Microsoft Incentives Claims

1. Log into the Microsoft Partner Centre: <https://partner.microsoft.com/en-us/dashboard/home>
2. Click “Incentives”
3. On left-hand menu, click “Customer Claims”
4. Under Modern Work and Security – Click Add Customer -> User or Consume  
   A screen shot of a computer

   Description automatically generated
5. Enter a name for the claim (i.e Envestra Onboarding / Banctrust Teams Phone System / etc)
6. Select a Partner Location from the dropdown menu
   1. ZA – 3323599
   2. UK – 6323212
   3. SGE – 6767325
   4. US – 6907179  
      A screenshot of a computer

      Description automatically generated
7. Enter in Tenant ID for the Customer
   1. Tech Team can retrieve this information from the customer tenant
   2. It should look similar to the below:  
      A black and white screen with white text

      Description automatically generated
8. Click Next
9. Select the workloads associated with this claim. These must be mentioned, by name, in the scope of work document (usually our proposal document), the highlighted below are typical for a customer on E5 licensing  
   A screenshot of a computer

   Description automatically generated
10. Enter customer’s contact information in the first 3 blocks (this must match the signatory on the proposal document
11. Enter your contact information in the last 2 blocks.
12. Click Next
    1. You may be prompted to enter in this field afterwards, the reason for the email address being different to the Office 365 tenant must be given  
       
13. Click “Add Customer”
14. This will open the claim details page
15. Upload our scope of work document, this must contain:
    1. The workloads from the above step, mentioned by name
    2. The customer’s signature, an eCert must be included, or MS will say the signature cannot be validated
    3. The scope in the document must not be transactional in nature, it must show that we’ve either trained, or physically worked on the specific workload. Just selling the product is not sufficient for these claims.
16. Add comments if the scope document above needs additional explanation.
17. Tick the “I acknowledge that my proof of execution…” box
18. Click “Submit Claim.
19. Microsoft will then check our uploaded documents against the workloads we’re claiming for. They’ll either approve, or ask for more information
    1. Evenlake’s claim is a good example:  
       https://partner.microsoft.com/dashboard/v2/incentives/customer-association/claim/eaa5456e-0d55-4bcb-90d4-72d914c4fd9c/3217216