketing and promotion of Microsoft software and Windows Devices.

Core Requirements (page 13)



Prominently display Incentives Program tagline.



Include Company/Brand name and contact information.



Include a minimum of 30% Microsoft content in support of the sale of Microsoft software and/or Windows Devices and/or fully assembled systems with preinstalled Microsoft software.

Requirements

- Displayed in retail storefront

Eligible Activities

Promotional retail merchandising activities should further the marketing and promotion of Microsoft software.

Activities include but are not limited to:

- In-store display: Create in-store retail displays that further the marketing and promotion of Microsoft software such as:
 - End caps
 - Window clings
 - Retractable banners and stands
- In-store materials: Print in-store materials that further the marketing and promotion of Microsoft software at the point-of-sale such as:
 - Shelf talkers
 - Sales materials
 - Tear sheets
 - Free-standing point-of-purchase displays
- Permanent signage: Install permanent signage on the storefront for ongoing value and communicating the Partner's/customer's commitment to Microsoft for the long-term.
- Outdoor retail signs
- Storefront signs

Allowable Expenses

- In-store and outdoor retail displays
- Permanent signage
- Printed materials
- Agency fees

Best Practices

- Consider the size and layout of the retail storefront in determining point-of-sale materials.
- Stocked with product at all times (if applicable).
- Located in a high-traffic area.
- Permanent signage installed on the storefront for ongoing value and communicating the Partner's/customer's commitment to Microsoft for the long-term.

Required Proof of Execution

Demonstrate the Incentives Program requirements have been met by submitting all that apply:

- Dated photographs
- Electronic copy of display
- Third-party invoices

Sponsorships

Sponsorships are primarily designed to build relationships and brands, rather than drive sales. They can be effective communication tools, however can be hard to quantify and tie to sales. Sponsorship opportunities may include sporting events (golf tournament, fun run, sports team, etc.) or industry events. Sponsorship materials may include welcome brochures or packs, jerseys, field signage, etc. See examples on [page i](#).

Core Requirements (page 13)



Prominently display Incentives Program tagline.



Include Company/Brand name and contact information.



Include a minimum of 30% Microsoft content in support of the sale of Microsoft software and/or Windows Devices and/or fully assembled systems with preinstalled Microsoft software.

Requirements

- Sponsorships must be for participation in an external activity not hosted by the OEM Reseller.
- Sponsorship should clearly be branded for the Partner and not appear to be sponsored on behalf of Microsoft.
- All print materials must meet branding and logo usage guidelines ([page 14](#)).
- Must have a target Partner/customer audience.

Eligible Activities

Sponsorship activities include but are not limited to:

- Signage and displays
- Giveaways

Allowable Expenses

- Sponsorship fees
- Printed materials
- Signage and displays
- Agency fees
- Giveaways

Best Practices

- Use sponsorships to make connections with Partners/customers.
- The message should be that Microsoft products are available through the Partner.
- Provide ways for prospects and Partners/customers to respond.
- Giveaways must not be used to provide cash, cash equivalent, store credit or service rebates of any kind.

Required Proof of Execution

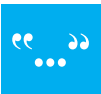


Demonstrate the Incentives Program requirements have been met by submitting all that apply:

- Dated event photographs, tear sheets and/or copies of printed/communication materials
- Sponsorship terms and conditions
- Third-party invoices

Telemarketing

Telemarketing involves the calling of customers or potential customers in an attempt to promote and sell Microsoft software and Windows Devices. It can be an effective tool to prospect for leads and communicate directly with customers.

» Core Requirements (page 13)

- | | | |
|----------------------------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
|  Prominently display Incentives Program tagline. |  Include Company/Brand name and contact information. |  Include a minimum of 30% Microsoft content in support of the sale of Microsoft software and/or Windows Devices and/or fully assembled systems with preinstalled Microsoft software. |
|----------------------------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|

Requirements

- Should verbally deliver the Incentives Program tagline or promote a specific Microsoft product.
- The Incentives Program core requirements of Microsoft content and the Company/Brand name must be written in the telesales script. Contact information is implied in the call to action.
- Indicate that the call is from your company and not Microsoft.
- Script must be 100% Microsoft focused.
- Database acquisition, telephone equipment purchases and other overhead costs are not eligible.

Allowable Expenses

- Call center charges

Best Practices

- Use the appropriate trademarked names for software in the script.
- Focus on communicating the most important message and driving a response.
- Appeal to Partners/customers by meeting a specific need.
- Have a strong call-to-action and response mechanism.
- Make sure the Partner/customer list is targeted, focused, and cleaned prior to conducting the telemarketing campaign.
- Test multiple lists and offers to see which has the greatest impact.
- Can be used to make sales calls, build a sales pipeline, or communicate with new or existing Partners/customers.

Required Proof of Execution

Demonstrate the Incentives Program requirements have been met by submitting all that apply:

- Copy of script
- Summary of results
 - Number of calls made
 - Successful contacts
- Third-party invoices

Tradeshows

A **Tradeshow** is a third-party exhibition where OEM Resellers can promote their business and the related sales of Microsoft software or Windows Devices. See example on [page j](#).

Core Requirements (page 13)



Prominently display Incentives Program tagline.



Include Company/Brand name and contact information.



Include a minimum of 30% Microsoft content in support of the sale of Microsoft software and/or Windows Devices and/or fully assembled systems with preinstalled Microsoft software.

Requirements

- Tradeshows must be for participation in an external activity not hosted by the OEM Reseller.
- Booth and materials must not mislead the audience that the booth is “sponsored by” or “provided by” Microsoft.
- Resellers are allowed to include non-Microsoft operating system, productivity suite, server solution, collaboration suite software or a device running a non-Microsoft operating system in this activity. The claim may be submitted for the Microsoft proportional cost of this activity.

For example booth signage, printed materials, etc. that are dedicated to Microsoft software. If the booth contains at least 30% Microsoft content that meets the requirements, then the Microsoft proportion of the registration fee will be eligible. If the booth is 100% dedicated to Microsoft software, then the OEM Reseller can claim 100% of the booth costs.

Eligible Activities

Tradeshow expenses include:

- Event signage
- Table-top signage and handouts
- Demonstration materials using an interactive display to communicate with customers
- Promotional materials
- Giveaways

Allowable Expenses

- Facility fees
- Tradeshow equipment rental
- Catering (excluding alcohol)
- Printed promotional materials
- Signage and display fees, including development, shipping, and setup
- Giveaways
- Registration fees for booth
- Agency fees

Best Practices

- Include the program tagline, company name and contact information in the invitation to the tradeshow.
- Provide giveaways to attract attendees, increase participation, and collect customer information.

Note: Giveaways must not be used to provide cash, cash equivalent, store credit or service rebates of any kind.

- Customize your tradeshow strategy based on the unique needs of your business.

Required Proof of Execution




Demonstrate the Incentives Program requirements have been met by submitting all that apply:

- Dated tradeshow photographs
- Copies of printed/communication and/or electronic materials
- Tradeshow agenda and/or presentation deck
- Third-party invoices

Web Marketing Syndication

Web Marketing Syndication is the placement of Microsoft created and maintained content on the Partner's own Web page.

Core Requirements (page 13)

-  Prominently display Incentives Program tagline.
-  Include Company/Brand name and contact information.
-  Include a minimum of 30% Microsoft content in support of the sale of Microsoft software and/or Windows Devices and/or fully assembled systems with preinstalled Microsoft software.

Overview

Web Marketing Syndication is the placement of Microsoft created and maintained content on the Partner's own Web page.

- **Web Banners and Microsites:** Strategic placement of Microsoft Web banners and microsites on the Partner's Web site designed to promote marketing awareness and evangelize Microsoft solutions.

Requirements

- Syndicated Web banners and microsites:
 - At least one Web banner should be prominently placed on the Partner's own home page, within the top 20% of the page, for at least 90 days.
- OR
- A minimum of two Web banners should be syndicated on the Partner's Web site which deliver at least a combined total of 100 click-throughs.
- Targets must be achieved in the period in which the claim is filed.

Eligible Activities

- Web banner placement on the Reseller's Web site
 - Cost must not exceed \$4,250 USD per program period

Allowable Expenses

Actual costs associated with:

- Agency fees
- Development costs
- Placement costs

Best Practices

- Opt to include the "Buy Now" button within microsites.
- Visit the Microsoft Digital Commerce and Campaign Network at www.msdcn.com to access content.
- Choose from numerous Microsoft marketing campaigns.

Required Proof of Execution

- Screenshot and URL of the placement or link to live placement
- Third-party invoices or CSR

Partner Readiness: Overview

Partner Readiness reimburses specific Microsoft product training, technical certification, and Microsoft event registration.

Eligible Activities

- Microsoft On-Site Trainings: 100% Microsoft focused training at the reseller location. Third-party expenses for catering, equipment rental, external speaker fees, giveaways, signage, display, and printed materials are reimbursable with required proof of execution.
- Microsoft Partner Network (MPN) registration fees
- Official Microsoft curriculum for training through www.microsoft.com/learning
- Windows Logo Program fees
- Three attendees to approved Microsoft conferences (such as Worldwide Partner Conference and Tech Ed)
 - Registration fees
 - Airfare and hotel room rate only (room service, mini-bar, laundry, etc. are not eligible) up to \$3,000 USD per person. Airfare and hotel should be submitted in one claim per person.
 - To check the eligibility of the conference you wish to attend, please send an email to oeminentives@microsoft.com with a link to the conference Web site. Only conferences that are hosted by Microsoft and are widely available to Partners will be considered for reimbursement.
- Demo units* installed with Windows 8: Partners can be reimbursed up to \$2,400 USD or 5% of the total accrued OEM Co-op funds, whichever is greater, per the program period.

The following expenses are not covered:

- Travel expenses, meals, mileage, and any other travel costs.
- Airfare or hotel upgrades or add-ons.
- Materials other than predefined course materials.
- Training or exams not listed on www.microsoft.com/learning.
- Testing environments and other technology.

Claim Timing Requirements

- Partner Readiness claims may be submitted for any qualifying readiness activity that has taken place within the 6 month usage period.
- For MPN Registration and Windows Logo Program fees, if the invoice from Microsoft is dated after the claim deadline - the Partner will be allowed to claim the cost against the following period.

Required Proof of Execution

Microsoft On-Site Trainings

- Demonstrate 100% Microsoft content by submitting all that apply:
 - Dated event photographs
 - Copies of printed/electronic communication materials
 - Event agenda and/or presentation deck
 - Third-party invoices

Invoices specific to activity. For example:

- Microsoft Partner Registration and Windows Logo Program fees
 - Original invoice issued by Microsoft
- Microsoft Training Tuition fees
 - Third-party invoice with course code and dates of completion
- Microsoft Exam fees
 - Third-party invoice with exam number and date of completion
- Microsoft Conference Registration fees
 - Third-party invoice
- Microsoft Conference travel fees
 - Flight itinerary with travel dates
 - Third-party invoice for airfare and hotel

Windows 8 Demo Units

- If the system is purchased from a third-party, the third-party invoice including system specifications should be uploaded into CHIP.

* Demo units must be sold through direct OEM, distribution and reseller channels only.

Readiness and Training Activities	Reimbursable Expenses
Microsoft Partner Network registration fees	<ul style="list-style-type: none"> • Annual enrollment fee
Partner exam fees	<ul style="list-style-type: none"> • Required classes and exams for certifications and competencies • Recommended certification exams
Microsoft conference registration fees (Worldwide Partner Conference, Tech Ed, other)	<ul style="list-style-type: none"> • Registration - up to three (3) attendees <p>Note: To check the eligibility of the conference you wish to attend, please send an email to oeminentives@microsoft.com with a link to the conference Web site. Only conferences that are hosted by Microsoft and are widely available to Partners will be considered for reimbursement.</p>
Microsoft conference airfare/hotel expenses	<ul style="list-style-type: none"> • Airfare and hotel room rate only (room service, mini-bar, laundry, etc. are not eligible) up to \$3,000 USD per person - up to three (3) attendees <p>Note: Airfare and hotel should be submitted in one claim per person.</p>
Microsoft training tuition fees	<ul style="list-style-type: none"> • Microsoft Official Curriculum through http://www.microsoft.com/learning
Demo units* installed with Windows 8	<ul style="list-style-type: none"> • Partners can be reimbursed up to \$2,400 USD or 5% of the total accrued OEM Co-op funds, whichever is greater, per the program period.
Microsoft On-Site Trainings	<ul style="list-style-type: none"> • Third-party expenses for catering, equipment rental, external speaker fees, giveaways, signage, display, and printed materials.

Partner Readiness: Guidelines

This is a partial list of qualifying exams and expenses. For a complete listing please visit <http://microsoft.com/learning>.

Exams

Recommended Core Exams	
Number	Description
70-684	OEM Reseller
74-697	OEM Pre-installation

Recommended Elective Exams	
Number	Description
70-410	Installing & Configuring Windows Server 2012
70-411	Administering Windows Server 2012
70-412	Configuring Advanced Windows Server 2012 Services
70-413	Designing and Implementing a Server Infrastructure
70-687	Configuring Windows 8
70-688	Managing and Maintaining Windows 8
70-689	Upgrading Your Skills to MCSA Windows 8
74-324	Administering Office 365 for Small Businesses

Note: These exams are related to the Tier 1 Reseller Eligibility Requirements for Software.

To read more details based on your competency level, go to: <https://mspartner.microsoft.com/en/us/Pages/Membership/oem-competency.aspx>

Microsoft Windows Logo Program Qualifying Labs

Windows Logo Program Qualifying Expenses		
Reimbursable Expense	Description	Reimbursable
VeriSign Code Signing ID	Obtain a VeriSign Code Signing Digital ID for submitting your product to the Microsoft Windows Logo Program and to the Windows Catalog. Be sure to select the Microsoft Authenticode® digital ID product.	One, two or three year certificate
Microsoft fee	After your product has passed the HCT tests, use Incentives Program funds to send your log file package to Windows Quality Online Services, WinQual. This enables you to qualify systems for the "Windows Logo Program". Use up to \$250 USD per submission and per OS.	Up to \$250 USD
Windows Logo Program Third Party Vendor Audio Test	Work with an authorized independent Windows Logo Program Testing Vendor and use up to \$360 USD for each AUDIO test completed.	Up to \$360 USD
Windows Logo Program Third Party Vendor Windows Client or Device testing fee	Use up to \$2,400 USD for an authorized independent Windows Logo Program Testing Vendor for each Windows Client or Device Submission conducted on your behalf.	Up to \$2,400 USD
Windows Logo Program Third Party Vendor Windows Server 2003 testing fee	Use up to \$3,200 USD for an authorized independent Windows Logo Program Testing Vendor for each Windows Server 2003 Submission conducted on your behalf.	Up to \$3,200 USD
Windows Logo Program Third Party Vendor Windows Server 2008 testing fee	Use up to \$9,500 USD for an authorized independent Windows Logo Program Testing Vendor for each Windows Server 2008 Submission conducted on your behalf.	Up to \$9,500 USD

OEM Rebates

OEM Rebates claims are cash rebate claims that require no proof of execution. OEM Rebates claims are limited to the total amount of OEM Rebate Funds available.

OEM Rebates claims must be submitted in CHIP for cash reimbursements. OEM Rebates claims may be adjusted based on the amount of OEM Rebate Funds available.

Requirements

- Claims can be submitted up to the OEM Rebate Funds allocation in CHIP ([page 11](#)).
- No proof of execution is required to be uploaded if claiming a cash rebate.
- Enter an OEM Rebates claim in CHIP and select submit for your claim to be validated.

Note: CHIP cannot process claim amounts that are \$1 USD or less. To help our Partners receive all of their Incentive Funds, OEM Rebates claims which result in less than \$1 USD of Incentive Funds remaining in an OEM Reseller's account will be ruled Non-Compliant in order to allow the OEM Reseller to submit a new claim for the whole OEM Rebate amount.

Claim Timing Requirements

- An OEM Rebates claim must be submitted for cash rebate within the claiming period.

Claim Timing and Deadlines	FY H1 Period (Jul – Dec)	FY H2 Period (Jan – Jun)
Claim submission deadline:	15 Feb	15 Aug

Glossary

Accrued funds: The total amount of Incentives Program Fund dollars that is calculated based on eligible license purchases during the fiscal half-year eligibility/purchase period.

Available funds: Funds that can be used for claiming and reimbursement in the fiscal half-year usage period following the eligibility/purchase period.

Cash equivalent: Item that can be used in place of cash as payment. Includes, but is not limited to gift cards (e.g. pre-paid credit cards (American Express, Visa, Mastercard, etc.), bank cards, multi-store and/or single store), certificates, vouchers, capital bonds, and any commodities (e.g. gold, gems, other precious metals).

Catalog: Multi-page publication containing products from multiple departments of the company. May be printed or published digitally.

Committed funds: The total funds set aside for submitted claims. Indicates when a claim has been validated by the Incentives Program claim validation team and is in the process of funds disbursement.

Demand Generation: A marketing activity in which performance and the size of the audience can be verified. Examples include print, broadcast and Web advertising, and direct response mailing or emailing. Partners can be reimbursed for the cost of qualifying Demand Generation activities.

Demo unit: A system purchased or built by the Partner for demonstration to the customer of a specific Microsoft product available from the Partner.

Device: Any PC (including a desktop, laptop, tablet, all-in-one, or ultra mobile), mobile internet device (MID), or phone form factor (including any type of cell/mobile phone). Also includes video gaming systems, electronic music players, and electronic readers.

Eligible Products: The specific Software, Service, and Windows Devices for which Company is eligible to receive incentives under this Agreement, as identified on www.oem incentives.com

Incentives Program: The OEM Reseller Incentives Program described in this Guidebook and designed to help qualified partners grow their businesses. The funds provide reimbursement for approved Demand Generation, Marketing Development, Partner Readiness, and Rebate activities. Partner funds accrue based upon qualifying Eligible Product purchases. These funds become available in the subsequent fiscal half-year usage period.

Incentives Program periods: 6 month periods running from 1 January through 30 June, and 1 July through 31 December.

Incentives Program Rate Flyer: Provides an overview of the program, eligibility requirements, key dates, and per-unit Incentive Funds for Eligible Products in a given program period. This can be accessed on www.oem incentives.com at the beginning of the program period.

Market Development: Marketing activities for which performance and the size of the audience cannot be verified, such as customer events, sponsorships, tradeshow, point of-purchase sales materials, telemarketing, offers and incentives that support the sale of Windows-based systems.

Marketing services costs: Costs associated with the creation or design of the marketing piece by a third-party.

Media placement costs: Costs associated with purchasing measured media space from a third-party.

Microsoft Authorized OEM Distributor: A Distributor who has entered into a Microsoft OEM Distributor Channel Agreement to license OEM software licenses and Windows Devices. Eligible Partners accrue Incentive Funds for qualifying Windows licenses purchased only through a Microsoft Authorized OEM Distributor.

Partner Readiness: Training, exams and conference fees associated with the achievement and maintenance of specific Microsoft Competencies.

Partner Sales Executive: Microsoft field personnel who are assigned to individual Microsoft Partners to monitor marketing and other business development activities.

Proof of execution: To be eligible for reimbursement, proof of execution documentation must be submitted by the established deadline. Proof of execution is critical to the reimbursement process. Accepted file types are:

- Document - doc, docx, xls, xlsx, csv, ppt, pptx, msg, rtf, mht, htm, html
- Media - bmp, dib, jpeg, jpg, jpe, jfif, gif, tiff, png, psd, wmv, wma
- Reader - pdf, xps
- Post - BluRay, CD, DVD, Cassette, VHS

OEM Channel Distributor: An entity that distributes Eligible Products. These distributors do not have a direct distribution agreement with Microsoft, but may have a distribution agreement with an OEM. Contact oem incentives@microsoft.com to inquire which OEM Channel Distributors are eligible to participate in the Incentives Program.

OEM Co-op Funds: Funds that can be claimed for reimbursement on qualifying activities described in the Demand Generation, Market Development, and Partner Readiness categories.

OEM Rebates Claim: A cash rebate claim that requires no proof of execution. OEM Rebates claims will be capped at the total amount of OEM Rebate Funds available.

OEM Rebate Funds: Funds that can be used for cash rebates claimed in the OEM Rebates claim category in CHIP. These funds can also be used toward all marketing activity claim types.

System: A fully assembled computer system consisting of at least a central processing unit, a motherboard, hard drive, a power supply, and a case.

Tax requirements: Certain geographies are required to submit tax documentation to Microsoft. Incentives Program Partners required to submit third-party invoices should use the View Claim Summary feature on CHIP for approved claim amounts.

Third-party: A business or service provider that is not affiliated with Microsoft or the Partner company enrolled in the Incentives Program.

Web banner: Graphical element embedded on a Web page that when clicked, directs the user to a new Web site hosted by the Partner. Banners within an email are considered part of the email.

Wholly owned subsidiary: Company or subsidiary which is at least 51% owned by the registered Partner.

Windows Devices: The Featured Devices and other devices that Microsoft may identify on www.oem incentives.com as eligible for Incentive Funds.

Payment Processing, Tax Requirements

Payment Processing

Payments for approved claims are processed twice a month. **Payments are typically disbursed 6 weeks from the date of claim approval.** Multiple approved claims in the same disbursement period, will be consolidated into one payment.

Currency Exchange Rates

Currency exchange rates are applied at the time a claim is entered. Payment is made in the local currency per the associated payment profile.

Microsoft will use the foreign exchange mid-range rate published by Reuters in the Financial Times on the Wednesday before the last day of the Microsoft fiscal month before the payment date. If Reuters does not publish such rate on the Wednesday before the end of the Microsoft fiscal month, Microsoft will use the previously published rate.

Tax Documentation Requirements for China

Partners in China are required to submit Business Tax invoices to Microsoft for all approved claims. Tax invoice requests are sent at the time of claim approval and include submission instructions. Please forward your Business Tax invoice for the approved claim to the address listed below and include your Incentives Program Identification Number, the Claim Number, and your Vendor Identification Number on or with the invoice so that it is applied appropriately.

PRC Business Tax invoices should be sent to:

Attn: Jing Meng
 Microsoft (One Finance)
 BSS EDM
 c/o Accenture Technology Solutions (Dalian) Co. Ltd.
 No. 1 North Section Digital Road
 Dalian, China
 Post code: 116023

Tax Documentation Requirements for Europe, Middle East, and Africa (EMEA)

Incentives Program Partners requiring submission of invoices for tax documentation should refer to the Claim Summary available on CHIP for approved claim amounts. Upon logging in to CHIP, select "View Claim Summary" from the right menu, select the desired program period, then download to Microsoft Excel.

EMEA VAT invoices should be sent quarterly to:
 Microsoft Ireland Operations Limited
 Dublin, Ireland
 c/o Incentives Program
 PO BO X 1165
 33759 Versmold
 Germany

Payment Status on CHIP

Payment Status	Details	Partner Actions
Validating	Payment in queue for review	No action
Payment Held	Action required	Contact oeincentives@microsoft.com
Action Required	For China only. Tax approver must approve before validated by Microsoft	No action
Pending Payment Profile	Banking profile needs to be set up to receive payment	Partners must contact oeincentives@microsoft.com to set up banking details in CHIP.
Payment Sent	Please allow 5-10 business days for the deposit	Check with bank in 5-10 business days for deposit
Payment Cancelled	Payment cannot be made; Microsoft will contact Primary Program Admin (PPA) with more information	No action
Payment Approved	Payment process initiated	No action

Certification Statement and Report

OEM Resellers are allowed to use the Certification Statement and Report (CSR) found on www.oeminentives.com to claim internal costs associated with the following activities only - Partner Sales Executive approval is required.

1. E-Commerce
2. Email (must be filed under Market Development - E-Commerce)
3. Web Syndication

Note: All other marketing activities require a third-party invoice.

Please refer to the most updated CSR currently posted on the Program Resources link off CHIP or on the Channel Incentives Resources site (www.oeminentives.com) prior to submitting a claim.

Sample of a CSR form:

Certification Statement and Report (CSR) for the OEM Reseller Incentives Program Updated for FY14 H2 (January 1, 2014)

OEM Resellers who develop marketing activities internally (meaning Company is not using a 3rd party agency) may use this Certification Statement and Report (CSR) to claim internal costs incurred related to the limited activities documented below in section 1, and only for the specific expenses identified in section 3. For each activity, Account Manager approval is REQUIRED. For all other activities third party invoices are required for reimbursement. Microsoft only reimburses claims based on the qualified OEM Resellers Incentives Program marketing activities detailed in the Guidebook.

Marketing Activities for each Incentives Program Period will be conducted under the following schedule:

Incentives Program Period	Complete Marketing Activities by:	All Documentation sent to CHIP by:
FY H1: 1 JUL through 31 DEC	31-Dec	15-Feb
FY H2: 1 JAN through 30 JUN	30-Jun	15-Aug

*Completed and signed CSR, marketing activity claims, and POE must be submitted via CHIP by the deadlines above.

Instructions

1. Mark the Claim Type that matches the submission in CHIP (Channel Incentives Platform at <https://channelincentives.microsoft.com>).
2. Check and Sign the Box if your Claim Activity has a non-Microsoft operating system, productivity suite, server solution, collaboration suite software or a device running a non-Microsoft operating system is present.
3. Detail Marketing Expenses, enter the amount claimed in CHIP in US Dollars.
 - If Company has checked and signed the box designated in STEP 2, Company can only submit 35% of the total expenses associated for this qualifying activity.
 - If Company has not checked or signed the box designated in STEP 2, Company is stating activity is focused on Microsoft operating system, productivity suite, server solution, collaboration suite software or Windows Device. If so, Company can submit 100% of total expenses associated for this qualifying activity.
4. Double check the total amount entered on this form is accurate and equal to the amount of internal expenses claimed in CHIP.
5. Have a senior officer of the Company fill in the information box at the bottom and sign. Original copy of the CSR must be retained for two years after the program period ends.

1 Claim Type (choose one):

Market Development	Partner Readiness
<input type="checkbox"/> e-Commerce and Mobile Commerce	<input type="checkbox"/> Windows 8 Demo Units up to \$2400 USD or 5% of OEM Co-op funds (whichever is greater) per program period
<input type="checkbox"/> Web Syndication	<input type="checkbox"/> *Demo units must be sold through direct OEM, distribution, and reseller channels only.

All other activities not listed here require a third party invoice. NOTE: If Windows 8 Demo Unit was acquired via a third party, please submit the third party invoice via CHIP and do not use CSR form.

2 Sign here if box is checked (if applicable) Signature required to receive reimbursement if your Claim Activity has a non-Microsoft operating system, productivity suite, server solution, collaboration suite software or a device running a non-Microsoft operating system is present. See instructions 2 and 3 for details.

3 Marketing Expenses

Windows 8 Demo Units*	\$
Other: (explanation of expenses)	
	\$
Design # _____ hours = \$	
Distribution/execution # _____ hours = \$	
TOTAL	\$0.00

Company and Designated Signer hereby certifies to the following:
 Understands that this Certificate Statement and Report (CSR) is in connection with the OEM Resellers Incentives Program Agreement with Microsoft (MS). Company has read the OEM Resellers Incentives Program Guidebook and is complying to the rules for submitting required Proof of Execution materials for the claim referenced above. Microsoft only reimburses according to the OEM Resellers Incentives Program approved marketing activities detailed in the Guidebook.
 Company must keep complete and accurate records relating to its performance under the OEM Resellers Incentives Program Agreement up to two years. This CSR is subject to verification upon request from MS (or MS designated claim validation entity).
 By signing below, Company confirms that it has made no changes or modifications to the Incentives Program claim, invoices, and/or the original execution copy of this CSR. The designated senior officer of the Company is duly authorized to make the above certifications. Designated signer must fill out ALL fields to be eligible for reimbursement. Contact information will only be used as needed for auditing purposes.

5 Choose one: 1) Print out the form, physically sign, and then scan, or 2) Sign electronically

COMPANY NAME: _____ <small>(Type Company Name Here)</small>
A company organized under the laws of: _____ <small>(Type Country and/or Region Here)</small>
By: _____
Name: _____
Email Address: _____
Title: _____
Date: _____

Best Practices

Ensure that the CSR is correctly and fully completed, paying extra attention to the following items:

- The claim type marked in box 1 and total amount in box 4 must match the submitted claim type and invoice amount entered in CHIP.
- Select appropriate Marketing Expense(s) in box 3. If "Other" is selected, provide an explanation of the specific expense(s) claimed. Please note that restating the claim type is not considered an eligible expense.
- If claiming expenses for an On-Site Resource in box 3 for services rendered internally, indicate both the number of hours and amount of funds being claimed.
- Complete all entries in box 5, including a signature of a senior officer of the Company.

Program, Marketing and Training Resources

Channel Incentives Resources Site Overview

The Channel Incentives Resources site (www.oeminentives.com) shown below provides eligible CHIP Partners access to detailed program requirements, approved marketing assets, training, latest announcements, and Frequently Asked Questions (FAQ). Partners can access the site directly or via the Quick Links section on the CHIP home page.

Templates

View all available marketing creative and templates from the [Marketing](#) link. Browse for the needed materials and then download the corresponding template files.

Partners using these template files are required to make modifications to ensure the creative meets Incentive Program core requirements and branding guidelines in order to be eligible for reimbursement.



CHIP:

<https://channelincentives.microsoft.com>

Channel Incentives Resources:

www.oeminentives.com

Customer Service and Support:

oeminentives@microsoft.com

Preapproval email:

LOEMpre@microsoft.com

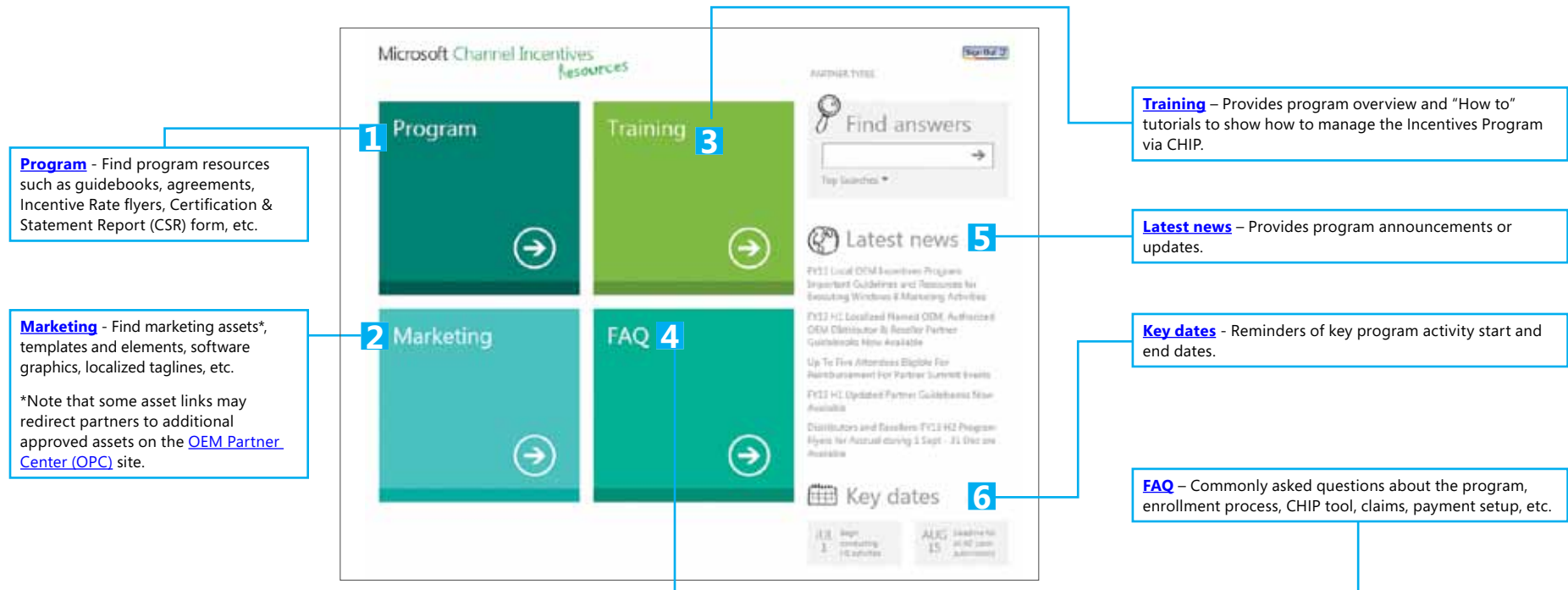
For VAT related items, contact your Partner Sales

Executive or send inquiries to:

APIE@microsoft.com

Address for Claim Submission via post:

Local OEM Incentives Program
Microsoft Corporation
c/o Inviso Corporation
3009 112th Ave. NE, Suite 200
Bellevue, WA 98004



Customer Offer Example

ABC Company recommends Windows Devices.



WINDOWS 8 AND OFFICE FOR SMALL AND MIDSIZED CUSTOMERS

THIS FINANCIAL YEAR END, GIVE EXTRA BACKUP TO YOUR SMALL BUSINESS CUSTOMERS.

FREE 2TB External Hard Drive*

Windows 8 and Office Professional 2013 give small business clients the latest software for simpler, safer, and more productive computing. With the addition of a large external hard drive, Advanced Backup can safeguard data even more securely.



ABC Company - Windows preinstalled device

- Intel® Core™ i5 Processor 2300 (2.80Ghz)
- 2GB DDR3 RAM (1,333Mhz)
- 500GB Hard Disk Drive
- Dual Layer DVD Burner
- Memory Card Reader
- 3 Years On-Site Warranty
- Windows 8
- Office Professional 2013



*Special Offer limited to first 30 Windows preinstalled devices purchased by December 30, 2013.

Microsoft product images reprinted with permission from Microsoft Corporation.

Telephone 444-555-6789 | 101 West Street, Anytown USA 98765 | www.abccompany.com



Devices - Customer Offer

E-Commerce - Search Engine Placement Example



Search

Ads

Preinstalled Microsoft Software

Software preinstalled with the purchase of a PC.

www.abccompany.com

Results

Landing Page

Monthly Invoice **1 July 2013 - 31 December 2013**

<p>Microsoft 1 Microsoft Way Redmond, WA 98004 United States VAT Number: IE 1234567V</p> <p>Bill To: ABC Company 101 West Street Anytown, CA 98765 United States VAT Number: CT 9876543Y</p>	<p>Advertising Services: Microsoft adCenter Customer ID: 123-456-7890 Invoice Number: Ads-9876543210-123456 Invoice Date: 1 December 2013 Payment Due Date: 31 December 2013 Payment Terms: Immediate</p>
----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------	-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------

Date	Description	Amount (USD)
31 December 2013	Customer initiated payment	\$4500.00
	Subtotal:	\$4500.00
	VAT Amount*:	\$0.00
	Total:	\$4500.00

*Services subject to the reverse charge – VAT to be accounted for by the recipient as per Article 123 of Council Directive 2011/456/EC

Third-party Invoice

Seminar Example



Seminar Invitation



Seminar Photo

Internal Incentives/SPIFFs Example



The graphic features a blue header with a stack of \$100 gift cards on the left. The main title is 'Microsoft® October Promo'. On the right, the 'ABC company' logo is displayed with contact information: Telephone: 444-555-6789, Fax: 444-555-8910, and 101 West Street, Anytown USA 98765.

Promo Details:

- You will need to work as both individuals and a team.
- Team goal is sales of XXX units of Office and XXX of Windows 8.
- Individual revenue goals per plan.

Prize Details:

- For every unit sold, you get an entry into a raffle for a Travel Voucher.
- Top three sellers automatically get a \$100 restaurant gift card.
- For the top team, each team member gets a \$100 petrol card.

Below the details are five product boxes: Office Home & Student 2013, Office Home & Business 2013, Office Professional 2013, Windows 8, and Windows 8 Pro. Each box includes the Microsoft logo.

ABC Company recommends Microsoft® software.

Internal Incentive/SPIFF Example

Sponsorship Examples



Fun Run Sponsorship



Golf Hole Sponsorship

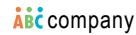
Tradeshow Example

Non-Partner Company Technology Tradeshow

12-14 November 2013
Visit us at the ABC Company booth to learn more about Microsoft



Time	Activities
9:00am	Registration and networking breakfast
10:30am	Welcome and introduction: Presenter 1—Strategy
11:30am	Presenter 2—Training
1:00pm	Presenter 3—Sales
2:00pm	Panel discussion: Presenters 4, 5, 6—Q&A
4:00pm	Closing remarks: Presenter 1—Vision and execution



Telephone 444-555-6789 | 101 West Street, Anytown USA 98765 | www.abccompany.com
Fax 444-555-8910

ABC Company recommends Windows.



Booth

Agenda



Presentation