Microsoft Partner Incentives

Partner Incentives Experience Guide

July 1, 2017 – June 30, 2018

Microsoft
Partner Network

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
Cloud Solution Provider	CSP
Hosting	Host.
Managed Reseller (EMEA)	MR
Syndication	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.

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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 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 PIEX

There are two partner user roles on PIEX: 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 PIEX 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
- 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
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. 2. Verify contact details. 3. Review and accept terms and conditions. 4. Request PIN and then add into PIN entry box.	5. On PIEX homescreen select Program tile, then Enrollment. 6. In enrollment area click Enroll now. 7. Confirm account details. 8. Click on Get Started under Tax Profile to go to Bank and Tax Management area. 9. Complete both tax and banking profiles including assignment of currency and banking profile to correct geography (if not already in place). 10. Once payment profile is complete and approved, you can receive incentive payments.

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

Managed Reseller (EMEA) & Hosting programs	**Syndication and CSP programs**
North America: ciquest@microsoft.com Latin America: msreb@microsoft.com Europe: erebates@microsoft.com Asia Pacific including Greater China: apocchi@microsoft.com	North America: ocina@microsoft.com Latin America: ocilatam@microsoft.com Europe: ociemea@microsoft.com Asia Pacific including Greater China: ociapgc@microsoft.com Japan: ocijp@microsoft.com

Log on

Invitation email

Microsoft

Partner Incentives Experience

Enrollment Invitation

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.
   Note: If the link provided is not working, please copy and pas 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
North America: ciquest@microsoft.com
Latin America: msreb@microsoft.com
Europe: erebates@microsoft.com
Asia Pacific, Japan, Greater China: apocchi@microsoft.com

Syndication and CSP programs
North America: ocina@microsoft.com
Latin America: ocilatam@microsoft.com
Asia Pacific including Greater China: ociapgc@microsoft.com
Japan: ocijp@microsoft.com
Europe: ociemea@microsoft.com

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.

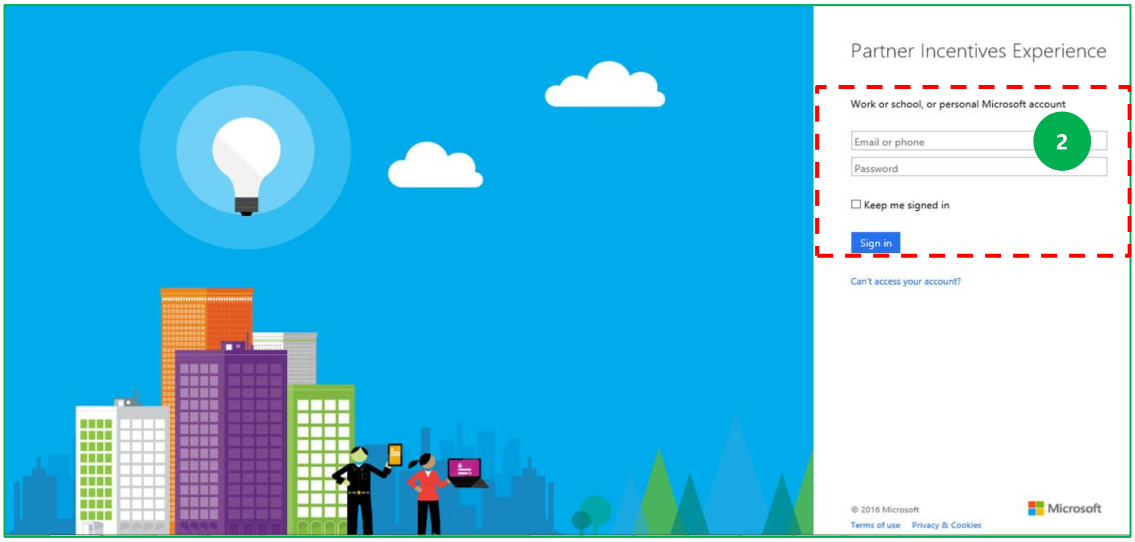
Microsoft respects your privacy. Please read our Privacy Statement.

If you would prefer not to receive future promotional emails from Microsoft Corporation please click here.

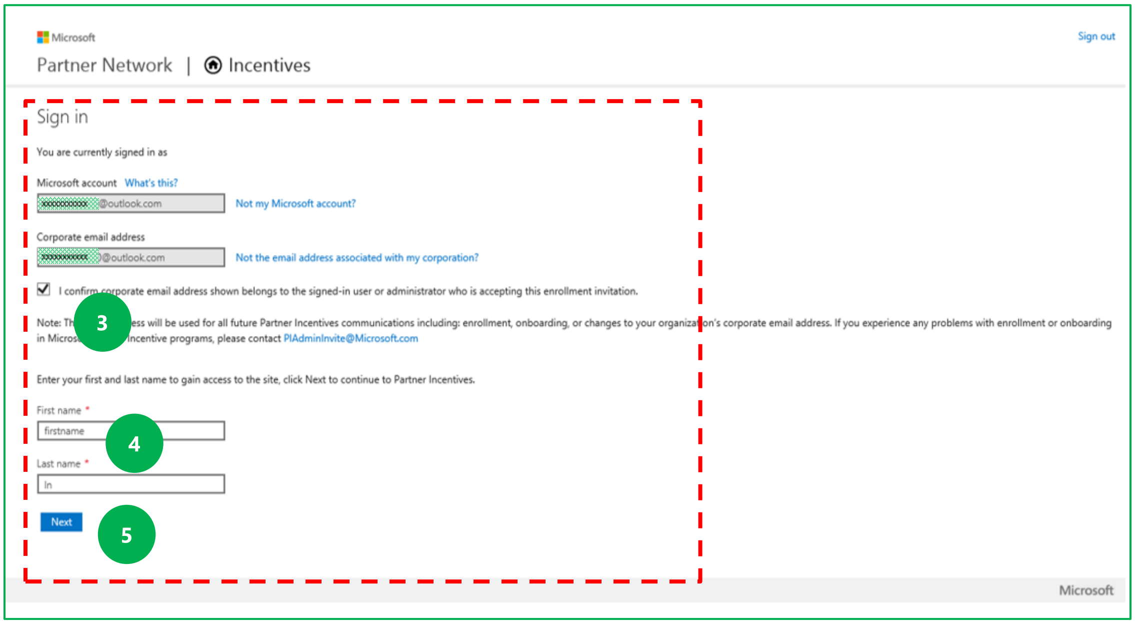
To set your contact preferences for other Microsoft Communications, click here.

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

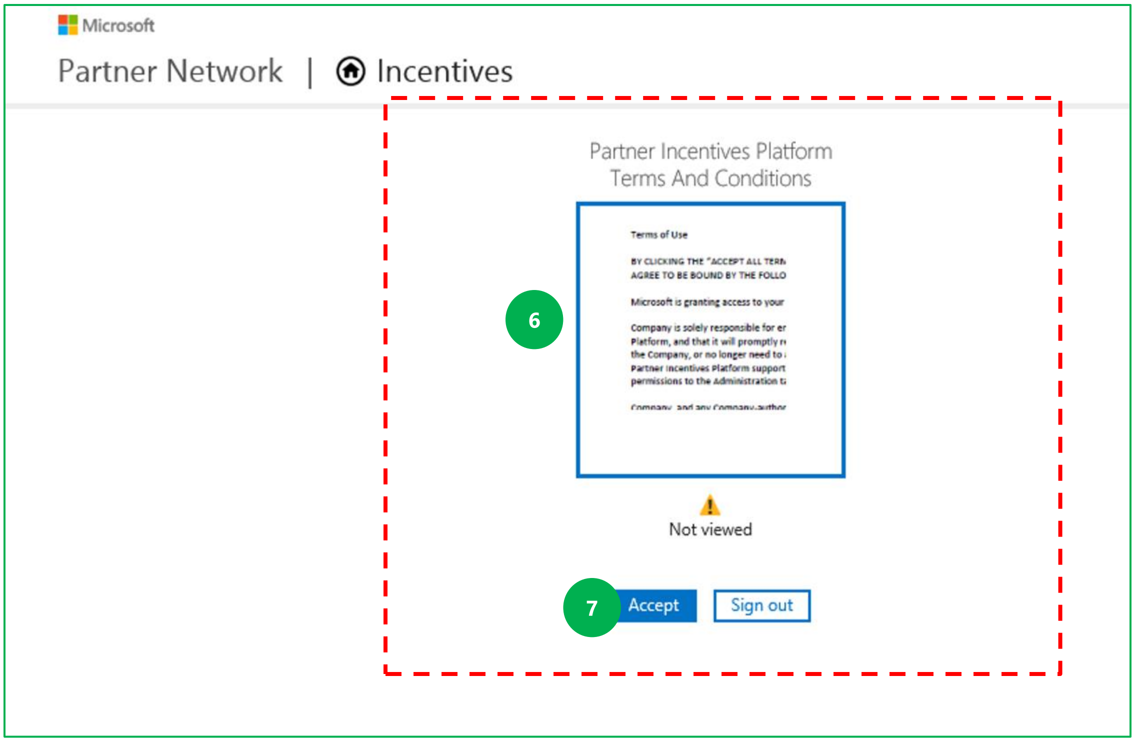
You are taken to initial sign in page:

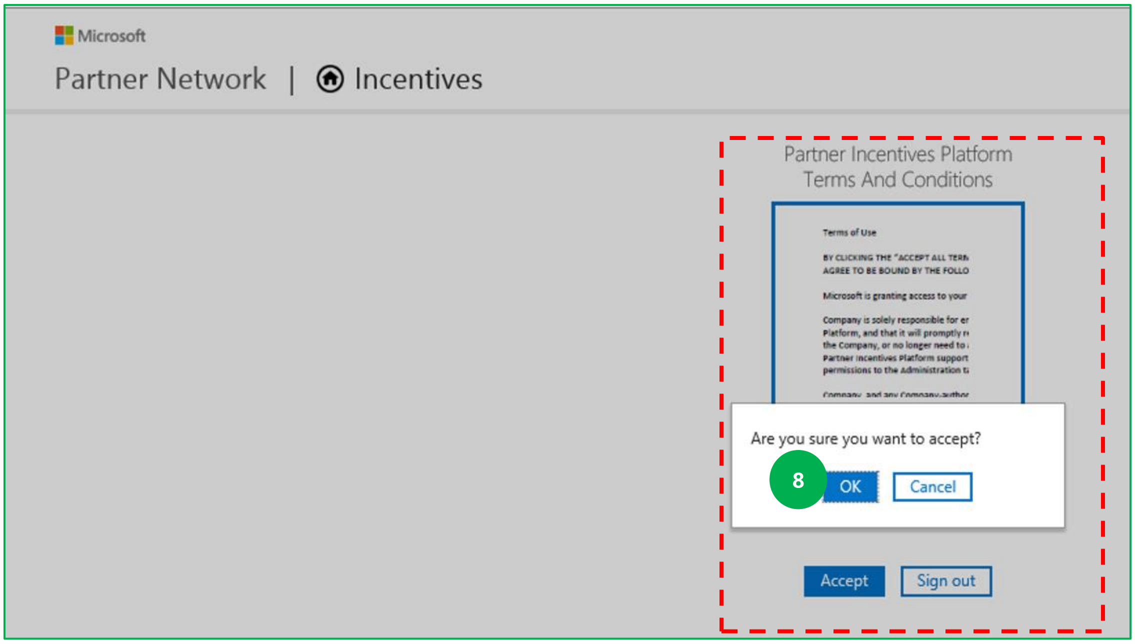


2. Enter your Microsoft account email and password. Then click **Sign In.**

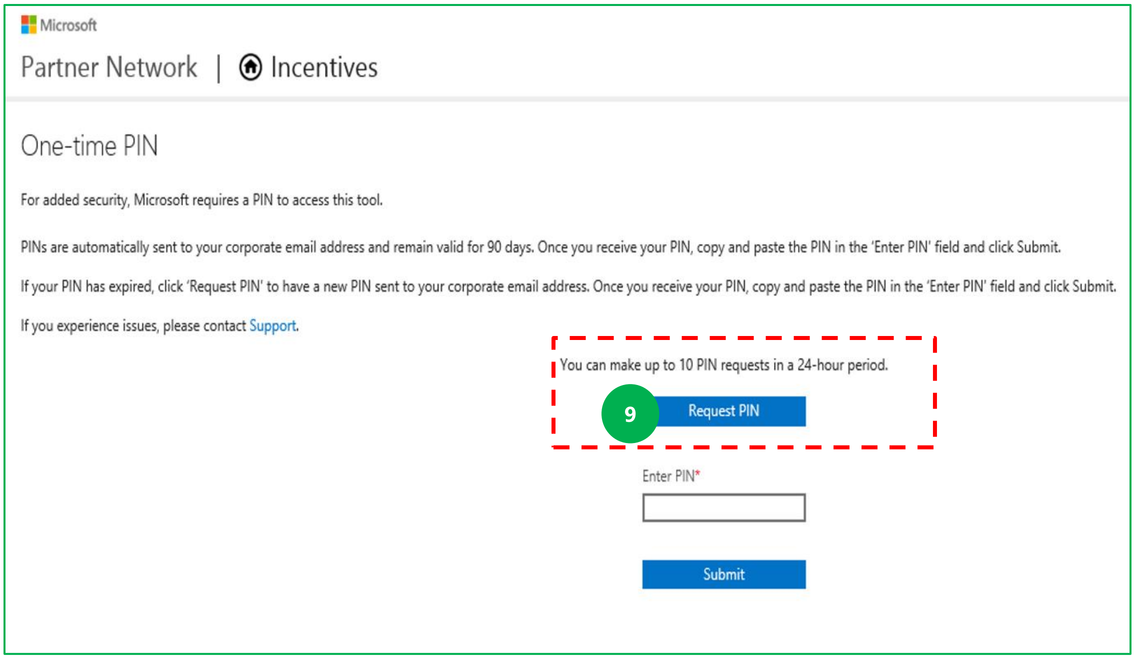


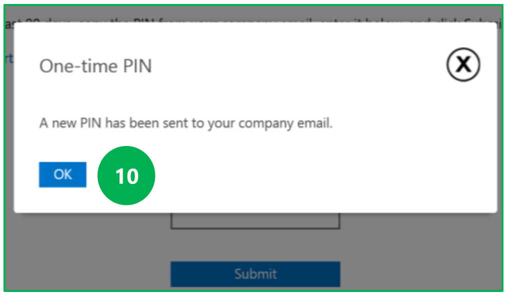
3. Check Microsoft account and corporate email details in grey boxes. If correct tick the **confirm details box.**
4. Enter **first name** and **last name.**
5. Click **Next** to continue.



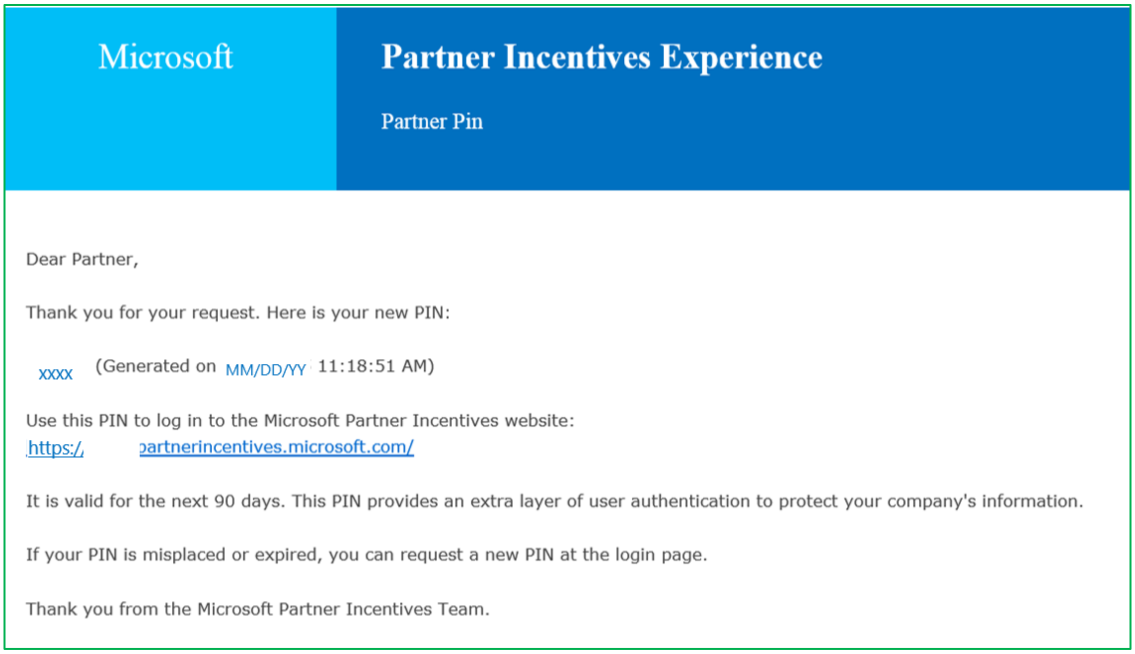


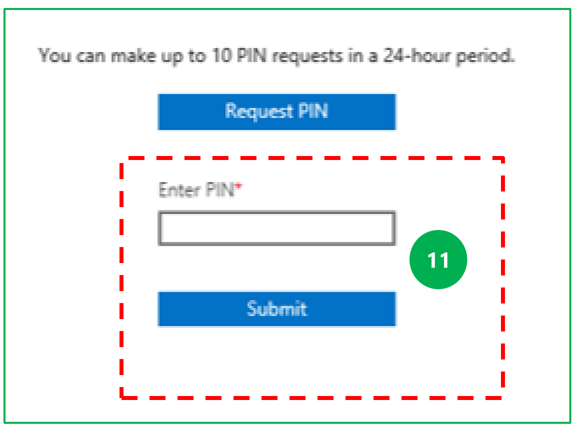
6. Click on **Terms and Conditions document** to review.
7. Once you are happy to accept terms and conditions, click **Accept.**
8. Then click **OK** to confirm acceptance.





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



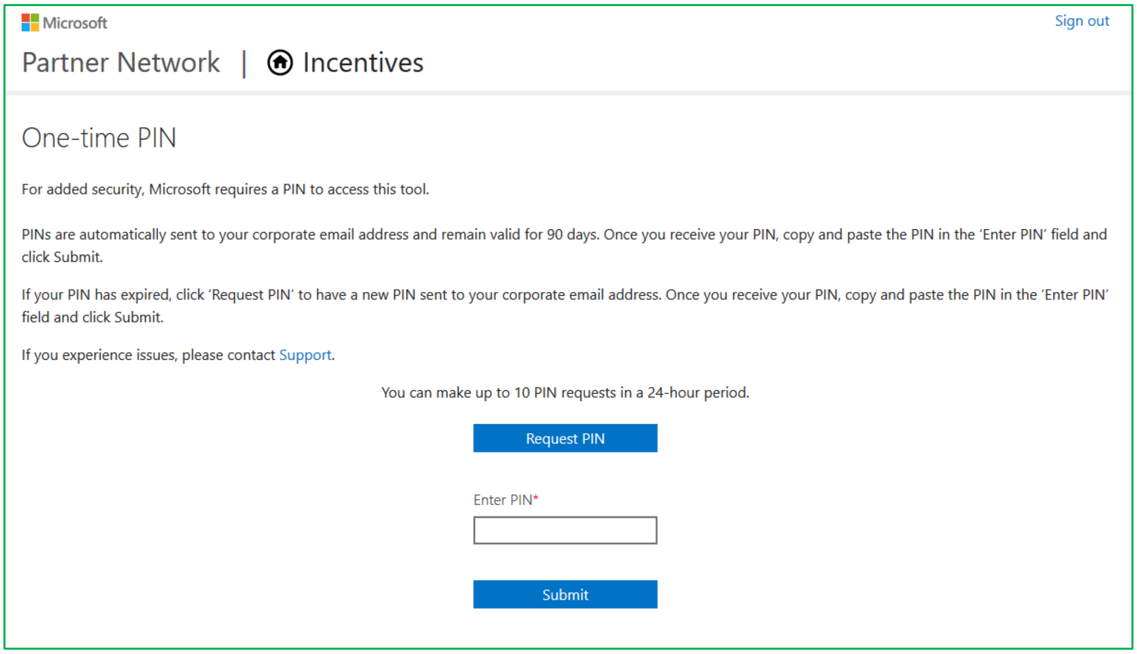


A pin is then sent to your corporate email address.

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

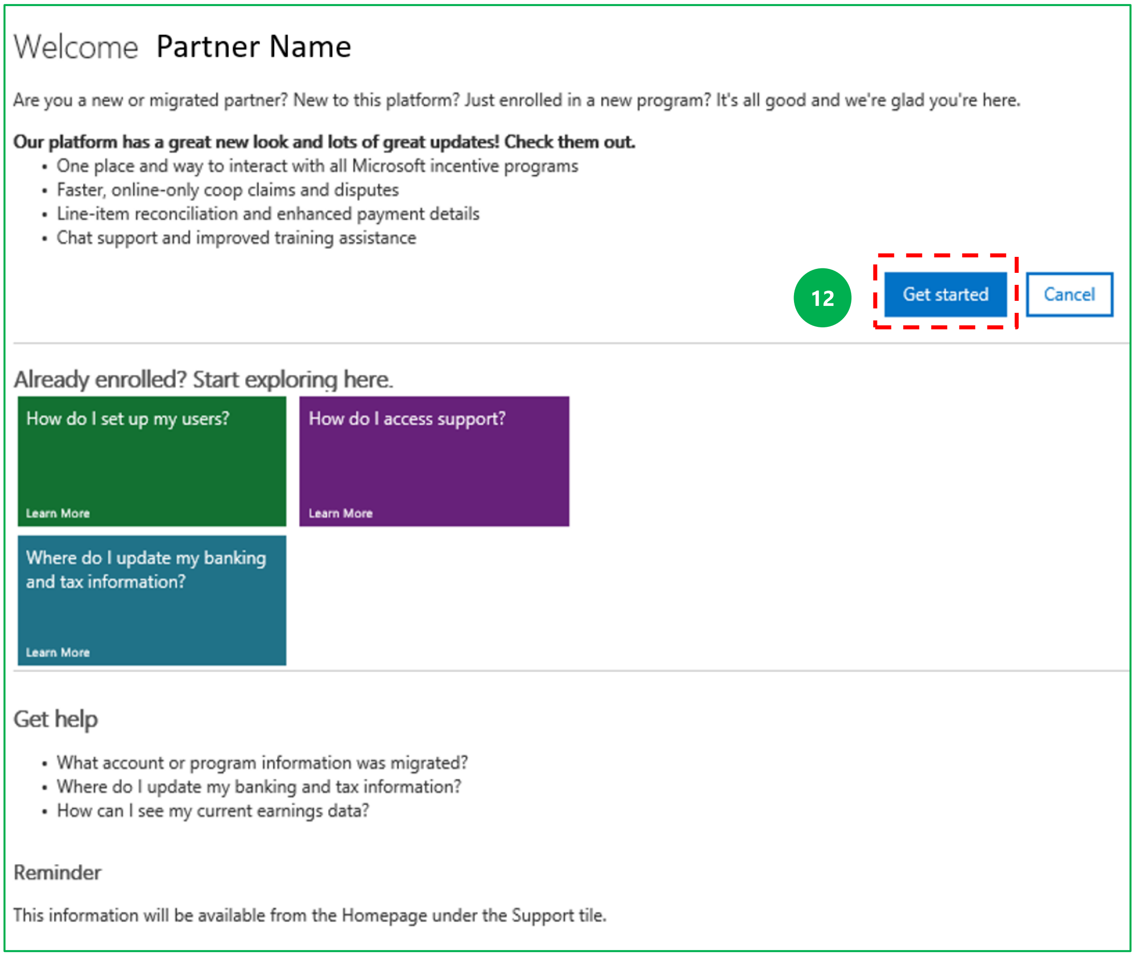
System then redirects to **PIEX welcome screen.**

Notes re PIN:



- 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 PIEX) 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



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 PIEX 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 PIEX. 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.

Tax profile

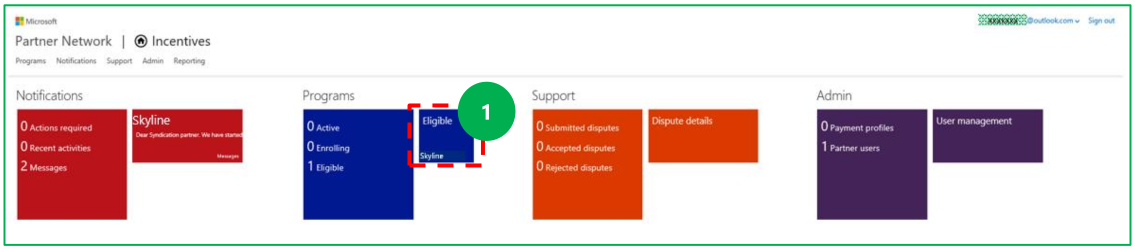
Section	Input requirements
Business Profile	**Details of company** which includes name/s and business numbers.
Setup	**Location** (country) of where your company and customers are incorporated.
Tax status	**Company Tax ID** Type and **Tax ID** (these are the same details are also in the Beneficiary section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

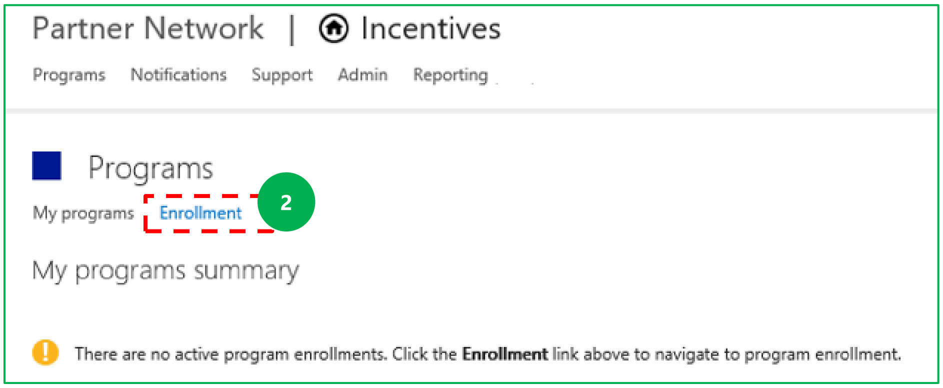
Bank profile

Section	Input requirements
Details	**Location** (country) of where your company and customers are incorporated
	Disbursement currency – the currency in which you want to be paid by Microsoft
	Payment method—the method through which you will be paid *Note: This is typically set to the default which is electronic payment.*
Bank account	**Bank identifier—**such as IBAN or SWIFT/BIC
	Company Tax ID Type and **Tax ID** (these details are also in the Tax status section of Tax profile).
Beneficiary	Dependent on the incorporation country of your company there may be a requirement to enter additional beneficiary information such as: ▪ Bank beneficiary contact name and contact details *(i.e. the person named on your bank account as your Company contact and their recorded contact details)* ▪ Company name on bank account *(i.e. the Company name as recorded on your bank account)* ▪ Company Tax ID type and Tax ID *(e.g. VAT, GST or similar)* ▪ Company address (*i.e. the Company address as recorded on your bank account)*

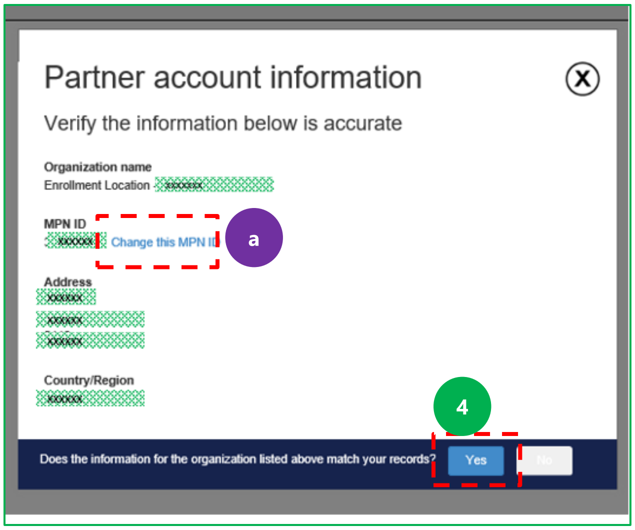
Accessing Banking and Tax Management page

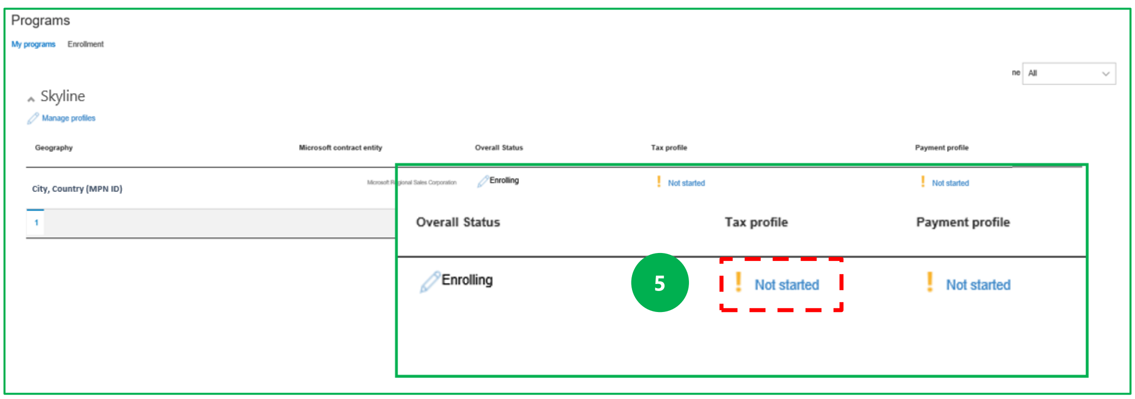
Access the Banking and tax management page and begin to add or complete details (as required).





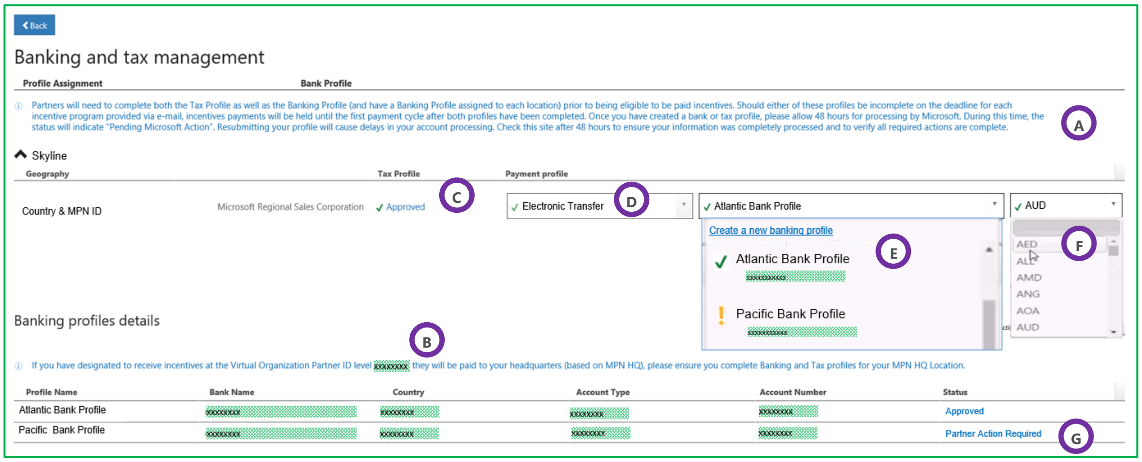
14. On dashboard click on **program** tile.
15. Click on **Enrollment** in sub menu.
16. Click on **Enroll Now** within Enrollment area.





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.



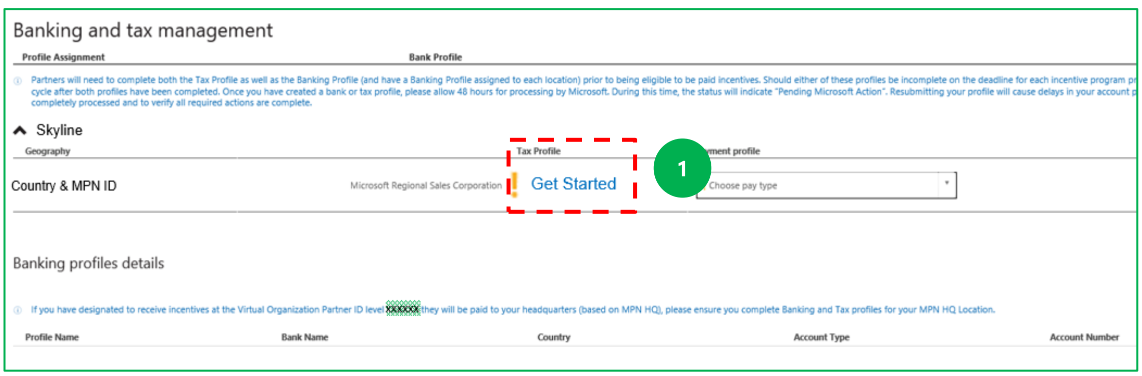
A. Note requirements for incentives to be paid.
B. Note requirements for Organization Partner ID if this message is shown.
C. Add tax profile here if status shown as *"Not Started"*.
D. Select payment method here.
E. Create and / or assign bank profiles/s here. Banking profiles are created at an organization 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



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

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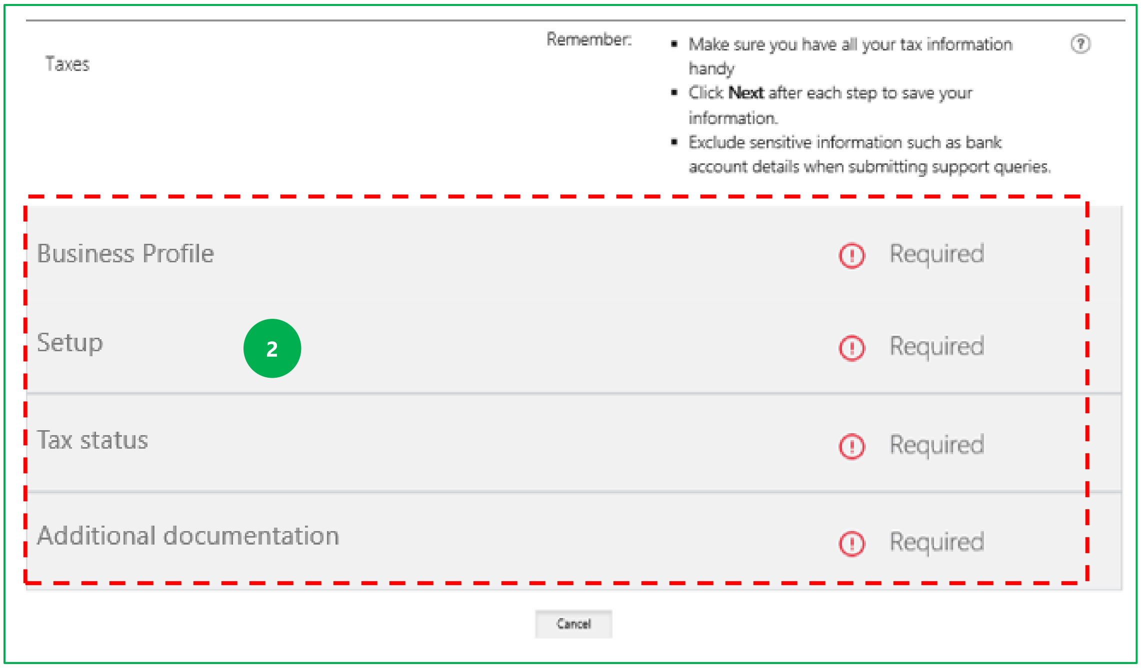
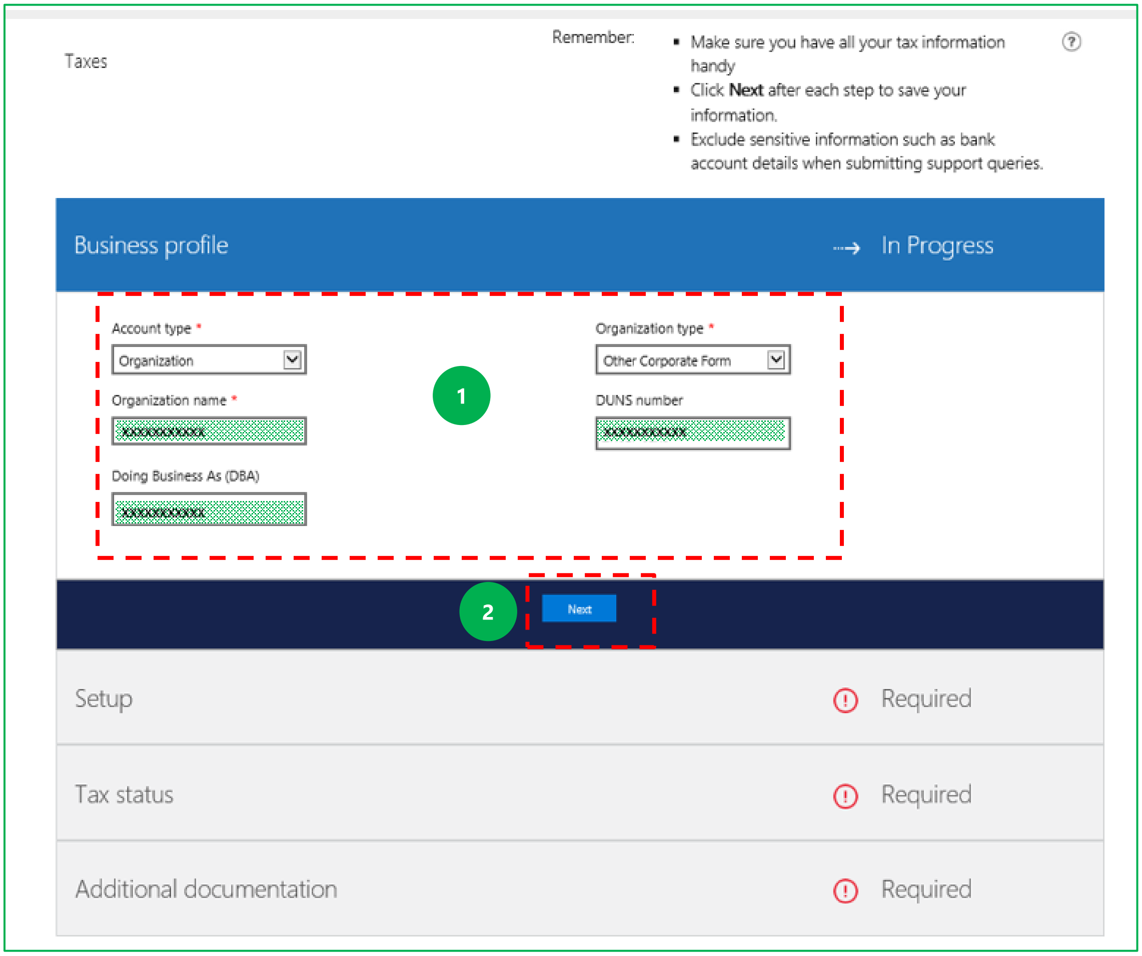


2. The online tax form contains 4 sections: **Business Profile, Setup, Tax status,** and **Additional documentation**. Please note dependent on country of company incorporation, you may not need to complete all sections. The system will alert partner to what is required in each section, or a section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



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

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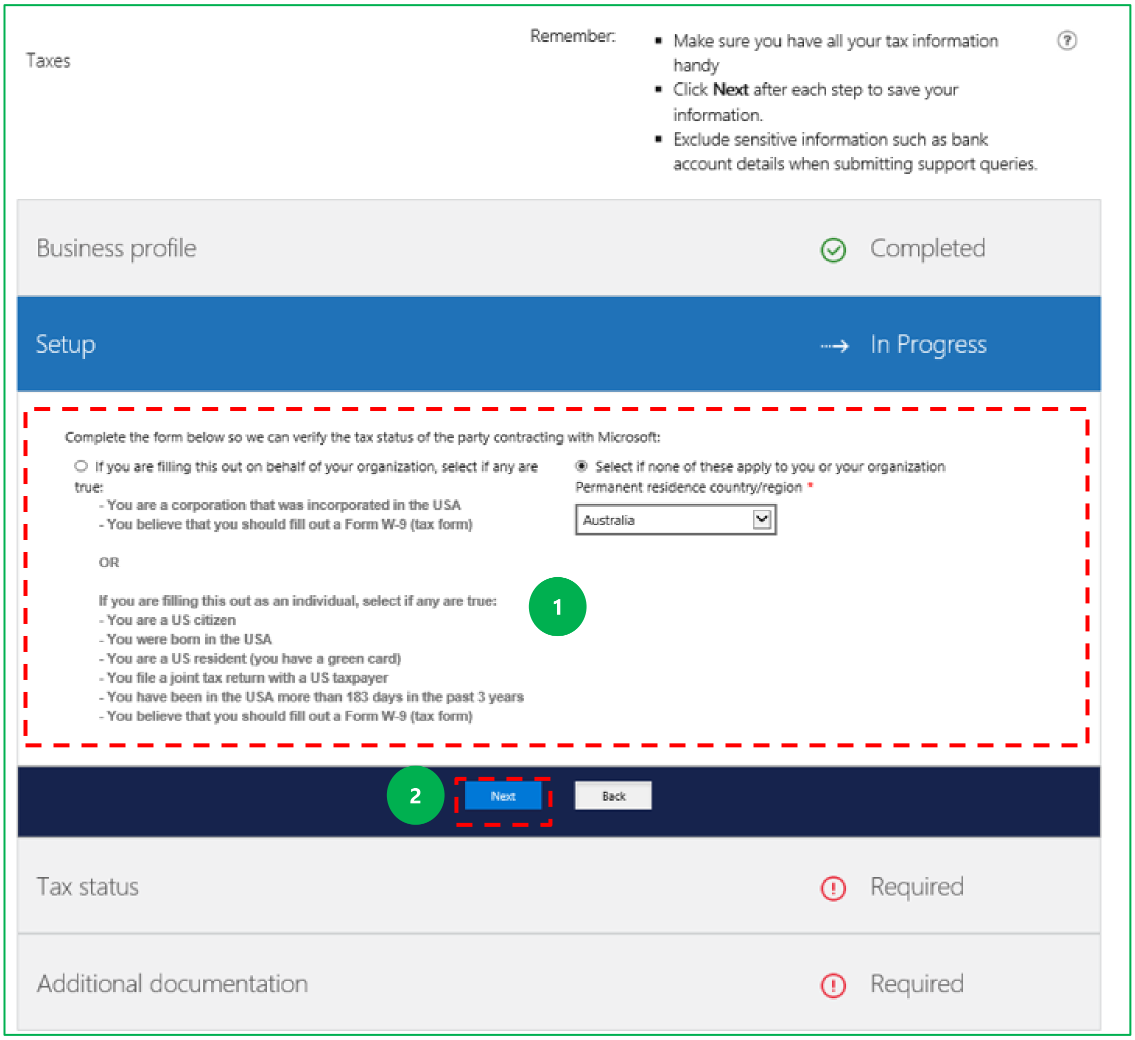
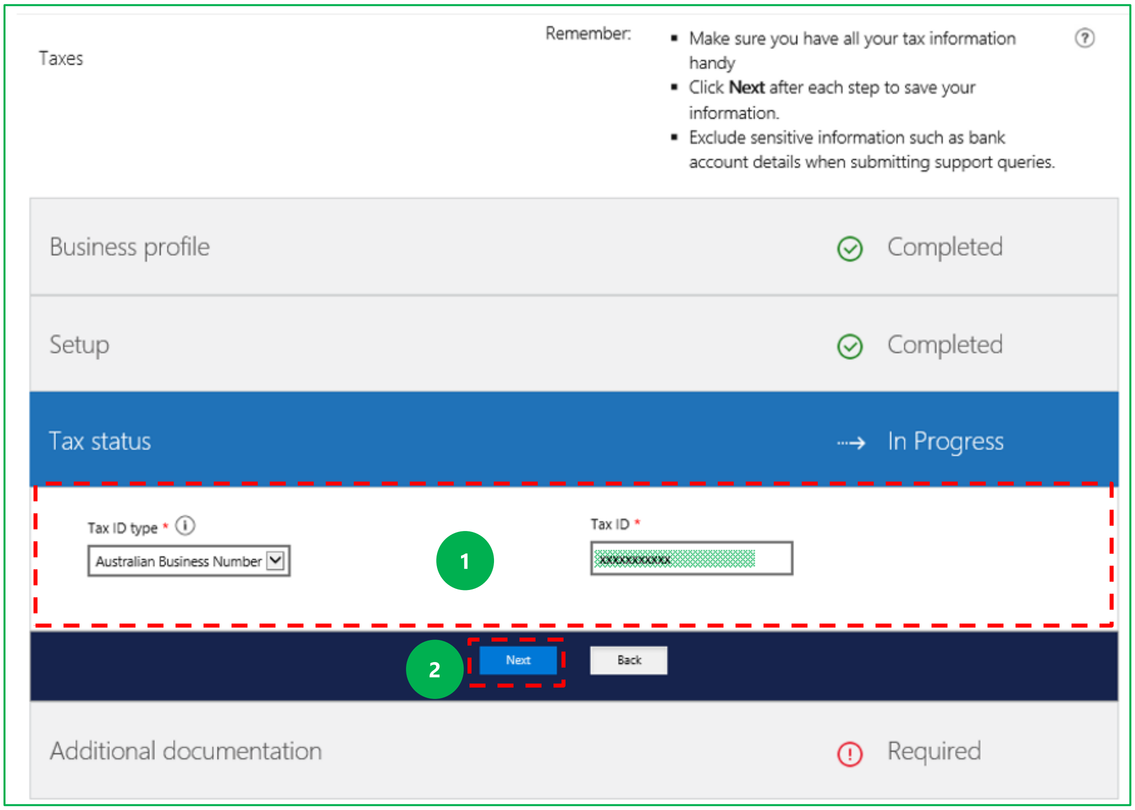
Step 3 of 6: Complete Setup section



1. 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.
2. Click **Next** to continue.

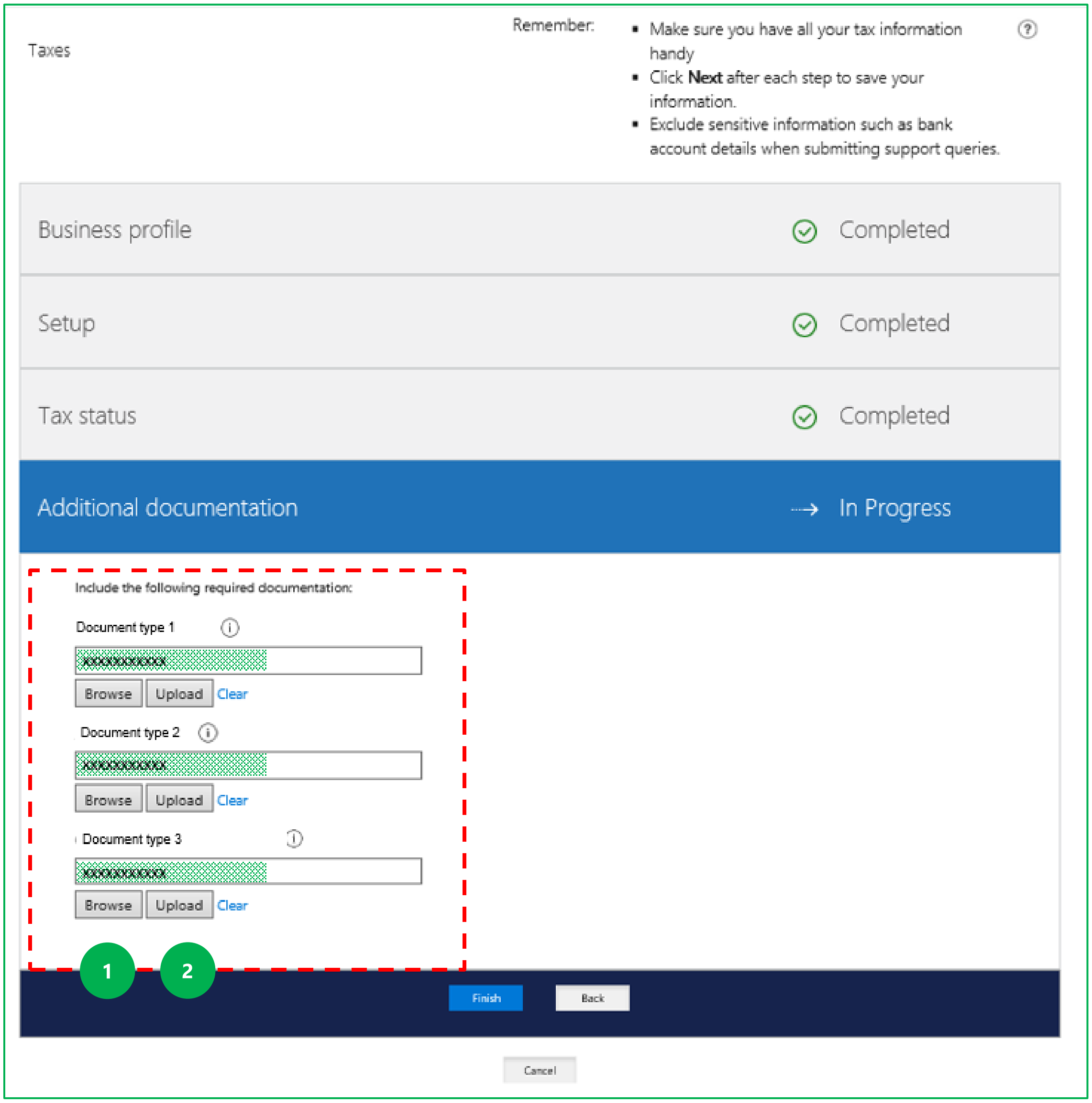
Step 4 of 6: Complete Tax status section



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.



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

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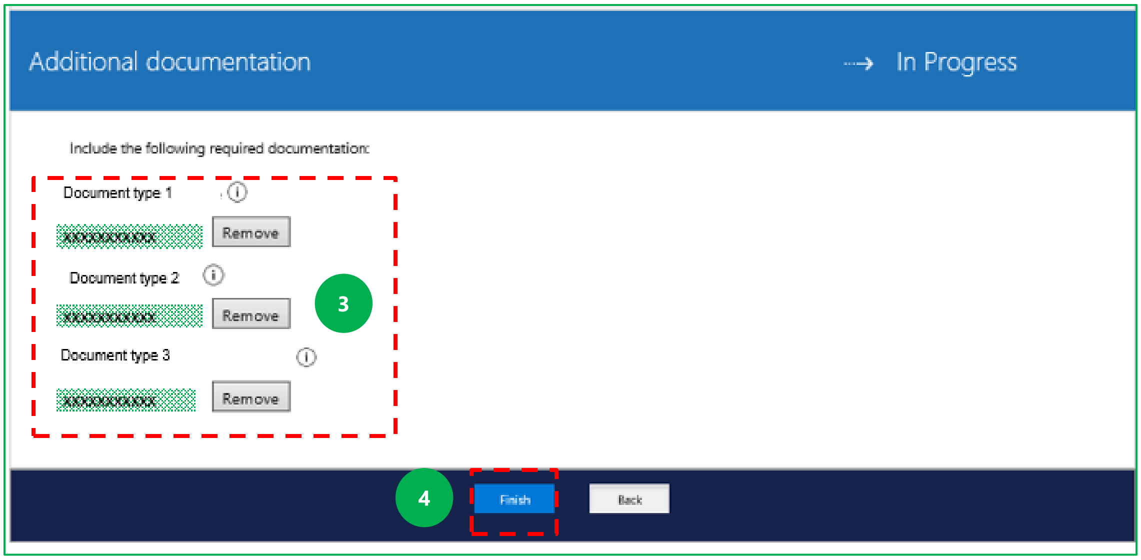
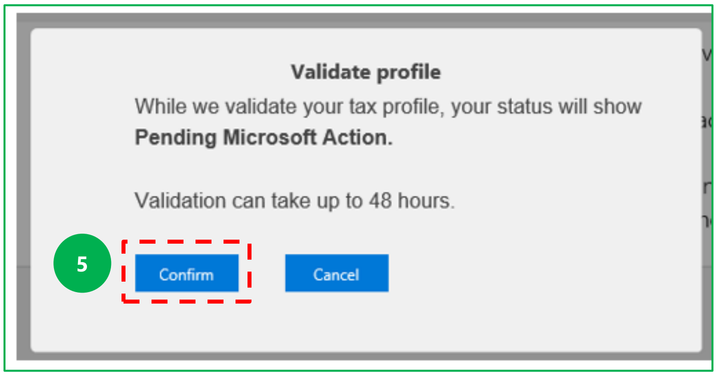
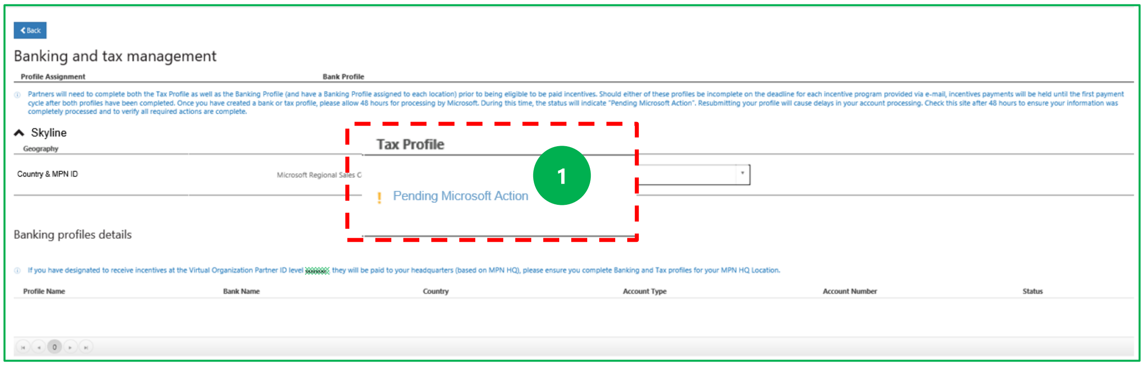


3. When you successfully upload a document, a **Remove** button is visible, and **Browse** and **Upload** buttons will no longer be visible.
4. Click **Finish** to save data and continue.



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



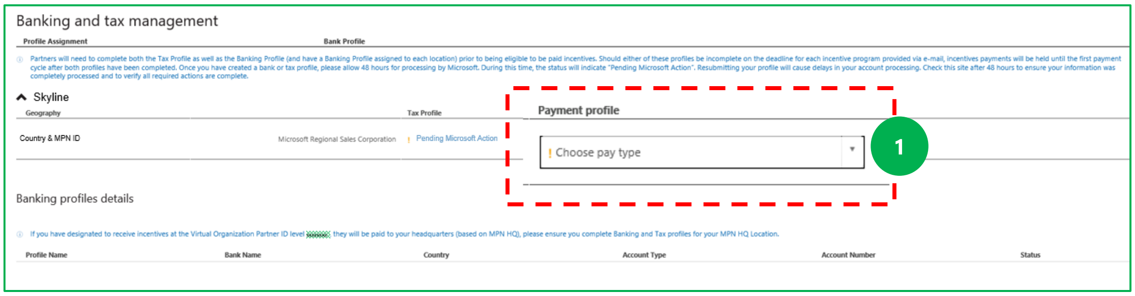
*After completion of the Tax form online system redirects back to this screen and the tax status (point 1) will be updated depending on what needs to be done (**Pending Microsoft Action, Partner Action Required, Approved**).*

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".

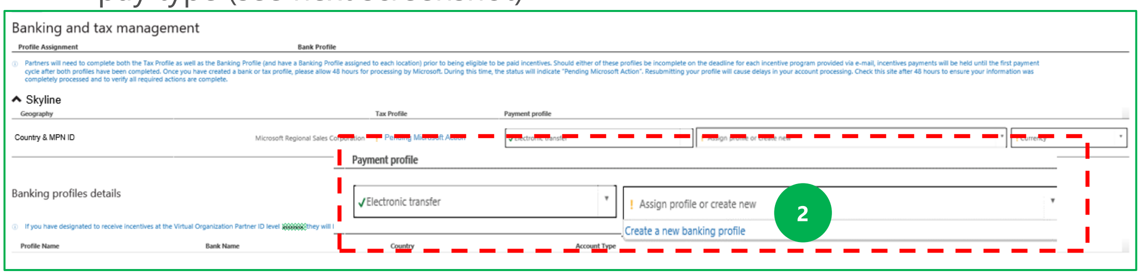
*If 48 hours after completion of above steps (and refreshment of Banking and tax management page) your payment profile is not set to "**Approved**", then contact Support to raise a query.*

Create new bank profile with online application form

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



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)



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.

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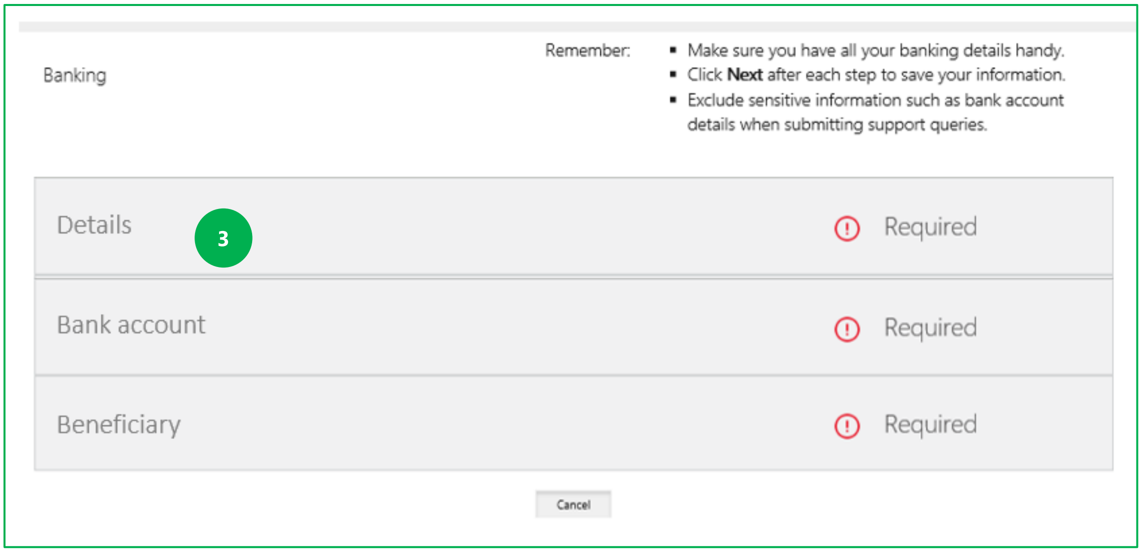
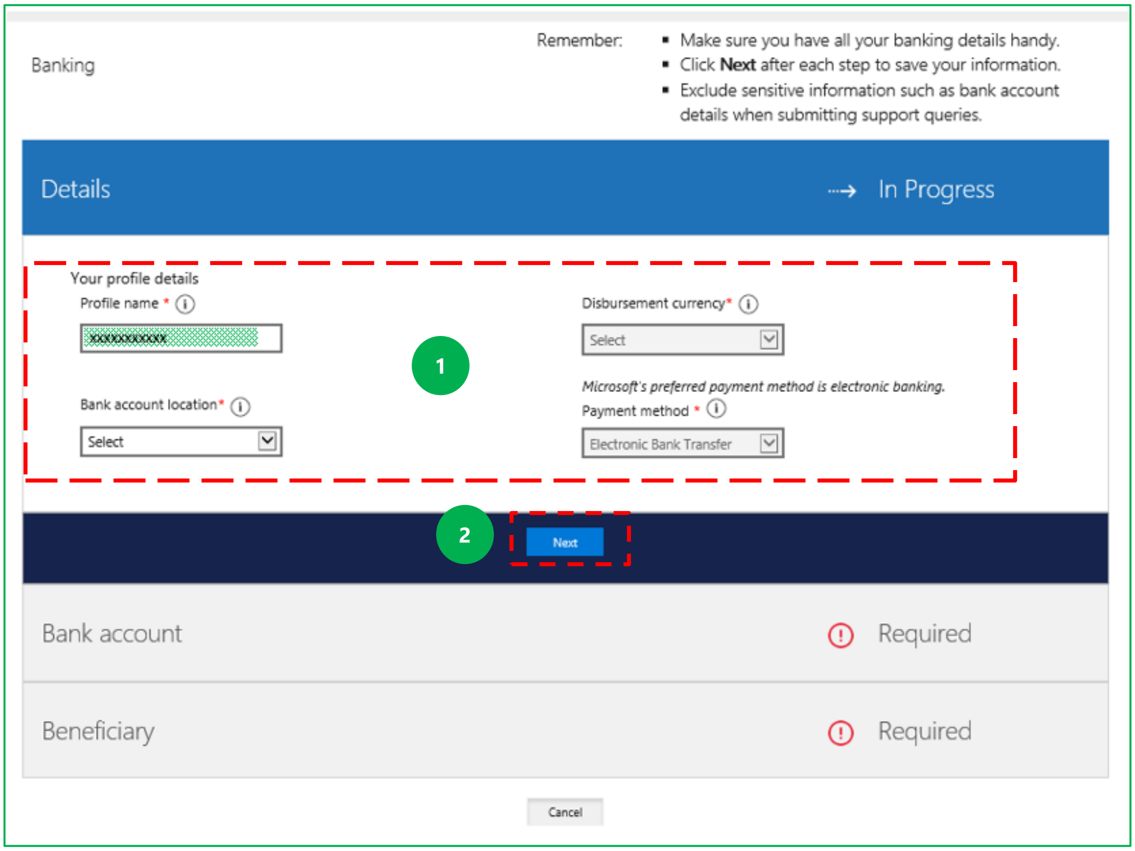


The payment profile information is organized under three sections—*Details*, *Bank account* and *Beneficiary*.

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

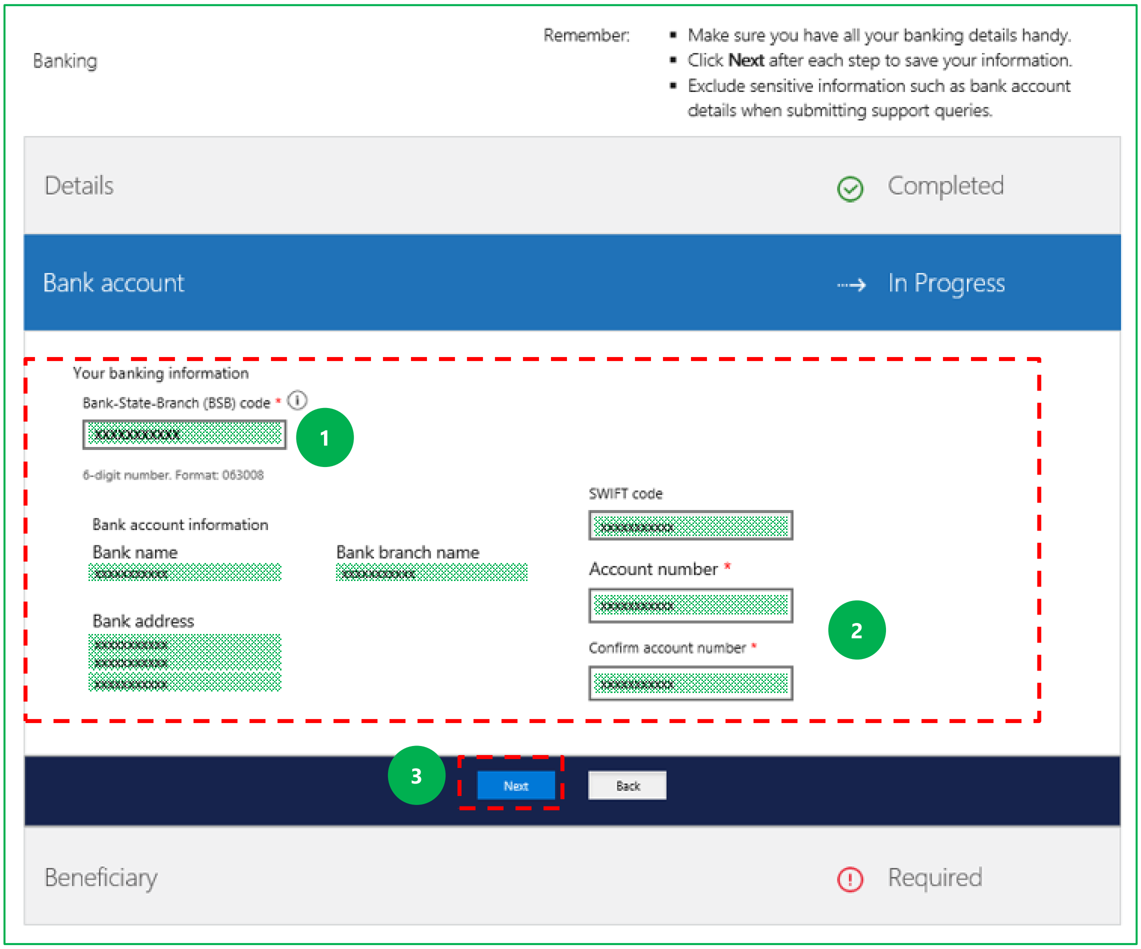


1. Under **Details** enter this information:

- *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



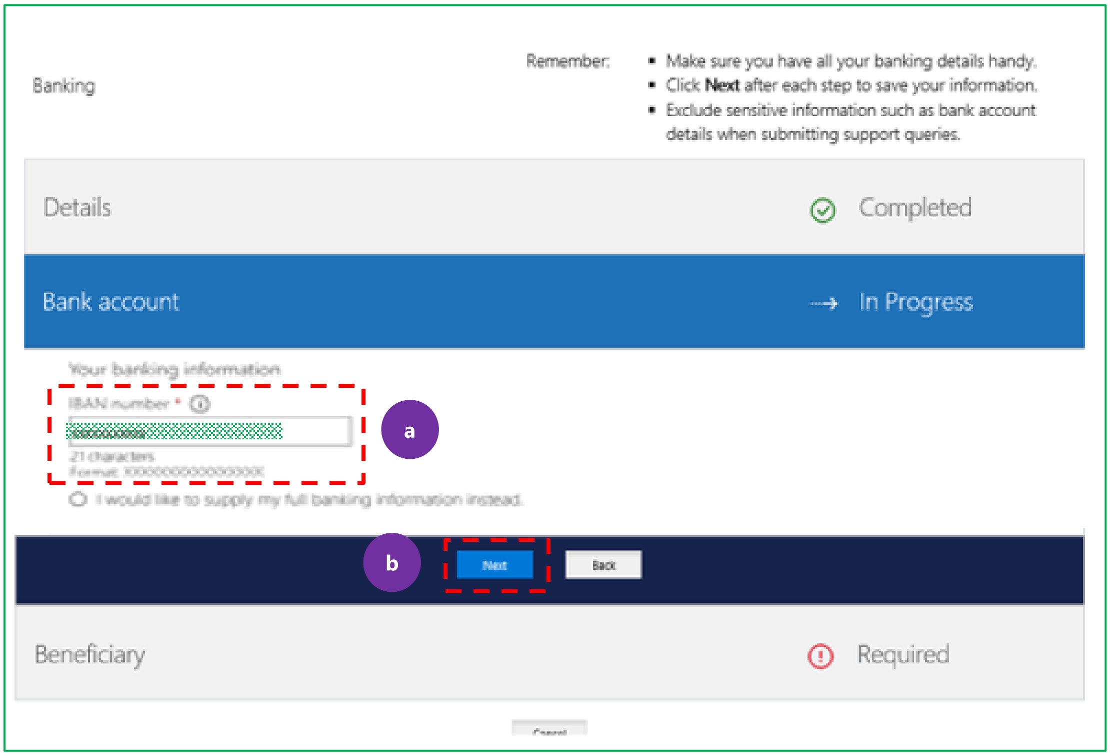
1. Under **Bank account** enter bank identifier such as IBAN, BSB or SWIFT/BIC. The fields visible in this section will vary by country.

2. 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.

3. Click **Next** to save these details and move on to the **Beneficiary** section.

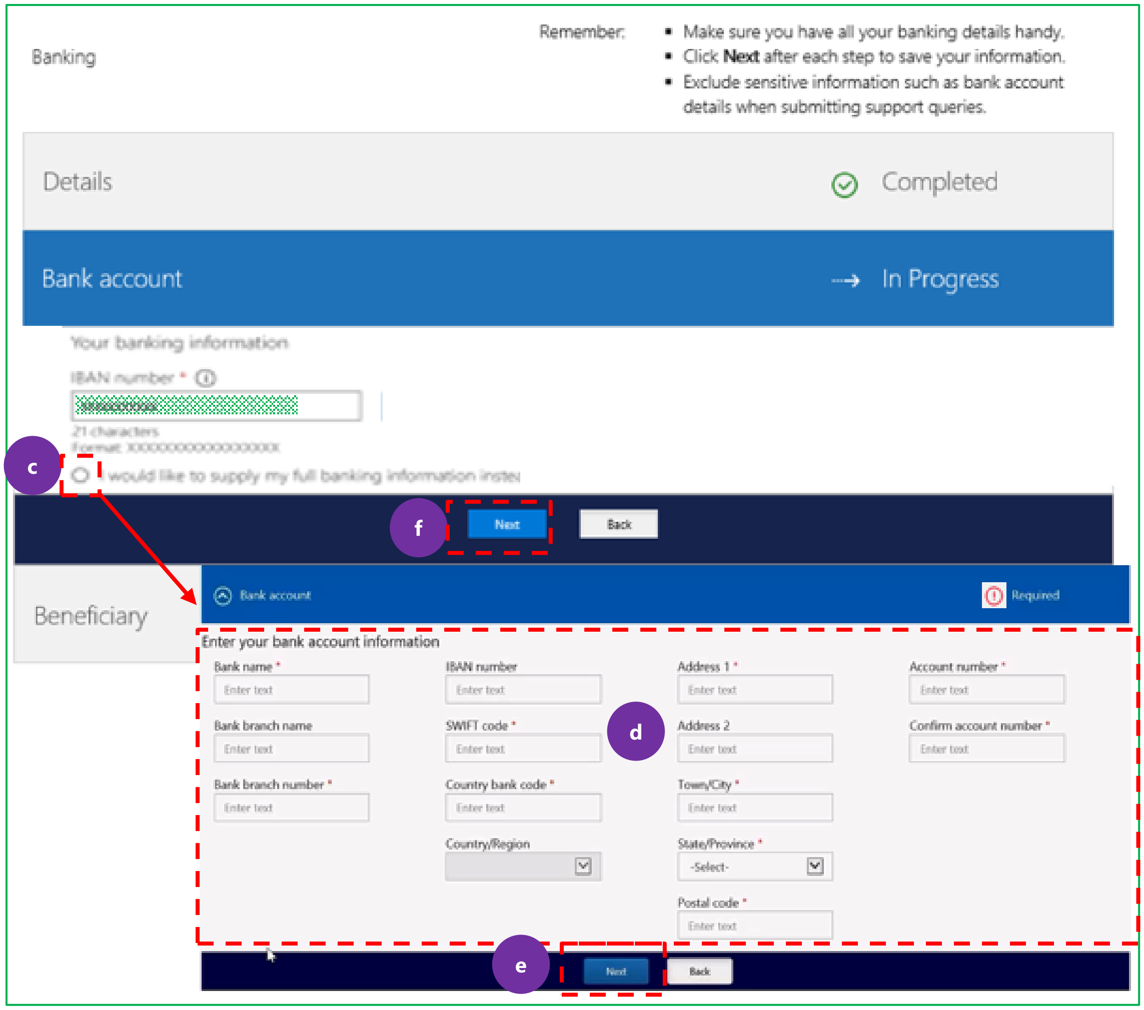
Note: The following are requirements under Bank account—**Country code, Bank routing number,** and **Bank account number.** These codes are part of your IBAN. If you enter your SWIFT/BIC, then you will see prompt to enter your Bank account number (point 2).

What if bank account identifier is incorrect or not recognized?



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.*

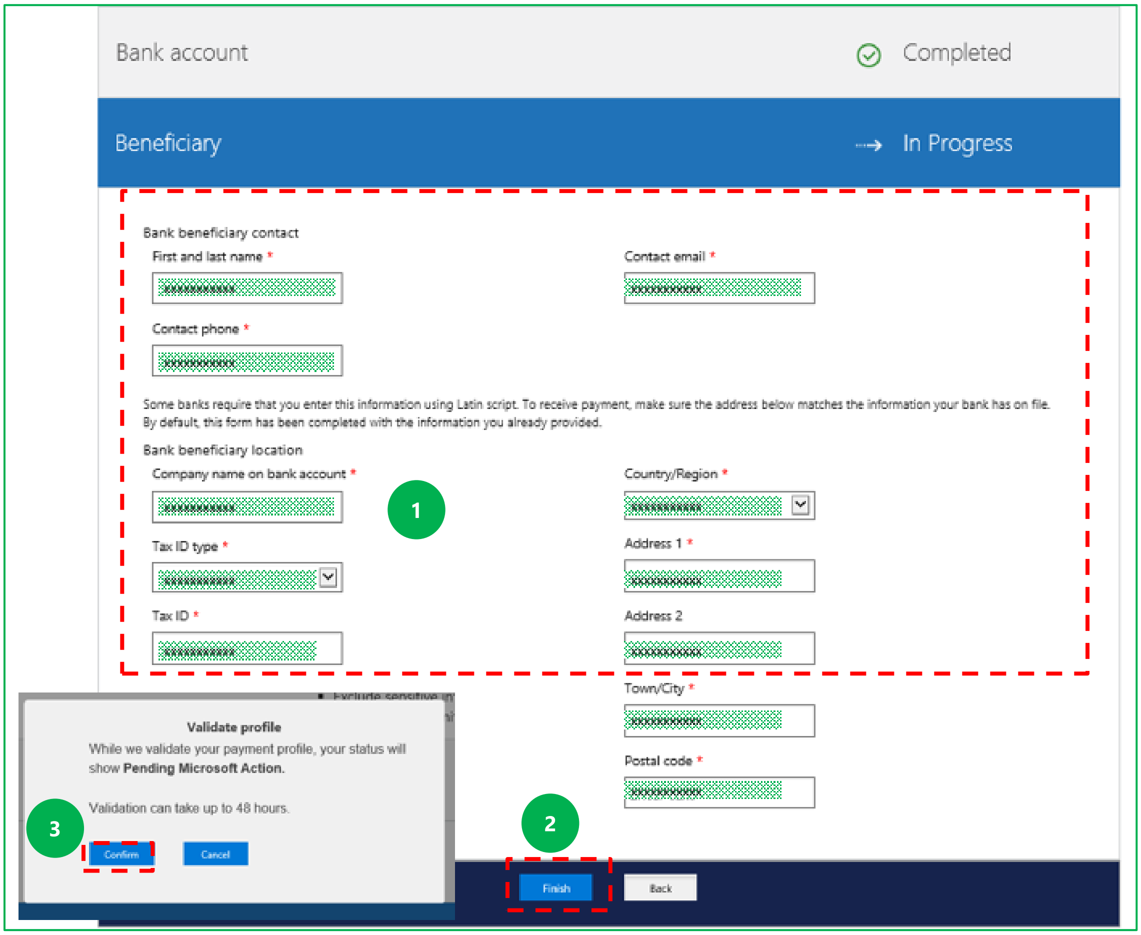


If the identifier is still not recognized, you have the option to supply full payment details (click the checkbox next to **(c)**). Enter details in the table that pops out **(d),** then click **Next (e)** at the bottom of the table to save these details. The pop out table **(d)** is now hidden again.

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



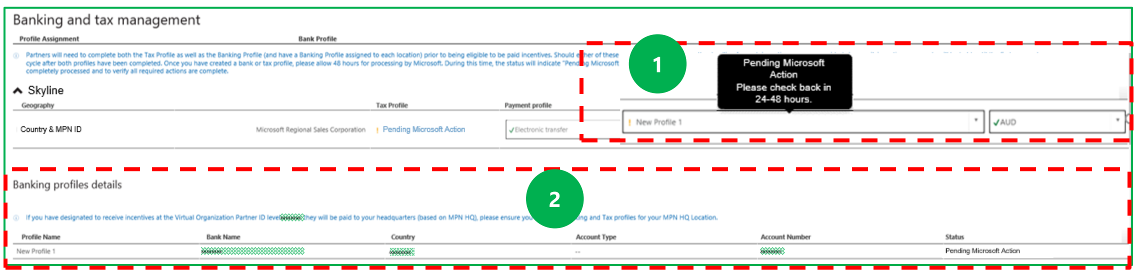
Beneficiary is the person in your company the bank would contact if they need to discuss your account.

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



1. 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**.
2. 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.

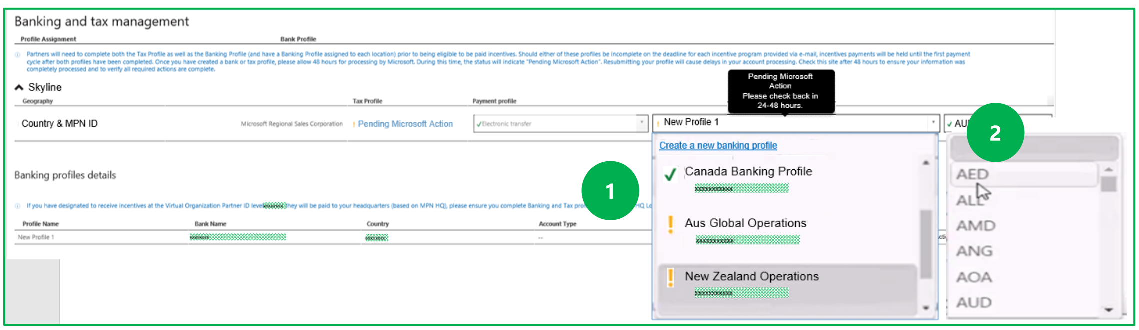
Assignment of bank profile and currency to location

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.

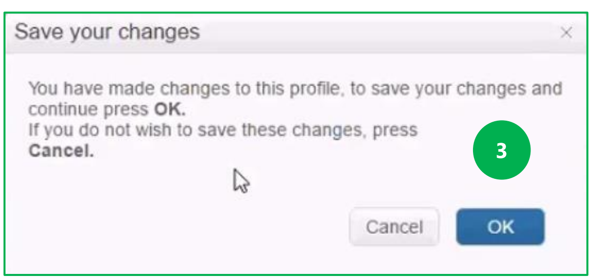
If you confirm the details shown in Profile assignment section are correct, then no action is necessary.

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.

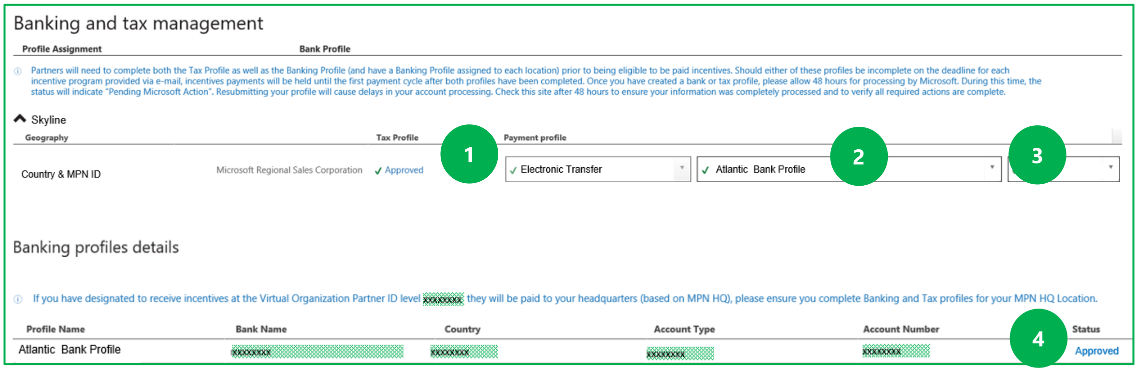


3. When making changes confirmation message will appear to save your changes, click on **OK**.

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 PIEX.

Banking and tax management once payment profile complete



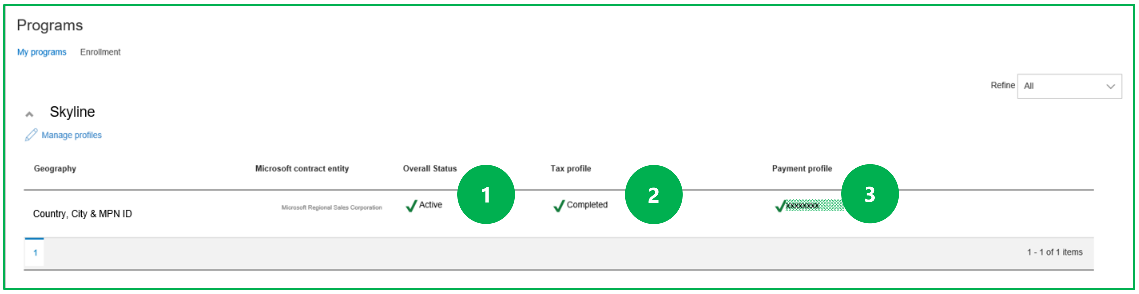
In Profile assignment area:

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



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 PIEX but must continue to meet eligibility requirements to earn and be paid incentives for the current fiscal year.

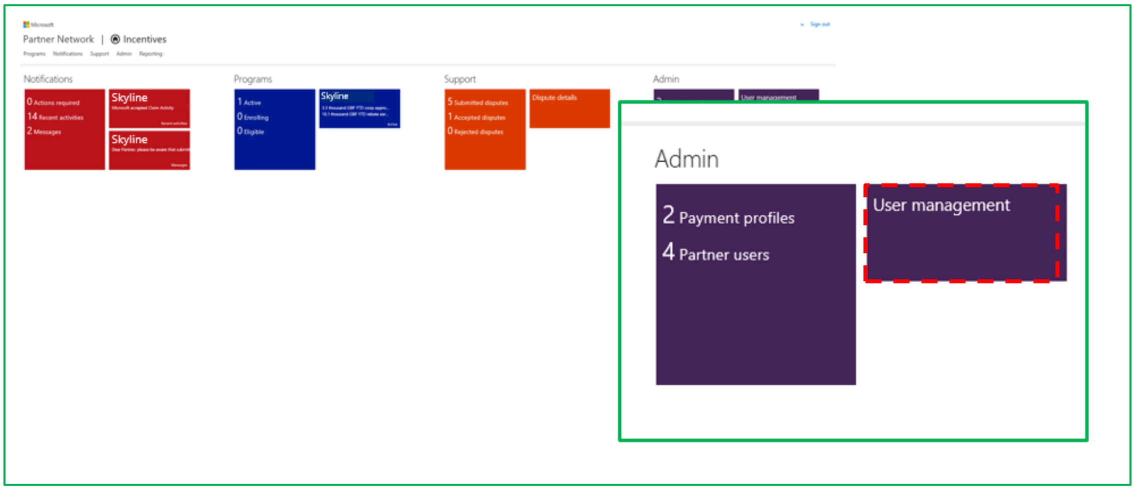
Access and navigate PIEX post enrollment

Once the tool is initially accessed and all PIEX 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.

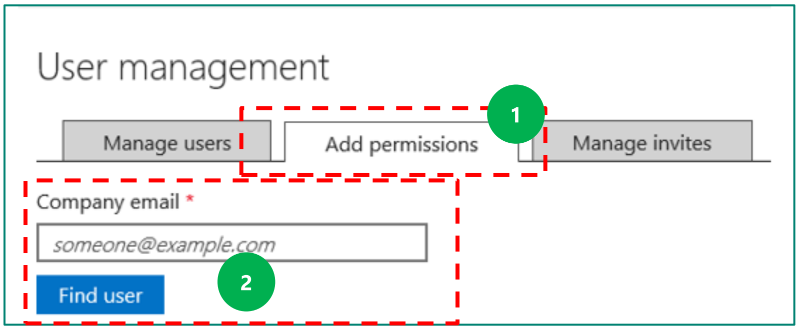


Under this you have three options:

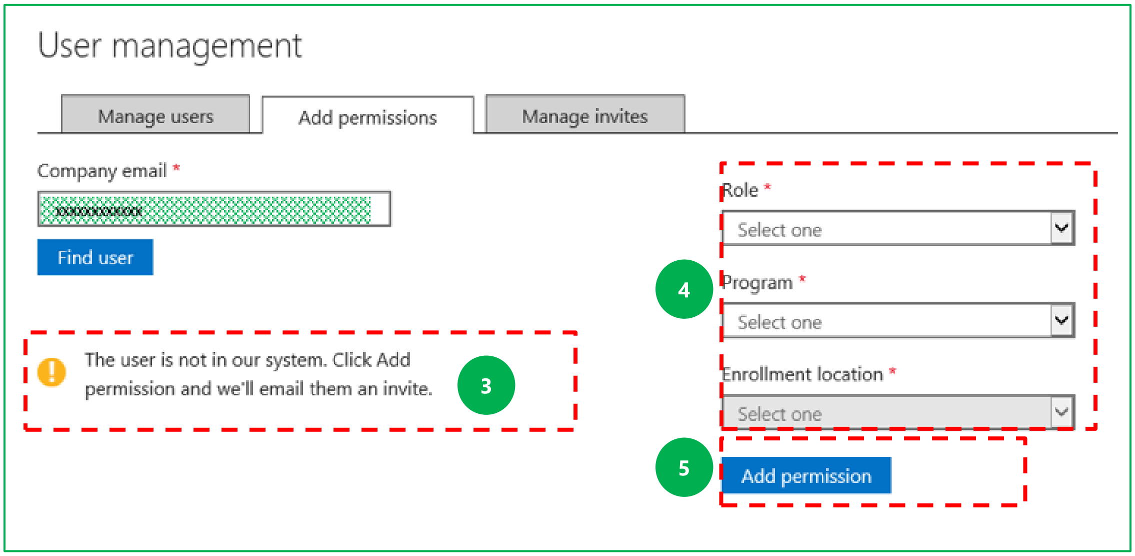
- **Manage users**: See the list of currently enrolled partner admins and users, their permissions and email addresses. You can delete users and permissions here.
- **Add users/permissions**: Add new users or change the permissions of current users
- **Manage invites**: Manage invites already sent.

Add users

To add users:



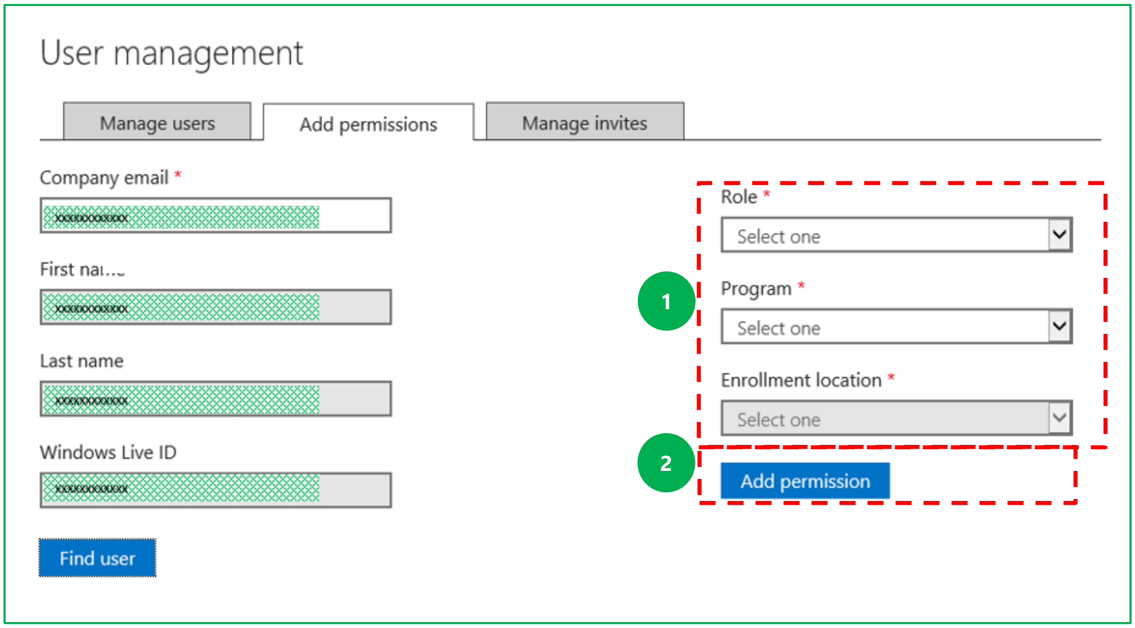
1. Click **Add permissions** tab.
2. Enter user email (company domain email or Microsoft Account email), and click **Find user**.



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 PIEX their details display. The partner admin can now modify current permissions (for example, change role from partner admin to user.)



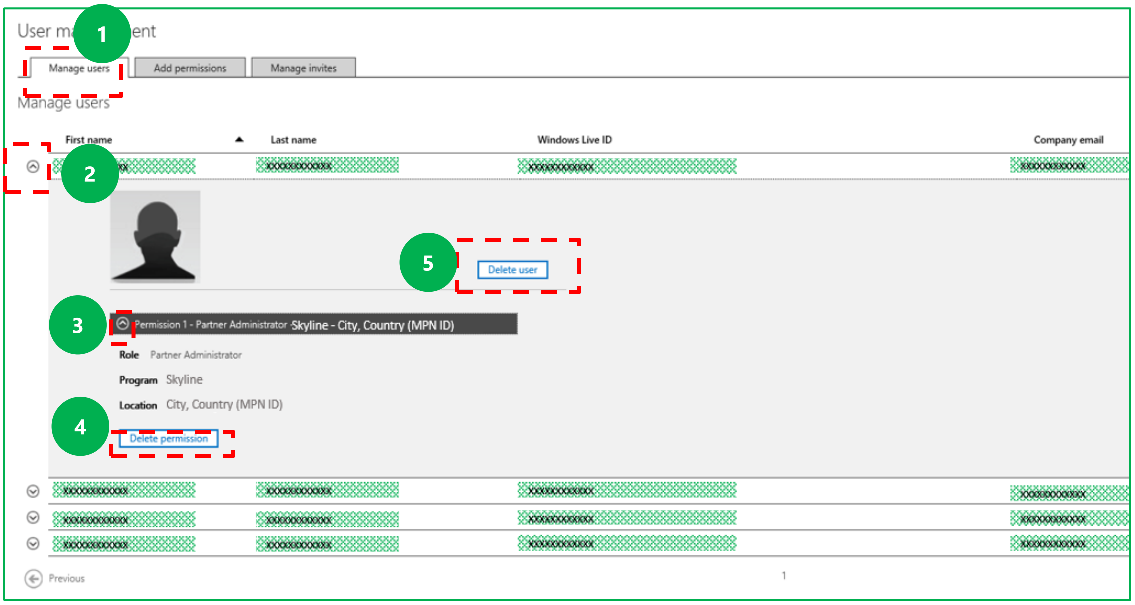
1. Make any changes (select the new role, program and/or enrollment location).
2. Click **Add permission**.

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.



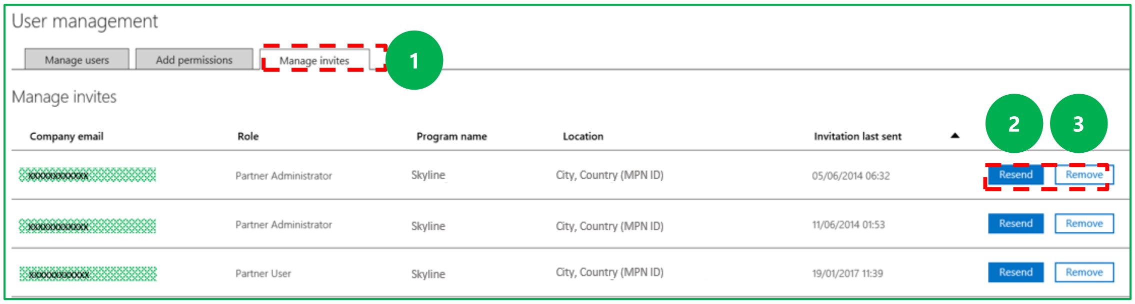
1. Click the **Manage users** tab.
2. Select a specific user by clicking on the arrow sign next to the user whose permission you want to change. You are then shown the permissions for that user (role, program, and location).
3. Click the secondary arrow sign to expand the permission details.
4. Select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



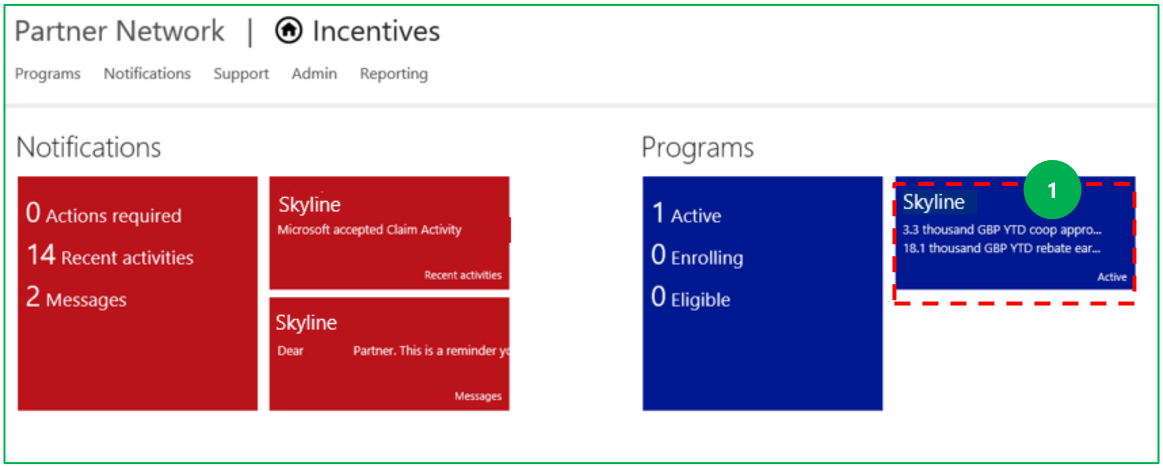
1. Click **Manage invites**.
2. For current users to whom you have already sent an invite, click **Resend.**
3. If you wish to remove an invite, click **Remove.**

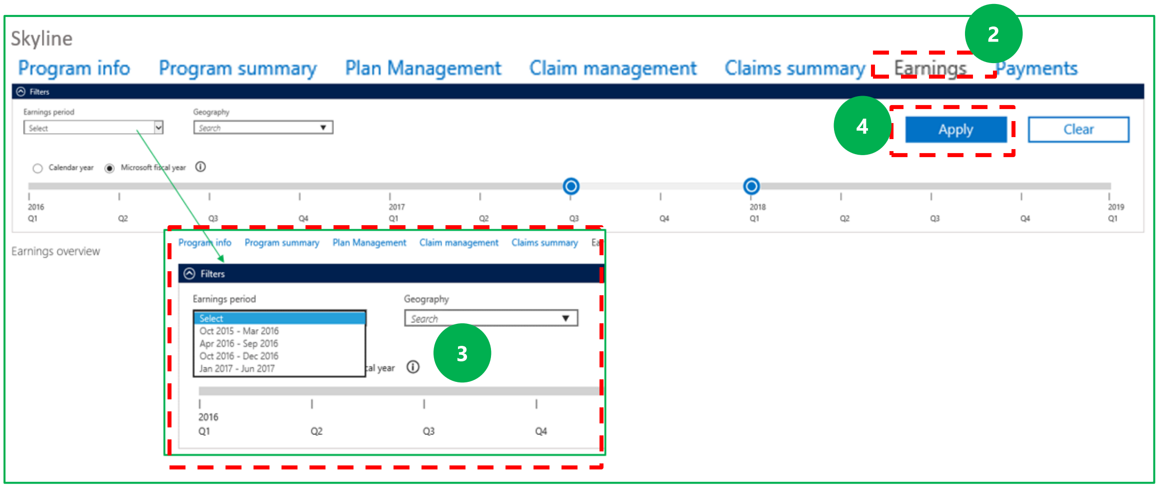
Microsoft
Partner Network

View Earnings

PIEX 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.

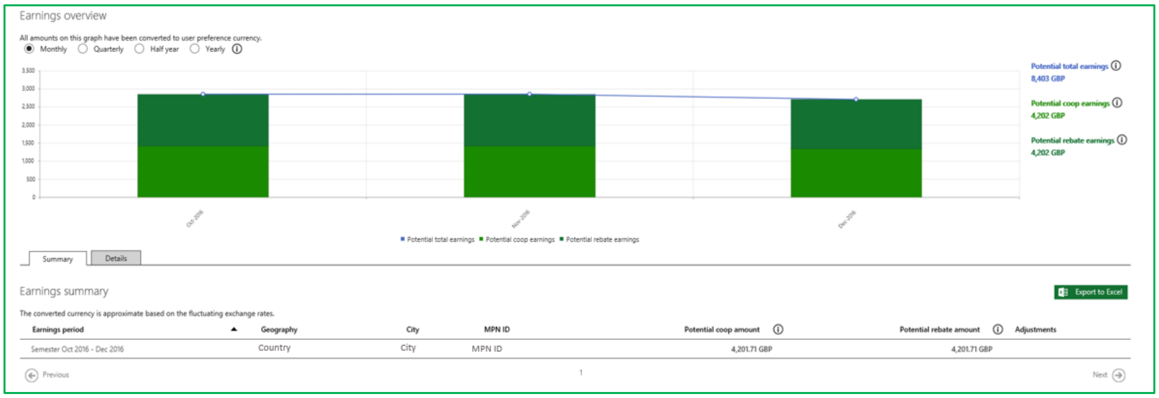
To view your earnings:

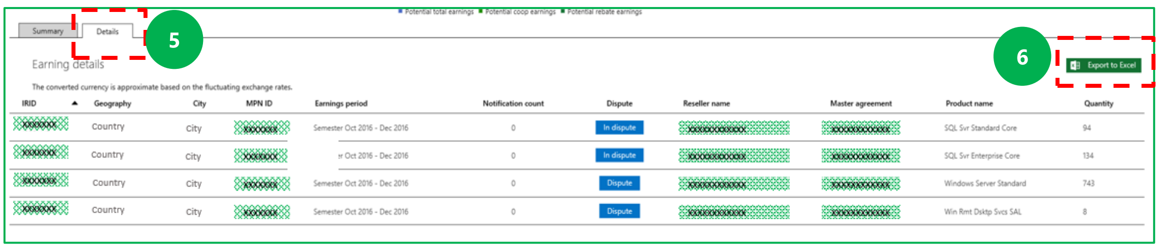




1. Click on the relevant program on the dashboard.
2. Click **Earnings** on the top menu.
3. Under filters, select the **Earnings period** (this will vary dependent on your program), and a country/region under **Geography** if relevant.
4. Click **Apply**. The timeline below will adjust to the time period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





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.

	PIEX Co-op capability		
Partner type	**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 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.

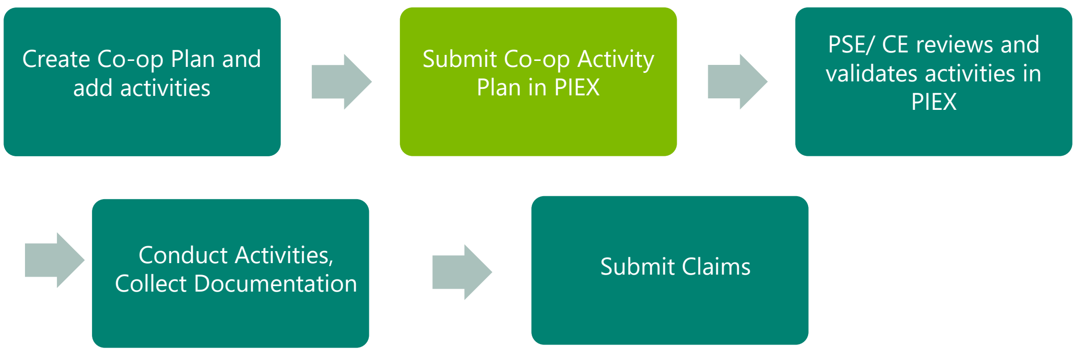
Remember to submit a Co-op Marketing Activity Plan well in advance of activity execution. Plans can be submitted from 15 business days in advance of usage period (via Partner Incentives Experience platform).

Co-op Marketing Activity Plan process

For Hoster, 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.



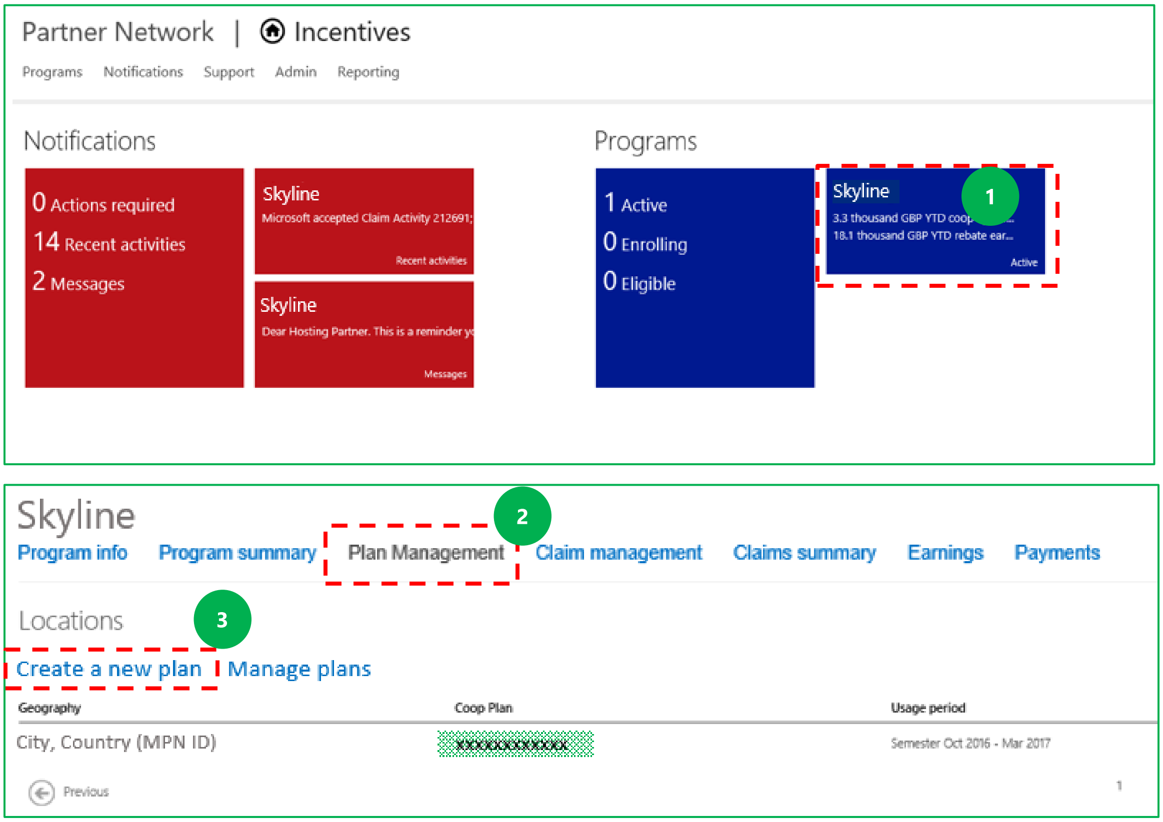
Submit Co-op Marketing Activity Plans in PIEX as early as possible before the activities you are plan are in schedule to begin. PIEX will be open to submit the Co-op Activity Plan 15 days prior to the usage period start date. You can follow status of activities in PIEX under Plan Management.

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

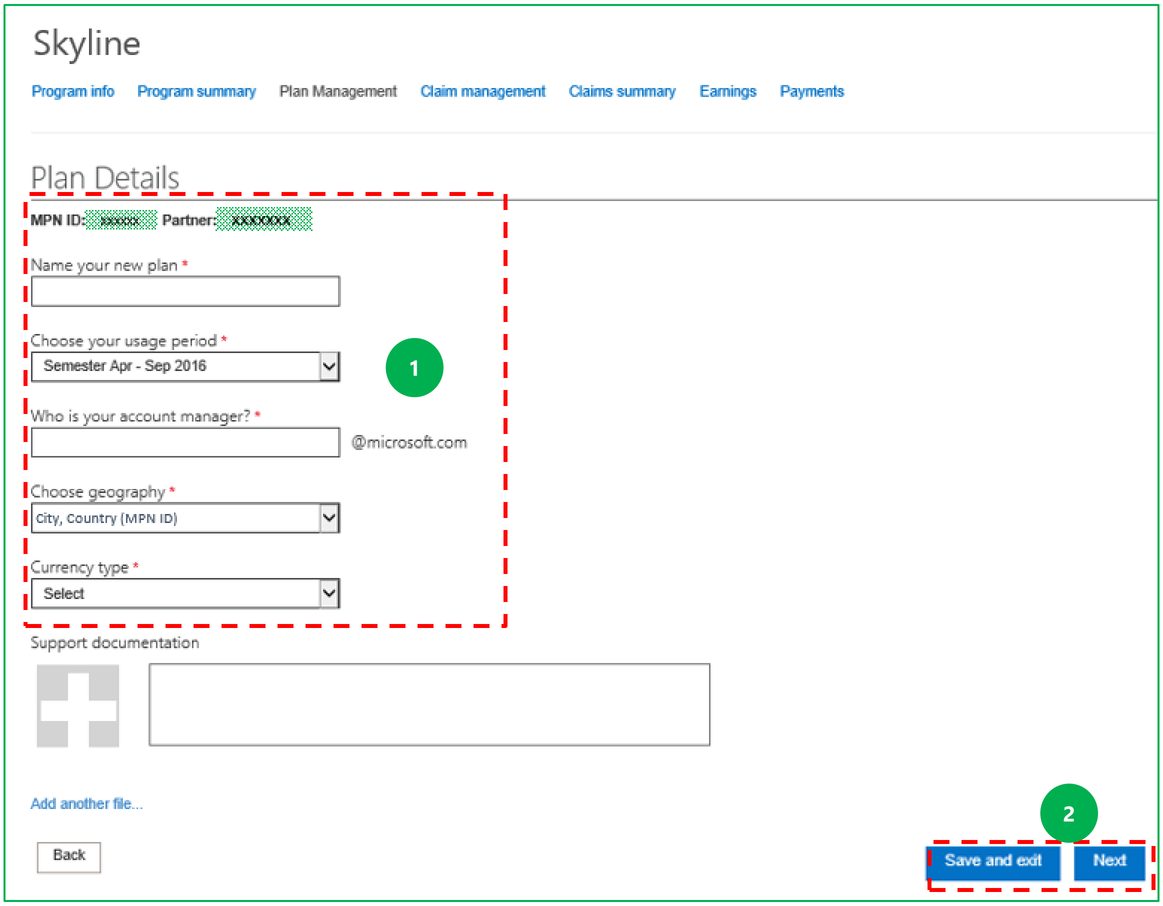
Create a Co-op Marketing Activity Plan

TIPS:

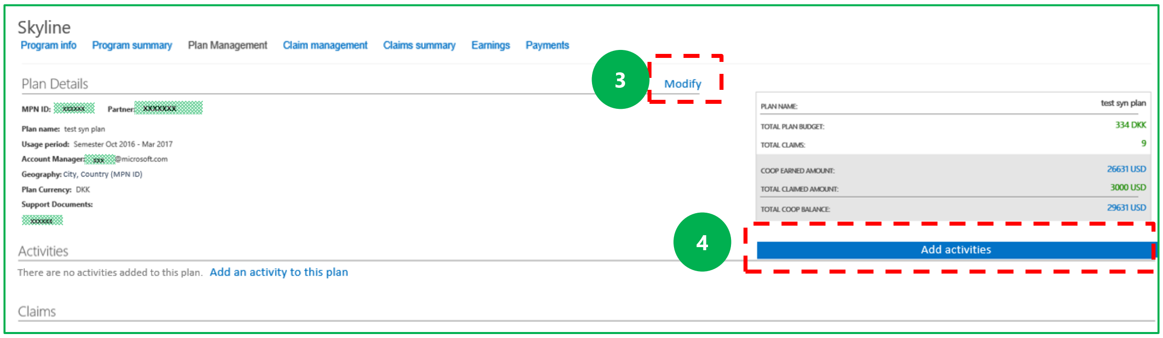
- Please create one co-op plan per geography per usage period. Your co-op plan should include all the activities you plan to undertake for the entire semester.
- If you already started your co-op plan for the usage period, add additional activities to your co-op plan in the same geography and usage period.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



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.

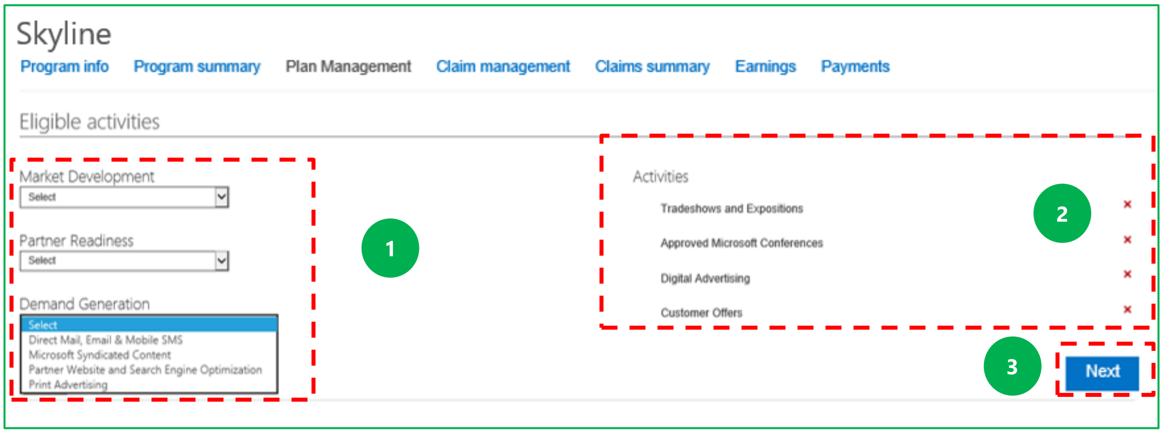


1. Enter the Plan header details. Help & Tips for each field can be found in the gray box on the side.
2. Click **Next** to add the activities to your plan or **Save & Exit** if you want to continue at a later time.



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:

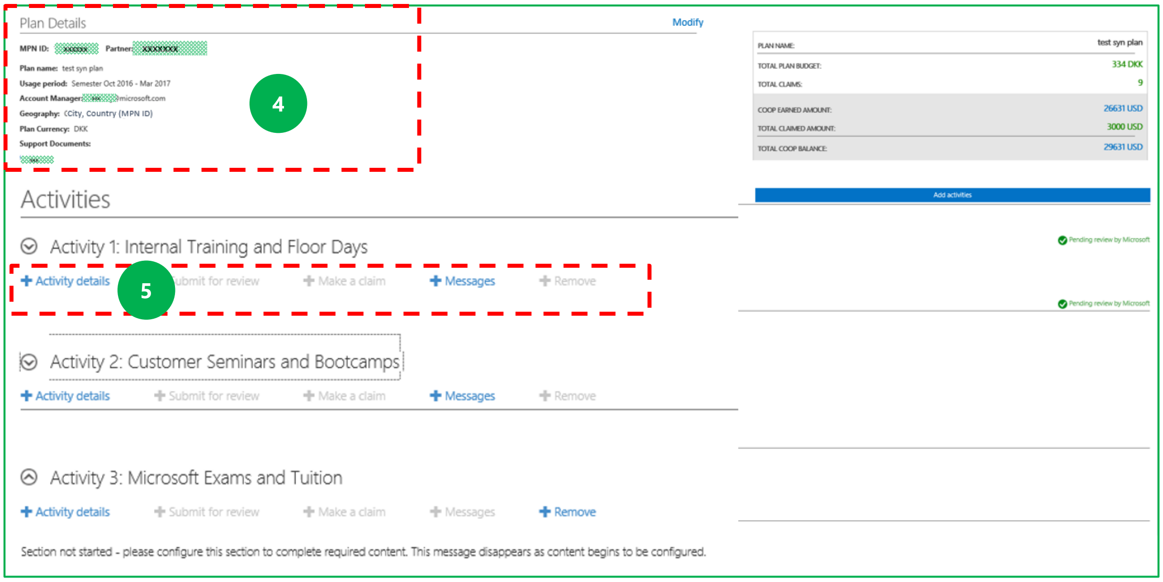


1. Click on the drop down for each activity category and select all relevant activities to add to plan.
2. Chosen activities will show up on the right side of the screen. Click the relevant red cross to remove.
3. Click **Next** to add these activities to plan and continue to provide details for each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

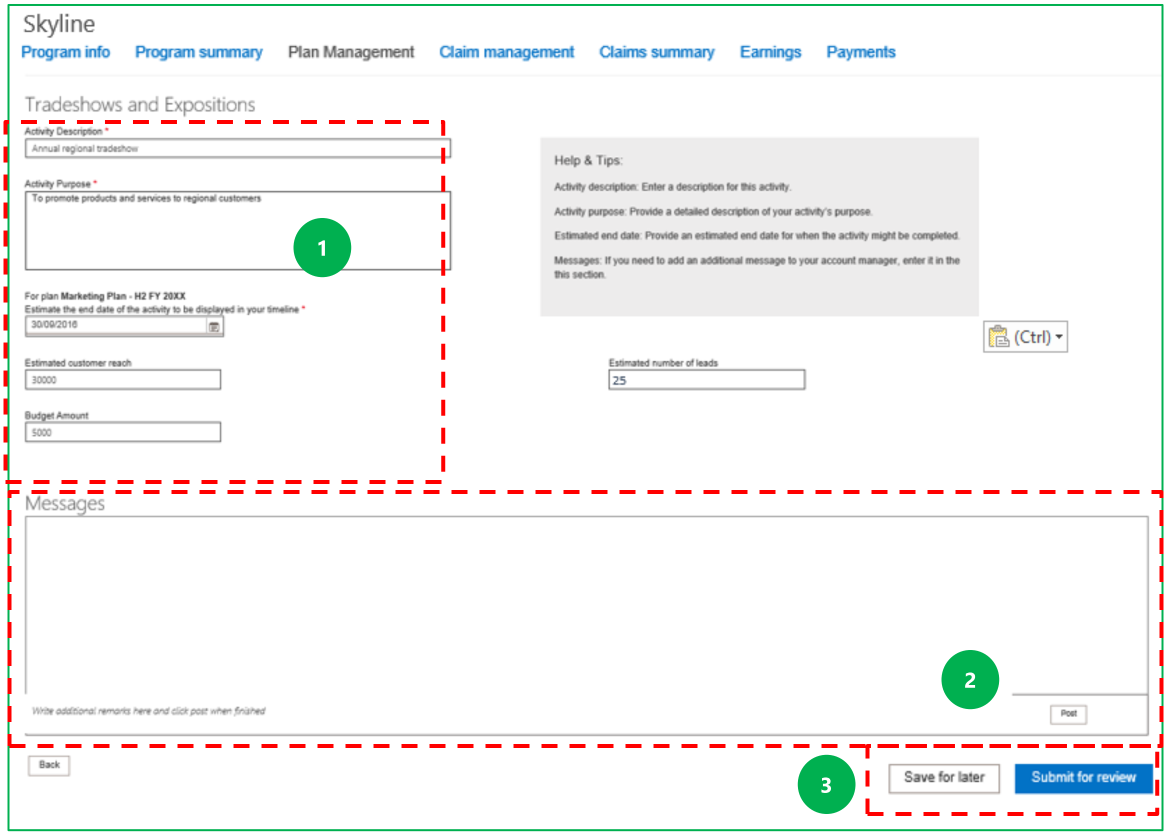
NOTE:

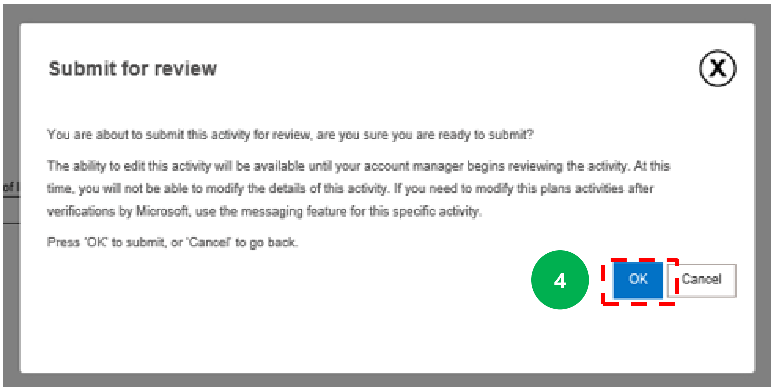
- Partners can now submit an activity type multiple times within a co-op plan. Previously partners could not enter redundant activity types within a co-op plan (e.g. two On Site Champ activities for two different audiences are now possible within a single plan). Please use the "**Activity Title**" field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

Microsoft
Partner Network



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.



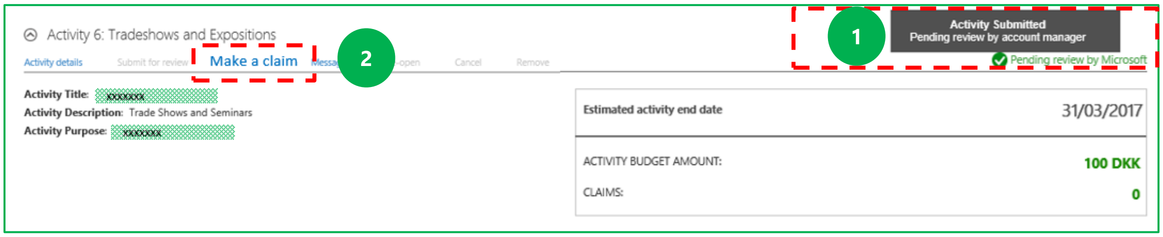


1. Complete details for activity. Guidance is provided in gray box.
2. Use the **Messages box** to provide optional additional commentary for Microsoft Account Manager, then click **Post** to add to form.
3. When complete click **Submit** for review or **Save** for later if need to complete later.
4.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

NOTES:

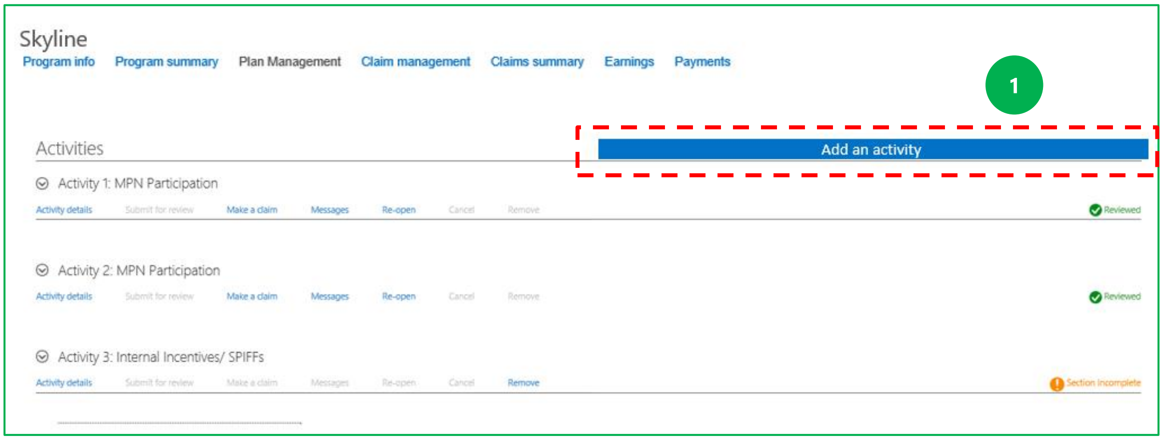
- Submit each activity individually so if there are questions on a specific activity, it does not block the entire plan.
- Only activities that have been reviewed by your PSE / CE will have status of **Reviewed** and will see **Make a Claim** link live in blue. Claims cannot be made against non reviewed 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



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



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

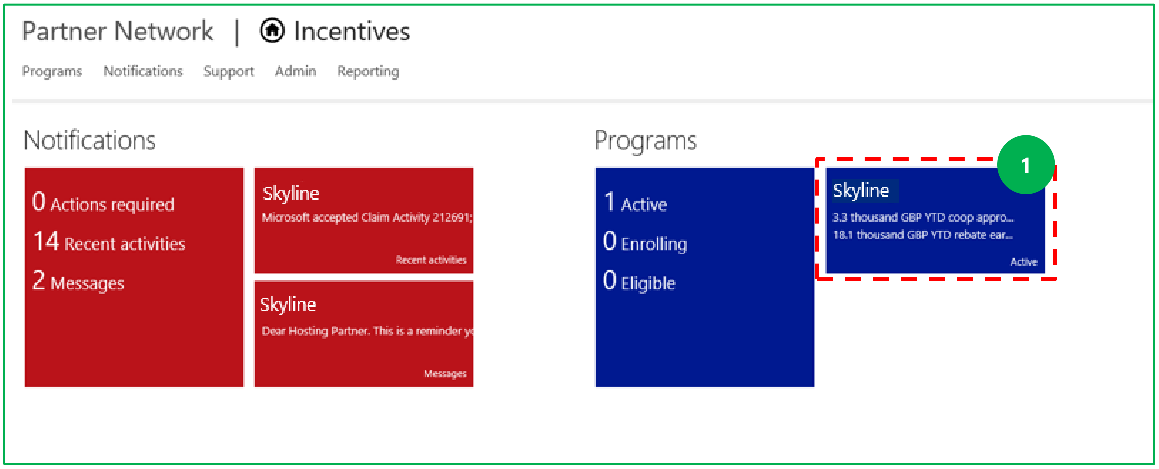
PIEX provides partners with the ability to make a claim for co-op expenses. Consult the Co-op Guidebook for details on eligible activities and expenses, and the Proof of Execution (POE) requirements which you need to submit with your claim. For co-op earning and usage periods, and related deadlines please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

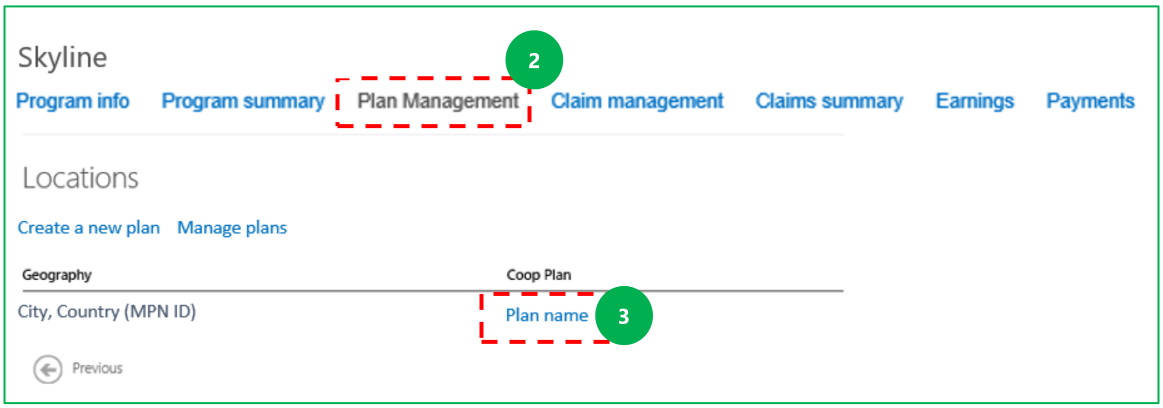
For claims which relate to plans that were created **prior to the launch of the new Plan Management functionality in PIEX,** please submit claims via Claim Management.

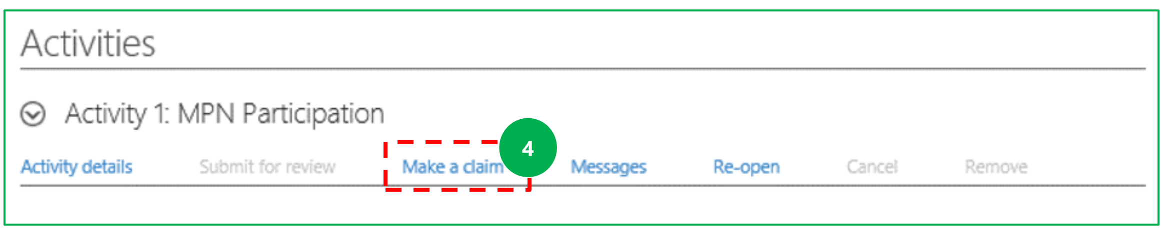
Both scenarios then follow same process after initial different steps. Partners utilizing plan management functionality will see some data prepopulated from their plan, this saves time when you enter details of claim.

Co-op claim which begins from Plan Management



1. Click on relevant program on dashboard.

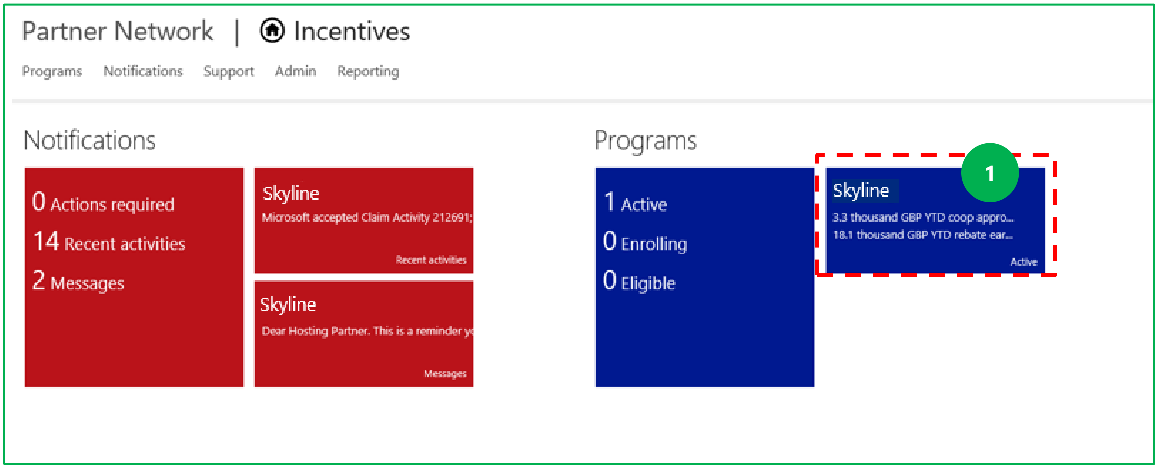


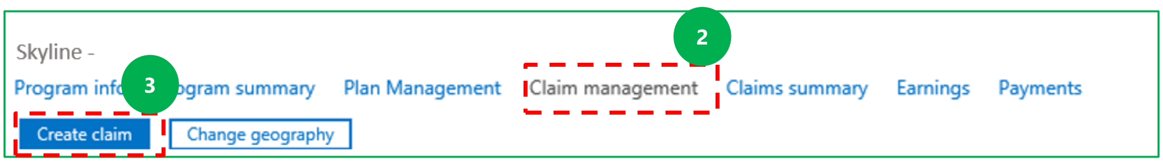


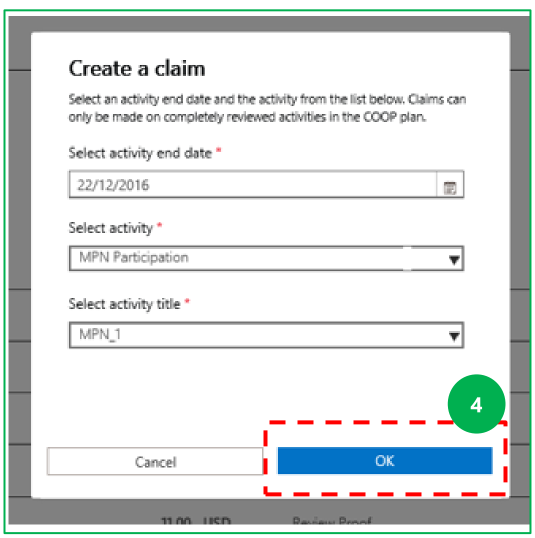
2. Click **Plan Management** on the top menu.
3. Select plan which contains relevant activities.
4. Click **Make a claim** to begin claim process.

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







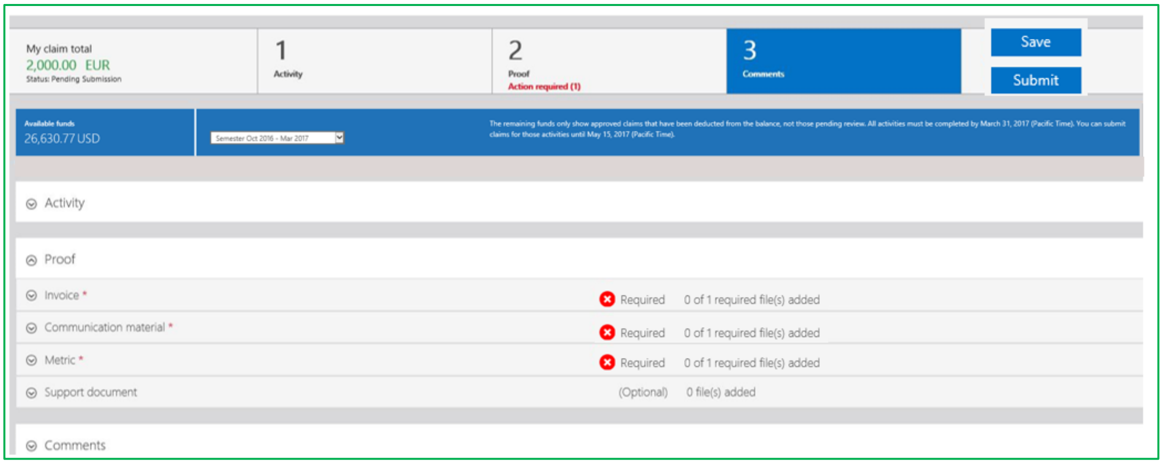
1. Click on the relevant program on the dashboard.
2. Select **Claim management** from the top menu.
3. Click **Create claim**.
4. On pop up window, select the activity end date and activity details, then click **OK.**

Now go to section on next page to continue.

Submit claim – all partners from this point forward:

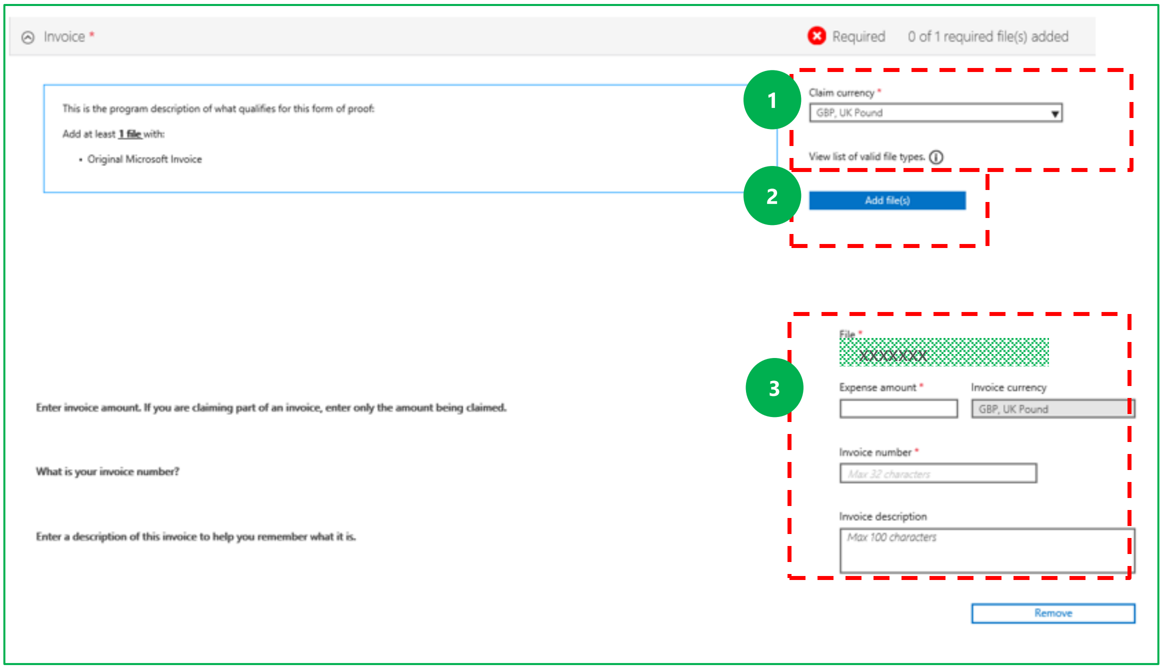
The Co-op Guidebook and related assets can be accessed via aka.ms/partnerincentives under the “Co-op” section on left hand side menu. Refer to as you complete the sections of the claim form.

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.



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:

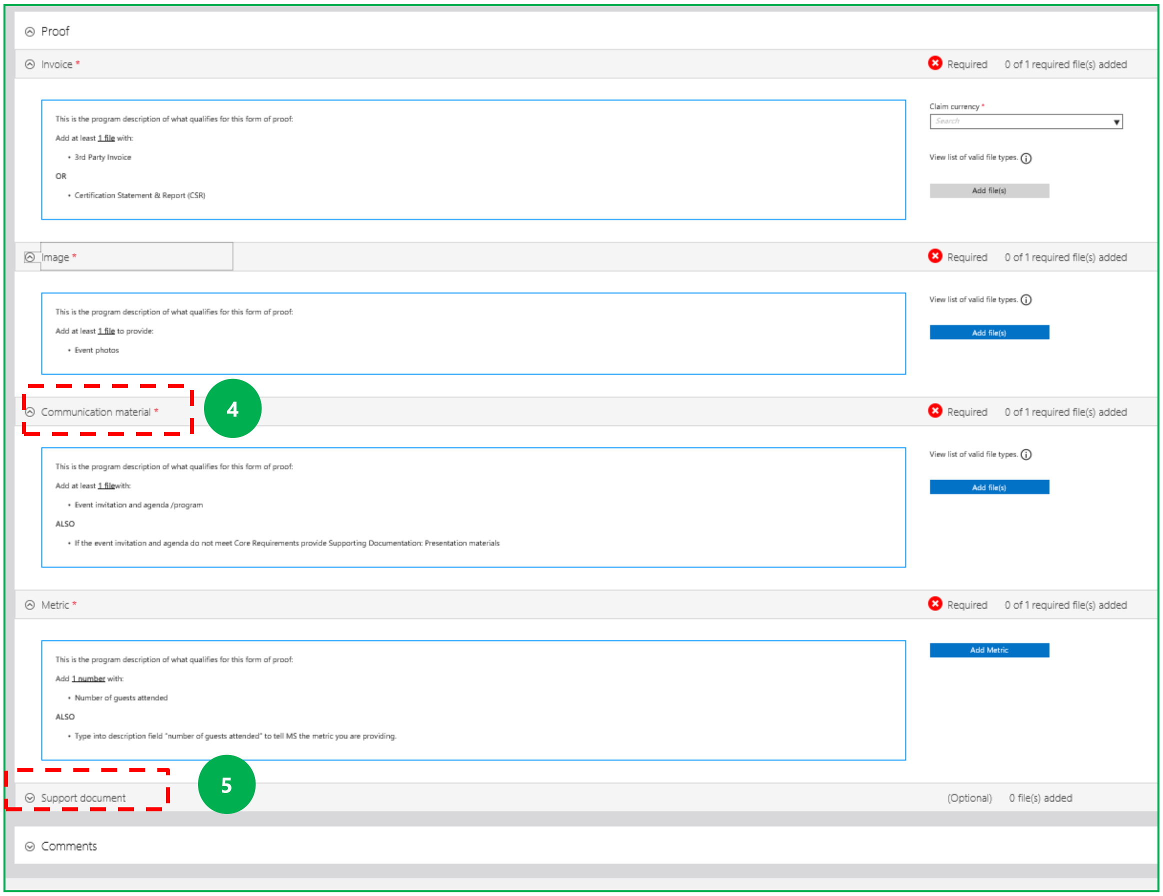
- Submit invoices under the **Invoice** heading – see below for guidance.
- Submit non-invoice Proof/POE files (e.g. certificate of course completion, copy of communication, photo of message for mobile) under the **Communications material, Metric** and **Support document** headings.



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.

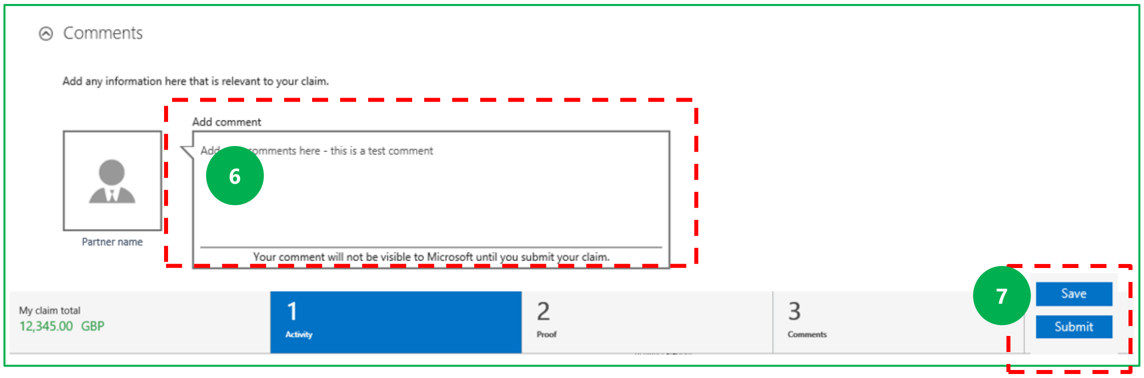
Notes:

- 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.

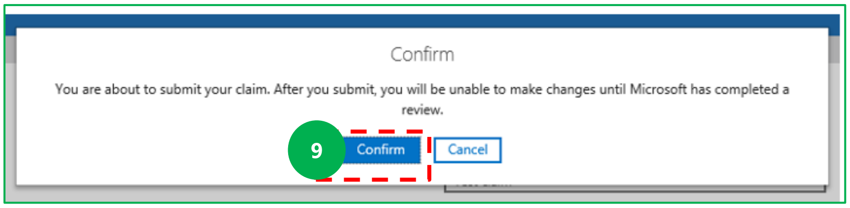


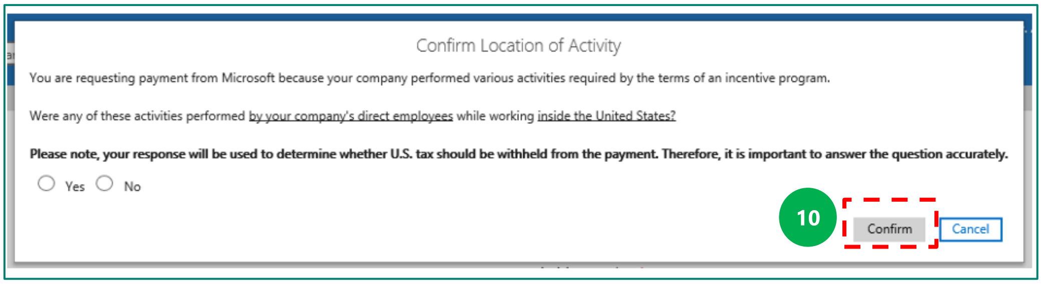
Enter all additional information in the **Proof** sections of the claim form.

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*.





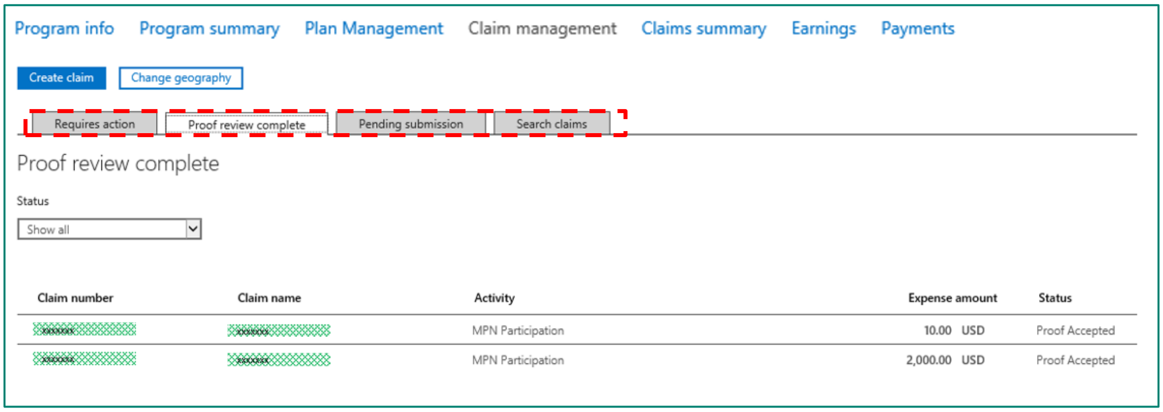
8. To submit the claim for review, click **Submit claim** on the scroll bar.
9. Click **Confirm** in message dialog box.
10. On Confirm Location of Activity dialog box, select appropriate response, then click **Confirm.**

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:



Within the Claim Management area you can filter claims by:

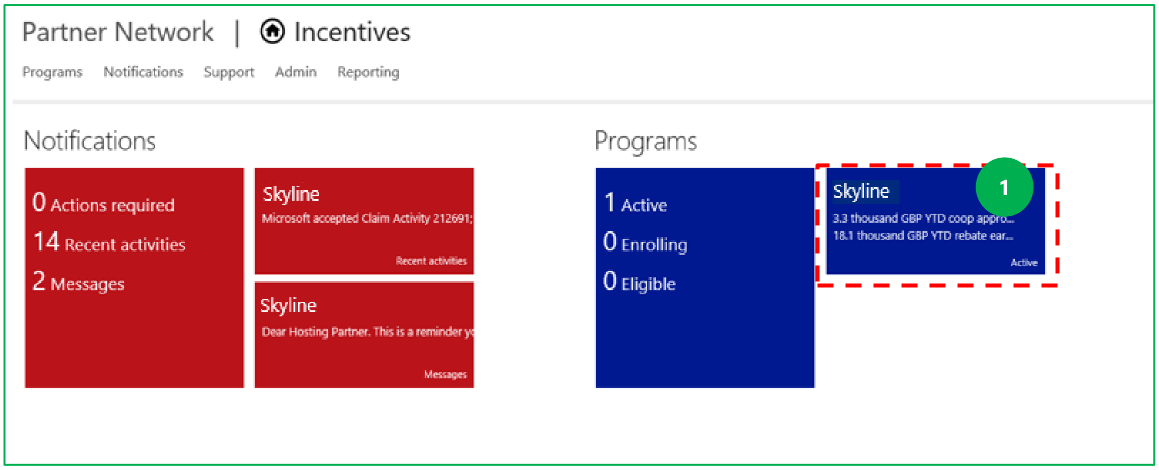
- Claims requiring action from the partner or Microsoft (**Requires action** tab).
- Complete claims (**Proof review complete** tab).
- Saved claims (**Pending submission** tab).

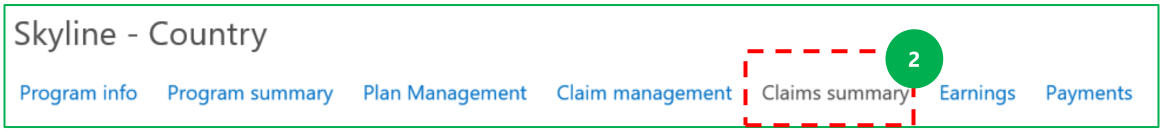
Or you can search for specific claims in the **Search claims** tab using claim number.

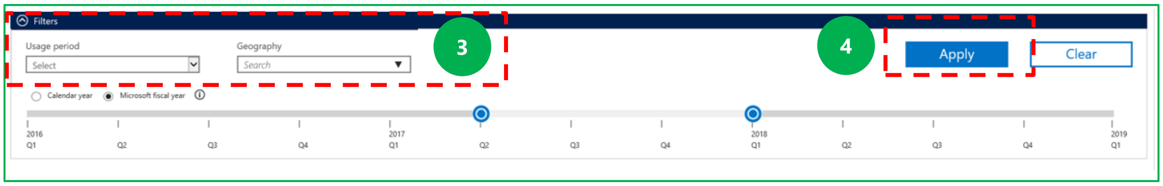
Claims summary

You can view the status of your claims on PIEX. 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.**

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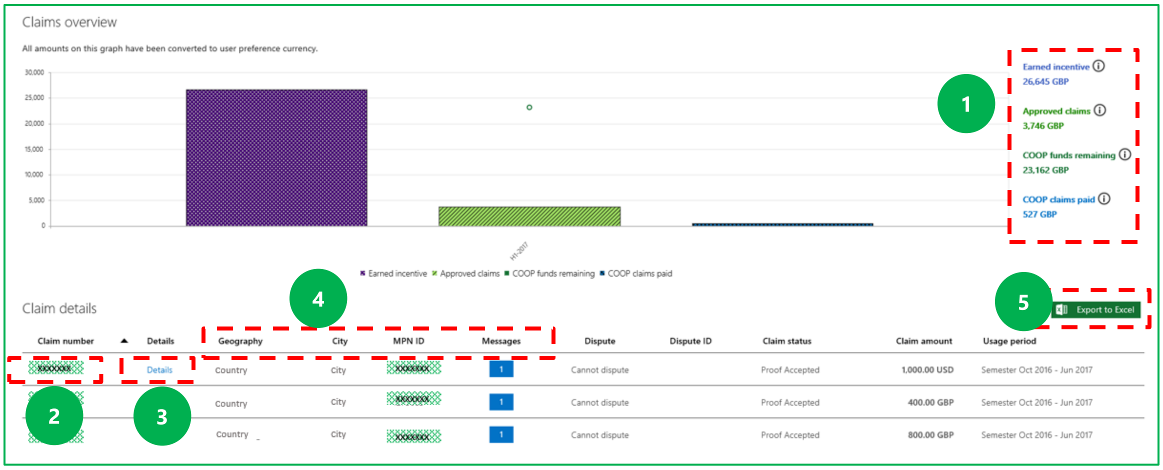
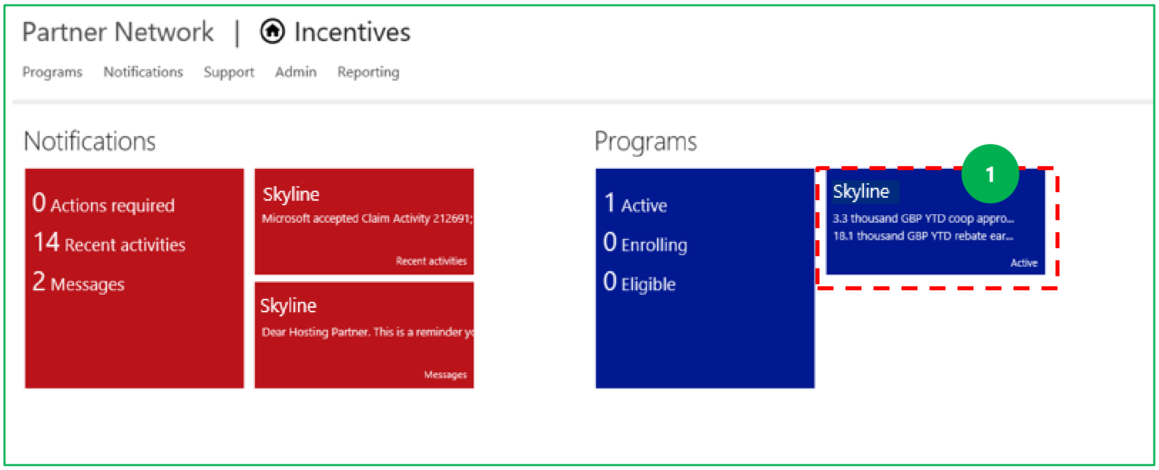
View high level claim data on the **Claims overview** section and claim details in the **Claim details** section.

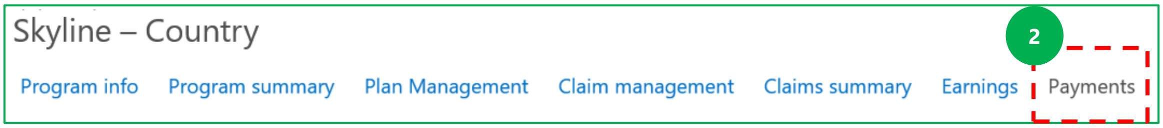


1. The total figures for claim earnings and available funds are shown on the right.
2. Select a **claim number** to view a specific claim form and it's details.
3. Alternatively, select **Details.**
4. Sort columns by clicking the column header.
5. Click **Export to Excel** to download the raw data file.

Track payments

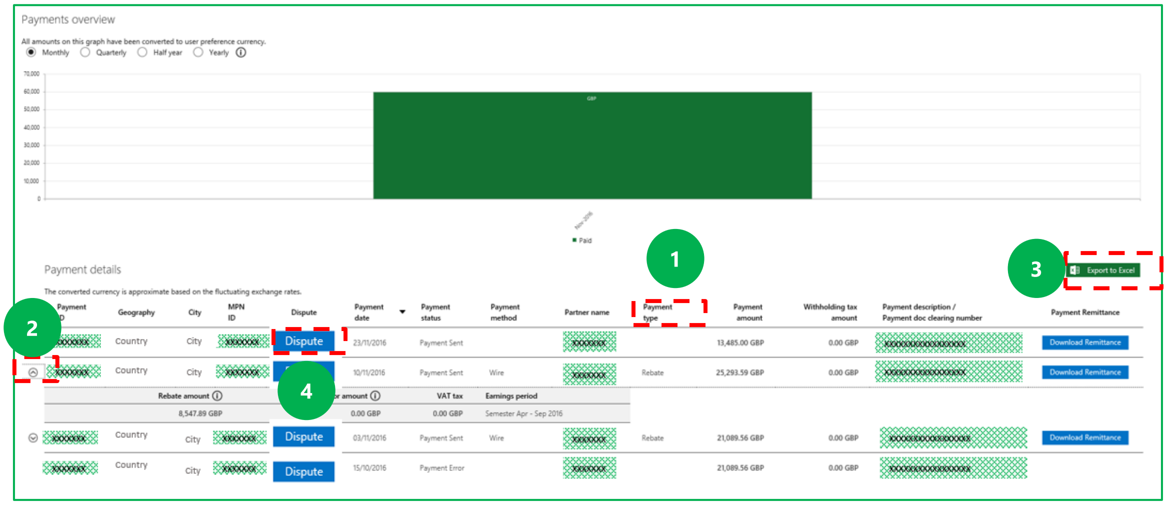
You can view the details of your payments on PIEX. You can contest a payment using the dispute option. To track your payments:





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:

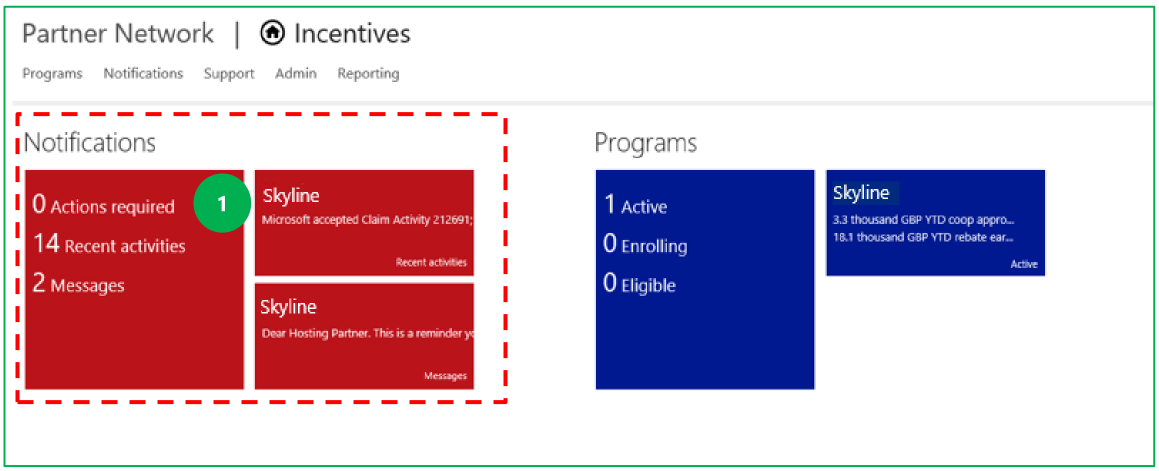
1. The type of payment—either Claim or Rebate—under **Payment type**
2. Select the down arrow alongside each payment for further details
3. Select **Export to Excel** for offline analysis.
4. Select **Dispute** to contest a payment.

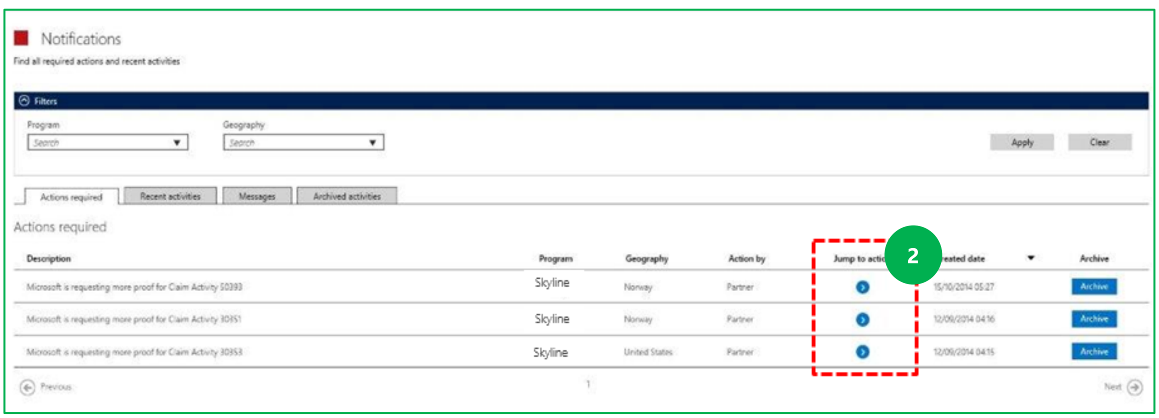
Change payment and tax profiles

For guidance on how to change a payment or tax profile please refer to Update or change payment profile information in PIEX section.

Notifications

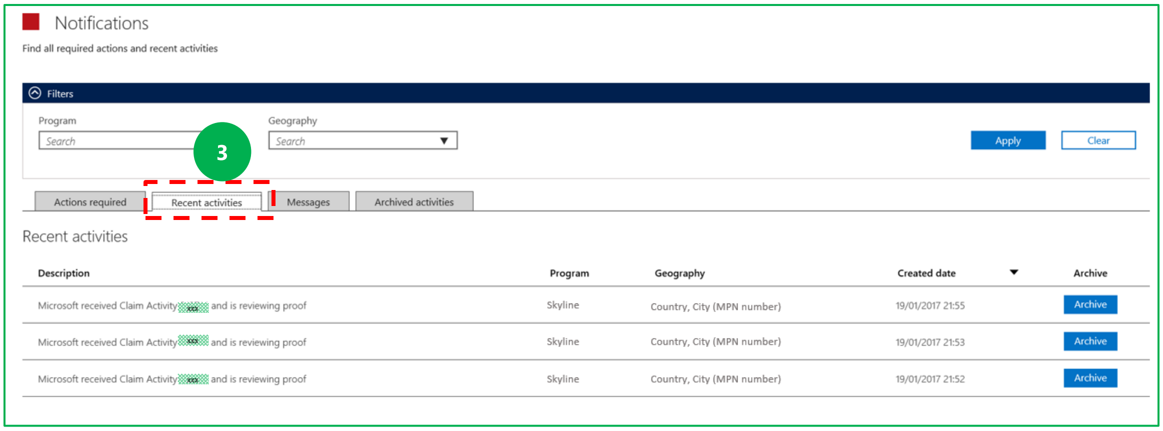
Notifications are visible on the homepage. Notifications trigger when specific events occur in PIEX. For example, when a partner starts the enrollment process this event will trigger a notification that *Payment profile needs to be completed*. Notifications are visible to partner admins and users.





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.

Microsoft
Partner Network



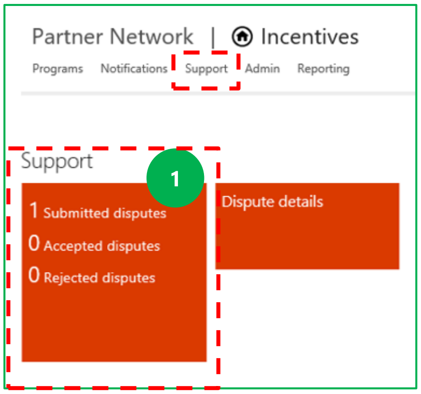
3. Select the **Recent activities** tab to view a list of all recently complete activities.

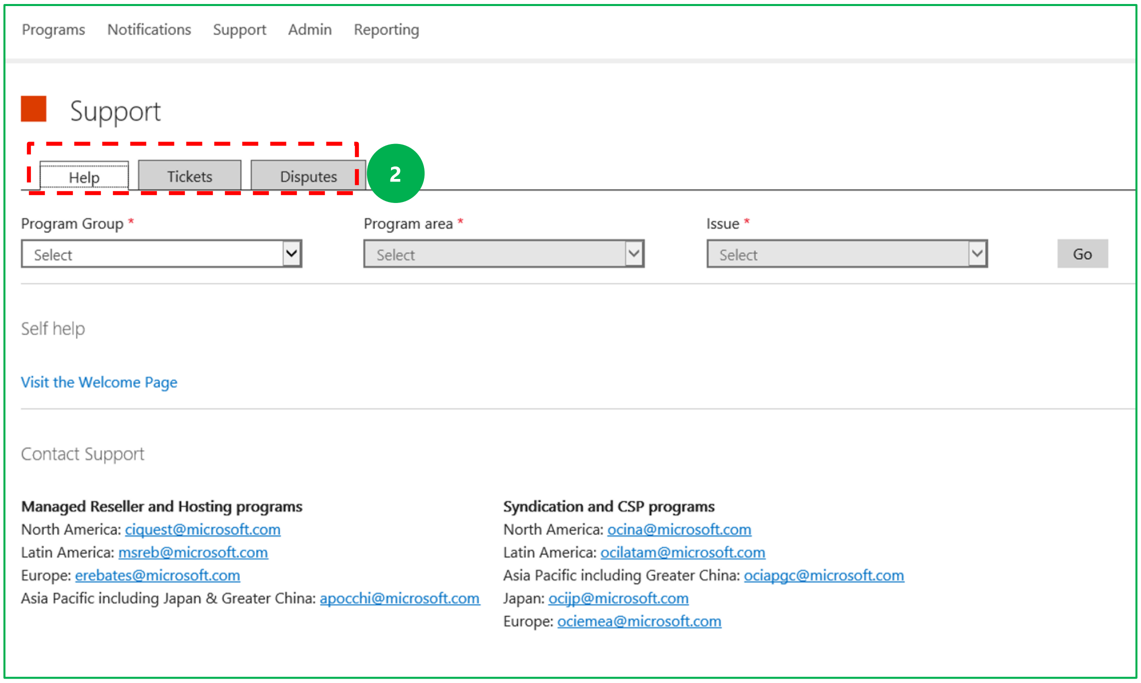
Notes:

- **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.

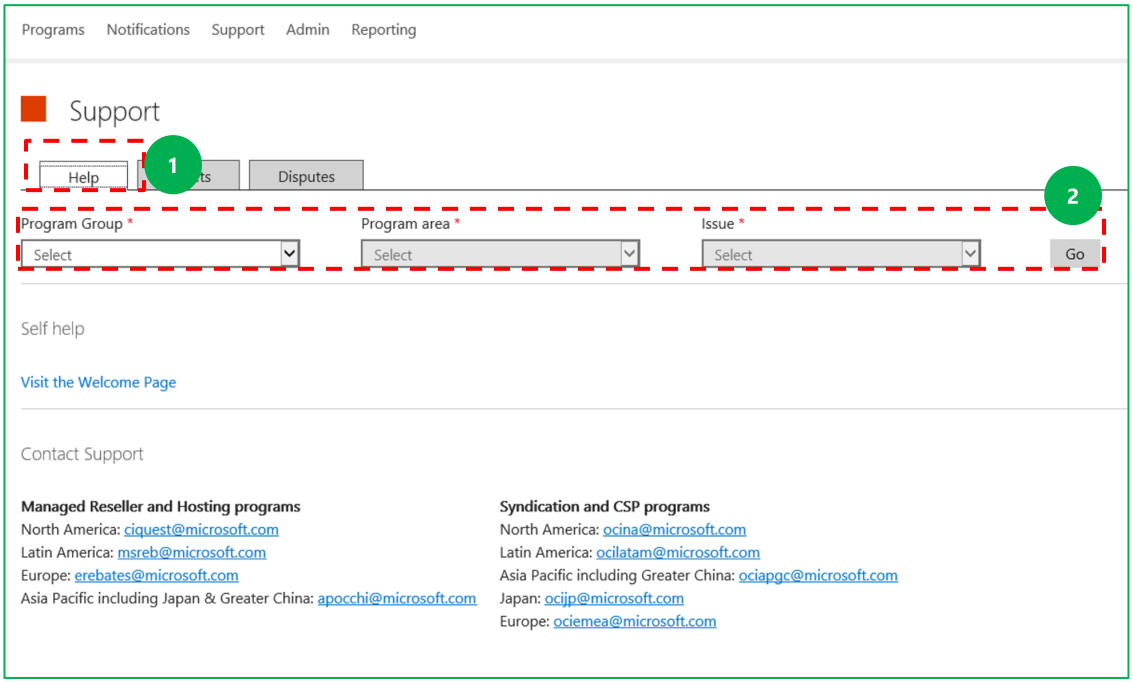




1. To access support select **Support** on the dashboard or top menu.
2. On the Support page:

- 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.**

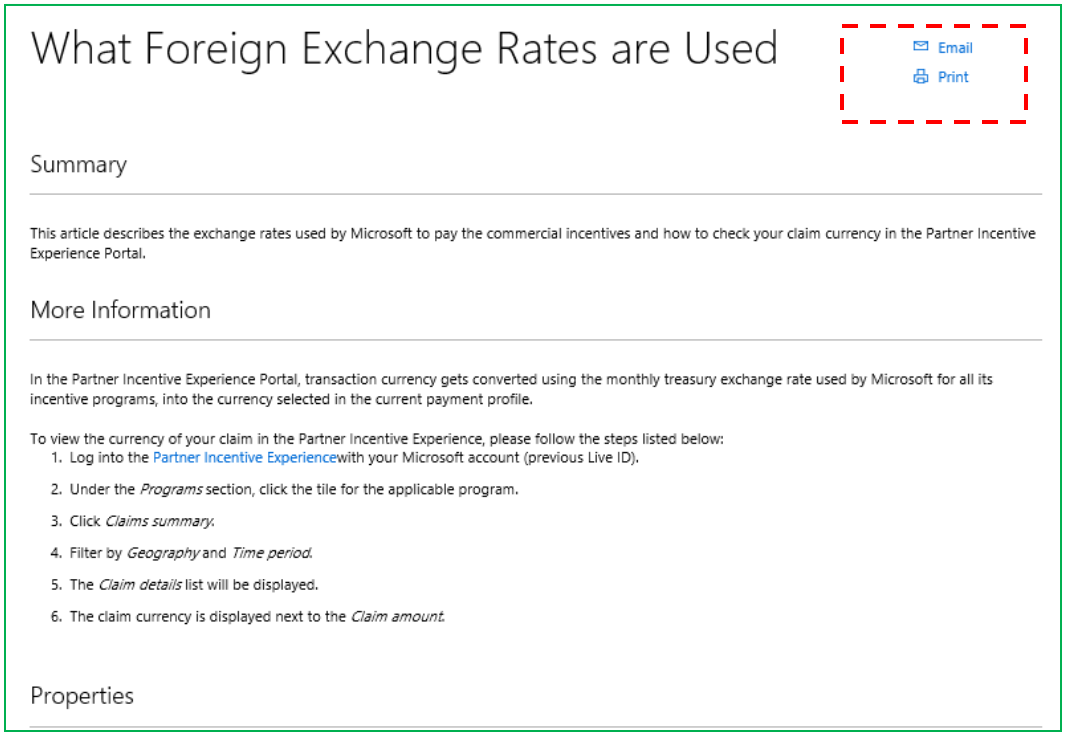
Help option



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

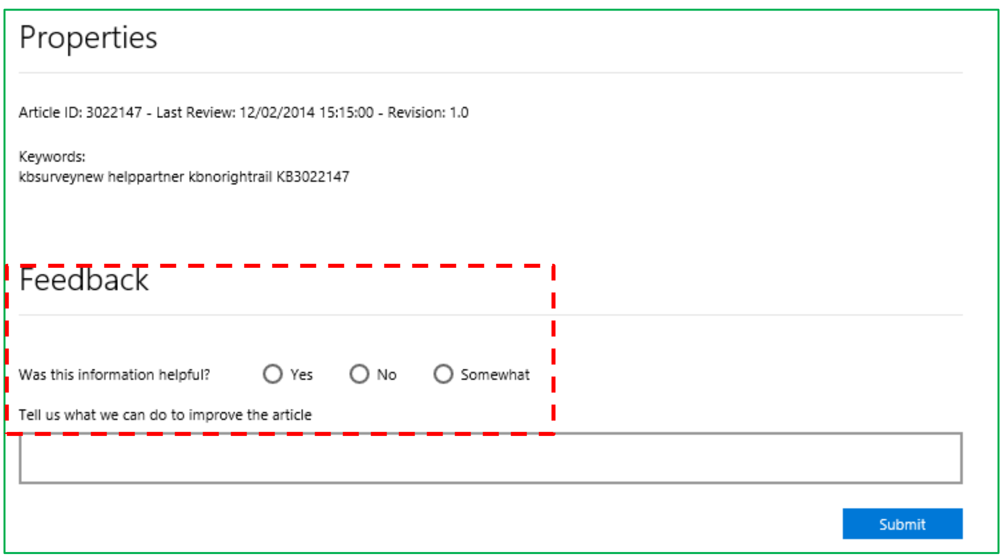
This article describes the exchange rates used by Microsoft to pay the commercial incentives and how to check your claim currency in the Partner Incentive Experience Portal.

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 Experiencewith 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 kbnorightrail KB3022147

Feedback

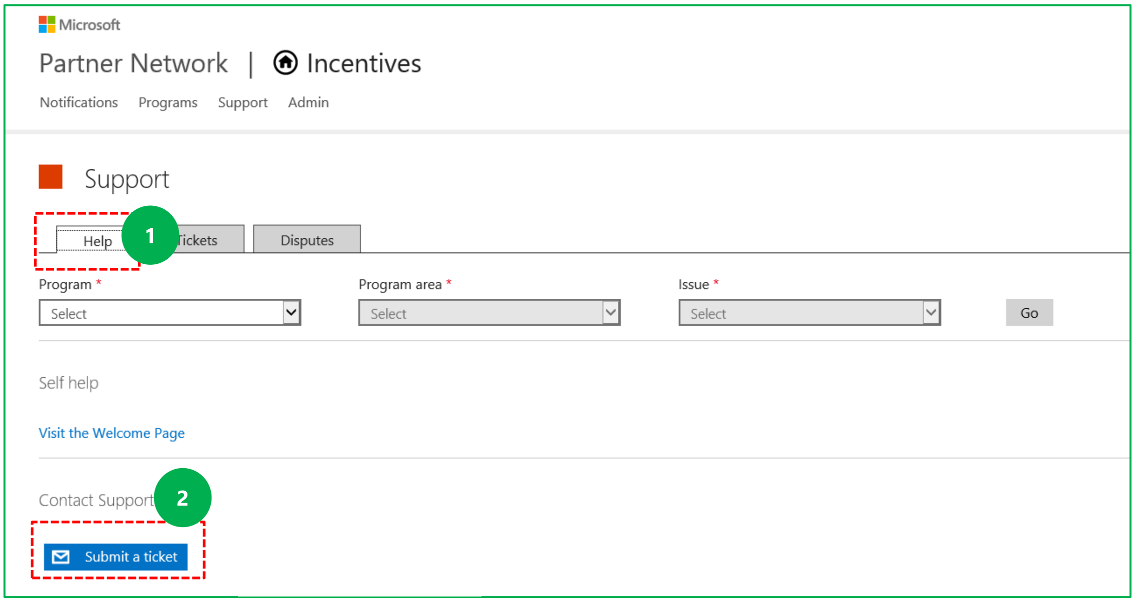
Was this information helpful? Yes No Somewhat

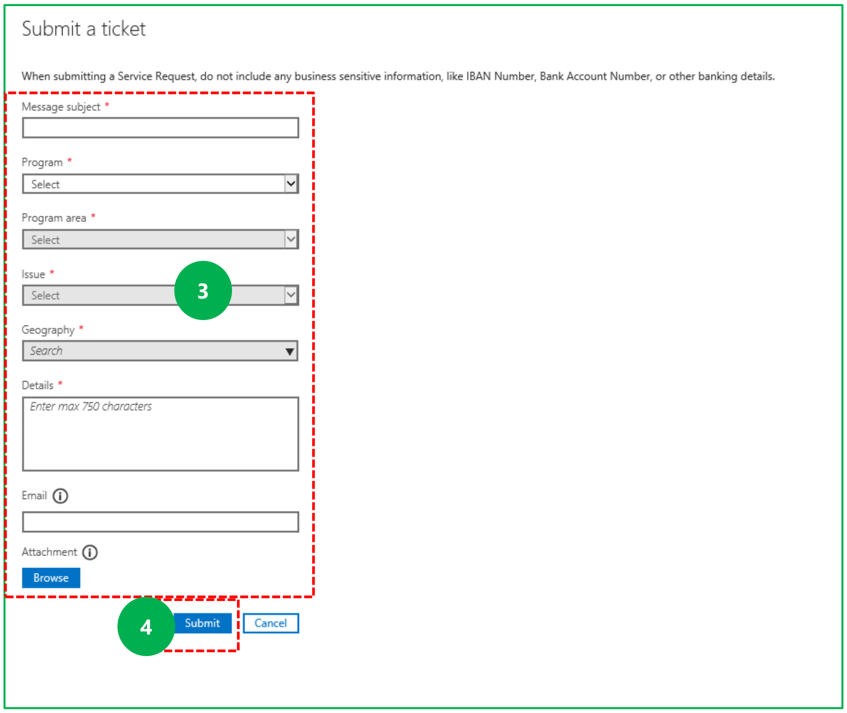
Tell us what we can do to improve the article

Submit

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

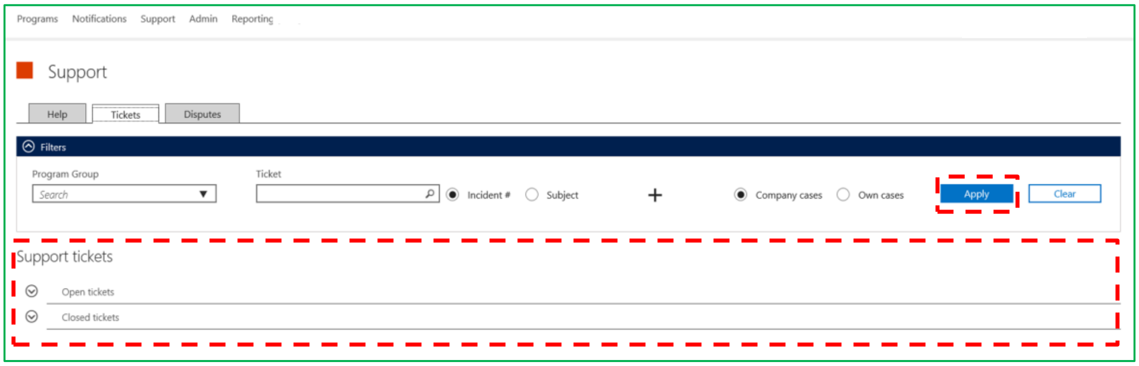
Submit a ticket





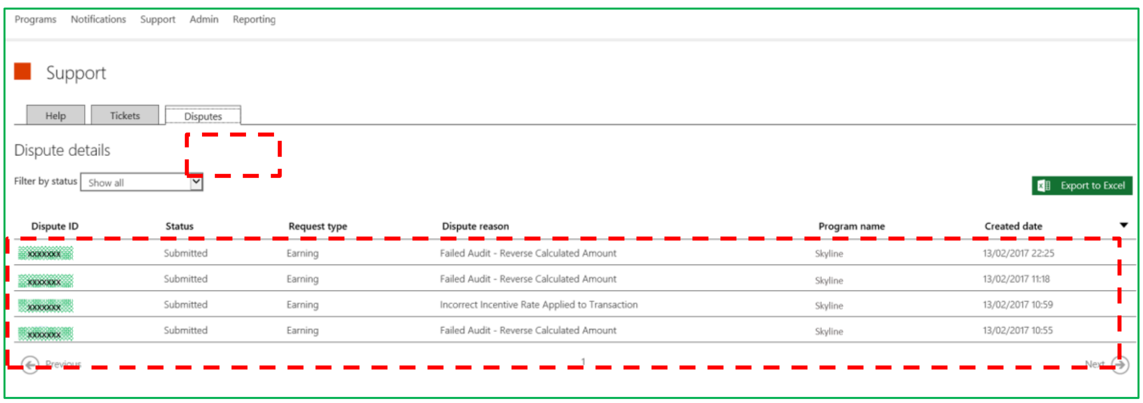
1. Select the **Help tab.**
2. Click **Submit a ticket.**
3. Complete the **Submit a ticket dialog box**, add attachments if relevant.
4. Click **Submit** when complete.

Tickets



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

Disputes



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.