

Modern enrollment

Investment Plans in Partner Center





Introduction

In this training we explore the investment plans process for partner incentive programs in Partner Center.

The modern planning and execution of marketing funds process



Objectives

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

- Investment plans for new plans
- Access help and support.

Contents

1. Introduction.
2. Create Plan
3. New Campaign
4. New Activity
5. POE
6. Support

Planning

In order to be eligible for payment of Marketing Funds, Partners need to submit a Plan and an overview of the Marketing Funds to be spent on Activities in accordance with MS instructions and approved by Microsoft before execution of the Activities. Approval of a Plan is a necessary prerequisite to payment of Marketing Funds.

Plans from the CHIP system will NOT be migrated to Partner Center.

More information on the Planning and Execution of Marketing Funds can be found in the [Jumpstart 2020 Tier 1 Program Letter](#), [Office Incentive Program Resource Center](#), [Program Year 2020 Server MDF Program Letter](#)



Plan Process

1 Select Program from dropdown under Incentives; Program name.

2. Select Create plan in the applicable market type.

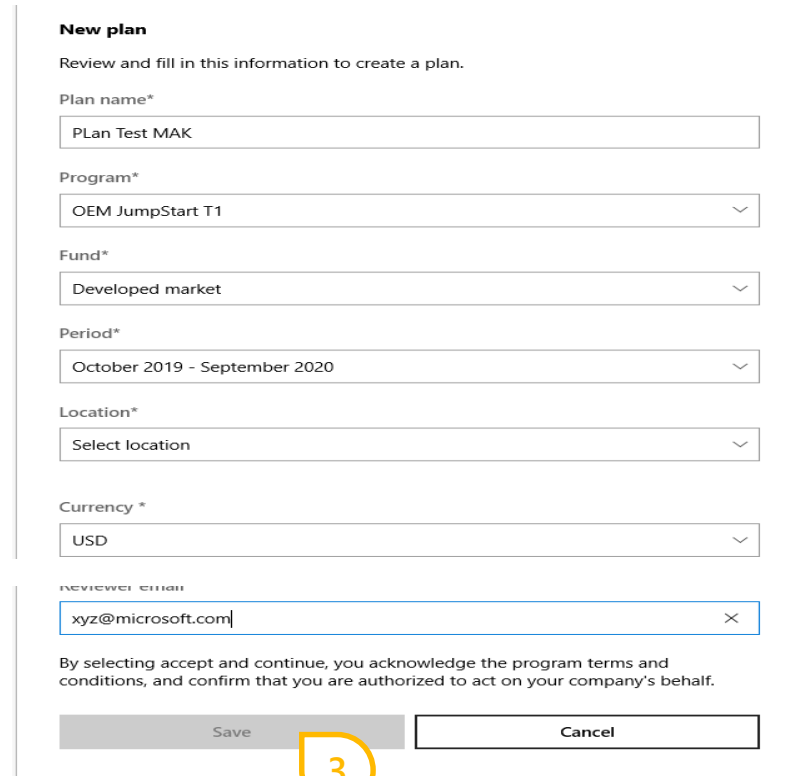
The screenshot displays the Microsoft Partner Center dashboard. On the left, a dark sidebar contains navigation links: Incentives, Overview, Products, Program, Jumpstart Tier 1, CSA, and Co-op management. The main content area is titled 'Program name' and shows three market type cards: 'FY19 Developed Market', 'FY19 Emerging Market', and 'FY19 Pro'. Each card has a 'Create Plan' button. A red circle with the number '1' highlights the 'Program' dropdown menu in the sidebar, and a red circle with the number '2' highlights the 'Create Plan' button on the 'FY19 Emerging Market' card. Below the market cards, there are sections for 'Incentives earned this period' (0.00 USD), 'Incentives paid this period' (0.00 USD), and 'Active levers' (0). Further down, there is a 'Total earnings by country/region' map, a 'Program details' section with placeholder text, 'Program earnings by lever' and 'Program earnings by type' charts, 'Recent claims' table, and a 'GAI Funding' bar chart.

Plan Process

3. Complete the New plan form and select Save.

- The fields that auto populate based on the selections on the previous screen, can be changed at this time if desired.
- Currency is the value you want to have the plan reflect; as activities can vary. The activities values will be converted to this selected Currency.
- Reviewer email should be the Microsoft email of your Account Manager.

Only one plan can be created per MPN id, fund, Program and Period. An error message will be presented.



New plan

Review and fill in this information to create a plan.

Plan name*

Plan Test MAK

Program*

OEM JumpStart T1

Fund*

Developed market

Period*

October 2019 - September 2020

Location*

Select location

Currency *

USD

Reviewer email

xyz@microsoft.com

By selecting accept and continue, you acknowledge the program terms and conditions, and confirm that you are authorized to act on your company's behalf.

Save Cancel

Note: When you select Save you are acknowledging the program terms and conditions as called out in the form.

Plan Process

4 Select New Campaign

You can Edit the details by selecting Edit.

Note the progress bar in the top right corner.

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Authorized Dist (1005341)

Details [Edit](#)

Plan ID	1005341
Date created	October 2, 2019
Program	OEM JumpStart T1
Fund	Emerging market
Location	Darmstadt, DE (MPN: 546539)
Period	October 2019 - September 2020
Total amount	0.00 USD
Reviewer email	xyz@microsoft.com

Status

Editing

Review

Approval

To submit this plan for review, please add applicable campaigns. [Learn more](#)

Campaigns

New campaign

4

Comments

Add any additional information you want to provide regarding this plan. (optional)

Please add your comment here

Submit plan

Save comments

Plan Process

5 Complete and Save New campaign form.

New campaign

Name*

Category

Start date*

End date*

Device type*

Segment*

Product family*

Priority*

Description

Save

Cancel

5

Plan Process

6 Select New Activity

Microsoft | Partner Center

Home

INCENTIVES

Overview

Programs

Co-op management

Customer associations

WINDOWS

CROSS-DEVICE EXPERIENCES

Authorized Dist marsha test (1005342)

Details

Plan ID1005342

Date createdOctober 2, 2019

ProgramOEM JumpStart T1

FundWindows pro market

LocationDarmstadt, DE (MPN: 546539)

PeriodOctober 2019 - September 2020

Total amount0.00 USD

Reviewer emailxyz@microsoft.com

Status

Editing

Review

Approval

To submit this plan for review, please add applicable campaigns. [Learn more](#)

Campaigns

New campaign

Test

More details

+ New activity

Activity	Type	Requested amount	Approved amount	Actions
Add activities to see them here				

Plan Process

7. Complete New Activity form and select Save.

Note: Country is a multi select field.

New activity

Name*

Activity type*

Country*

☐ Afghanistan

☐ Åland Islands

☐ Albania

☐ Algeria

☐ American Samoa

Category of spend*

Amount*

Currency *

Description

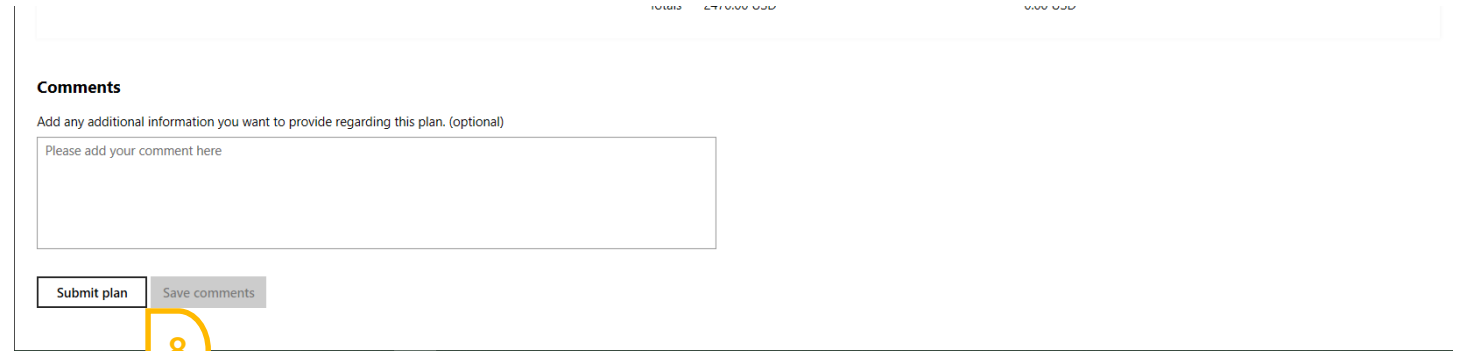
Save

Cancel

7

Plan Process

8. Add comments as desired; select Save Comments; and Select Submit Plan.
9. Select Confirm to submit your plan noting this plan can no longer be edited until after the Microsoft review.



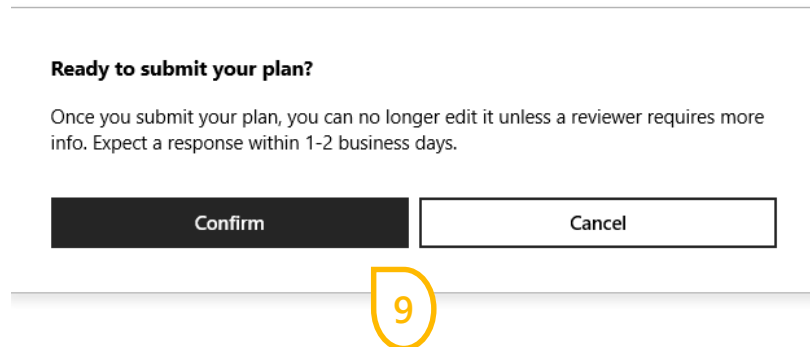
Comments

Add any additional information you want to provide regarding this plan. (optional)

Please add your comment here

Submit plan Save comments

8



Ready to submit your plan?

Once you submit your plan, you can no longer edit it unless a reviewer requires more info. Expect a response within 1-2 business days.

Confirm Cancel

9

Plan Process

The plan must now be approved by Microsoft.

The plan submitter will receive an email when the plan is approved or more information needed. Any Incentive Admin will be able to action the plan from the action needed status.

To edit the activity, select the activity name . Edits will follow the approval process of a new activity.

While a plan is in the Review status, you may recall the plan to make edits to:

- Plan name
- Currency
- Reviewer email

10. Click Recall plan

Authorized Dist marsha test (1005342)

Details

Plan ID	1005342
Date created	October 2, 2019
Program	OEM JumpStart T1
Fund	Windows pro market
Location	Darmstadt, DE (MPN: 546539)
Period	October 2019 - September 2020
Total amount	2470.00 USD
Reviewer email	xyz@microsoft.com

Status

Submitted
Review
Approval

Campaigns

Test
[More details](#)

Activity	Type	Requested amount	Approved amount	Proof of execution
Test	Print	2000.00 GIP	0.00 GIP	Add POE
Totals		2470.00 USD	0.00 USD	Add POE

Comments

Add any additional information you want to provide regarding this plan. (optional)

Please add your comment here

[Cancel plan](#) [Recall plan](#) [Save comments](#)

10

Plan Process

11. Select Confirm

Note: this will stop the approval process.

The Status will now reflect Editing.

12. Complete the Edit plan form and select Save.

The plan must now be approved by Microsoft.

Ready to recall this plan?

Recalling the plan will prevent the internal reviewer from performing any actions on the plan while it is in this state.

Confirm

Cancel

Microsoft | Partner Center

Home

INCENTIVES

Overview

Programs

Co-op management

Customer associations

WINDOWS

CROSS-DEVICE EXPERIENCES

Authorized Dist (1005341)

Details Edit

Plan ID1005341

Date createdOctober 2, 2019

ProgramOEM JumpStart T1

FundEmerging market

LocationDarmstadt, DE (MPN: 546539)

PeriodOctober 2019 - September 2020

Total amount0.00 USD

Reviewer emailxyz@microsoft.com

Status

Editing

Review

Approval

To submit this plan for review, please add applicable campaigns. [Learn more](#)

Campaigns

Edit plan

Review and fill in this information to update your plan.

Plan name*

Currency *

Reviewer email

Save

Cancel

Plan Process

After approval, the new activity is added under campaigns reflecting:

- Requested Amount
- Approved Amount
- Add POE

Note the progression of the status bar.

Home

INCENTIVES

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Authorized Dist marsha test (1005342)

Details

Plan ID

1005342

Date created

October 2, 2019

Program

OEM JumpStart T1

Fund

Windows pro market

Location

Darmstadt, DE (MPN: 546539)

Period

October 2019 - September 2020

Total amount

2470.00 USD

Reviewer email

xyz@microsoft.com

Status

Submitted

Review

Approval

Campaigns

Test

More details

Activity	Type	Requested amount	Approved amount	Proof of execution
Test	Print	2000.00 GIP	0.00 GIP	Add POE
Totals		2470.00 USD	0.00 USD	Add POE

Comments

Add any additional information you want to provide regarding this plan. (optional)

POE

POE functionality will **not** be available until CY 2020

10. Complete New proof of execution claim and Select Save
11. Drag or browse files to upload proof documents

NOTE:

Per program rules, POE must be submitted by 6 months after the campaign end date.

New proof of execution claim

Name*

Date*

Amount*

 USD

Save

Cancel

To submit this claim for review, please upload the following proof documents. [Learn more](#)

Proof of execution ⓘ

11

Drag or browse files to upload or [Request documents](#)

Support and resources

Support

To access support follow these steps.

1. Select ? from the top navigation bar.
2. Select Incentives.

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Authorized Dist marsha test (1005342)

Details

Plan ID	1005342
Date created	October 2, 2019
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Location	Darmstadt, DE (MPN: 546539)
Period	October 2019 - September 2020
Total amount	2470.00 USD
Reviewer email	xyz@microsoft.com

Status

Submitted

Review

Approval

Campaigns

Test
[More details](#)

Activity	Type	Requested amount
----------	------	------------------

Help and support

Support options

Cross-device experiences

Incentives


Windows

More

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Support

Scroll down for more options.

 Microsoft

Partner Network

Membership ▾

Solutions ▾


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Top Partner Questions


▾ How do I activate my MPN benefits?

▾ What benefits do I get with Microsoft Action Pack subscription?

▾ How do I migrate from Partner Membership Center to Partner Center?

▾ How do I become a Microsoft Partner Network member?


More Support resources



Compare support offerings

Learn about benefits offered to help align to your organization's specific needs and capabilities, including MPN technical, Advanced Support for Partners and Premier Support for Partners.


[Learn more >](#)



Engage in technical journeys

Take advantage of your partner benefits with services to help you succeed along your technical journey.


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