

Customer Association Process

Claiming Partner of Record (CPOR)

A modern office environment with large arched windows and indoor plants. In the foreground, a man and a woman are standing and looking at a tablet together. In the background, a woman is sitting at a desk using a smartphone, and two other people are sitting on a bench. The entire image has a blue color overlay.

Introduction

In this training, we explore the customer association model supporting the FY20 OSU/OSA programs.



Objectives

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

- navigate the new customer association process.
- describe the new customer association process.

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Customer Association Process

A new customer association incentive process

Why a new process?

- In Microsoft's efforts to improve your incentives experience, we have replaced Digital Partner of Record (DPOR) with a new customer associations model; Claiming Partner of Record (CPOR).
- CPOR will put partners in control and lessen the dependency on customer actions.
- CPOR applies to OSU-Microsoft 365, Dynamics 365 under OSU-Business Applications, and OSA Sell. Partners who want to receive incentives for PowerBI will still need to become associated via DPOR.
- In the new CPOR model, you will be associated with the customer at a subscription or product/workload level. You will do this by submitting a customer association through the [Partner Center Dashboard](#).
- This training will run through the creation, submission, and tracking of a customer association.



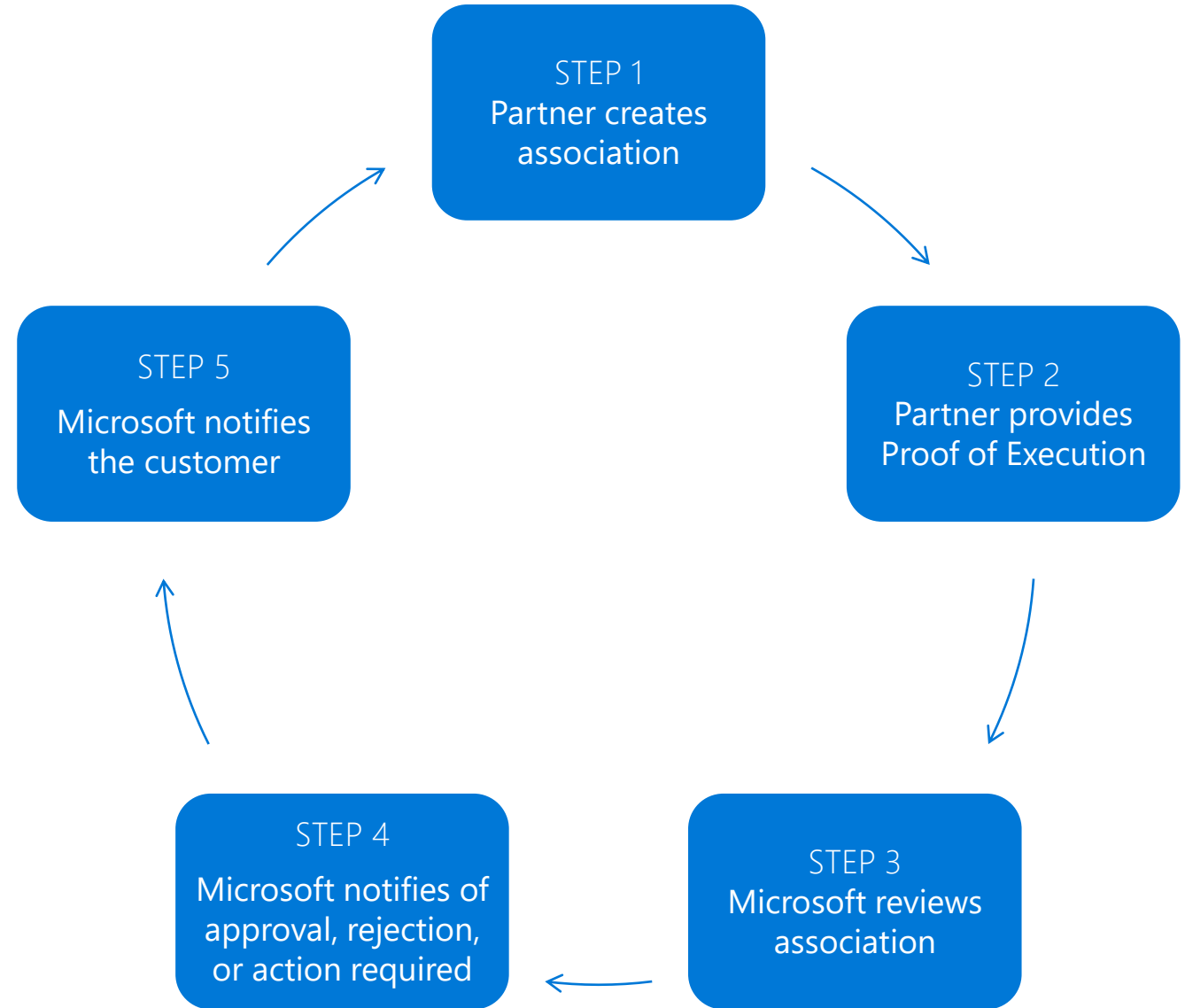
Customer association process

- CPOR is how partners associate with customers at product/workload or subscription level via claims.
- CPOR is how partners will get recognized for the engagement and impact they drive.
- Partners will create the association within Partner Center. Microsoft will verify the association request with the customer.
- A single customer can have multiple partners but only one partner per product/workload or subscription.



Customer association process

- After you create a new customer association, Microsoft will verify the details of the association and proof of execution provided to ensure its accuracy.
- If you and another partner claim for the same customer and product/workload, Microsoft will review each partner's proof of execution documentation to determine which partner to approve.
- Additional information might be requested from both partners which could cause delays in processing your association request.
- If your association is approved Microsoft will notify the customer



Creating a customer association
(Business Applications)

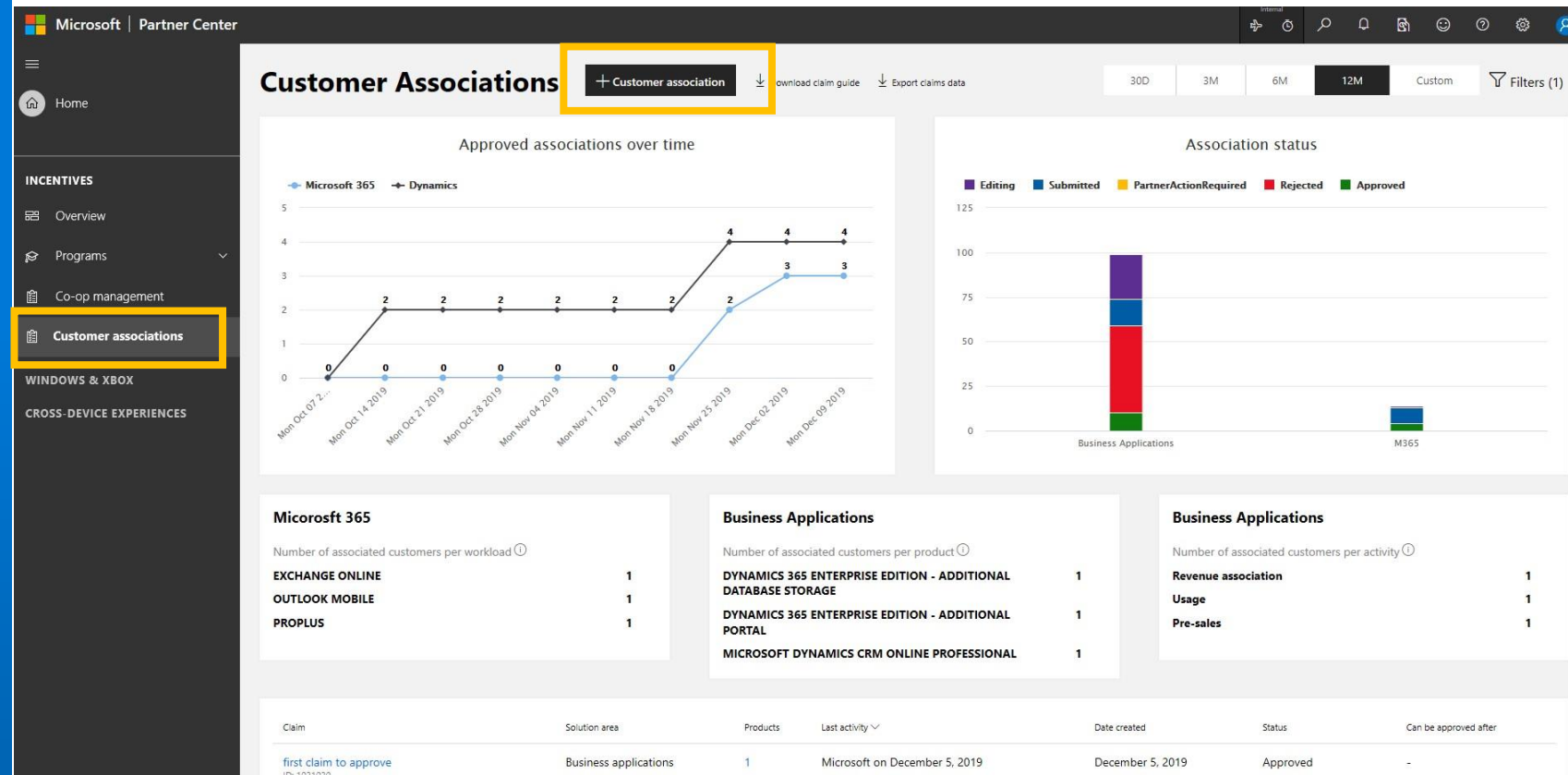
Creating an association (Business Applications)

To create an association, you must follow the steps below:

- Visit **Partner Center Dashboard**
- Under **Incentives**, select **Customer associations**.
- Select **+Customer association**

Note:

- A new window will open where you provide information about your association.
- Alternatively, you can select the relevant program under the **Program** dropdown menu. Then select Customer Association.
- Only the following users in Partner Center can view and create associations.
 - Incentive Admin
 - Incentive User



Creating an association (Business Applications)

To create an association, you must follow the steps below:

A new window opens. Filling out these details will determine the type of association you create.

- Select Solution area

Note:

- This is a dynamic screen where the options change based on your selection.
- The solution area and activity selected are applicable for certain incentive programs.

Customer Associations

+Customer association

Download claim guide

Export claims data

30D

3M

6M

12M

Approved associations over time

Microsoft 365

Business Applications

0

27. Jan

3. Feb

10. Feb

17. Feb

Association status for claims created in selected time period

Editing

Submitted

PartnerActionRequired

Rejected

Approved

4

3

Business Applications

1

Microsoft 365

Number of associated customers per workload ⓘ

PROPLUS

Business Applications

Number of associated customers per activity

PRE-SALES

Associate customer

Select the solution area you want to make a claim for.

Solution area

☒ Business Applications

☐ Microsoft 365

Cancel

Continue

Claim	Solution area	Customer domain name	Products	Last activity ^	Date created	Status
Scenario 1 ID: 1000012	Business applications	microsoft.com	1	Microsoft on March 25, 2020	March 25, 2020	Approved
Scenario 2 ID: 1000013	Microsoft 365	microsoft.com	1	Microsoft on March 25, 2020	March 25, 2020	Approved
Scenario 3 ID: 1000014	Business applications	microsoft.com	1	Customer on March 25, 2020	March 25, 2020	Customer cc

Creating an association

(Business Applications)

- Select the desired activity

Note: Do not select "Revenue association" if you also want to earn incentives for this customer association

The revenue association option is only applicable under the OSA Sell incentive program.

Associations

+Customer association

Download claim guide

Export claims data

30D

3M

6M

Approved associations over time

Business Applications

3. Feb

10. Feb

17. Feb

customers per workload

Association status for claims created in se

Editing

Submitted

PartnerActionRequired

Rejected

Approved

4

3

Business Applications

1

Business Applications

Number of associated customers

PRE-SALES

Associate customer

Select the activity you did to support your customer.

Either choose an incentive fee motion (which includes pre-sales and usage) or revenue association. For more information, please consult the program guides found on the [overview page](#).

Incentive fee

☒ Pre-sales

☐ Usage

Revenue association

☐ Revenue association

Associate with your customer via the 'pre-sales' option if you influenced their selection of an eligible product, and you want to apply for pre-sale incentives.

Back

Cancel

Continue

Solution area	Customer domain name	Products	Last activity	Date created
Business applications	microsoft.com	1	Microsoft on March 25, 2020	March 25, 2020
Microsoft 365	microsoft.com	1	Microsoft on March 25, 2020	March 25, 2020
Business applications	microsoft.com	1	Customer on March 25, 2020	March 25, 2020
Business applications	microsoft.com	1	Ola Demmo on April 1, 2020	April 1, 2020

Creating an association (Business Applications)

To create an association, you must follow the steps below:

The next window appears where you select your location and customer for this association.

- Select MPN location
- Filter locations participating in incentives (if applicable)
- Enter Customer domain name
- Enter Directory ID (Tenant ID).
- Select **Continue**.

Customer Associations

+Customer association

Download claim guide

Export claims data

30D3M6M

Approved associations over time

Microsoft 365

Business Applications

0

27. Jan3. Feb10. Feb17. Feb

Association status for claims created in selected

Editing

Submitted

PartnerActionRequired

Rejected

Approved

4

Business Applications

1

Business Applications

Number of associated customers per activ
PRE-SALES

Associate customer

Select the MPN ID for your company entity that will be associated with the customer.
Add the customer's domain name and directory ID (tenant ID).

The MPNs listed in the dropdown box below include all active MPNs that you have access to. In order to earn incentives for pre-sales in Business Applications, the MPN you select must be enrolled in the OSA Sell incentive program. [Manage enrollments here.](#)

MPN location

TORONTO, CA (563676) *

☐ Only show enrolled MPNs *

Customer domain name

company.onmicrosoft.com

Directory ID (Tenant ID)

0XXXXXXX-YYYY-HHHH-GGGG-123456789123

Back

Cancel

Continue

Microsoft 365

Number of associated customers per workload ⓘ
PROPLUS

Claim	Solution area				Date created	Status
Scenario 1 ID: 1000012	Business applications				25, 2020	Approve
Scenario 2 ID: 1000013	Microsoft 365	microsoft.com	1	Microsoft on March 25, 2020	March 25, 2020	Approve
Scenario 3 ID: 1000014	Business applications	microsoft.com	1	Customer on March 25, 2020	March 25, 2020	Custome
claim test ID: 1000000	Business applications	microsoft.com	2	Ola Demmo on April 1, 2020	April 1, 2020	Under re

Creating an association (Business Applications)

To create an association, you must follow the steps below:

The next window appears where you select the products for this association.

- Select product(s)
- Select **Continue**.

Note:

- Products already associated with your organization, will be grayed out and unavailable for selection.
- Only select products you are actively engaged with the customer on. Otherwise your association may be rejected or delayed.
- Business Applications claims are associated at the Tenant/Product/Subscription level

Customer Associations

+Customer association

Download claim guide

Export claims data

30D

3M

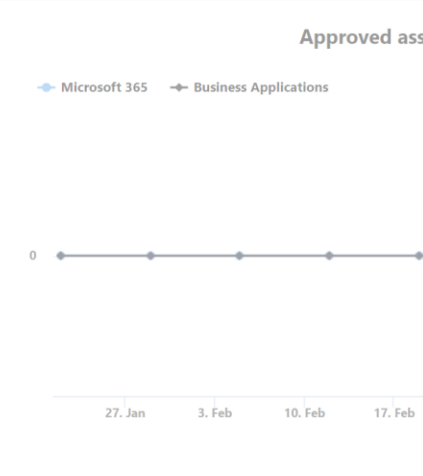
6M

12M

Approved associations over time

Microsoft 365

Business Applications



Association status for claims created in selected time range

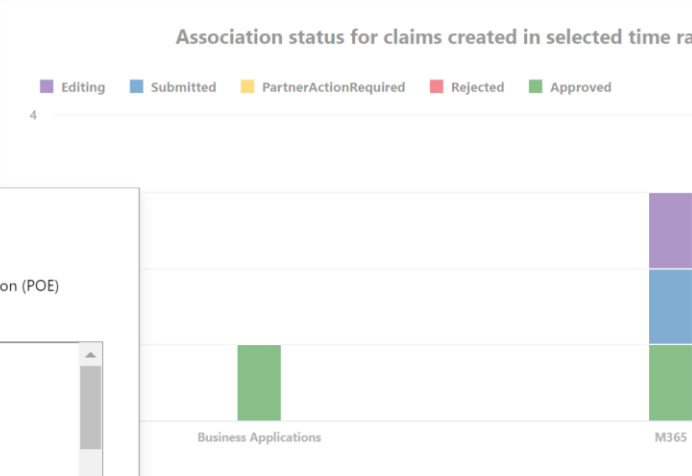
Editing

Submitted

PartnerActionRequired

Rejected

Approved



Microsoft 365

Number of associated customers per workload ⓘ

PROPLUS

Business Applications

Number of associated customers per activity ⓘ

PRE-SALES

Associate customer

Select up to four product(s)/workload(s) for which your proof of execution (POE) supports.

☐ DYNAMICS 365 CUSTOMER ENGAGEMENT PLAN ENTERPRISE EDITION

☒ DYNAMICS 365 ENTERPRISE EDITION - ADDITIONAL DATABASE STORAGE

☒ DYNAMICS 365 ENTERPRISE EDITION - ADDITIONAL PORTAL

☐ DYNAMICS 365 FOR MARKETING USL

☐ DYNAMICS 365 FOR TEAM MEMBERS

By selecting continue, I agree to the language in the applicable Incentive guide.

Back

Cancel

Continue

Claim	Solution area				Date created	Status
Scenario 1 ID: 1000012	Business applications	microsoft.com	1	Microsoft on March 25, 2020	March 25, 2020	Approved
Scenario 2 ID: 1000013	Microsoft 365	microsoft.com	1	Microsoft on March 25, 2020	March 25, 2020	Approved
Scenario 3 ID: 1000014	Business applications	microsoft.com	1	Customer on March 25, 2020	March 25, 2020	Customer consent d
claim test ID: 1000000	Business applications	microsoft.com	2	Ola Demmo on April 1, 2020	April 1, 2020	Under review
claim test ID: 1000000	Business applications	microsoft.com	2	Ola Demmo on April 1, 2020	April 1, 2020	Under review

Creating an association (Business Applications)

To create an association, you must follow the steps below:

For Business Applications, a new window may appear asking for the Subscription ID.

- Enter Subscription ID
- Select **Continue**
- The system will then validate the subscription provided

Note:

- The customer must have purchased the subscription.
- Subscription ID is required if the customer has multiple subscriptions of a single product or the product(s) selected don't exist on the Tenant ID provided.
- Contact the customer associated with this claim for subscription information.
- Please note you must wait 48hrs after subscription activation to claim.

Customer Associations

+Customer association

Download claim guide

Export claims data

30D

3M

6M

Approved associations over time

Microsoft 365

Business Applications

27. Jan3. Feb10. Feb17. Feb

Association status for claims created in selected

Editing

Submitted

PartnerActionRequired

Rejected

Approved

4

3

Business Applications

1

Microsoft 365

Number of associated customers per workload ⓘ

PROPLUS

Associate customer

Enter your subscription(s) by product below. To access this information, contact the customer associated with this claim.

DYNAMICS 365 ENTERPRISE EDITION - ADDITIONAL DATABASE STORAGE

0XXXXXXX-YYYY-HHHH-GGGG-123456789123

+ Add subscription

DYNAMICS 365 ENTERPRISE EDITION - ADDITIONAL PORTAL

0XXXXXXX-YYYY-HHHH-GGGG-123456789123

+ Add subscription

Back

Cancel

Continue

Business Applications

Number of associated customers per act

PRE-SALES

Claim	Solution area	Customer domain name	Products	Last activity ^	Date created	Status
Scenario 1 ID: 1000012	Business applications	microsoft.com	1	Microsoft on March 25, 2020	March 25, 2020	Approvi
Scenario 2 ID: 1000013	Microsoft 365	microsoft.com	1	Microsoft on March 25, 2020	March 25, 2020	Approvi
Scenario 3 ID: 1000014	Business applications	microsoft.com	1	Customer on March 25, 2020	March 25, 2020	Custom

Creating an association (Business Applications)

When selecting product(s) for Business Applications associations you may be required to provide the subscription.

Contact the customer associated with this claim for this information.
Customers can find this information by

1. Logging into the O365 portal at: <https://portal.office.com/>
2. Selecting Billing > Products & Services.
3. Selecting the subscription name.
4. Selecting "Partner".
5. The subscription ID will be visible in the middle of the page.

The screenshot shows the Microsoft 365 portal interface. On the left is a navigation menu with options like Home, Users, Groups, Resources, Billing, Products & services, Licenses, Bills, Billing accounts, Payment methods, Billing notifications, Support, Settings, Setup, and Reports. The 'Products & services' section is expanded, showing 'Office 365 Business Essentials' with a price of \$5.00 per user/month. Below this, there's a 'Billing' section showing the same price and a 'Settings & Actions' section with links like 'Cancel subscription', 'Edit service usage address', and 'Install'. A warning message states 'Subscription has a past due payment Pay now'. At the bottom, there's a section for 'Enter Partner Network Id' with a text input field and an 'Add' button. The subscription ID '90de0f24-3db1-4fe5-8f98-90de0f24-3db1' is visible in the top right corner.

Products & services

Office 365 Business Essentials
\$5.00 user/month • Commercial direct

Licenses

1 available of 1 (0 used)

Add/Remove licenses

Billing

\$5.00 (excluding tax)

Billed monthly Edit • Visa ****6868 Edit

Renews on 6/9/20 Edit

Subscription has a past due payment Pay now

View last bill

Settings & Actions

Cancel subscription

Edit service usage address

Install

Users Add-ons Partner Upgrade

Are you currently working with a partner who deploy, optimize, or manage your online services? Enter their Microsoft Partner Network ID to associate them with this subscription (SubId: 90de0f24-3db1-4fe5-8f98-90de0f24-3db1).

By continuing, you agree that Microsoft can share your ongoing contact and subscription information, including aggregated information about your organization's usage of the service, with this partner.

Enter Partner Network Id

Enter Microsoft Partner Network ID Add

Creating an association (Business Applications)

If you receive the following error it could be for several reasons:

- The product selected doesn't exist on the customers tenant
- The subscription provided is not for Dynamics
- The subscription provided is for CSP
- The customer has not yet activated the products for that subscription
- The subscription has already been claimed
- The identifier provided is not a subscription ID

Associate customer

Enter your subscription(s) by product below. To access this information, contact the customer associated with this claim.

DYNAMICS 365 CUSTOMER ENGAGEMENT PLAN

 This subscription is invalid or has already been claimed.

[+ Add subscription](#)

[Back](#)

Cancel

Continue

Creating an association

(Business Applications)

To create an association, you must follow the steps below:

- Add your customer contact information. Microsoft will use these details to notify the customer of your request to be associated.
- Enter your organization's preferred contact. They should be familiar with the customer, as they will be included in the consent email.
- Name your claim. This will help you easily identify the claim later.
- Select **Create claim.**

Note:

For privacy reasons, Microsoft will notify the customer contact to give them the option of denying your access to their data. The customer's Office Portal administrator will also be copied in.

Customer Associations

+Customer association

Download claim guide

Export claims data

30D

3M

6M

Approved associations over time

Microsoft 365

Business Applications

0

27. Jan

3. Feb

10. Feb

17. Feb

Association status for claims created in select

Editing

Submitted

PartnerActionRequired

Rejected

Approved

4

Microsoft 365

Number of associated customers per workload

PROPLUS

Business Applications

Number of associated customers per workload

PRE-SALES

Associate customer

Please provide your customer's primary contact information, and your own company's contact information for this customer. We will use this information to notify the customer of your request to be associated with their product/workload(s).

Business contact name

Business contact email

Joseph Jones

Business contact work title

Your company information

Contact name

Contact email

Name this claim

Back

Cancel

Create claim

Claim	Solution area				Date created	Status
Scenario 1 ID: 1000012	Business applications				March 25, 2020	Appr
Scenario 2 ID: 1000013	Microsoft 365	microsoft.com	1	Microsoft on March 25, 2020	March 25, 2020	Appr
Scenario 3 ID: 1000014	Business applications	microsoft.com	1	Customer on March 25, 2020	March 25, 2020	Custc

Creating an association (Business Applications)

To create an association, you must follow the steps below:

- The association page displays. You can see all the information have just entered related to the claim.

New claim editing functionality in Partner Center:

- If you select **Edit** you can change some details of your claim like:
 - MPN Selection
 - Product Selection
 - Subscription Selection
 - Contact Information
- The **Claim Status** diagram on the top right, tells you what stage your claim is at and if any action is needed.

Dynamics for CompanyX (1000004)

Claim details

Claim ID	1000004
Date created	April 1, 2020
Solution area	Business Applications
Activity	Pre-sales
Location	TORONTO, CA (MPN: 563676)
Partner	name (telupu@microsoft.com)
Customer tenant ID	72F988BF-86F1-41AF-91AB-2D7CD011DB47
Customer domain name	microsoft.com
Customer contact	Joseph Jones (telupu@microsoft.com)
Product(s)	DYNAMICS 365 ENTERPRISE EDITION - ADDITIONAL DATABASE STORAGE View details

[Edit](#) ⓘ
Edit your MPN selection, product/workload selection, and contact information. Solution area and activity selection is not editable.

Claim status

...

Editing

☒ Upload proof of execution

✓

Review

✓

Approval

Proof of execution

[Download template](#) ↓


Drag or browse files to upload ⓘ

Optional comment

Add any additional information you want to provide the reviewer regarding your claim.

Please add your comment here

 Proof of execution document is required to submit this claim.

 For the reviewer to take action, you must submit your claim.

Submit claim

Save comments

Creating an association (Business Applications)

To create an association, you must follow the steps below:

- It is possible to see the history of all actions relating to this claim
- You can now upload the supporting documentation for the claim

Microsoft | Partner Center

Home

INCENTIVES

Overview

Programs

Co-op management

Customer associations

WINDOWS

CROSS-DEVICE EXPERIENCES

Marsha (1004973)

Claim details

Claim ID

1004973

Date created

September 20, 2019

Activity

Pre-sales / Usage

Location

BEZONS, FR (MPN: 504203)

Partner

z (z@microsoft.com)

Customer tenant ID

72F9888F-86F1-41AF-91AB-2D7CD011DB47

Customer domain name

microsoft.com

Product(s)

DYNAMICS 365 - ADDITIONAL PRODUCTION INSTANCE

Claim Status

History

Editing

Review

Approval

Proof of execution

Download template

Drag or browse files to upload

Optional comment

Add any additional information you want to provide the reviewer regarding your claim.

Please add your comment here

Proof of execution document is required to submit this claim.

Submit claim

Save comments

Creating an association (Business Applications)

- When finished, click "Submit claim"

Business Applications

Business Applications

Business Applications

Business Applications

Business Applications

Business Applications

Business Applications

Business Applications

Business Applications

Business Applications

Business Applications

Business Applications

Ready to submit your claim?

Once you submit your claim, you can no longer edit it unless a reviewer requires more info. Once your claim is approved, an email will get sent to the customer notifying them of your association.

Submit claim

Cancel

Drag or browse files to upload ⓘ

Business Applications

Revenue association

View Business Influencer-associated revenue within the "Partner focus– Sales summary" section of PartnerSource Business Center (PSBC).

- Select Performance Area "AX/D365 Rev Rec" for recognition of ERP revenue.
- Select Performance Area "CRM/D365 Rev Rec" for recognition of CRM revenue.

For more details on revenue association and the applicable requirements please review the OSA Sell incentive guide on aka.ms/partnerincentives

PartnerSource Business Center VIEWING

[Team Member](#) [Home](#) [Partner Focus](#) [Orders](#) [Developer Tools](#) [Support](#)

Sales Summary -

Account Number:
Data as of Friday, December 21, 2018
Performance Area: **AX/D365 Rev Rec**
View sale for: **Organization**
Currency: **US Dollars**

AX/D365 Rev Rec Performance (Gross to Partner) - 12 Month Roll

Revenue Performance	License Revenue	Enhancement and Software Assurance Revenue	Total Revenue	Customer Adds
Current 12 Month Roll				0

[Show Detailed AX/D365 Rev Rec Revenue Information](#)

PartnerSource Business Center VIEWING

[Team Member](#) [Home](#) [Partner Focus](#) [Orders](#) [Developer Tools](#) [Support](#)

Sales Summary -

Account Number:
Data as of Friday, December 21, 2018
Performance Area: **CRM/D365 Rev Rec**
View sale for: **Organization**
Currency: **US Dollars**

CRM/D365 Rev Rec Performance (Gross to Partner) - 12 Month Roll

Revenue Performance	License Revenue	Enhancement and Software Assurance Revenue	Total Revenue	Customer Adds	Net Seat Adds
Current 12 Month Roll					

[Show Detailed CRM/D365 Rev Rec Revenue Information](#)

Create a customer association
(Microsoft 365)

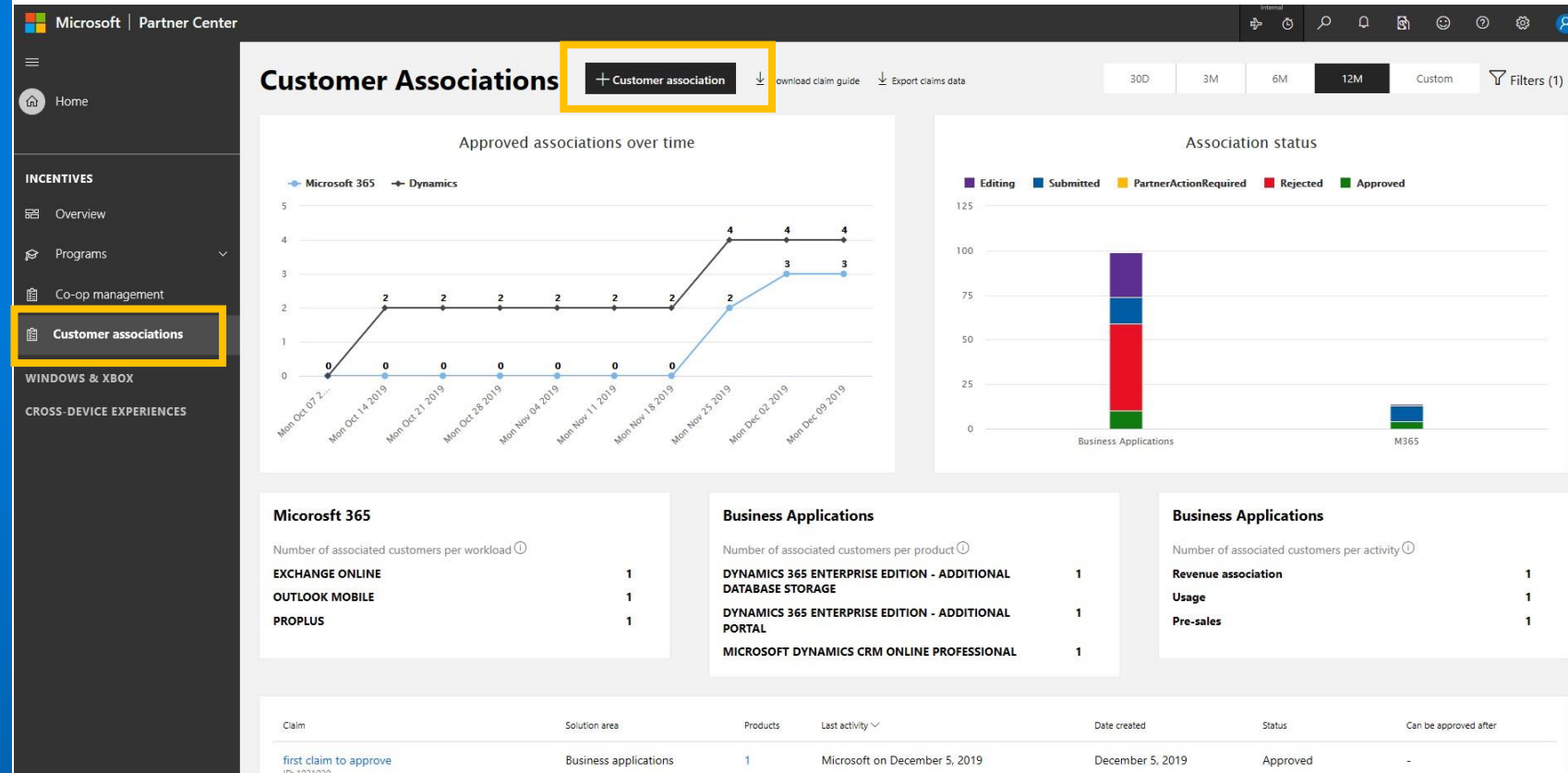
Creating an association (Microsoft 365)

To create an association, you must follow the steps below:

- Visit **Partner Center Dashboard**
- Under **Incentives**, select **Customer associations**.
- Select **+Customer association**

Note:

- A new window will open where you provide information about your association.
- Alternatively, you can select the relevant program under the **Program** dropdown menu. Then select Customer Association.
- Only the following users in Partner Center can view and create associations.
 - Incentive Admin
 - Incentive User



Creating an association (Microsoft 365)

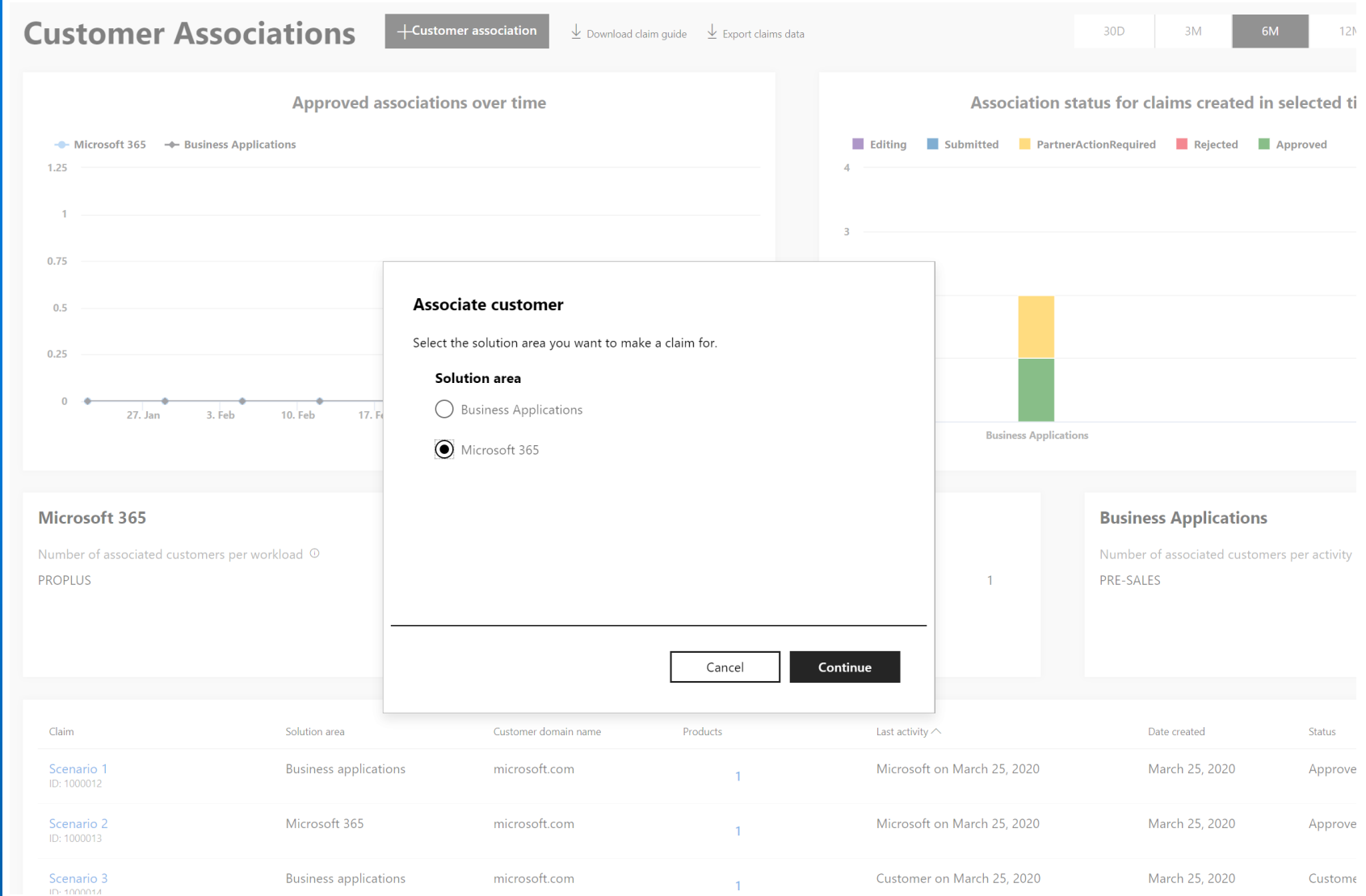
To create an association, you must follow the steps below:

A new window opens. Filling out these details will determine the type of association you create.

- Select Solution area

Note:

- This is a dynamic screen where the options change based on your selection.
- The solution area and activity selected are applicable for certain incentive programs.



Creating an association (Microsoft 365)

- Select the desired activity

Customer Associations

+Customer association

Download claim guide

Export claims data

30D

3M

Approved associations over time

Microsoft 365

Business Applications

1.25

1

0.75

0.5

0.25

0

27. Jan

3. Feb

10. Feb

17. Feb

Association status for claims created

Editing

Submitted

PartnerActionRequired

Rejected

4

3

Business Applications

1

Microsoft 365

Number of associated customers per workload ⓘ

PROPLUS

Business Application

Number of associated customers per workload ⓘ

PRE-SALES

Associate customer

Select the activity you did to support your customer.

For more information, please consult the program guides found on the [overview page](#).

Incentive fee

☒ Usage ⓘ

Associate with your customer via the 'usage' option if you drive their adoption and usage of an eligible product/workload, and you want to apply for usage incentives.

Back

Cancel

Continue

Claim	Solution area	Customer domain name	Products	Last activity ^	Date created
Scenario 1 ID: 1000012	Business applications	microsoft.com	1	Microsoft on March 25, 2020	March 25, 2020
Scenario 2 ID: 1000013	Microsoft 365	microsoft.com	1	Microsoft on March 25, 2020	March 25, 2020

Creating an association (Microsoft 365)

To create an association, you must follow the steps below:

The next window appears where you select your location and customer for this association.

- Select MPN location
- Filter locations participating in incentives (if applicable)
- Enter Customer domain name
- Enter Directory ID (Tenant ID).
- Select **Continue**.

Customer Associations

+Customer association

Download claim guide

Export claims data

30D

3M

6M

Approved associations over time

Microsoft 365

Business Applications

1.25

1

0.75

0.5

0.25

0

27. Jan

3. Feb

10. Feb

17. Feb

Association status for claims created in select

Editing

Submitted

PartnerActionRequired

Rejected

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4

Business Applications

1

Microsoft 365

Number of associated customers per workload ⓘ

PROPLUS

Business Applications

Number of associated customers per workload ⓘ

PRE-SALES

Claim

Solution area

Back

Cancel

Continue

Scenario 1

ID: 1000012

Business applications

microsoft.com

1

Microsoft on March 25, 2020

March 25, 2020

A

Scenario 2

ID: 1000013

Microsoft 365

microsoft.com

1

Microsoft on March 25, 2020

March 25, 2020

A

Scenario 3

ID: 1000014

Business applications

microsoft.com

1

Customer on March 25, 2020

March 25, 2020

C

Associate customer

Select the MPN ID for your company entity that will be associated with the customer. Add the customer's domain name and directory ID (tenant ID).

The MPNs listed in the dropdown box below include all active MPNs that you have access to. In order to earn incentives for usage in Microsoft 365, the MPN you select must be enrolled in the OSU - Microsoft 365 incentive program. Manage enrollments [here](#).

MPN location

TORONTO, CA (563676) *

☐ Only show enrolled MPNs *

Customer domain name

company.onmicrosoft.com

Directory ID (Tenant ID)

0XXXXXXX-YYYY-HHHH-GGGG-123456789123

Creating an association (Microsoft 365)

To create an association, you must follow the steps below:

The next window appears where you select the workloads for this association.

- Select workload(s)
- Select **Continue**.

Note:

- Workloads already associated with your organization, will be grayed out and unavailable for selection.
- Only select workloads you are actively engaged with the customer on. Otherwise your association may be rejected or delayed.
- Microsoft 365 is associated at the Tenant/Workload level

The screenshot displays the 'Customer Associations' dashboard. At the top, there's a header with the title 'Customer Associations', a '+Customer association' button, and links for 'Download claim guide' and 'Export claims data'. On the right, there are filters for '30D' and '3M'. The main area is divided into two sections: 'Approved associations over time' on the left, which features a line chart comparing 'Microsoft 365' and 'Business Applications' over a timeline from January to February, and 'Association status for claims created i' on the right, which includes a legend for 'Editing', 'Submitted', 'PartnerActionRequired', and 'Rejected', and a bar chart for 'Business Applications'. A modal dialog box titled 'Associate customer' is centered on the screen. It prompts the user to 'Select up to four product(s)/workload(s) for which your proof of execution (POE) supports.' The dialog lists several options: 'AZURE ACTIVE DIRECTORY PREMIUM (AADP)', 'AZURE ADVANCED THREAT PROTECTION (AATP)*', 'AZURE INFORMATION PROTECTION (AIP)' (checked), 'EXCHANGE ONLINE*', and 'INTUNE' (checked). Below the list, a note states: '* Your company has already submitted a customer association for this product/workload'. At the bottom of the dialog, there's a checkbox for 'By selecting continue, I agree to the language in the applicable Incentive guide.' and three buttons: 'Back', 'Cancel', and 'Continue'. In the background, a table lists existing associations with columns for 'Claim', 'Solution area', 'Date created', and 'Date created'. Two entries are visible: 'Scenario 1' (ID: 1000012) for 'Business applications' and 'Scenario 2' (ID: 1000013) for 'Microsoft 365'.

Customer Associations +Customer association Download claim guide Export claims data 30D 3M

Approved associations over time

Microsoft 365 Business Applications

1.25 1 0.75 0.5 0.25 0

27. Jan 3. Feb 10. Feb 17. Feb

Association status for claims created i

Editing Submitted PartnerActionRequired Rejected

4

Business Applications

Associate customer

Select up to four product(s)/workload(s) for which your proof of execution (POE) supports.

☐ AZURE ACTIVE DIRECTORY PREMIUM (AADP)

☐ AZURE ADVANCED THREAT PROTECTION (AATP)*

☒ AZURE INFORMATION PROTECTION (AIP)

☐ EXCHANGE ONLINE*

☒ INTUNE

* Your company has already submitted a customer association for this product/workload

By selecting continue, I agree to the language in the applicable Incentive guide.

Back Cancel Continue

Microsoft 365

Number of associated customers per workload ⓘ

PROPLUS

Claim	Solution area	Date created
Scenario 1 ID: 1000012	Business applications	March 25, 2020
Scenario 2 ID: 1000013	Microsoft 365	March 25, 2020

Creating an association (Microsoft 365)

To create an association, you must follow the steps below:

- Add your customer contact information. Microsoft will use these details to notify the customer of your request to be associated.
- Enter your organization's preferred contact. They should be familiar with the customer, as they will be included in the consent email.
- Name your claim. This will help you easily identify the claim later.
- Select **Create claim.**

Note:

For privacy reasons, Microsoft will notify the customer contact to give them the option of denying your access to their data. The customer's Office Portal administrator will also be copied in.

Customer Associations

+Customer association

Download claim guide

Export claims data

30D

3M

6M

Approved associations over time

Microsoft 365

Business Applications

0

27. Jan

3. Feb

10. Feb

17. Feb

Association status for claims created in select

Editing

Submitted

PartnerActionRequired

Rejected

Approved

4

Microsoft 365

Number of associated customers per workload ⓘ

PROPLUS

Business Applications

Number of associated customers per workload ⓘ

PRE-SALES

Associate customer

Please provide your customer's primary contact information, and your own company's contact information for this customer. We will use this information to notify the customer of your request to be associated with their product/workload(s).

Business contact name

Business contact email

Joseph Jones

Business contact work title

Your company information

Contact name

Contact email

Name this claim

Back

Cancel

Create claim

Claim	Solution area				Date created	Status
Scenario 1 ID: 1000012	Business applications				March 25, 2020	Appr
Scenario 2 ID: 1000013	Microsoft 365	microsoft.com	1	Microsoft on March 25, 2020	March 25, 2020	Appr
Scenario 3 ID: 1000014	Business applications	microsoft.com	1	Customer on March 25, 2020	March 25, 2020	Custc

Creating an association (Microsoft 365)

To create an association, you must follow the steps below:

- The association page displays. You can see all the information have just entered related to the claim.

New claim editing functionality in Partner Center:

- If you select **Edit** you can change some details of your claim like:
 - MPN Selection
 - Workload Selection
 - Subscription Selection
 - Contact Information
- The **Claim Status** diagram on the top right, tells you what stage your claim is at and if any action is needed.

M365 for CompanyX (1000005)

Claim details

Edit ⓘ ⓘ

Edit your MPN selection, product/workload selection, and contact information. Solution area and activity selection is not editable.

Claim ID	1000005
Date created	April 1, 2020
Solution area	Microsoft 365
Activity	Usage
Location	TORONTO, CA (MPN: 563676)
Partner	My name
Customer tenant ID	72F988BF-86F1-41AF-91AB-2D7CD011DB47
Customer domain name	microsoft.com
Product(s)	AZURE INFORMATION PROTECTION (AIP), INTUNE

Claim status

✓ Ready to submit

✓ Review

✓ Approval

Proof of execution [Download template](#) ⬇

Document name	Comment	Last activity
Scanning document Proof of Execution with CompanyX.xlsx ✕	Add note	Uploaded by Ola Demmo on April 1, 2020 at 12:23:45 PM
<div><div>Drag or browse files to upload ⓘ</div></div>		

Optional comment

Add any additional information you want to provide the reviewer regarding your claim.

Please add your comment here

OD

Ola Demmo on April 1, 2020, 12:23 PM

I have a comment on this claim

⚠ For the reviewer to take action, you must submit your claim.

Submit claim

Save comments

Creating an association (Microsoft 365)

To create an association, you must follow the steps below:

- It is possible to see the history of all actions relating to this claim
- You can now upload the supporting documentation for the claim

Microsoft | Partner Center

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Marsha (1004973)

Claim details

Claim ID

1004973

Date created

September 20, 2019

Activity

Pre-sales / Usage

Location

BEZONS, FR (MPN: 504203)

Partner

z (z@microsoft.com)

Customer tenant ID

72F9888F-86F1-41AF-91AB-2D7CD011DB47

Customer domain name

microsoft.com

Product(s)

DYNAMICS 365 - ADDITIONAL PRODUCTION INSTANCE

Claim Status

Editing

Review

Approval

History

Proof of execution

Download template

Drag or browse files to upload

Optional comment

Add any additional information you want to provide the reviewer regarding your claim.

Please add your comment here

Proof of execution document is required to submit this claim.

Submit claim

Save comments

Creating an association (Microsoft 365)

- When finished, click "Submit claim"

Business Applications

Business - sales

10000, CA (MPN: 563676)

Phone (telupu@microsoft.com)

988BF-86F1-41AF-91AB-2D7CD011DB47

microsoft.com

Stephen Jones (telupu@microsoft.com)

Microsoft 365 ENTERPRISE EDITION - ADDITIONAL DATABASE

Usage

[View details](#)

[Template](#) ↓

CompanyX.xlsx ×

Ready to submit your claim?

Once you submit your claim, you can no longer edit it unless a reviewer requires more info. Once your claim is approved, an email will get sent to the customer notifying them of your association.

Submit claim Cancel

[Drag or browse files to upload](#) ⓘ

Provide the reviewer regarding your claim.

on April 1, 2020 at 11:31

Submitting Proof of Execution

Proof of Execution

In between the creation and submission of your customer association, you will need to provide a proof of execution (POE) for each customer association.

POE must be included with all customer associations, for Microsoft to validate your involvement with the customer. Not applicable for revenue association.

For detailed guidance please review the POE Guidance document on aka.ms/partnerincentives.

Note:

- Partners can either use the POE template, or submit other supporting document (ex: SOW).
- To use the template, select **Download Template**.
- POE must be included with all claims in order to be submitted.

Microsoft | Partner Center

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Marsha (1004973)

Claim details

Claim ID

1004973

Date created

September 20, 2019

Activity

Pre-sales / Usage

Location

BEZONS, FR (MPN: 504203)

Partner

z (z@microsoft.com)

Customer tenant ID

72F988BF-86F1-41AF-91AB-2D7CD011DB47

Customer domain name

microsoft.com

Product(s)

DYNAMICS 365 - ADDITIONAL PRODUCTION INSTANCE

Claim Status

Editing

Review

Approval

Proof of execution

Download template

Drag or browse files to upload

Optional comment

Add any additional information you want to provide the reviewer regarding your claim.

Please add your comment here

Proof of execution document is required to submit this claim.

Submit claim

Save comments

Proof of Execution

POE quality is the determining factor for a successful claim. We require submission of a Statement of Work, a Master Agreement or a Purchase order that contains:

A customer signature or proof of customer acknowledgment to validate your involvement with the customer.

1. Connection between products/workloads and a description of the intended/ongoing work.
2. Activities driving revenue and/or usage growth need to be explicitly stated.
3. The name of the claiming partner and the corresponding customer clearly visible
4. Dates shown clearly. Please ensure milestones and partner/customer signature dates are visible.

Microsoft | Partner Center

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Marsha (1004973)

Claim details

Claim ID1004973

Date createdSeptember 20, 2019

ActivityPre-sales / Usage

LocationBEZONS, FR (MPN: 504203)

Partnerz (z@microsoft.com)

Customer tenant ID72F988BF-86F1-41AF-91AB-2D7CD011DB47

Customer domain namemicrosoft.com

Product(s)DYNAMICS 365 - ADDITIONAL PRODUCTION INSTANCE

Claim Status

Editing

Review

Approval

Proof of execution [Download template](#)

Drag or browse files to upload

Optional comment

Add any additional information you want to provide the reviewer regarding your claim.

Please add your comment here

▲ Proof of execution document is required to submit this claim.

Submit claim

Save comments

Submit an Association

To submit an association, you must follow the steps below:

- **Drag or browse files to upload** the proof of execution for your association.
- Select **Submit claim** when you are satisfied that you have added the relevant details.

Note:

- Add an optional comment to the document uploaded.
- Add an optional comment with details about your overall association.

Claim details

[Edit](#)

Claim ID	1055772
Date created	February 11, 2020
Solution area	Microsoft 365
Activity	Usage
Location	TEST TEST Mary Poppins, US, Redmond (MPN: 5060430)
Partner	Me (me@outlook.com)
Customer tenant ID	
Customer domain name	
Product(s)	AZURE ACTIVE DIRECTORY PREMIUM (AADP)

Claim status

✓

Ready to submit

✓

Review

✓

Approval

Proof of execution

[Download template](#)

Document name	Comment	Last activity
CPOR_ProofOfExecution_Template (1).pdf	Add note	Uploaded by [redacted] on March 2, 2020 at 1:26:11 PM
<div><div></div><div>Drag or browse files to upload</div></div>		

Optional comment

Add any additional information you want to provide the reviewer regarding your claim.

Please add your comment here

Submit claim

Save comments

Status of a claim

Status of an Association:


To check the status of a claim after submission, you must follow the steps below.

- Open your claim. The **Submitted** status is active in the status section.
- A claim will remain in submitted status while it awaits Microsoft review.

Claim details

Claim ID	1012503
Date created	July 24, 2019
Solution area	Business Applications
Activity	Pre-sales
Location	United States (MPN: -1)
Partner	Test (test@gmail.com)
Customer tenant ID	
Customer domain name	microsoft.com
Customer contact	
Product(s)	MICROSOFT DYNAMICS CRM ONLINE ESSENTIAL View details
Flags	3

Claim status

 Submitted

Status of an Association:




To check the status of a claim after submission, you must follow the steps below.

- If your claim is flagged for POE review your claim status will change to "Under Review"
- You should expect a response from Microsoft within five business days after your claim status is changed to "Under Review"
- Microsoft will either approve the claim or request additional information.
- Please note, your claim may be in Under Review status for more than five days if the customer is already associated to another Partner. This will result in longer review time because both associations are evaluated.

Claim details

Claim ID	1012503
Date created	July 24, 2019
Solution area	Business Applications
Activity	Pre-sales
Location	United States (MPN: -1)
Partner	Test (test@gmail.com)
Customer tenant ID	
Customer domain name	microsoft.com
Customer contact	
Product(s)	MICROSOFT DYNAMICS CRM ONLINE ESSENTIAL View details
Flags	3

Claim status

-  Submitted
-  Under review
-  Approval

Status of an Association:

To check the status of a claim after submission, you must follow the steps below.

- If further action is required, your status will be changed to "Partner Action Required."
- You will be notified, and the upload area will re-activate.
- You will be able to edit MPN selection, Product Selection (and Subscription when applicable), and upload additional POE.
- If you cannot provide additional POE for products within your claim, these should be removed by editing your claim.
- Once you have addressed the feedback. Select **Submit claim**.

Note:

- Claims will not be processed unless any requested clarifications have been provided back to Microsoft.
- If you do not respond within 30 days your claim will be Rejected. This means that you have not provided proof documents on time and will need to create a new claim.

Dynamics for CompanyX (1000004)

Claim details

Edit  

Edit your MPN selection, product/workload selection, and contact information. Solution area and activity selection is not editable.

Claim ID	1000004
Date created	April 1, 2020
Solution area	Business Applications
Activity	Pre-sales
Location	TORONTO, CA (MPN: 563676)
Partner	name (telupu@microsoft.com)
Customer tenant ID	72F988BF-86F1-41AF-91AB-2D7CD011DB47
Customer domain name	microsoft.com
Customer contact	Joseph Jones (telupu@microsoft.com)
Product(s)	DYNAMICS 365 ENTERPRISE EDITION - ADDITIONAL DATABASE STORAGE
	View details


Claim status



Submitted






Action required

 The products/services purchased by the customer have not been specified.



Approval


Proof of execution [Download template](#)

Document name	Comment	Last activity
Scanning document Proof of Execution with CompanyX.xlsx 	Add note	Uploaded by Ola Demmo on April 1, 2020 at 11:31:07 AM
<div> Drag or browse files to upload </div>		

Optional comment

Add any additional information you want to provide the reviewer regarding your claim.

Please add your comment here

 For the reviewer to take action, you must submit your claim.

Submit claim

Save comments

Status of an Association:

To check the status of a claim after submission, you must follow the steps below.

Once you re-submit your claim and provide all the relevant information, Microsoft will review it again.

If no further action is required, your status section will update to show that your claim is **Approved**.

After your association is approved a notification will be sent to the customer giving them the opportunity to deny your association. The customer will then have seven days to opt out after Microsoft approval.




Note:

Approved indicates the status of the customer association, not the status of the payment.

Claim details

Claim ID	1012503
Date created	July 24, 2019
Solution area	Business Applications
Activity	Pre-sales
Location	United States (MPN: -1)
Partner	Test (test@gmail.com)
Customer tenant ID	
Customer domain name	microsoft.com
Customer contact	
Product(s)	MICROSOFT DYNAMICS CRM ONLINE ESSENTIAL View details
Flags	3

Claim status

-  Submitted
-  Reviewed
-  Approved

Status of an Association:



To check the status of a claim after submission, you must follow the steps below.

If you have not provided all the required information, your claim will be **Rejected**.

Claim details

Claim ID	1012503
Date created	July 24, 2019
Solution area	Business Applications
Activity	Pre-sales
Location	United States (MPN: -1)
Partner	Test (test@gmail.com)
Customer tenant ID	
Customer domain name	microsoft.com
Customer contact	
Product(s)	MICROSOFT DYNAMICS CRM ONLINE ESSENTIAL View details
Flags	3

Claim status

-  Submitted
-  Reviewed
-  Rejected

Customer Notification

For privacy reasons, Microsoft will notify the customer contact to provide them with the option of denying your access to their subscription. The customer's Office Portal administrator will also be copied.

The customer will receive the consent email.

- If the customer consents to the association request, no action is required from them.
- Customers can deny or cancel the request at any time.
- If the customer denies consent, the status of your customer association will change from **Approved** to **Customer consent denied**.
- If customers have questions, they can reach out to the partner contact provided.

Note:

Customer consent opt-out emails are not sent for revenue association requests.

Please note that the claiming partner is not copied on this notification.

Microsoft 365

Notification of partner association request

Dear Customer,

Partner is requesting to be associated with your Microsoft 365 implementation. If associated, the partner will be able to access information regarding your implementation including and limited to the usage (active entitlements) and the sold seats (qualified entitlements) for the workload they are implementing at your organization.

If you wish to deny or cancel the above association request click [here](#), otherwise there is no action for you.

If you have any questions, please contact the partner.

Customer name: teo lupu

Tenant/Directory ID: 72F988BF-86F1-41AF-91AB-2D7CD011DB47

Domain: microsoft.com

Product(s): [AZURE INFORMATION PROTECTION (AIP), AIP], [EXCHANGE ONLINE, EXO]

Partner organization name:

Partner contact name: organization contact personwoasd

Partner contact email: teo@hotmail.com

Thanks, Microsoft

Microsoft respects your privacy. To learn more please read our online [Privacy Statement](#). Because you have an active account, you

Business Applications

Notification of partner association request

A Microsoft partner is requesting to be associated with your implementation of Dynamics 365. If associated, the partner will be able to access information regarding your implementation including and limited to the usage (active entitlements) and the sold seats (qualified entitlements) for the product they are implementing at your organization.

To provide feedback on the partner to help Microsoft improve your Dynamics 365 experience and get a \$25 gift card, please take this ~1 minute survey [here](#).

If you wish to deny or cancel the above association, please click [here](#), otherwise there is no action for you.

If you have any questions, please contact the partner noted below.

Customer name: teo lupu

Tenant/Directory ID: 72F988BF-86F1-41AF-91AB-2D7CD011DB47

Domain: microsoft.com

Subscription(s): [DYNAMICS 365 ENTERPRISE EDITION - ADDITIONAL PORTAL (QUALIFIED OFFER), D66656C2-F69B-4488-8035-287EB6711DDC, United States], [MICROSOFT DYNAMICS CRM ONLINE BASIC, EBD0569-A643-46F4-94A0-194EF73B85A2, United States]

Partner organization name: FridayINC

Partner contact name: organization contact personwoasd

Partner contact email: telupu@microsoft.com

Thanks, Microsoft

Microsoft respects your privacy. To learn more please read our online [Privacy Statement](#). Because you have an active account, you

Customer Notification

This is what the customer will see if they choose to deny or cancel the association per the email.



Microsoft 365

Azure

Office 365

Dynamics 365

SQL

Windows 10

We are denying the request to associate with this partner

Let us know why you don't want this subscription associated with this partner.

☐ We don't want to share our data.

☐ Partner is unknown

☐ Other

Comments optional

Deny Request

Resources

- Microsoft Partner Network: <https://mspartner.microsoft.com>
 - Program membership, products, licensing, training and event information
- Partner Incentives MPN Portal: <https://partner.microsoft.com/membership/partner-incentives>
- Partner Center: <https://partnercenter.microsoft.com/partner/home>
- Partner Incentives Reporting: <https://partnerincentives.microsoft.com>

Support channels: Support including self-help, live support agents, community support, and support tickets can be accessed through the Microsoft Partner Network on <https://mspartner.microsoft.com>. Under the "Support" tab, select "Contact Support." When the portal opens, select "Partner Incentives" as your Category. You are then able to choose your Topic and Issue.



Thank you.