

# Microsoft Partner Incentives

## Partner Incentives Experience Guide

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# Partner Incentives Experience Guide

**Please note:**

- This is a universal guide, relevant for each program on the on the *Partner Incentives Experience*. To this end, the term Skyline is a pseudonym program name in place of any individual specific program.
- The programs that currently engage with PIEX are:
  - Hosting
  - Cloud Solution Provider (CSP)
  - Syndication
  - Managed Reseller (EMEA)

To demonstrate the various capabilities and which programs avail of them the following abbreviations within this guide will be used.

PROGRAM NAME	Guide Abbreviation
<b>Cloud Solution Provider</b>	CSP
<b>Hosting</b>	Host.
<b>Managed Reseller (EMEA)</b>	MR
<b>Syndication</b>	Synd

- As Microsoft continually evolves its partner incentive tools to optimize functionality and usability, screenshots in this guide may vary from your actual experience.
- The abbreviation PIEX is used as shorthand for the *Partner Incentives Experience* in the guide.

## Role of this guide

To offer a better experience and greater transparency in the payment of incentives to our partners, Microsoft has built the *Partner Incentives Experience* platform. Post enrollment, partners can view incentives earnings, make co-op claims and submit proof, do payment reconciliations, and manage users—all from one single secure platform. Please note not all functionality and system capabilities are available in every program.

## Table of Contents

Onboard to Partner Incentives Experience .....	6
Partner roles on PIEX .....	7
PIEX onboard checklist .....	8
Steps to onboard onto PIEX .....	9
Log on .....	11
Enrollment and complete PIEX payment profile .....	19
Preparation: information to complete tax and bank profile .....	21
Accessing Banking and Tax Management page .....	22
Create new tax profile with online application form .....	25
Step 1 of 6: Begin from Profile Assignment section .....	25
Step 2 of 6: Complete Business Profile section .....	27
Step 3 of 6: Complete Setup section .....	28
Step 4 of 6: Complete Tax status section .....	29
Step 5 of 6: Complete the additional documentation section .....	30
Step 6 of 6: Redirection and updating of tax status .....	32
Create new bank profile with online application form .....	33
Step 1 of 4: From Profile Assignment, create or assign bank profile .....	33
Step 2 of 4: Complete Details section .....	35
Step 3 of 4: Complete Bank account section .....	36
What if bank account identifier is incorrect or not recognized? .....	37
Step 4 of 4: Beneficiary information .....	39
Viewing status of your new Banking Profile via Profile Assignment section ..	40
Assignment of bank profile and currency to location .....	41
Confirm payment profile is complete and can receive incentives .....	42
Banking and tax management once payment profile complete .....	42
PIEX once profiles active .....	43
Update or change payment profile information in PIEX .....	44
Re-enrollment process .....	45
Access and navigate PIEX post enrollment .....	45

User Management .....	46
Add users.....	47
Delete users and permissions .....	49
Manage invites.....	50
View Earnings.....	51
Co-op Marketing Activity Plan .....	53
Co-op guidance.....	54
Select and plan Co-op activities.....	54
Co-op Marketing Activity Plan process .....	55
Create a Co-op Marketing Activity Plan .....	56
Add activities:.....	58
Activity status and claiming.....	61
Add more activities to plan .....	62
Claim submission process .....	63
Co-op claim which begins from Plan Management .....	64
Co-op claim which begins from Claim Management.....	65
Submit claim – all partners from this point forward:.....	66
Track claim status.....	72
Search and track claims:.....	72
Claims summary .....	73
Track payments.....	75
Change payment and tax profiles.....	77
Notifications.....	77
Support .....	79
Help option.....	80
Submit a ticket .....	82
Tickets.....	83
Disputes .....	83
MPN Support .....	84
Appendix: Microsoft Partner Network ID .....	85

# Onboard to Partner Incentives Experience

## Why onboard to the Partner Incentives Experience?

Partners must onboard to the Partner Incentives Experience to ensure Microsoft can send incentive payments. The Partner Incentives Experience also allows partners to view and track incentive earnings and payments. If partners do not complete enrollment by end of H2 2017 earnings may be subject to forfeiture.

## How to onboard

The partner admin for eligible partners will receive an invitation by email from [microsoft@e-mail.microsoft.com](mailto:microsoft@e-mail.microsoft.com) to log into the *Partner Incentives Experience*. The partner admin is determined by the partner during initial enrollment profile validation. There is no need to re-onboard to PIEX if partner remains eligible for the incentive program. Details of steps to onboard are covered in the following pages.

## Partner roles on PLEX

There are two partner user roles on PLEX: administrator (admin) and user—see the table for the capabilities available to each.

Notes:

- Multiple locations from one partner can be onboarded/managed by the same contact person who receives the PLEX invite. This is only possible if the different locations are under the same legal entity MPN v-org ID.
- Only those with partner admin rights can manage enrollment, add and delete users, and edit payment profiles. There is no limit to the number of partner users. Please note not all functionality and system capabilities are available in every program. See User Management section for details on how to add new users or new admins.
- After invite sent and primary partner admin added, only partner company not Microsoft can add additional admins.

Role capabilities	Partner Admin	Partner User
Manage enrollment	✓	-
User management - add, delete or change permissions	✓	-
Manage payment profiles	✓	-
View rebate earnings*	✓	✓
View co-op earnings	✓	✓
Access Support	✓	✓
Dispute payments	✓	✓
View bank details and payments	✓	✓
Submit co-op proof of execution	✓	✓
Please note that rebate earnings for CSP China are not applicable, an introduction free can be earned instead.		

## PIEX onboard checklist

To ensure a smooth program enrollment process, partner should have these items at hand:

- Access to their company email account
- PIEX invitation email from [microsoft@e-mail.microsoft.com](mailto:microsoft@e-mail.microsoft.com)
- PIN number (following request of # on initial onboarding page)
- Microsoft Account (formerly Windows Live ID)
- Unique identifier number such as primary location MPN# or TPID# that partner transacts with.
- Bank and tax information (note a limited number of programs and countries do not need to provide these details, system will alert to information required).
  - Bank details (such as BIC, IBAN, Routing number etc.).
  - Beneficiary details (beneficiary is the person in the company that the bank would contact if they had any questions)
  - Tax details (for example, VAT Number, EIN, W8,W9, etc.) where applicable

Notes:

- Invitations must be used by original addressee and can not be forwarded to someone else.
- Emails invitations must go to a corporate email address or domain.
- Partners must ensure related data sources are up to date, to enable Microsoft to pull correct information. For example, company details on Partner Center and MPN.
- Please also check that all users use one of the browser supported by PIEX:
  - Microsoft Internet Explorer (Desktop, Modern & Edge) 10 or higher
  - Chrome 31.0.1650.63 or higher
  - Firefox 26.0 or higher



## Steps to onboard onto PIEX

The partner admin is able to onboard their partner company onto the relevant partner incentives program, in addition to ability to provision /edit permissions of other partner users and manage payment profiles. To access PIEX, partners log on with a Microsoft Account and PIN to <https://partnerincentives.microsoft.com/>. Log on details are provided in two separate emails. For any onboarding deadlines please refer to program incentive guides or communications. Partners will need to complete these steps by location.

Onboard process consists of initial log onto PIEX steps followed by enrollment:

Log on	Enrollment
<ol style="list-style-type: none"> <li>1. Click on link within invite, which goes to PIEX onboarding page. Please note invite expires after 30 days – contact Support after 30 days to request a new invite.</li> <li>2. Verify contact details.</li> <li>3. Review and accept terms and conditions.</li> <li>4. Request PIN and then add into PIN entry box.</li> </ol>	<ol style="list-style-type: none"> <li>5. On PIEX homescreen select Program tile, then Enrollment.</li> <li>6. In enrollment area click Enroll now.</li> <li>7. Confirm account details.</li> <li>8. Click on Get Started under Tax Profile to go to Bank and Tax Management area.</li> <li>9. Complete both tax and banking profiles including assignment of currency and banking profile to correct geography (if not already in place).</li> <li>10. Once payment profile is complete and approved, you can receive incentive payments.</li> </ol>

If you experience any problems with onboard process in Microsoft Partner Incentives programs, please contact your Microsoft Regional Service Center:

<b>Managed Reseller (EMEA) &amp; Hosting programs</b>	<b>Syndication and CSP programs</b>
North America: <a href="mailto:ciquest@microsoft.com">ciquest@microsoft.com</a> Latin America: <a href="mailto:msreb@microsoft.com">msreb@microsoft.com</a> Europe: <a href="mailto:erebates@microsoft.com">erebates@microsoft.com</a> Asia Pacific including Greater China: <a href="mailto:apocchi@microsoft.com">apocchi@microsoft.com</a>	North America: <a href="mailto:ocina@microsoft.com">ocina@microsoft.com</a> Latin America: <a href="mailto:ocilatam@microsoft.com">ocilatam@microsoft.com</a> Europe: <a href="mailto:ociemea@microsoft.com">ociemea@microsoft.com</a> Asia Pacific including Greater China: <a href="mailto:ociapgc@microsoft.com">ociapgc@microsoft.com</a> Japan: <a href="mailto:ocijp@microsoft.com">ocijp@microsoft.com</a>

## Log on

## Invitation email

Dear Partner,

We now invite you to begin using the website for Microsoft Partner Incentives for the Skyline program. Do not forward this to anyone, since the link is specifically for you. This invitation will expire 180 days after it is sent to you.

Before you begin, remember that Microsoft Account is the new name for Windows Live ID.

**Sign in:**

1. Go to the [Partner Incentives Experience](#) website. 1  
 Note: If the link provided is not working, please copy and paste the following web address into your browser:  
<https://partnerincentives.microsoft.com> personalised link
2. Select the Windows Live ID tile and click Next. Enter your Microsoft Account and Password. Verify that Microsoft Account and corporate email address shown are the credentials you intend to associate with your organization in the Welcome screen, then enter your first and last name. Click **Next** to proceed.  
 Need help? [Go here.](#)
3. Click Request a new PIN and a unique PIN will be sent to your company email address.  
 Note: Your company email address may be different from your Microsoft Account email address.
4. Get the PIN from your mailbox, enter the PIN, and click Submit.

You should now see the website.

Get started (from your dashboard):

1. Enroll - Select a Program tile.
2. Set Up Users - Select the Admin tile to add co-workers.

Thank you from the Microsoft Partner Incentives Team

**For additional support feel free to contact your Microsoft Regional Service Center:**

Managed Reseller and Hosting programs	Syndication and CSP programs
North America: <a href="mailto:cicust@microsoft.com">cicust@microsoft.com</a>	North America: <a href="mailto:ocina@microsoft.com">ocina@microsoft.com</a>
Latin America: <a href="mailto:msreb@microsoft.com">msreb@microsoft.com</a>	Latin America: <a href="mailto:oclatam@microsoft.com">oclatam@microsoft.com</a>
Europe: <a href="mailto:erebates@microsoft.com">erebates@microsoft.com</a>	Asia Pacific including Greater China: <a href="mailto:ociapac@microsoft.com">ociapac@microsoft.com</a>
Asia Pacific, Japan, Greater China: <a href="mailto:apocchi@microsoft.com">apocchi@microsoft.com</a>	Japan: <a href="mailto:ocijp@microsoft.com">ocijp@microsoft.com</a>
	Europe: <a href="mailto:ociemea@microsoft.com">ociemea@microsoft.com</a>

You have received this message from Microsoft as a result of your participation in the Microsoft Partner Network. This message contains important information on your general membership, or your benefits as a member.

Microsoft respects your privacy. Please read our [Privacy Statement](#).

If you would prefer not to receive future promotional emails from Microsoft Corporation please click [here](#).

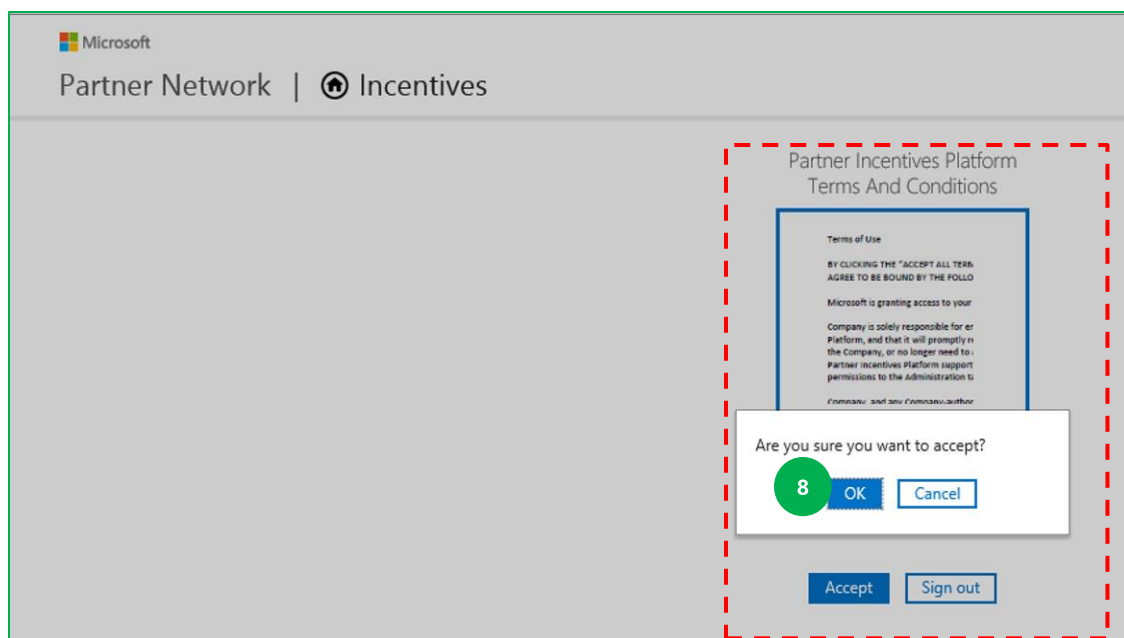
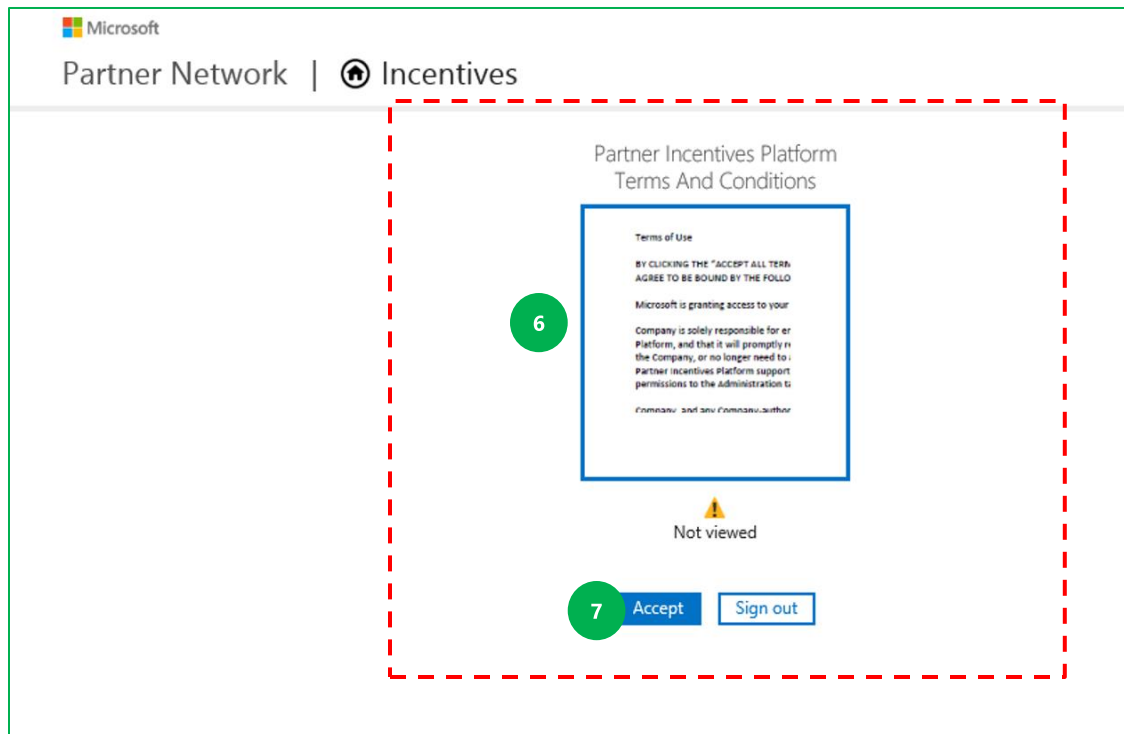
To set your contact preferences for other Microsoft Communications, click [here](#).

1. From invitation email sent from [microsoft@e-mail.microsoft.com](mailto:microsoft@e-mail.microsoft.com), click URL in the invitation, or copy and paste into browser. Please save this email address to trusted contacts to ensure invite reaches inbox.

You are taken to initial sign in page:

2. Enter your Microsoft account email and password. Then click **Sign In**.

3. Check Microsoft account and corporate email details in grey boxes. If correct tick the **confirm details box**.
4. Enter **first name** and **last name**.
5. Click **Next** to continue.



6. Click on **Terms and Conditions document** to review.
7. Once you are happy to accept terms and conditions, click **Accept**.
8. Then click **OK** to confirm acceptance.

Microsoft

Partner Network | Incentives

### One-time PIN

For added security, Microsoft requires a PIN to access this tool.

PINs are automatically sent to your corporate email address and remain valid for 90 days. Once you receive your PIN, copy and paste the PIN in the 'Enter PIN' field and click Submit.

If your PIN has expired, click 'Request PIN' to have a new PIN sent to your corporate email address. Once you receive your PIN, copy and paste the PIN in the 'Enter PIN' field and click Submit.

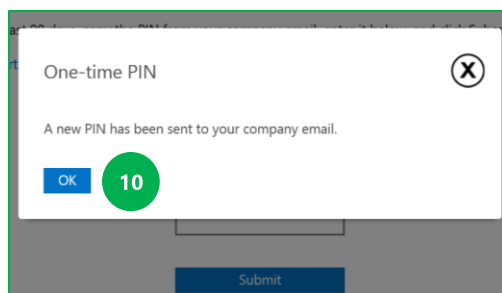
If you experience issues, please contact [Support](#).

You can make up to 10 PIN requests in a 24-hour period.

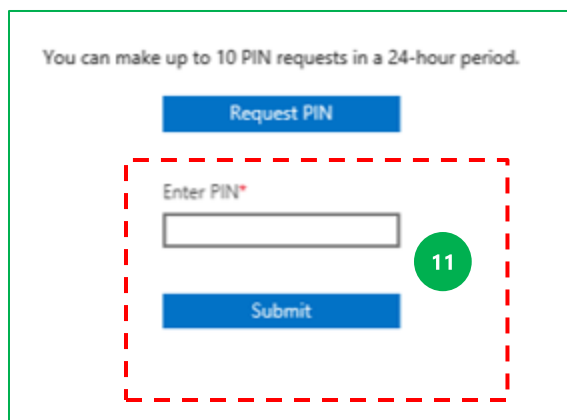
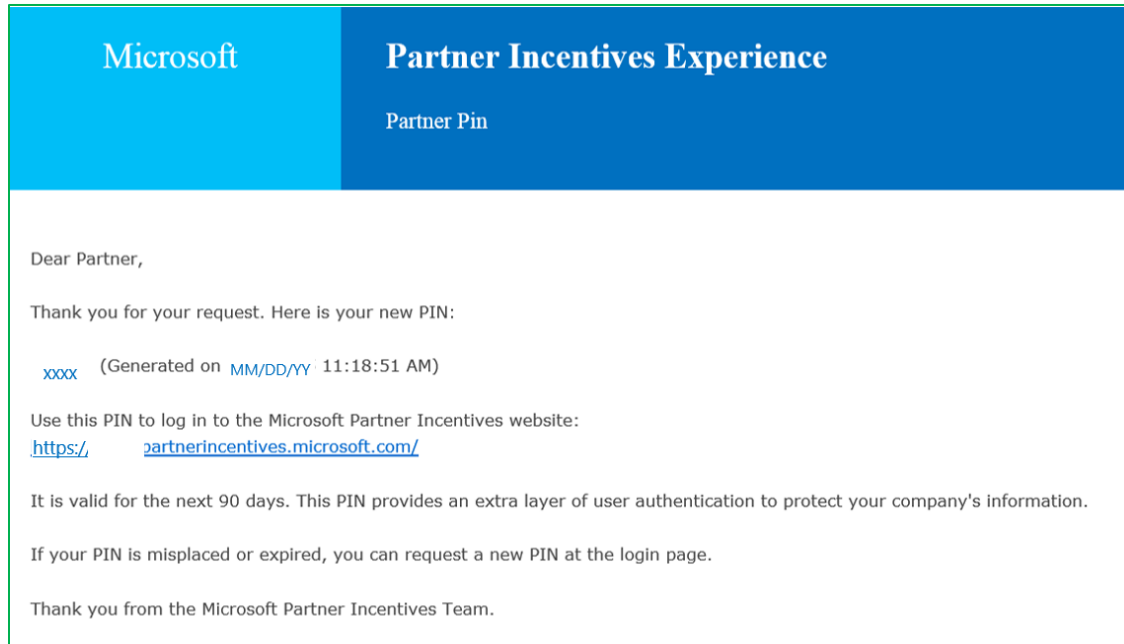
9 Request PIN

Enter PIN\*

Submit



9. Click **Request PIN** box.
10. Then click **OK** on pop up box that appears.



A pin is then sent to your corporate email address.

11. Once you receive PIN email, **copy and paste this PIN** into the Enter PIN box. Then click **Submit**.

System then redirects to **PIEX welcome screen**.

**Notes re PIN:**

The screenshot shows the Microsoft Partner Network Incentives page. At the top left is the Microsoft logo, and at the top right is a 'Sign out' link. Below the navigation bar, the page title is 'One-time PIN'. The main content area contains the following text:

For added security, Microsoft requires a PIN to access this tool.

PINs are automatically sent to your corporate email address and remain valid for 90 days. Once you receive your PIN, copy and paste the PIN in the 'Enter PIN' field and click Submit.

If your PIN has expired, click 'Request PIN' to have a new PIN sent to your corporate email address. Once you receive your PIN, copy and paste the PIN in the 'Enter PIN' field and click Submit.

If you experience issues, please contact [Support](#).

You can make up to 10 PIN requests in a 24-hour period.

The form includes a blue 'Request PIN' button, a text input field labeled 'Enter PIN\*' with a red asterisk, and a blue 'Submit' button.

- Two factor identification (Microsoft Account and a PIN) is designed to ensure secure partner log on.
- Each user's unique PIN is stored for 90 days from when they first enter it — on the 91st day, you will need to request (you will see request new PIN button on PLEX) and enter a new unique PIN will need to be entered.
- Enter each PIN only once. After that, do not enter PIN again until you request a new PIN.
- The invitation email is valid for 30 days. After 30 days please contact Support to request a new invite as link in email expires.



## PIEX welcome screen

Welcome **Partner Name**

Are you a new or migrated partner? New to this platform? Just enrolled in a new program? It's all good and we're glad you're here.

**Our platform has a great new look and lots of great updates! Check them out.**

- One place and way to interact with all Microsoft incentive programs
- Faster, online-only coop claims and disputes
- Line-item reconciliation and enhanced payment details
- Chat support and improved training assistance

12 [Get started](#) [Cancel](#)

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Already enrolled? Start exploring here.

How do I set up my users?

[Learn More](#)

How do I access support?

[Learn More](#)

Where do I update my banking and tax information?

[Learn More](#)

---

**Get help**

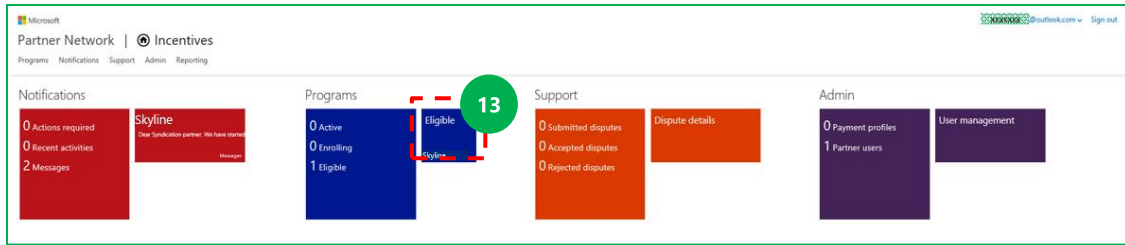
- What account or program information was migrated?
- Where do I update my banking and tax information?
- How can I see my current earnings data?

**Reminder**

This information will be available from the Homepage under the Support tile.

Note that the guidance under *Already enrolled?* will also be visible in the Support area post enrollment.

12. Click **Get started** to go to the PIEX dashboard.



13. Click on **Eligible program** tile.

This will take you to the start of the enrollment process which includes payment profile. Please see the next section to continue.

## Enrollment and complete PLEX payment profile

To enable Microsoft to pay incentives, partners complete bank and tax details via the Banking and tax management page. Access this page from the Enrollment section of the Programs area on PLEX. If a partner has previously used the Banking and tax management page for another program some of the steps below may already be complete.

There are up to 4 steps which must be complete to enable Microsoft to initiate payment - partners must enter their bank and tax details, and for each location assign a banking profile and select currency (if not already in place or if would like to change). Microsoft must have complete payment details for the locations where your incentives are paid in order to process the incentives payment.

- Bank or tax profiles once created won't appear as *Approved* for 48 hours due to verification by Microsoft. If a profile isn't approved after 48 hours, contact Support.
- Do not create a duplicate bank profile . See below for more details on duplicate profiles:

If the same bank account number is entered in another bank profile which has same V-Org as an already approved bank profile, this duplicate bank profile will be rejected by Microsoft. If the bank account number is submitted for a bank profile under a V-Org which does not have a bank profile with that bank account already approved, the bank profile will be approved .

- Create a tax profile for each location / country as profiles relate to specific tax requirements per country, however you can assign the same banking profile to multiple locations. Do not create a duplicate banking profile.
- Once bank and tax profiles are complete, system redirects back to Banking and tax management page to confirm assignment of bank profile and currency details. No action needed if assignment correct, or make changes – see guidance below.
  - A new bank profile automatically assigns to the location it was created from, has currency visible as selected in bank profile, and has status of *Pending Microsoft Action*. Approval takes 48 hours. Please contact Support after 48 hours if status *Pending Microsoft Action* remains.
  - If the required bank profile and currency do not already appear on screen (or a partner wishes to change either bank profile or currency), select from the dropdowns. Changes to bank profile assignment or

currency assignment can be made to both approved and unapproved bank profiles.

## Preparation: information to complete tax and bank profile

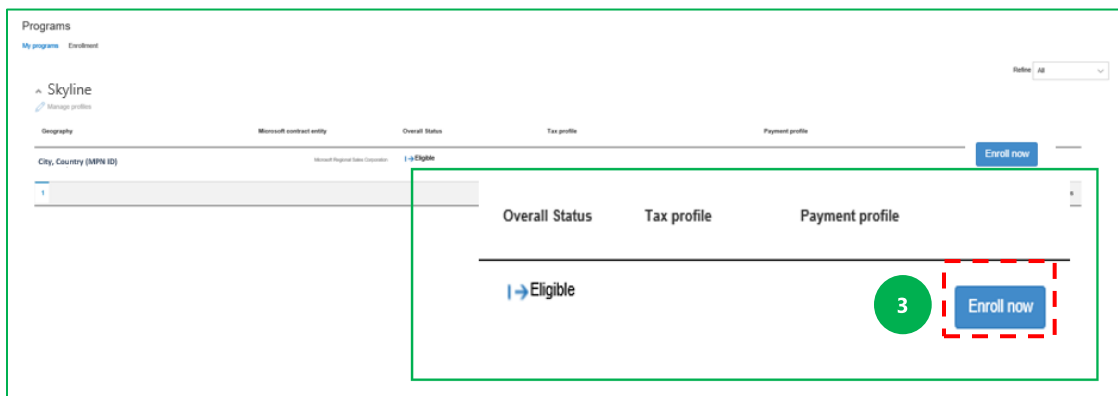
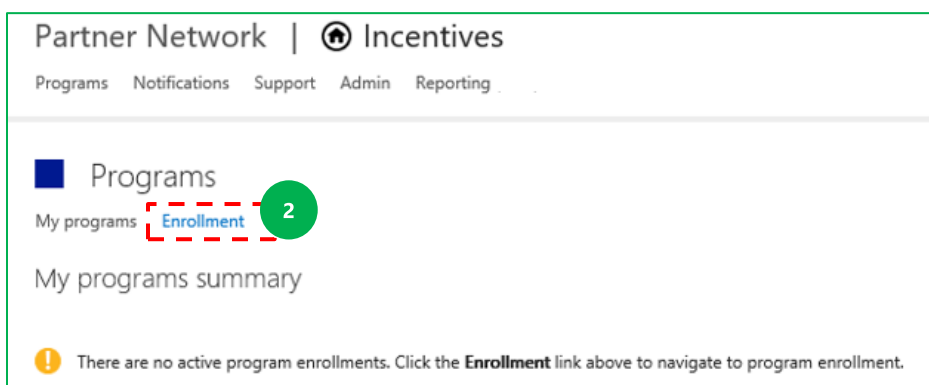
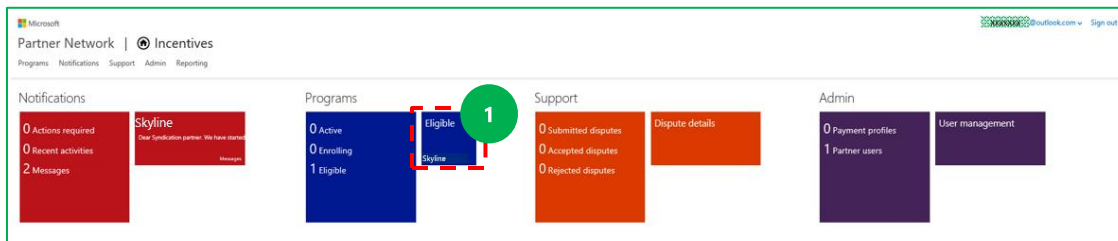
The tax and bank online wizard will guide you through entry of your details. Having the relevant information at hand will make this process quicker and easier.

Section	Input requirements	Tax profile
<b>Business Profile</b>	<b>Details of company</b> which includes name/s and business numbers.	
<b>Setup</b>	<b>Location</b> (country) of where your company and customers are incorporated.	
<b>Tax status</b>	<b>Company Tax ID</b> Type and <b>Tax ID</b> (these are the same details are also in the Beneficiary section of the Banking profile)	
<b>Additional documentation</b>	Dependent on the country in which your company is incorporated you may be required to enter additional tax documentation or information	

Section	Input requirements	Bank profile
<b>Details</b>	<b>Location</b> (country) of where your company and customers are incorporated	
	<b>Disbursement currency – the currency in which you want to be paid by Microsoft</b>	
	<b>Payment method</b> —the method through which you will be paid <i>Note: This is typically set to the default which is electronic payment.</i>	
<b>Bank account</b>	<b>Bank identifier</b> —such as IBAN or SWIFT/BIC	
	<b>Company Tax ID</b> Type and <b>Tax ID</b> (these details are also in the Tax status section of Tax profile).	
<b>Beneficiary</b>	Dependent on the incorporation country of your company there may be a requirement to enter additional beneficiary information such as: <ul style="list-style-type: none"> <li>▪ Bank beneficiary contact name and contact details (<i>i.e. the person named on your bank account as your Company contact and their recorded contact details</i>)</li> <li>▪ Company name on bank account (<i>i.e. the Company name as recorded on your bank account</i>)</li> <li>▪ Company Tax ID type and Tax ID (<i>e.g. VAT, GST or similar</i>)</li> <li>▪ Company address (<i>i.e. the Company address as recorded on your bank account</i>)</li> </ul>	

## Accessing Banking and Tax Management page

Access the Banking and tax management page and begin to add or complete details (as required).



14. On dashboard click on **program** tile.
15. Click on **Enrollment** in sub menu.
16. Click on **Enroll Now** within Enrollment area.

**Partner account information** ✕

Verify the information below is accurate


Organization name  
Enrollment Location

MPN ID Change this MPN ID **a**

Address

Country/Region

Does the information for the organization listed above match your records? **4**

 To change, select a different MPN ID from the dropdown. Once saved this can not be undone. **b**

Programs

My programs Enrollment

no All

^ Skyline  
Manage profiles

Geography	Microsoft contract entity	Overall Status	Tax profile	Payment profile
City, Country (MPN ID)	Microsoft General Sales Corporation	Enrolling	Not started	Not started
1		Overall Status Enrolling	Tax profile Not started <b>5</b>	Payment profile Not started

17. Verify that account information shown is correct. Click **Yes**, or if not:
  - a. If you wish to change click on "Change this MPN ID" link.
  - b. Select different MPN ID from dropdown.
18. Click on **Not started** under Tax profile to go to Banking and tax management page.

Banking and tax management page is made up of 2 sections: Profile Assignment and Banking profiles details. Scroll or click on Profile Assignment or Bank Profile headings to navigate between sections. See below for outline of key functionality.

The screenshot shows the 'Banking and tax management' interface. At the top, there are tabs for 'Profile Assignment' and 'Bank Profile'. A note (A) explains that partners need to complete both Tax and Banking profiles to be eligible for incentives. Below this is a 'Skyline' section with three tabs: 'Geography', 'Tax Profile', and 'Payment profile'. Under 'Tax Profile', the status is 'Approved' (C). Under 'Payment profile', the method is 'Electronic Transfer' (D). A dropdown menu (E) shows 'Atlantic Bank Profile' (checked) and 'Pacific Bank Profile'. A currency dropdown (F) shows 'AUD'. Below is the 'Banking profiles details' section (B) with a note about Virtual Organization Partner ID. A table (G) lists the profiles:

Profile Name	Bank Name	Country	Account Type	Account Number	Status
Atlantic Bank Profile	XXXXXXXXXX	XXXXXXXXXX	XXXXXXXXXX	XXXXXXXXXX	Approved
Pacific Bank Profile	XXXXXXXXXX	XXXXXXXXXX	XXXXXXXXXX	XXXXXXXXXX	Partner Action Required

- A. Note requirements for incentives to be paid.
- B. Note requirements for Organization Partner ID if this message is shown.
- C. Add tax profile here if status shown as "Not Started".
- D. Select payment method here.
- E. Create and / or assign bank profiles/s here. Banking profiles are created at an organization level and can be assigned across multiple locations. Profiles and status visible in dropdown. A green tick means profile is complete and ready to receive payments. A yellow symbol means further action required by partner or Microsoft. See Banking profile details section for information on status and action required.
- F. Confirm, select or change currency from dropdown to assign to location. Assignment of currency is automatic based on bank profile selection, but you can also change here.
- G. From Banking Profiles details you can complete a bank profile with status of "Partner Action Required".



## Create new tax profile with online application form

### Notes:

- **Taxes is a dynamic section.** Dependent on the details you enter under Setup (that is, the incorporation country of your company), PIEX will request you to enter the relevant tax information details for that country.
- Please reference official sources of tax information for your country if you require guidance regarding specific tax details to provide.
- Only company details are to be entered on the taxes page. Personal details should **NEVER** be entered
- For partner companies in the Americas, if you require information on completing the W8 or W9 forms the following links take you to the IRS site
  - <http://www.irs.gov/pub/irs-pdf/iw8.pdf>
  - <http://www.irs.gov/pub/irs-pdf/iw9.pdf>

### Step 1 of 6: Begin from Profile Assignment section

**Banking and tax management**

**Profile Assignment** **Bank Profile**

Partners will need to complete both the Tax Profile as well as the Banking Profile (and have a Banking Profile assigned to each location) prior to being eligible to be paid incentives. Should either of these profiles be incomplete on the deadline for each incentive program cycle after both profiles have been completed. Once you have created a bank or tax profile, please allow 48 hours for processing by Microsoft. During this time, the status will indicate "Pending Microsoft Action". Resubmitting your profile will cause delays in your account profile being completely processed and to verify all required actions are complete.

**Skylines**

Geography

Country & MPN ID Microsoft Regional Sales Corporation

**Tax Profile** Banking Profile

**Get Started** 1 Choose pay type

**Banking profiles details**

If you have designated to receive incentives at the Virtual Organization Partner ID level (XXXXXX) they will be paid to your headquarters (based on MPN HQ), please ensure you complete Banking and Tax profiles for your MPN HQ Location.

Profile Name	Bank Name	Country	Account Type	Account Number
--------------	-----------	---------	--------------	----------------

1. To create a new tax profile, click on "Get Started" status which will redirect to the tax profile creation form.

Taxes

Remember:

- Make sure you have all your tax information handy
- Click **Next** after each step to save your information.
- Exclude sensitive information such as bank account details when submitting support queries.

Business Profile	Required
Setup	Required
Tax status	Required
Additional documentation	Required

Cancel

- The online tax form contains 4 sections: **Business Profile, Setup, Tax status,** and **Additional documentation.** Please note dependent on country of company incorporation, you may not need to complete all sections. The system will alert partner to what is required in each section, or a section may not appear if not required.

*Step 2 of 6: Complete Business Profile section*

There are several items to complete in the taxes section. The tax pages are dynamic, so their content changes dependent on the incorporation country of your company. Only enter company tax details in these tax pages. NEVER enter personal details.

Taxes

Remember:

- Make sure you have all your tax information handy
- Click **Next** after each step to save your information.
- Exclude sensitive information such as bank account details when submitting support queries.

Business profile → In Progress

Account type \*  
Organization

Organization type \*  
Other Corporate Form

Organization name \*  
XXXXXXXXXX

DUNS number  
XXXXXXXXXX

Doing Business As (DBA)  
XXXXXXXXXX

Next

Setup	Required
Tax status	Required
Additional documentation	Required

1. In the **Business profile** section add organization details such as name/s and business numbers.
2. Click **Next** to continue.

## Step 3 of 6: Complete Setup section

Taxes

Remember:

- Make sure you have all your tax information handy
- Click **Next** after each step to save your information.
- Exclude sensitive information such as bank account details when submitting support queries.

Business profile ✓ Completed

Setup → In Progress

Complete the form below so we can verify the tax status of the party contracting with Microsoft:

If you are filling this out on behalf of your organization, select if any are true:

- You are a corporation that was incorporated in the USA
- You believe that you should fill out a Form W-9 (tax form)

Select if none of these apply to you or your organization

Permanent residence country/region \*

Australia

OR

If you are filling this out as an individual, select if any are true:

- You are a US citizen
- You were born in the USA
- You are a US resident (you have a green card)
- You file a joint tax return with a US taxpayer
- You have been in the USA more than 183 days in the past 3 years
- You believe that you should fill out a Form W-9 (tax form)

2 Next Back

Tax status ⓘ Required

Additional documentation ⓘ Required

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

*Step 4 of 6: Complete Tax status section*

Taxes

Remember:

- Make sure you have all your tax information handy
- Click **Next** after each step to save your information.
- Exclude sensitive information such as bank account details when submitting support queries.

Business profile ✓ Completed

Setup ✓ Completed

Tax status → In Progress

Tax ID type ⓘ  
Australian Business Number

Tax ID \*  
XXXXXXXXXXXX

Next Back

Additional documentation ⓘ Required

1. In the Tax status section, enter your company **Tax ID type** and **Tax ID**.
2. Click **Next** to save these details and continue.

*Step 5 of 6: Complete the additional documentation section*

**Notes:** The content of this section will vary dependent on the company location input in **Setup** section. For some countries/regions, this tab will not appear. There may be also be minor differences to this page dependent on the internet browser you use.

Taxes

Remember:

- Make sure you have all your tax information handy
- Click **Next** after each step to save your information.
- Exclude sensitive information such as bank account details when submitting support queries.

Business profile ✓ Completed

Setup ✓ Completed

Tax status ✓ Completed

**Additional documentation** → In Progress

Include the following required documentation:

Document type 1 ⓘ  
  
 Browse Upload Clear

Document type 2 ⓘ  
  
 Browse Upload Clear

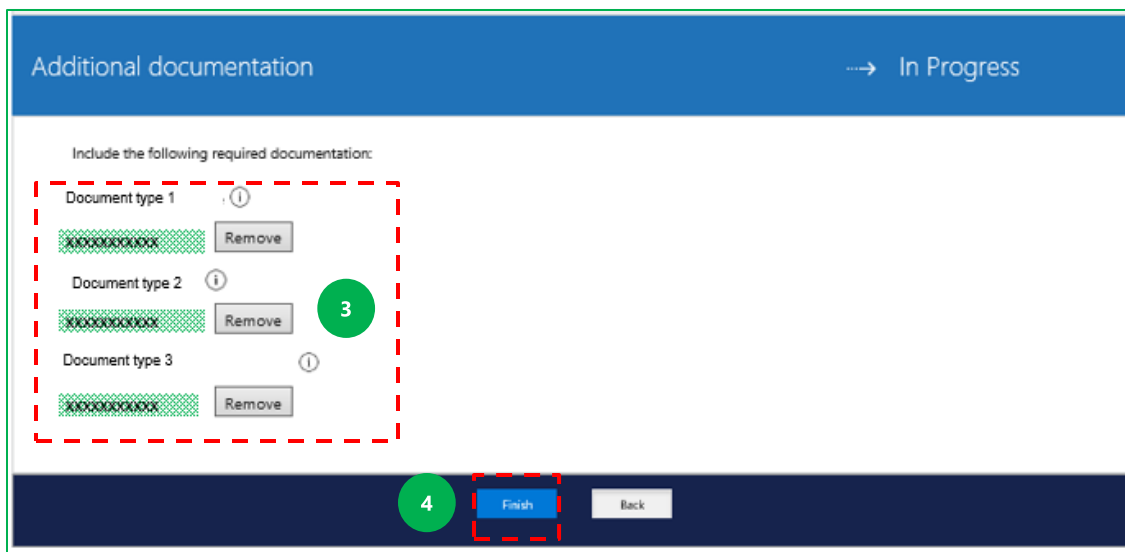
Document type 3 ⓘ  
  
 Browse Upload Clear

1 2

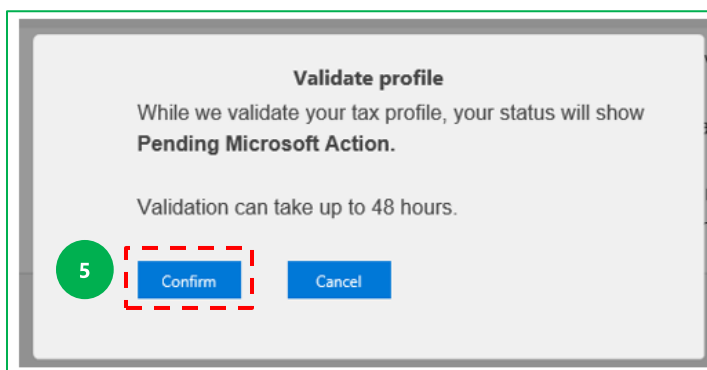
Finish Back

Cancel

1. For each required document, click **Browse** to add document.
2. When a document name is visible click **Upload** to complete submission of document.



3. When you successfully upload a document, a **Remove** button is visible, and **Browse** and **Upload** buttons will no longer be visible.
4. Click **Finish** to save data and continue.



5. A pop up message will appear. Click **Confirm** and system redirects back to the Banking and tax management page.

### Step 6 of 6: Redirection and updating of tax status

The screenshot shows a web interface for 'Banking and tax management'. At the top, there is a 'Back' button and a 'Bank Profile' section. Below this, a 'Tax Profile' section is highlighted with a red dashed box and a green circle containing the number '1'. This section includes a 'Geography' dropdown menu and a status indicator that reads 'Pending Microsoft Action' with a yellow warning icon. Below the 'Tax Profile' section, there is a 'Banking profiles details' table with columns for Profile Name, Bank Name, Country, Account Type, Account Number, and Status.

After completion of the Tax form online system redirects back to this screen and the tax status (point 1) will be updated depending on what needs to be done (**Pending Microsoft Action, Partner Action Required, Approved**).

**Note:** Tax profiles may take more than 1 stage of approval due to review of tax forms for certain countries, or if partner submits inaccurate data. If a tax profile has status of "**Partner Action Required**" please complete action/s and recheck. Then click on "**Finish**" within the tax profile again to resend to Microsoft for review and approval. If everything is correct Microsoft will then move status to "**Approved**".

If 48 hours after completion of above steps (and refreshment of Banking and tax management page) your payment profile is not set to "**Approved**", then contact Support to raise a query.



## Create new bank profile with online application form

### Step 1 of 4: From Profile Assignment, create or assign bank profile

**Banking and tax management**

**Profile Assignment** **Bank Profile**

Partners will need to complete both the Tax Profile as well as the Banking Profile (and have a Banking Profile assigned to each location) prior to being eligible to be paid incentives. Should either of these profiles be incomplete on the deadline for each incentive program provided via e-mail, incentives payments will be held until the first payment cycle after both profiles have been completed. Once you have created a bank or tax profile, please allow 48 hours for processing by Microsoft. During this time, the status will indicate "Pending Microsoft Action". Resubmitting your profile will cause delays in your account processing. Check this site after 48 hours to ensure your information was completely processed and to verify all required actions are complete.

**Skylight**

Geography: Microsoft Regional Sales Corporation | Tax Profile: Pending Microsoft Action

Country & MPN ID: Microsoft Regional Sales Corporation | Payment profile: Choose pay type

**Banking profiles details**

If you have designated to receive incentives at the Virtual Organization Partner ID level 00000000000000000000, they will be paid to your headquarters (based on MPN HQ), please ensure you complete Banking and Tax profiles for your MPN HQ Location.

Profile Name	Bank Name	Country	Account Type	Account Number	Status
--------------	-----------	---------	--------------	----------------	--------

1. Under pay type select an appropriate available payment method, for example electronic transfer. Two columns will then appear to the right of pay type (see next screenshot)

**Banking and tax management**

**Profile Assignment** **Bank Profile**

Partners will need to complete both the Tax Profile as well as the Banking Profile (and have a Banking Profile assigned to each location) prior to being eligible to be paid incentives. Should either of these profiles be incomplete on the deadline for each incentive program provided via e-mail, incentives payments will be held until the first payment cycle after both profiles have been completed. Once you have created a bank or tax profile, please allow 48 hours for processing by Microsoft. During this time, the status will indicate "Pending Microsoft Action". Resubmitting your profile will cause delays in your account processing. Check this site after 48 hours to ensure your information was completely processed and to verify all required actions are complete.

**Skylight**

Geography: Microsoft Regional Sales Corporation | Tax Profile: Pending Microsoft Action

Country & MPN ID: Microsoft Regional Sales Corporation | Payment profile: Electronic transfer

**Banking profiles details**

If you have designated to receive incentives at the Virtual Organization Partner ID level 00000000000000000000 they will be paid to your headquarters (based on MPN HQ), please ensure you complete Banking and Tax profiles for your MPN HQ Location.

Profile Name	Bank Name	Country	Account Type	Account Number	Status
--------------	-----------	---------	--------------	----------------	--------

2. From drop down box select **Create a new banking profile** system redirects to setup pages.

If a banking profile that is already created for other locations is to be used for the newly onboarded program choose this from the drop down menu instead of creating a new profile. **Do not create duplicate bank profiles.** See [profile assignment section](#) for further details.

Banking

Remember:

- Make sure you have all your banking details handy.
- Click **Next** after each step to save your information.
- Exclude sensitive information such as bank account details when submitting support queries.

Details	3	Required
Bank account		Required
Beneficiary		Required

Cancel

The payment profile information is organized under three sections—*Details*, *Bank account* and *Beneficiary*.

3. Start entry of payment details with the **Details** section.

*Step 2 of 4: Complete Details section*

Enter company account profile, bank location, currency & payment method

Banking

Remember:

- Make sure you have all your banking details handy.
- Click **Next** after each step to save your information.
- Exclude sensitive information such as bank account details when submitting support queries.

Details → In Progress

Your profile details

Profile name \* ⓘ

Bank account location \* ⓘ

Disbursement currency \* ⓘ

Microsoft's preferred payment method is electronic banking.

Payment method \* ⓘ

**Next**

Bank account ⓘ Required

Beneficiary ⓘ Required

Cancel

1. Under **Details** enter this information:

- *Profile name*—enter a unique name to identify this payment profile
- *Bank account location*—the country in which your company's bank is located
- *Disbursement currency*—the currency in which Microsoft will pay you. Depending on partner bank account location this may be set or another currency can be selected from the drop down.
- The payment method used by Microsoft to send you your payment cannot be changed as per program policy—it is set as Electronic Bank Transfer (wire transfer).
- Click **Next** to save these details and move to the **Bank account** section.

*Step 3 of 4: Complete Bank account section**Enter your company bank account identifier*

Banking

Remember:

- Make sure you have all your banking details handy.
- Click **Next** after each step to save your information.
- Exclude sensitive information such as bank account details when submitting support queries.

Details ✓ Completed

Bank account → In Progress

Your banking information

Bank-State-Branch (BSB) code \* 1

6-digit number. Format: 063008

Bank account information

Bank name Bank branch name

Bank address

SWIFT code

Account number \* 2

Confirm account number \*

3 Next Back

Beneficiary ⓘ Required

- Under **Bank account** enter bank identifier such as IBAN, BSB or SWIFT/BIC. The fields visible in this section will vary by country.
- The bank account information that relates to this identifier then appears on the page below. Next enter additional details such as account number if not already visible.
- Click **Next** to save these details and move on to the **Beneficiary** section.

Note: The following are requirements under Bank account—**Country code**, **Bank routing number**, and **Bank account number**. These codes are part of your IBAN. If you enter your SWIFT/BIC, then you will see prompt to enter your Bank account number (point 2).

What if bank account identifier is incorrect or not recognized?

Banking

Remember:

- Make sure you have all your banking details handy.
- Click **Next** after each step to save your information.
- Exclude sensitive information such as bank account details when submitting support queries.

Details ✓ Completed

Bank account → In Progress

Your banking information

IBAN number \* ⓘ

21 characters  
Format: XXXXXXXXXXXXXXXXXXXXX

I would like to supply my full banking information instead.

**a**

**b** Next Back

Beneficiary ⓘ Required

Cancel

A validation is made of the format of the bank identifier you enter. **If the format is incorrect** you will receive an error message that either the number or format is incorrect. If possible, make the change (correct the number or format) **(a)** and then click **Next (b)** to validate. See next page for details of validation.

**Note:** The correct format for the relevant country and an example is shown under the entry box.

Banking

Remember:

- Make sure you have all your banking details handy.
- Click **Next** after each step to save your information.
- Exclude sensitive information such as bank account details when submitting support queries.

Details ✓ Completed

Bank account → In Progress

Your banking information

IBAN number \* ?

21 characters  
Format: XXXXXXXXXXXXXXXXXXXXXXX

I would like to supply my full banking information instead

Beneficiary Bank account Required

Enter your bank account information

Bank name *	IBAN number	Address 1 *	Account number *
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Bank branch name	SWIFT code *	Address 2	Confirm account number *
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Bank branch number *	Country bank code *	Town/City *	
<input type="text"/>	<input type="text"/>	<input type="text"/>	
	Country/Region	State/Province *	
	<input type="text"/>	<input type="text"/>	
		Postal code *	
		<input type="text"/>	

If the identifier is still not recognized, you have the option to supply full payment details (click the checkbox next to **(c)**). Enter details in the table that pops out **(d)**, then click **Next (e)** at the bottom of the table to save these details. The pop out table **(d)** is now hidden again.

To continue onto the Beneficiary section, click **Next (f)** on the Bank account page.

*Step 4 of 4: Beneficiary information**Enter Beneficiary information—contact and tax details*

Bank account ✔ Completed

**Beneficiary** → In Progress

**Bank beneficiary contact**

First and last name \*

Contact email \*

Contact phone \*

Some banks require that you enter this information using Latin script. To receive payment, make sure the address below matches the information your bank has on file. By default, this form has been completed with the information you already provided.

**Bank beneficiary location**

Company name on bank account \*  1

Country/Region \*

Tax ID type \*

Tax ID \*

Address 1 \*

Address 2

Town/City \*

Postal code \*

**Validate profile**

While we validate your payment profile, your status will show **Pending Microsoft Action**.

Validation can take up to 48 hours.

3

2

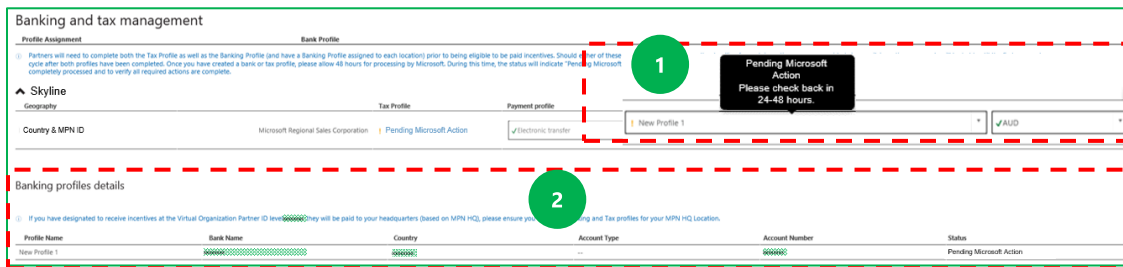
**Beneficiary** is the person in your company the bank would contact if they need to discuss your account.

1. Complete all details. This includes entry of **Tax Type** and **Tax ID** again.
2. When complete, click **Finish** to save.
3. A confirmation message appears on a pop out box. Click **Confirm** to agree to the validation and creation of a payment profile.

**Notes:**

- At least one payment profile is required per enrollment
- The disbursement currency you select is the currency in which your payments will be issued
- Payment information must be verified by Microsoft and may take up to 48 hours. The status of your payment profile is *Pending* until the validation is complete. No other edits can be made till Microsoft action is complete. Contact Support after 48 hours if profile status does not change.

Viewing status of your new Banking Profile via Profile Assignment section



- Once payment details are added system redirects back to the Profile Assignment section. Just like the tax profile, the banking profile status will move through steps after you submit it—from **Partner Action Required**, to **Pending Microsoft Action** to **Approved**.
- Go to **Banking Profile Details** to view all profiles including current status.

**Notes:**

- Bank profile and currency will auto assign to location in bank profile. You can change this location here. However restrictions by geography of bank and location may apply to assignment of banking profiles.
- It will take from 5 minutes to 48 hours to get the status to **Approved**. If need to take further action, complete the relevant steps to enable the status to change to Approved. Contact Support if status does not change to Approved.



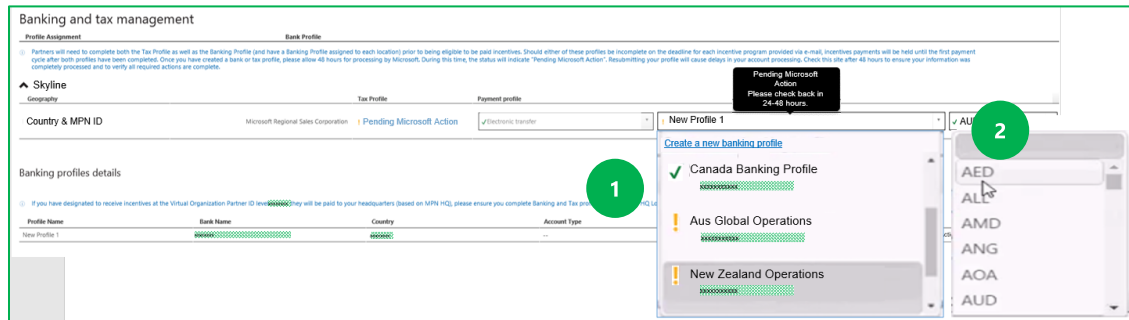
## Assignment of bank profile and currency to location

When partner creates a new bank profile, the bank profile auto assigns to the location partner enters in bank profile – this is visible in the Profile assignment section. The currency partner enters in the bank profile will also show in the Profile assignment section.

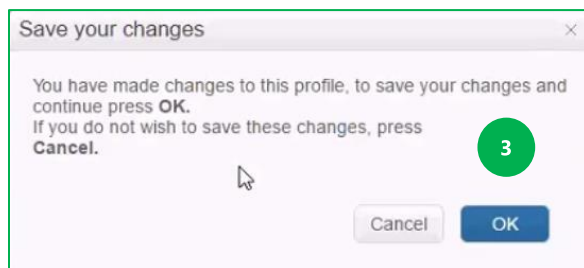
If you confirm the details shown in Profile assignment section are correct, then no action is necessary.

If a banking profile is created for one location and approved, it will appear in other locations also if the currency is supported for that location. So dependent on the currency filter, each location will show the list of available approved banking profiles.

If you wish to change assignment by location of either the bank profile or currency, please see instructions below.



1. To assign a banking profile to a location select **Banking Profile** from drop down box.
2. To assign a currency to a location select **currency** from drop down box.



3. When making changes confirmation message will appear to save your changes, click on **OK**.

## Confirm payment profile is complete and can receive incentives

To confirm payment profile is fully set up and can receive incentives, check the below is visible on the Banking and tax management page, and on PLEX.

### *Banking and tax management once payment profile complete*

**Banking and tax management**

**Profile Assignment** **Bank Profile**

Partners will need to complete both the Tax Profile as well as the Banking Profile (and have a Banking Profile assigned to each location) prior to being eligible to be paid incentives. Should either of these profiles be incomplete on the deadline for each incentive program provided via e-mail, incentives payments will be held until the first payment cycle after both profiles have been completed. Once you have created a bank or tax profile, please allow 48 hours for processing by Microsoft. During this time, the status will indicate "Pending Microsoft Action". Resubmitting your profile will cause delays in your account processing. Check this site after 48 hours to ensure your information was completely processed and to verify all required actions are complete.

**▲ Skyline**

**Geography** **Tax Profile** **Payment profile**

Country & MPN ID Microsoft Regional Sales Corporation ✓ Approved **1** ✓ Electronic Transfer **2** ✓ Atlantic Bank Profile **3**

**Banking profiles details**

If you have designated to receive incentives at the Virtual Organization Partner ID level xxxxxxxx, they will be paid to your headquarters (based on MPN HQ), please ensure you complete Banking and Tax profiles for your MPN HQ Location.

Profile Name	Bank Name	Country	Account Type	Account Number	Status
Atlantic Bank Profile	xxxxxxxx	xxxxxxxx	xxxxxxxx	xxxxxxxx	Approved <b>4</b>

In Profile assignment area:

1. Tax status shown as **Approved**.
2. Banking Profile (with green tick) visible in drop down.
3. Currency (with green tick) visible in drop down.

In Bank profiles details:

4. Status shown as **Approved**.

*PIEX once profiles active*

The screenshot shows a 'Programs' page with a 'Skyline' section. The profile is for 'Microsoft Regional Sales Corporation'. The 'Overall Status' is 'Active' (1), the 'Tax profile' is 'Completed' (2), and the 'Payment profile' is visible (3). The page includes a 'Refine' dropdown set to 'All', a 'Manage profiles' link, and a pagination bar showing '1' of '1 - 1 of 1 Items'.

1. Overall status is **Active** with green tick.
2. Tax profile status is **Completed** with green tick.
3. Payment profile (Bank profile) name is visible with green tick.

## Update or change payment profile information in PIEX

If a partner wishes to make changes to their bank or tax details or to assign a different bank profile to a location, see below for policy and guidance.

### **Update tax details:**

To change any tax details you must resubmit the full tax profile, due to legal requirements. See [Create new tax profile with online application form](#) for guidance.

### **Update bank details:**

Once Microsoft approves a bank profile (status of **Approved** visible on Profile assignment or Banking Profiles details sections), you cannot edit or delete this bank profile. If necessary create a new bank profile (ensure duplicate profile not already available in your list of bank profiles). See [Create new bank profile with online application form](#) for guidance. Note partner status will change from *Active* back to *Enrolling* until new / updated payment profile approved.

### **Assign different bank profile or currency to a location**

To change assignment of banking profile to a location, please follow the guidance in the [Assignment of banking profiles and currency to locations](#) section.

## Re-enrollment process

Partners who onboarded onto the Partner Incentives Experience platform in a previous fiscal year do not need to re-onboard onto PLEX but must continue to meet eligibility requirements to earn and be paid incentives for the current fiscal year.

## Access and navigate PLEX post enrollment

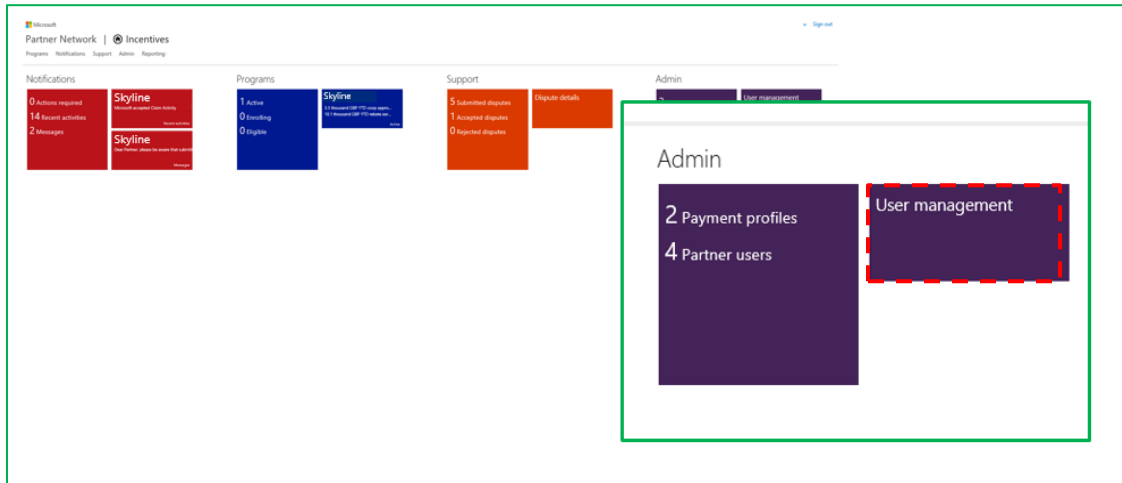
Once the tool is initially accessed and all PLEX onboarding stages are complete, users can log-in at any time through the URL:

<https://partnerincentives.microsoft.com/>

# User Management

User management is a **partner admin** function.

It is visible on the **Admin tile** on the dashboard.



Under this you have three options:

- **Manage users:** See the list of currently enrolled partner admins and users, their permissions and email addresses. You can delete users and permissions here.
- **Add users/permissions:** Add new users or change the permissions of current users
- **Manage invites:** Manage invites already sent.

## Add users

To add users:

User management

Manage users | Add permissions | Manage invites

Company email \*

someone@example.com

Find user

1. Click **Add permissions** tab.
2. Enter user email (company domain email or Microsoft Account email), and click **Find user**.

User management

Manage users | Add permissions | Manage invites

Company email \*

XXXXXXXXXX

Find user

The user is not in our system. Click Add permission and we'll email them an invite.

Role \*

Select one

Program \*

Select one

Enrollment location \*

Select one

Add permission

3. If the user email does not exist in PIEX, the message *user not found* is displayed. The partner admin can then choose to add the new user to PIEX.
4. Select the role: **partner user** or **partner admin**, program, and enrollment location for the new user.
5. Click **Add permission** and an email invitation is sent immediately.

**Note:** Invites can be tracked and re-sent in the **Manage invites** tab.

If the user email does exist in PLEX their details display. The partner admin can now modify current permissions (for example, change role from partner admin to user.)

The screenshot shows the 'User management' interface. At the top, there are three tabs: 'Manage users', 'Add permissions', and 'Manage invites'. Below the tabs, there are four input fields for user details: 'Company email \*', 'First name...', 'Last name', and 'Windows Live ID'. Each field has a green patterned placeholder. Below these fields is a 'Find user' button. On the right side, there are three dropdown menus: 'Role \*', 'Program \*', and 'Enrollment location \*', each with a 'Select one' option. Below these dropdowns is a blue 'Add permission' button. A red dashed box highlights the three dropdown menus, with a green circle containing the number '1' next to it. Another red dashed box highlights the 'Add permission' button, with a green circle containing the number '2' next to it.

1. Make any changes (select the new role, program and/or enrollment location).
2. Click **Add permission**.

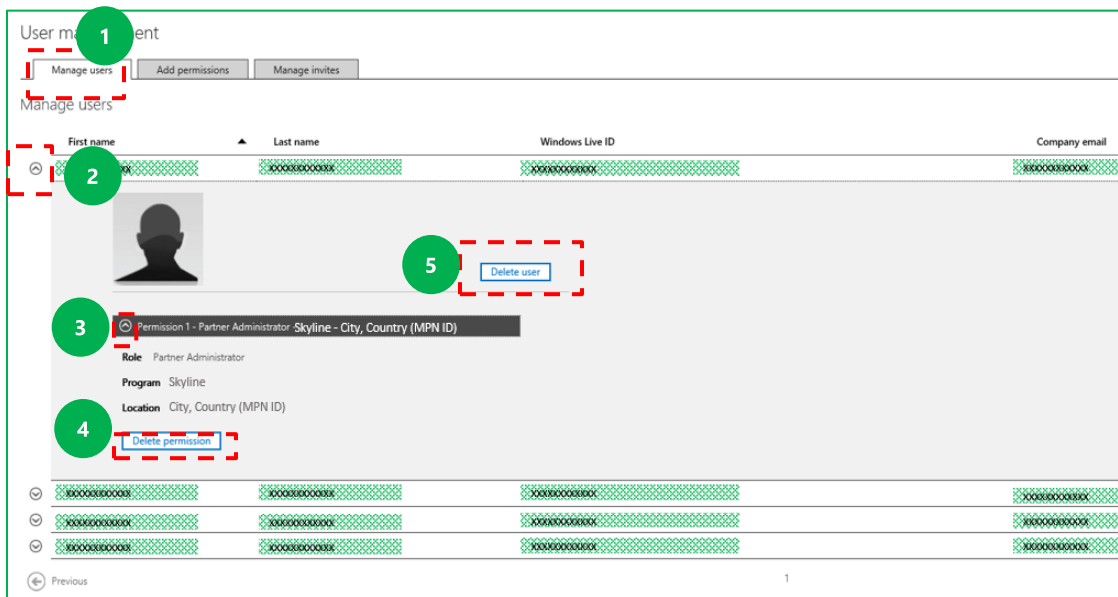
#### Notes:

- If permission change was successful, the **request created successfully** confirmation message will appear.
- No email invitation is required during this process because company has enrolled.



## Delete users and permissions

Delete users or their permissions from the Manage users tab.



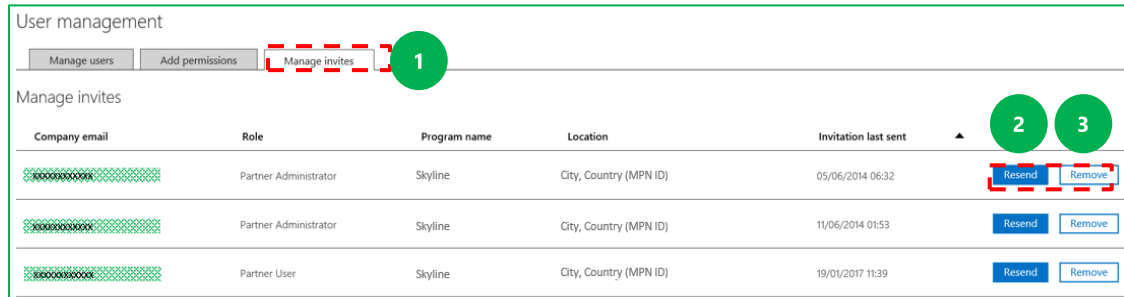
1. Click the **Manage users** tab.
2. Select a specific user by clicking on the arrow sign next to the user whose permission you want to change. You are then shown the permissions for that user (role, program, and location).
3. Click the secondary arrow sign to expand the permission details.
4. Select **Delete permission** to retain the user, but delete the specific entitlement.
5. Alternatively, select **Delete user** to delete a user completely.

### Notes:

- The user must have more than one permission in order to delete a permission.
- If you delete the only permission, the user is also deleted.
- Users with multiple roles/permissions (for example, partner user and partner admin) will automatically use the highest level role/permission assigned during log on.

## Manage invites

To retrigger or track invites to users:



User management

Manage users Add permissions **Manage invites** 1

Manage invites

Company email	Role	Program name	Location	Invitation last sent	2	3
[REDACTED]	Partner Administrator	Skyline	City, Country (MPN ID)	05/06/2014 06:32	Resend	Remove
[REDACTED]	Partner Administrator	Skyline	City, Country (MPN ID)	11/06/2014 01:53	Resend	Remove
[REDACTED]	Partner User	Skyline	City, Country (MPN ID)	19/01/2017 11:39	Resend	Remove

1. Click **Manage invites**.
2. For current users to whom you have already sent an invite, click **Resend**.
3. If you wish to remove an invite, click **Remove**.

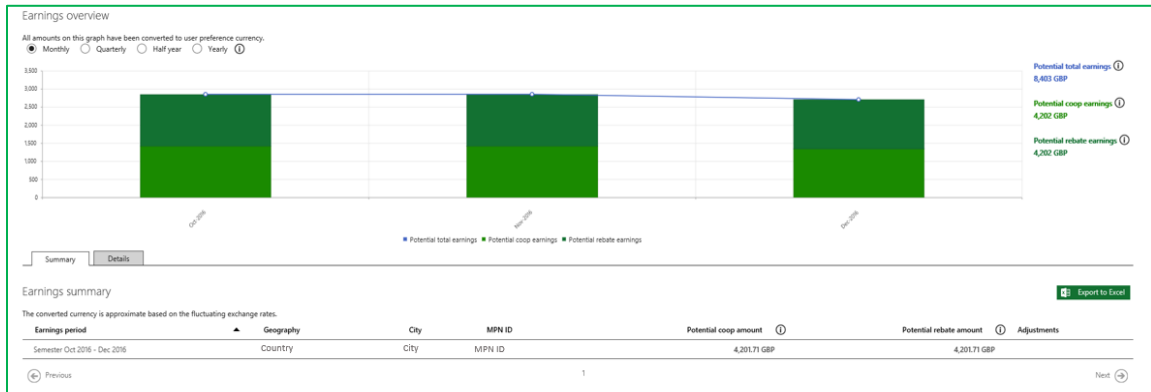
# View Earnings

PLEX provides partners with the ability to view incentives earnings. View earnings by both the partner admin and user in various formats and time periods, in order to assist in reconciliation. You can also export information to Excel for analysis.

## To view your earnings:

1. Click on the relevant program on the dashboard.
2. Click **Earnings** on the top menu.
3. Under filters, select the **Earnings period** (this will vary dependent on your program), and a country/region under **Geography** if relevant.
4. Click **Apply**. The timeline below will adjust to the time period you select, or you can use the time sliders to select a longer or shorter timeframe.

Scroll down to view a high level summary or details of your earnings.



**Earning details** Export to Excel

The converted currency is approximate based on the fluctuating exchange rates.

ID	Geography	City	MPN ID	Earnings period	Notification count	Dispute	Reseller name	Master agreement	Product name	Quantity
XXXXXXXXXX	Country	City	XXXXXXXXXX	Semester Oct 2016 - Dec 2016	0	<a href="#">In dispute</a>	XXXXXXXXXX	XXXXXXXXXX	SQL Svr Standard Core	94
XXXXXXXXXX	Country	City	XXXXXXXXXX	Oct 2016 - Dec 2016	0	<a href="#">In dispute</a>	XXXXXXXXXX	XXXXXXXXXX	SQL Svr Enterprise Core	134
XXXXXXXXXX	Country	City	XXXXXXXXXX	Semester Oct 2016 - Dec 2016	0	<a href="#">Dispute</a>	XXXXXXXXXX	XXXXXXXXXX	Windows Server Standard	743
XXXXXXXXXX	Country	City	XXXXXXXXXX	Semester Oct 2016 - Dec 2016	0	<a href="#">Dispute</a>	XXXXXXXXXX	XXXXXXXXXX	Win Rmt Dsktp Svcs SAL	8

5. Select the **Details** tab to see more information on your earnings.
6. Click **Export to Excel** to download the data for further analysis.

## Co-op Marketing Activity Plan

Who is this section relevant for?

Please note this section on co-op plan management functionality in PIEX is not relevant to all programs.

Partner type	PIEX Co-op capability		
	Submit Co-op Plan via PIEX	Submit Claims	Track Claims
CSP – Indirect Provider	✓	✓	✓
CSP – Direct Partner	NA	NA	NA
CSP – Indirect Reseller	NA	NA	NA
Hosting	✓	✓	✓
Managed Reseller	NA	✓	✓
Syndication	✓	✓	✓

## Co-op guidance

Partner Incentives Cooperative Marketing Funds (or co-op funds) are reimbursements of earned funds to partners who participate in specific incentives programs. These co-op funds help partners differentiate and build channel awareness and build preference for Microsoft products among their customers.

- Conduct and complete activities within the usage period and submit claims by end of usage period +45 days.
- Activities need to be Microsoft focused.
- Submit activities you plan as part of Co-op Marketing Activity Plan for Microsoft review.
- Plan review does not guarantee claim approval. Activities must meet the program guidelines in the Co-op Guidebook.
- Co-op funds you do not claim by deadline will be lost.
- All required Proof of Execution (POE) needs to be submitted for claims to be approved. (Refer to Co-op Guidebook for specific POE for each activity.)

The Partner Incentives Co-op Guidebook located under [aka.ms/partnerincentives](https://aka.ms/partnerincentives) provides further information per program.

## Select and plan Co-op activities

There are three categories of activity outlined in the Guidebook:

- **Demand Generation** – activities have a broad reach and are intended to raise awareness, for example, advertising.
- **Market Development** – activities target specific audience, for example, telemarketing.
- **Partner Readiness** – activities are focused on your own personnel to develop their Microsoft sales and technology expertise, for example, training.

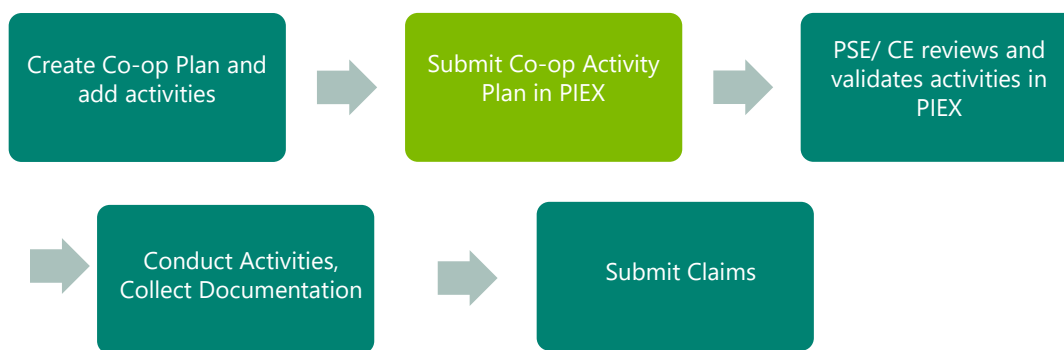
Remember to submit a Co-op Marketing Activity Plan well in advance of activity execution. Plans can be submitted from 15 business days in advance of usage period (via Partner Incentives Experience platform).

## Co-op Marketing Activity Plan process

For Host, Syndication and CSP Indirect Provider Partners, the Co-op Claim/Usage Period starts with a plan that you craft jointly with your Partner Sales Executive (PSE) / Channel Executive (CE). Therefore a Co-op Marketing Activity Plan is a requirement and a PSE / CE must review in PIEX, before any Co-op activities begin.

The Co-op Plan must correctly document the activities you plan to execute during the usage period to ensure a smooth claims process after the activity completion and claim submission.

After the Plan is finalized, your PSE / CE must review and validate the activities in the PIEX tool. You must submit the Co-op Plan, and PSE must review in PIEX prior to any submission of claims on the Partner Incentives Experience.



Submit Co-op Marketing Activity Plans in PIEX as early as possible before the activities you are plan are in schedule to begin. PIEX will be open to submit the Co-op Activity Plan 15 days prior to the usage period start date. You can follow status of activities in PIEX under Plan Management.

Refer to Co-op Guidebook or program incentives guides for details of usage and earning periods.

## Create a Co-op Marketing Activity Plan

### TIPS:

- Please create one co-op plan per geography per usage period. Your co-op plan should include all the activities you plan to undertake for the entire semester.
- If you already started your co-op plan for the usage period, add additional activities to your co-op plan in the same geography and usage period. Click on the **Plan link**, then click on “**Add an activity**” link in the plan summary page.”

Partner Network | Incentives

Programs Notifications Support Admin Reporting

Notifications

- 0 Actions required
- 14 Recent activities
- 2 Messages

Programs

- 1 Active
- 0 Enrolling
- 0 Eligible

Skyline

3.3 thousand GBP YTD coop...  
18.1 thousand GBP YTD rebate ear...  
Active

Skyline

Program info Program summary **Plan Management** Claim management Claims summary Earnings Payments

Locations

**Create a new plan** | Manage plans

Geography	Coop Plan	Usage period
City, Country (MPN ID)	XXXXXXXXXXXX	Semester Oct 2016 - Mar 2017

Previous 1

1. Click on the relevant program on the dashboard.
2. Select **Plan Management** from the Program menu.
3. To create a new Co-op Plan click **Create a new plan** under Locations.



Skyline

Program info Program summary Plan Management Claim management Claims summary Earnings Payments

### Plan Details

MPN ID: XXXXXX Partner: XXXXXXX

Name your new plan \*

Choose your usage period \*  
Semester Apr - Sep 2016

Who is your account manager? \*  
@microsoft.com

Choose geography \*  
City, country (MPN ID)

Currency type \*  
Select

Support documentation

Add another file...

Back

Save and exit Next

1. Enter the Plan header details. Help & Tips for each field can be found in the gray box on the side.
2. Click **Next** to add the activities to your plan or **Save & Exit** if you want to continue at a later time.

Skyline

Program info Program summary Plan Management Claim management Claims summary Earnings Payments

### Plan Details

MPN ID: XXXXXXX Partner: XXXXXXX

Plan name: test syn plan

Usage period: Semester Oct 2016 - Mar 2017

Account Manager: @microsoft.com

Geography: City, Country (MPN ID)

Plan Currency: DKK

Support Documents:

Activities

There are no activities added to this plan. [Add an activity to this plan](#)

Claims

PLAN NAME:	test syn plan
TOTAL PLAN BUDGET:	334 DKK
TOTAL CLAIMS:	9
COOP EARNED AMOUNT:	26631 USD
TOTAL CLAIMED AMOUNT:	3000 USD
TOTAL COOP BALANCE:	29631 USD

Modify

Add activities

3. Review plan details and if necessary click **Modify** to go back and make any changes.
4. Click **Add Activities** button to begin entry of activities to plan.

Add activities:

The screenshot shows the 'Skyline' interface with the following components:

- Navigation:** Program info, Program summary, Plan Management, Claim management, Claims summary, Earnings, Payments.
- Section:** Eligible activities.
- Area 1 (Left):** Three dropdown menus for 'Market Development', 'Partner Readiness', and 'Demand Generation'. The 'Demand Generation' dropdown is open, showing options: Direct Mail, Email & Mobile SMS; Microsoft Syndicated Content; Partner Website and Search Engine Optimization; Print Advertising.
- Area 2 (Right):** A list of activities: 'Tradeshows and Expositions', 'Approved Microsoft Conferences', 'Digital Advertising', and 'Customer Offers'. Each activity has a red 'x' icon to its right.
- Area 3 (Bottom Right):** A blue 'Next' button.

1. Click on the drop down for each activity category and select all relevant activities to add to plan.
2. Chosen activities will show up on the right side of the screen. Click the relevant red cross to remove.
3. Click **Next** to add these activities to plan and continue to provide details for each activity.

**NOTE:**

- Partners can now submit an activity type multiple times within a co-op plan. Previously partners could not enter redundant activity types within a co-op plan (e.g. two On Site Champ activities for two different audiences are now possible within a single plan). Please use the "**Activity Title**" field to differentiate the activities within the co-op plan.

The screenshot displays the 'Plan Details' and 'Activities' sections of a software interface. The 'Plan Details' section is highlighted with a red dashed box and contains a green circle with the number 4. The 'Activities' section lists three activities, with the first activity, 'Activity 1: Internal Training and Floor Days', having its 'Activity details' link highlighted by a red dashed box and a green circle with the number 5. To the right, a summary table shows financial metrics for the plan.

PLAN NAME:	test syn plan
TOTAL PLAN BUDGET:	334 DDK
TOTAL CLAIMS:	9
COOP EARNED AMOUNT:	25631 USD
TOTAL CLAIMED AMOUNT:	3000 USD
TOTAL COOP BALANCE:	25631 USD

Section not started - please configure this section to complete required content. This message disappears as content begins to be configured.

4. Plan details appear, with activities listed below.
5. Click on **Activity details** of relevant activity to provide further information for that activity or to edit previously created / copied activity. Click **Remove** to remove activities.

Skyline  
 Program info Program summary Plan Management Claim management Claims summary Earnings Payments

Tradeshows and Expositions

Activity Description \*  
 Annual regional tradeshow

Activity Purpose \*  
 To promote products and services to regional customers

For plan Marketing Plan - H2 FY 20XX  
 Estimate the end date of the activity to be displayed in your timeline \*  
 30/09/2018

Estimated customer reach  
 30000

Budget Amount  
 5000

Estimated number of leads  
 25

Help & Tips:  
 Activity description: Enter a description for this activity.  
 Activity purpose: Provide a detailed description of your activity's purpose.  
 Estimated end date: Provide an estimated end date for when the activity might be completed.  
 Messages: If you need to add an additional message to your account manager, enter it in the this section.

Messages  
 Write additional remarks here and click post when finished

Back

Save for later Submit for review

Submit for review

You are about to submit this activity for review, are you sure you are ready to submit?

The ability to edit this activity will be available until your account manager begins reviewing the activity. At this time, you will not be able to modify the details of this activity. If you need to modify this plans activities after verifications by Microsoft, use the messaging feature for this specific activity.

Press 'OK' to submit, or 'Cancel' to go back.

OK Cancel

1. Complete details for activity. Guidance is provided in gray box.
2. Use the **Messages box** to provide optional additional commentary for Microsoft Account Manager, then click **Post** to add to form.
3. When complete click **Submit** for review or **Save** for later if need to complete later.
4. Warning message is now shown. Click **OK** to submit activity for review.

**NOTES:**

- Submit each activity individually so if there are questions on a specific activity, it does not block the entire plan.
- Only activities that have been reviewed by your PSE / CE will have status of **Reviewed** and will see **Make a Claim** link live in blue. Claims cannot be made against non reviewed activities.
- Partners may cancel a planned activity and its associated budget. The budget will be “released” from the total plan amount. Partner is not required to secure PSE/CE approval to cancel an unexecuted activity.
- Partners may now update a reviewed activity by clicking the “**Re-Open**” link. Please note that once you re-open and re-submit an activity, after updates the activity reverts to “*Pending review by MS*” status. PSEs/CEs will receive an alert when the status of a previously reviewed activity changes; PSE/CE then has a requirement to review update of the activity and accept or reject.

## Activity status and claiming

Activity 6: Tradeshows and Expositions

Activity details   Submit for review   **Make a claim**   **2**   Re-open   Cancel   Remove

**1**   Activity Submitted  
Pending review by account manager  
✓ Pending review by Microsoft

Activity Title: [REDACTED]  
Activity Description: Trade Shows and Seminars  
Activity Purpose: [REDACTED]

Estimated activity end date	31/03/2017
ACTIVITY BUDGET AMOUNT:	100 DKK
CLAIMS:	0

1. Status *Pending review by Microsoft* for the activity is shown until Account Manager reviews. Please follow up with your PSE / CE if plan approval does not occur in a timely manner.
2. Once activity reviewed by Microsoft, status will change to **Reviewed** and claims for this activity can be made via **Make a claim**. See Submit Claim section later in this document, for details on how to complete and submit a claim.

## Add more activities to plan

The screenshot displays the 'Skyline' interface with the 'Plan Management' tab selected. A green circle with the number '1' is positioned above the 'Add an activity' button, which is highlighted with a red dashed border. The interface shows a list of activities: 'Activity 1: MPN Participation' (Reviewed), 'Activity 2: MPN Participation' (Reviewed), and 'Activity 3: Internal Incentives/ SPIFFs' (Section incomplete). The 'Add an activity' button is located at the top right of the activities list.

1. Add additional activities via the Plan Management tab, during usage period and when the Co-op Marketing Activity Plan is showing active.

## Claim submission process

PIEX provides partners with the ability to make a claim for co-op expenses. Consult the Co-op Guidebook for details on eligible activities and expenses, and the Proof of Execution (POE) requirements which you need to submit with your claim. For co-op earning and usage periods, and related deadlines please see incentives guides.

For claims which relate to Co-op Marketing Activity Plans which you **create under the new Plan Management functionality in PIEX**, please submit via Plan Management. This is the quickest way to submit these claims.

For claims which relate to plans that were created **prior to the launch of the new Plan Management functionality in PIEX**, please submit claims via Claim Management.

Both scenarios then follow same process after initial different steps. Partners utilizing plan management functionality will see some data prepopulated from their plan, this saves time when you enter details of claim.

## Co-op claim which begins from Plan Management

Partner Network | Incentives

Programs Notifications Support Admin Reporting

Notifications

- 0 Actions required
- 14 Recent activities
- 2 Messages

Programs

- 1 Active
- 0 Enrolling
- 0 Eligible

Skyline

3.3 thousand GBP YTD coop appro...  
18.1 thousand GBP YTD rebate ear...  
Active

1. Click on relevant program on dashboard.

Skyline

Program info Program summary **Plan Management** Claim management Claims summary Earnings Payments

Locations

Create a new plan Manage plans

Geography

City, Country (MPN ID)

Coop Plan

Plan name

Previous

Activities

Activity 1: MPN Participation

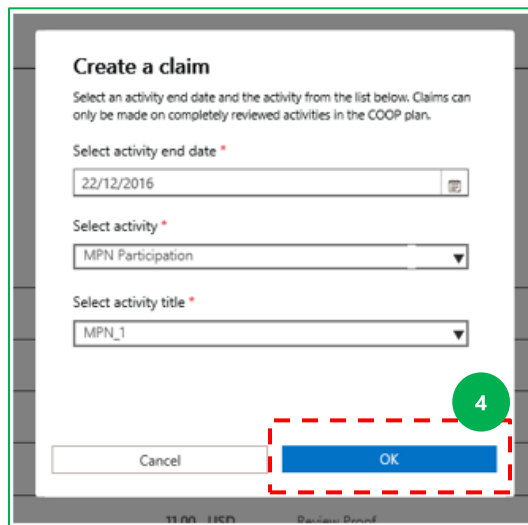
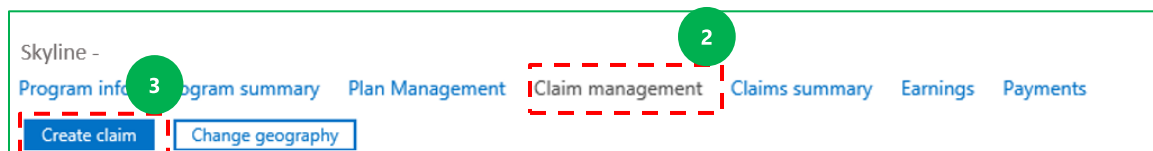
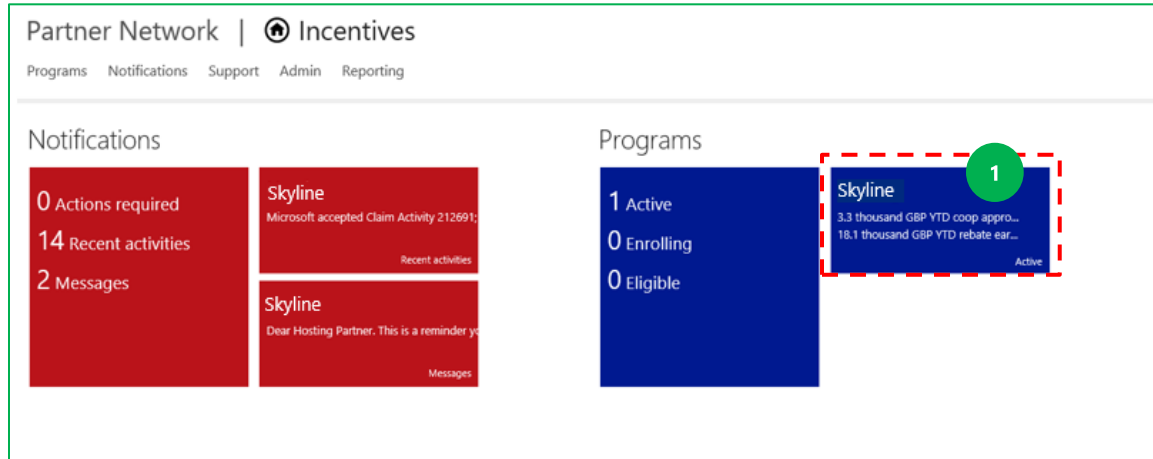
Activity details Submit for review **Make a claim** Messages Re-open Cancel Remove

2. Click **Plan Management** on the top menu.
3. Select plan which contains relevant activities.
4. Click **Make a claim** to begin claim process.

Now skip the next page and go to the following page - **Submit claim – all partners from this point forward:**



## Co-op claim which begins from Claim Management



1. Click on the relevant program on the dashboard.
2. Select **Claim management** from the top menu.
3. Click **Create claim**.
4. On pop up window, select the activity end date and activity details, then click **OK**.

Now go to section on next page to continue.

Submit claim – all partners from this point forward:

The Co-op Guidebook and related assets can be accessed via [aka.ms/partnerincentives](http://aka.ms/partnerincentives) under the “Co-op” section on left hand side menu. Refer to as you complete the sections of the claim form.

Activity

Enter a description to help you remember this claim.

When did your activity start?

This determines the claim period.

What kind of activity is this? **1**

If you don't see your activity listed here, **2** [Click here](#) to view and select an activity. Understanding which activity to select?

This field will show the activity you select.

Claim an expense for the selected activity.

Claim name \*

Activity start date \*

Activity end date \*

Activity \*

Activity category

Expense \*

Program info Program summary Plan Management Claim management **3** Claims summary Earnings Payments

My claim total 0.00

1 Activity Action required

2 Proof

3 Comments

Save

Submit

1. On claim form, under the **Activity** heading, complete any fields which are not already populated.
2. Click the hyperlink **Click here** to see a list of eligible activities and expenses for your program.
3. Use the vertical scroll bar at the top of the page to quickly navigate to the different sections of the claim form.

My claim total 2,000.00 EUR Status: Pending Submission	<b>1</b> Activity	<b>2</b> Proof Action required (1)	<b>3</b> Comments	Save
Available funds: 26,630.77 USD		Semester: Oct 2016 - Mar 2017		
The remaining funds only show approved claims that have been deducted from the balance, not those pending review. All activities must be completed by March 31, 2017 (Pacific Time). You can submit claims for those activities until May 15, 2017 (Pacific Time).				
⊖ Activity				
⊖ Proof				
⊖ Invoice *		✖ Required	0 of 1 required file(s) added	
⊖ Communication material *		✖ Required	0 of 1 required file(s) added	
⊖ Metric *		✖ Required	0 of 1 required file(s) added	
⊖ Support document		(Optional)	0 file(s) added	
⊖ Comments				

Under the **Proof** heading, **only** the required forms of proof for the activity and expense you select are shown—the portal filters on your selection. Guide-me text on the left will identify what is required for each sub-section. The headings in the Proof section change depending on the activity for which you are claiming. In the above example:

- Submit invoices under the **Invoice** heading – see below for guidance.
- Submit non-invoice Proof/POE files (e.g. certificate of course completion, copy of communication, photo of message for mobile) under the **Communications material**, **Metric** and **Support document** headings.

Invoice \*

Required 0 of 1 required file(s) added

This is the program description of what qualifies for this form of proof:

Add at least **1 file** with:

- Original Microsoft Invoice

Enter invoice amount. If you are claiming part of an invoice, enter only the amount being claimed.

What is your invoice number?

Enter a description of this invoice to help you remember what it is.

Claim currency \*

GBP, UK Pound

View list of valid file types. ⓘ

Add file(s)

File \*

Expense amount \*

Invoice currency

GBP, UK Pound

Invoice number \*

Max 32 characters

Invoice description

Max 100 characters

Remove

1. Under Invoice, select the **Claim Currency**. Currency will show up in currency code.
2. Upload the invoice file.
3. A sub-section will pop out, and you enter: Expense Amount and Invoice Number. The Invoice Description is optional, use to describe details.

### Notes:

- You can enter / upload multiple invoices and multiple currencies but within a single claim, only one currency is allowed.
- Partner will be paid in currency chosen in Payment profile during Enrollment process.
- An uploaded file is not active (clickable) until post claim submission. To check its content before then, you will need to remove it, check it and then upload again.

**Proof**

**Invoice \*** Required 0 of 1 required file(s) added

This is the program description of what qualifies for this form of proof:  
 Add at least **1 file** with:  
 • 3rd Party Invoice  
 OR  
 • Certification Statement & Report (CSR)

Claim currency \*

View list of valid file types: ⓘ

Add file(s)

**Image \*** Required 0 of 1 required file(s) added

This is the program description of what qualifies for this form of proof:  
 Add at least **1 file** to provide:  
 • Event photos

View list of valid file types: ⓘ

Add file(s)

**Communication material \*** 4 Required 0 of 1 required file(s) added

This is the program description of what qualifies for this form of proof:  
 Add at least **1 file** with:  
 • Event invitation and agenda /program  
 ALSO  
 • If the event invitation and agenda do not meet Core Requirements provide Supporting Documentation: Presentation materials

View list of valid file types: ⓘ

Add file(s)

**Metric \*** Required 0 of 1 required file(s) added

This is the program description of what qualifies for this form of proof:  
 Add **1 number** with:  
 • Number of guests attended  
 ALSO  
 • Type into description field "number of guests attended" to tell MS the metric you are providing.

Add Metric

**Support document** 5 (Optional) 0 file(s) added

**Comments**

Enter all additional information in the **Proof** sections of the claim form.

4. Under **Communications material**, upload the required non-invoice related material – communications, photographs, etc.
5. Under the heading **Support document**, you can upload additional documentation to support your claim (optional).

6. Under the **Comments** heading, type any comments that may aid in processing your claim.
7. Click **Save** on the scroll bar to save proof details for the claim activity. A claim number appears after you click **Save**. You can come back to it anytime to continue updating via *Claim management*.

8. To submit the claim for review, click **Submit claim** on the scroll bar.
9. Click **Confirm** in message dialog box.
10. On Confirm Location of Activity dialog box, select appropriate response, then click **Confirm**.

**Notes:**

- Once you submit your claim, you cannot change until Microsoft completes their review.
- The Microsoft proof validation standard response time (SLA) is 5 calendar days.
- The proof validation process is complete when all proof files within the claim activity have been validated as either *Proof Accepted* or *Proof Rejected*.

## Track claim status

Search and track claims:

The screenshot shows the Claim Management interface with the following elements:

- Navigation tabs: Program info, Program summary, Plan Management, Claim management, Claims summary, Earnings, Payments.
- Buttons: Create claim, Change geography.
- Filter tabs: Requires action, Proof review complete, Pending submission, Search claims. The "Requires action" tab is highlighted with a red dashed border.
- Section: Proof review complete.
- Status filter: A dropdown menu currently set to "Show all".
- Table of claims:

Claim number	Claim name	Activity	Expense amount	Status
123456	123456	MPN Participation	10.00 USD	Proof Accepted
123456	123456	MPN Participation	2,000.00 USD	Proof Accepted

Within the Claim Management area you can filter claims by:

- Claims requiring action from the partner or Microsoft (**Requires action** tab).
- Complete claims (**Proof review complete** tab).
- Saved claims (**Pending submission** tab).

Or you can search for specific claims in the **Search claims** tab using claim number.



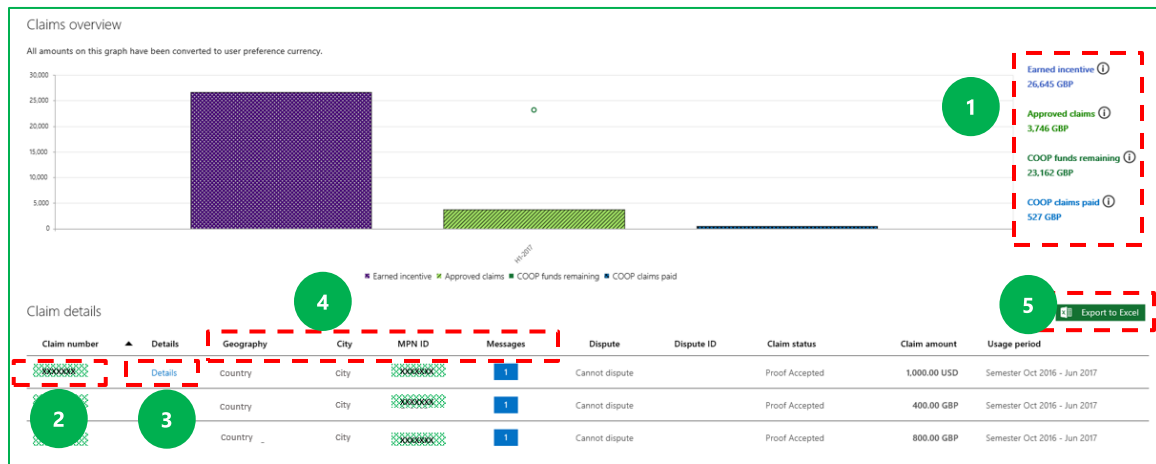
## Claims summary

You can view the status of your claims on PLEX. Filter your reports by time and geography.

To view a summary of your claims:

1. Click relevant program on the dashboard.
2. Select **Claims summary** from the top menu bar.
3. On the Claims summary page, select the **Usage period** the claims are for, and a country/region under **Geography** if relevant. **Note:** you can also use the time slider to select a longer or shorter time period.
4. Click **Apply**.

View high level claim data on the **Claims overview** section and claim details in the **Claim details** section.



1. The total figures for claim earnings and available funds are shown on the right.
2. Select a **claim number** to view a specific claim form and it's details.
3. Alternatively, select **Details**.
4. Sort columns by clicking the column header.
5. Click **Export to Excel** to download the raw data file.

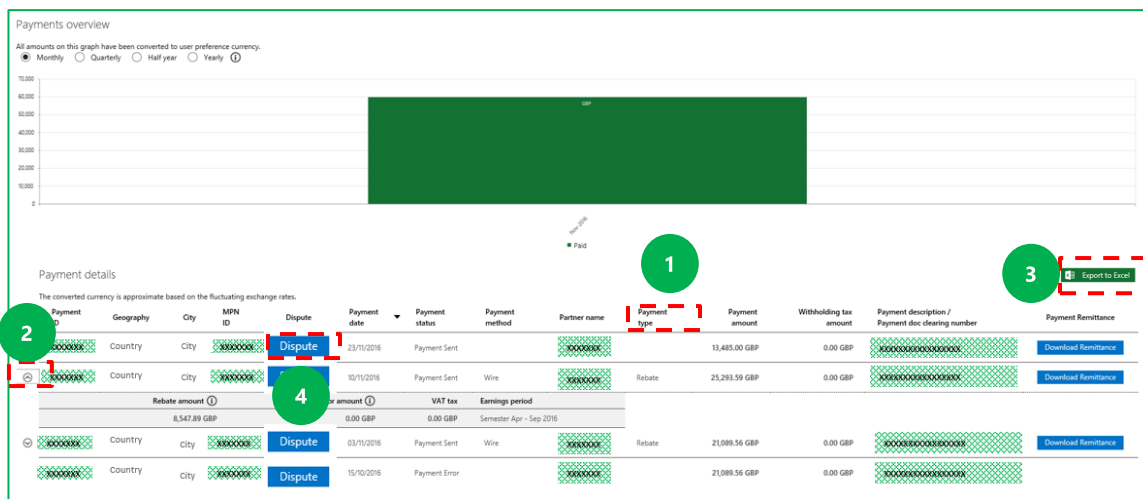
# Track payments

You can view the details of your payments on PIEX. You can contest a payment using the dispute option. To track your payments:

The screenshot shows the Partner Network Incentives dashboard. The top navigation bar includes 'Partner Network | Incentives' and links for 'Programs', 'Notifications', 'Support', 'Admin', and 'Reporting'. The dashboard is divided into 'Notifications' and 'Programs' sections. In the 'Programs' section, a 'Skyline' program tile is highlighted with a red dashed box and a green circle labeled '1'. Below this, a 'Skyline - Country' page is shown with a top menu bar containing 'Program info', 'Program summary', 'Plan Management', 'Claim management', 'Claims summary', 'Earnings', and 'Payments'. The 'Payments' link is highlighted with a red dashed box and a green circle labeled '2'. Below the menu bar, a 'Filters' section is visible, including a 'Geography' search dropdown (highlighted with a green circle labeled '3'), radio buttons for 'Calendar year' and 'Microsoft fiscal year', and a timeline slider for years 2016-2019. The 'Apply' button is highlighted with a red dashed box and a green circle labeled '4'.

1. Click on the relevant program tile on the dashboard.
2. Select **Payments** from the top menu bar.
3. On the **Payment overview** page, select the relevant time period and a country/region under **Geography** if relevant.
4. Click **Apply**.

A payment overview is shown graphically and payment details are in table form. Fields visible depend on incentive program.



Payment details include:

1. The type of payment—either Claim or Rebate—under **Payment type**
2. Select the down arrow alongside each payment for further details
3. Select **Export to Excel** for offline analysis.
4. Select **Dispute** to contest a payment.

## Change payment and tax profiles

For guidance on how to change a payment or tax profile please refer to [Update or change payment profile information in PIEX](#) section.

## Notifications

Notifications are visible on the homepage. Notifications trigger when specific events occur in PIEX. For example, when a partner starts the enrollment process this event will trigger a notification that *Payment profile needs to be completed*. Notifications are visible to partner admins and users.

Partner Network | Incentives

Programs Notifications Support Admin Reporting

**Notifications**

0 Actions required **1**

14 Recent activities

2 Messages

**Programs**

1 Active

0 Enrolling

0 Eligible

Notifications

Find all required actions and recent activities

Filters

Program: Search

Geography: Search

Apply Clear

Actions required Recent activities Messages Archived activities

**Actions required**

Description	Program	Geography	Action by	Jump to action <b>2</b>	Created date	Archive
Microsoft is requesting more proof for Claim Activity 52093	Skyline	Norway	Partner	→	15/10/2014 05:27	Archive
Microsoft is requesting more proof for Claim Activity 30551	Skyline	Norway	Partner	→	12/09/2014 04:36	Archive
Microsoft is requesting more proof for Claim Activity 30553	Skyline	United States	Partner	→	12/09/2014 04:55	Archive

Previous 1 Next

1. Select general or program specific **Notifications** from the dashboard.
2. Under the **Action required** tab, see all Notifications where action is required. Click the relevant arrow under **jump to action** to go directly to page that requires an action.

**Notifications**  
Find all required actions and recent activities

**Filters**

Program  Geography

**Recent activities**

Description	Program	Geography	Created date	Archive
Microsoft received Claim Activity [icon] and is reviewing proof	Skyline	Country, City (MPN number)	19/01/2017 21:55	<input type="button" value="Archive"/>
Microsoft received Claim Activity [icon] and is reviewing proof	Skyline	Country, City (MPN number)	19/01/2017 21:53	<input type="button" value="Archive"/>
Microsoft received Claim Activity [icon] and is reviewing proof	Skyline	Country, City (MPN number)	19/01/2017 21:52	<input type="button" value="Archive"/>

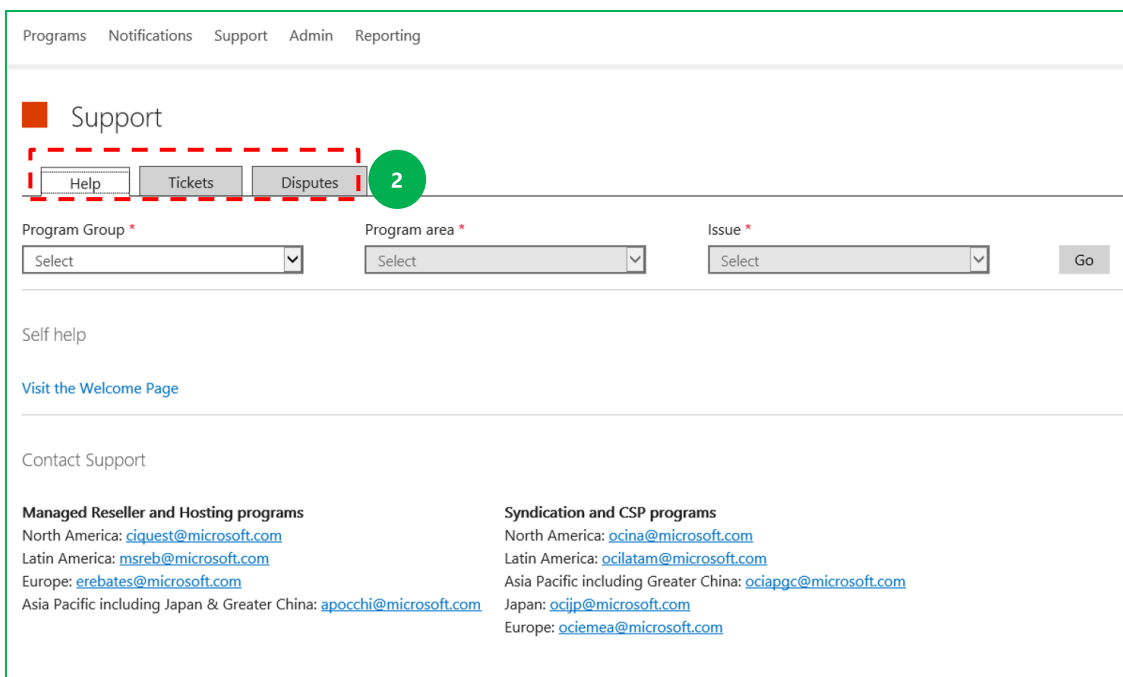
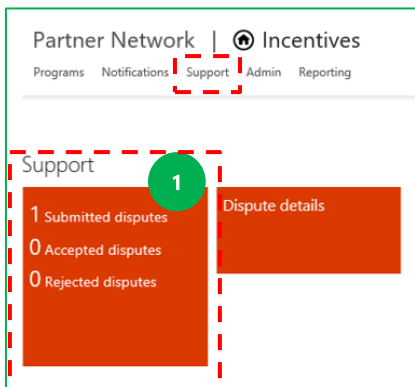
3. Select the **Recent activities** tab to view a list of all recently complete activities.

### Notes:

- **Time-based notifications** expire automatically over a period of time without needing partner action (for example: payment or tax profile assignment).
- **Non-time based notifications** do not expire without partner action (for example: review program documentation).
- **Other options** under Notifications are:
  - View messages between a partner and Microsoft under the Messages tab.
  - View archive notifications under the Archived activities tab.

# Support

Support for programs and PIEX is available through the dashboard. Access incentives guides for additional program guidance.



1. To access support select **Support** on the dashboard or top menu.
2. On the Support page:
  - Click **Help** to view self-help articles, submit a ticket, or see support aliases.
  - To search for a submitted ticket and view its status and history, click **Tickets**.
  - To view status of a dispute, see details, follow up with Support, click **Disputes**.

## Help option

Programs Notifications Support Admin Reporting

**Support**

Help Disputes Disputes

Program Group \* Program area \* Issue \*

Select Select Select Go

Self help

[Visit the Welcome Page](#)

Contact Support

**Managed Reseller and Hosting programs**  
 North America: [ciquest@microsoft.com](mailto:ciquest@microsoft.com)  
 Latin America: [msreb@microsoft.com](mailto:msreb@microsoft.com)  
 Europe: [erebates@microsoft.com](mailto:erebates@microsoft.com)  
 Asia Pacific including Japan & Greater China: [apocchi@microsoft.com](mailto:apocchi@microsoft.com)

**Syndication and CSP programs**  
 North America: [ocina@microsoft.com](mailto:ocina@microsoft.com)  
 Latin America: [ocilatam@microsoft.com](mailto:ocilatam@microsoft.com)  
 Asia Pacific including Greater China: [ociapgc@microsoft.com](mailto:ociapgc@microsoft.com)  
 Japan: [ocjip@microsoft.com](mailto:ocjip@microsoft.com)  
 Europe: [ociemea@microsoft.com](mailto:ociemea@microsoft.com)

To access self-help articles:

1. Select the **Help** tab.
2. Filter by **Program**, **Area**, and **Issue**, and click **Go** to access the most relevant self-help articles.

A list of relevant self-help articles will now appear. If you select an article, it will open on a separate web page.



## What Foreign Exchange Rates are Used

Email  
Print

### Summary

This article describes the exchange rates used by Microsoft to pay the commercial incentives and how to check your claim currency in the Partner Incentive Experience Portal.

### More Information

In the Partner Incentive Experience Portal, transaction currency gets converted using the monthly treasury exchange rate used by Microsoft for all its incentive programs, into the currency selected in the current payment profile.

To view the currency of your claim in the Partner Incentive Experience, please follow the steps listed below:

1. Log into the [Partner Incentive Experience](#) with your Microsoft account (previous Live ID).
2. Under the *Programs* section, click the tile for the applicable program.
3. Click *Claims summary*.
4. Filter by *Geography* and *Time period*.
5. The *Claim details* list will be displayed.
6. The claim currency is displayed next to the *Claim amount*.

### Properties

## Properties

Article ID: 3022147 - Last Review: 12/02/2014 15:15:00 - Revision: 1.0

#### Keywords:

kbsurveynew helppartner kbnohtrail KB3022147

## Feedback

Was this information helpful?  Yes  No  Somewhat

Tell us what we can do to improve the article

Submit

You can print and/or email the article and rate its content.

## Submit a ticket

Microsoft  
Partner Network | Incentives  
Notifications Programs Support Admin

**Support**

Help **1** Tickets Disputes

Program \*  
Select

Program area \*  
Select

Issue \*  
Select

Go

Self help  
[Visit the Welcome Page](#)

Contact Support **2**

Submit a ticket

Submit a ticket

When submitting a Service Request, do not include any business sensitive information, like IBAN Number, Bank Account Number, or other banking details.

Message subject \*

Program \*  
Select

Program area \*  
Select

Issue \* **3**  
Select

Geography \*  
Search

Details \*  
Enter max 750 characters

Email ⓘ

Attachment ⓘ  
Browse

**4** Submit Cancel

1. Select the **Help** tab.
2. Click **Submit a ticket**.
3. Complete the **Submit a ticket dialog box**, add attachments if relevant.
4. Click **Submit** when complete.

## Tickets

Programs Notifications Support Admin Reporting

Support

Help Tickets Disputes

Filters

Program Group  Ticket

Incident #  Subject +  Company cases  Own cases

Support tickets

Open tickets

Closed tickets

Select this option to query and filter on open and submitted tickets.

## Disputes

Programs Notifications Support Admin Reporting

Support

Help Tickets Disputes

Dispute details

Filter by status

Dispute ID	Status	Request type	Dispute reason	Program name	Created date
XXXXXXXX	Submitted	Earning	Failed Audit - Reverse Calculated Amount	Skyline	13/02/2017 22:25
XXXXXXXX	Submitted	Earning	Failed Audit - Reverse Calculated Amount	Skyline	13/02/2017 11:18
XXXXXXXX	Submitted	Earning	Incorrect Incentive Rate Applied to Transaction	Skyline	13/02/2017 10:59
XXXXXXXX	Submitted	Earning	Failed Audit - Reverse Calculated Amount	Skyline	13/02/2017 10:55

Select this option to see and track all disputes, and to filter on *Submitted*, *Accepted*, *Rejected*, and *Closed* disputes.

## MPN Support

The MPN Portal provides support options for Microsoft Partners including self-help articles searchable by Topic, Chat with a Live Support Agent, Community Support, and submission of a Support Ticket. The Call logging tool remains available.

### Support Options on MPN

These support options are accessed through the Microsoft Partner Network on <https://mspartner.microsoft.com> under the 'Support' tab, select the 'Contact Support' option. Then select 'Partner Incentives' as your Category. You can now choose your topic and issue.

Commercial Channel Incentive queries which may be logged with Support, include:

- Incentive calculation & payments questions
- Policy questions
- Eligibility queries
- Partner on-board queries

### Self-help Articles by Topic

Based on the topic and issue selection, self-help articles can be seen under 'Recommended Solutions' and can be accessed at any time.

Self-help articles will be available in the following languages; English, Chinese (Simplified & Traditional), Japanese, Spanish, Portuguese.

### Chat with a Live Support Agent

To initiate a Chat with a live Support Agent, select the 'Chat online with a live agent' button. Please fill in the requested information in the pre-chat survey that opens to begin your chat.

### Posting a question to the Community

Channel Incentives Support Agents monitor the Microsoft Partner Community. They will acknowledge your post within one business day. Please be aware that this is a public forum so do not post any financial, deal or partner sensitive information.

### Start a Support Ticket

Click '**Submit an issue**' button to start a support ticket..

## Appendix: Microsoft Partner Network ID

1. Within in MPN, there are identification numbers for each partner entity used by Microsoft to identify Microsoft Partner. This is also referred as the MPN ID.
2. For purposes of incentive payment, partners should utilize their Primary Location / Headquarters (HQ) ID or other Location IDs.
3. The MPN Company Address is used to validate and disburse payments to partners. When submitting bank details and/or tax forms, the Company address should be the same as listed under the relevant MPN ID in the Microsoft Partner Network (MPN) portal. Partners are responsible for ensuring that the correct address is entered in full and accurately in the portal in order to avoid payment delays.

*All materials and information presented should be treated as Microsoft Confidential Information and are subject to the terms of your NDA with Microsoft through your channel partner agreement or Microsoft Partner Network Agreement in its current form. This information is intended to be used for business planning purposes and may be subject to change.*

*Microsoft Partner Network Agreement in its current form. This information is intended to be used for business planning purposes and may be subject to change.*