Incentive reporting within Partner Center

Partner incentive programs

Microsoft

Introduction

In this training we explore the reporting functionality available within Partner Center for partner incentive programs.

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Objectives

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

- List the reporting options available within Partner Center

- Navigate the reporting experience
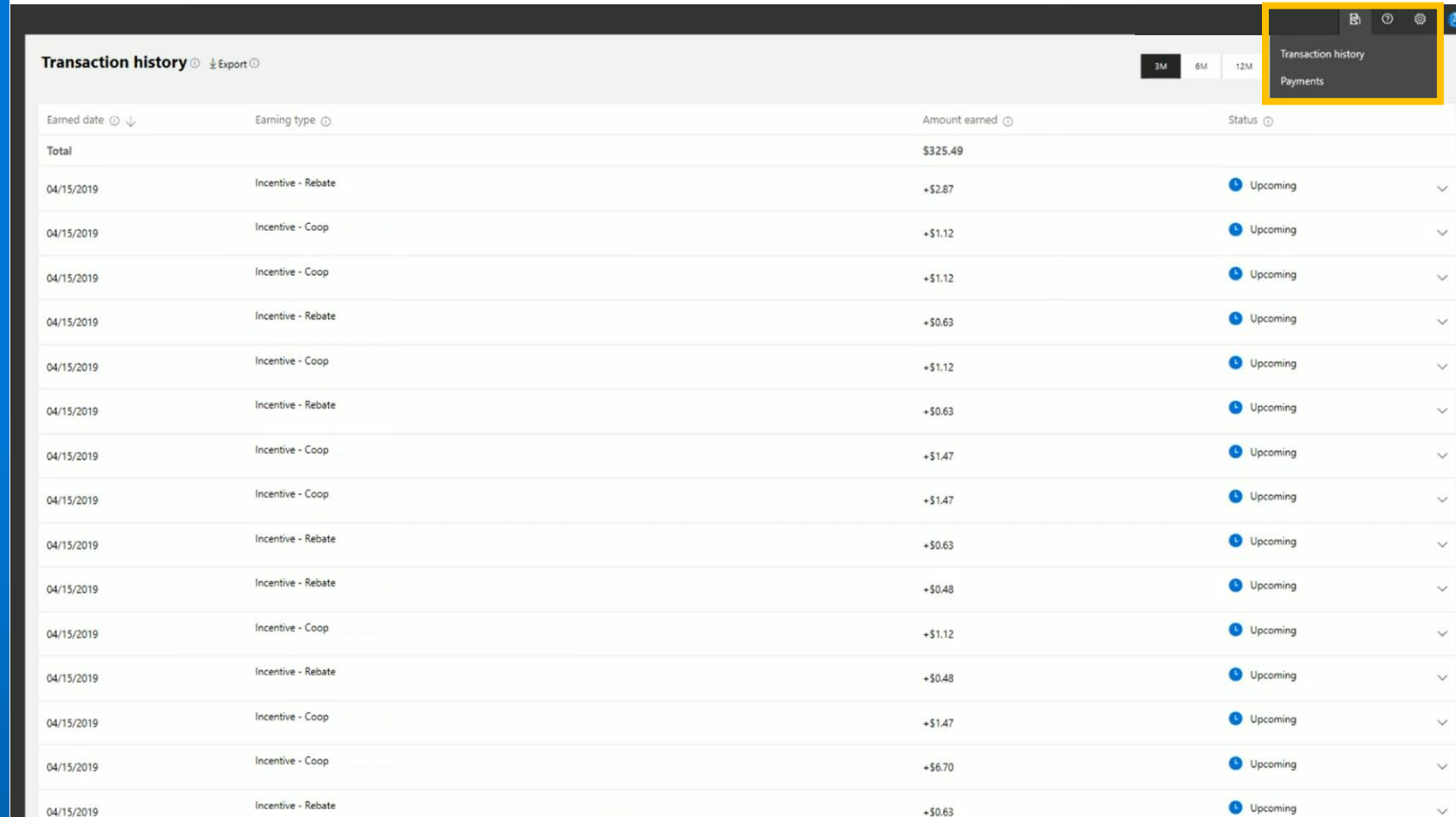
- Access support

Contents

Navigation

You can move through the **Transaction history** and **Payments** pages by selecting the money icon on the top navigation bar within Partner Center.

Select

Transaction history

Transaction history

This is a view of transaction information across all your organizations Microsoft Partner Network (MPN) ID's.

1. Alter the date range
   - 3 months is the default view
   - Data is available for 3 fiscal years

2. Apply filters

3. View earnings information:
   - Earned date
   - Earning type
   - Amount earned
   - Status

Transaction history

Filter options include:
- MPN ID
- Incentive program
- Payment ID
- Earning type
- Lever
- Status

Transaction history

4. Drill down for more information

Transaction history

Status possibilities

Status	Reason	Action Required?
Unprocessed	Pre-earning state	No
Upcoming	Earning eligible for payment	No
Tax invoice under review	Tax invoice review in progress. On approval payment will be released	No
Pending tax invoice	Tax invoice incomplete or invalid	Update tax invoice
Tax invoice rejected	Tax invoice rejected during Microsoft review. Any pending payment will be on-hold until Tax invoice is complete.	Contact Microsoft support for more details
Failed	Payment failed due to system error	Contact Microsoft support for more details
Reprocessing	Reprocessing payment due to system error	No
Incorrect payment	Payment recouping is in progress	No
Rejected during review	Payment rejected during review	Contact Microsoft support for more details
Reversed	Payment has been reversed by bank. Payment will be resent in next payment cycle	No
Rejected	Payment rejected by partner bank	Contact bank to understand reason for rejection
In progress	Payment is in progress	No
Sent	Payment successfully dispatched to partner's bank	No

Payments

Payments

This is an aggregated view of payment information across all your organization's MPN IDs and incentive programs.

1. Payment information
   - Note: Filters <u>do not</u> apply to this information

2. Payment information graphic
   - Note: Filters <u>do</u> apply to this information
   - Payments data is aggregated in USD
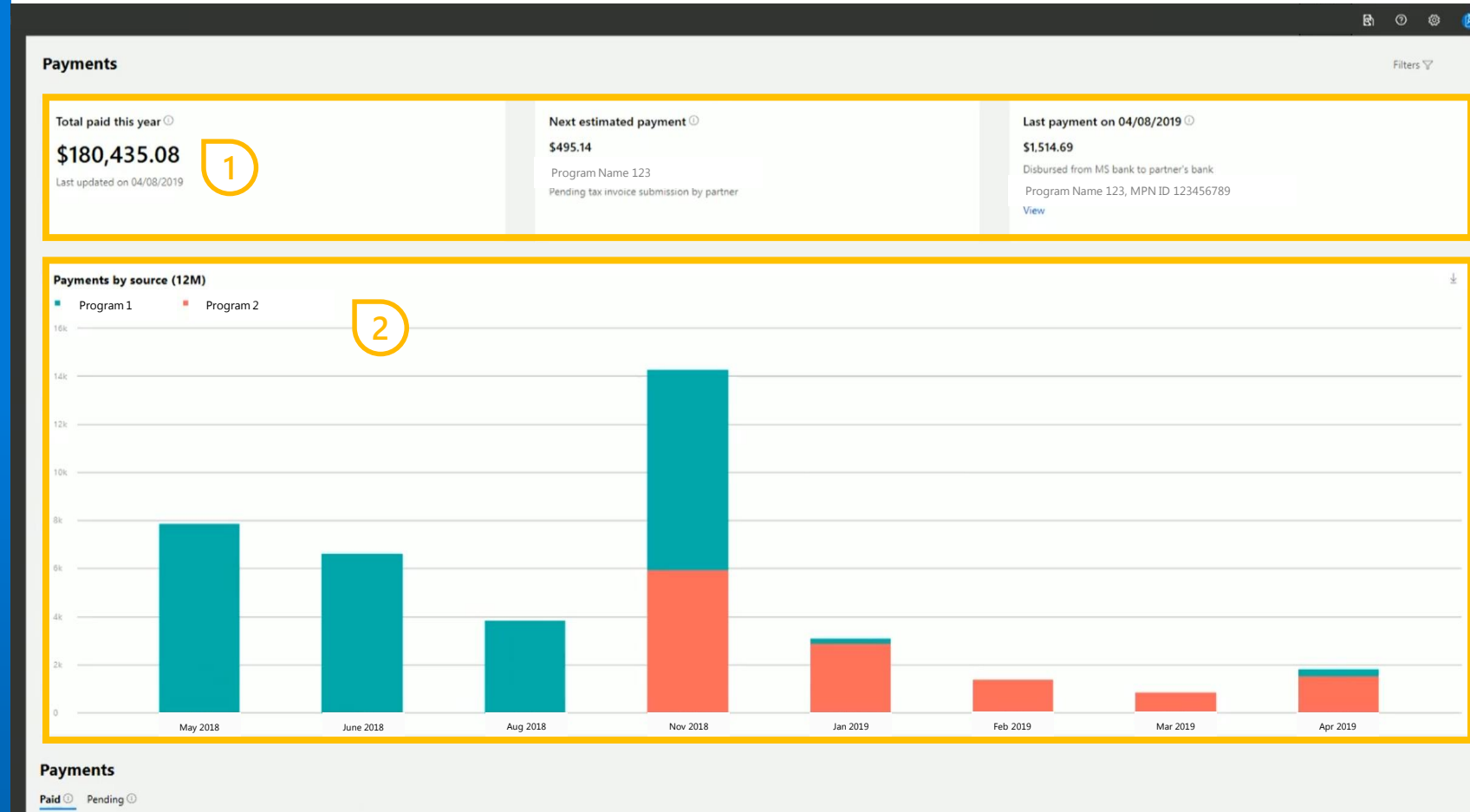
Payments

3. Payment information by line, including:
   - Earned in USD
   - Earned
   - Taxes withheld
   - Paid
   - Easily distinguish between paid and pending payments
   - Note: Filters do apply to this information

4. Select **view** to open a new tab and see transaction level detail for an individual payment

5. Select **download** to access the relevant payment remittance letter

Payments

Paid ⓘ   Pending ⓘ   ③

[All ▾]

Payments ↓	Earned (USD)	Earned	ithheld	Paid		
11/12/2018 Payment ID 006705852016, Advisor Deploy (MPN: 559196)	$8,342.69	₹541,185.08	₹45,863.00	₹495,322.08	View	Download
08/18/2018 Payment ID 006730405317, Advisor Deploy (MPN: 559196)	$3,848.22	₹244,511.09	₹20,721.00	₹223,790.09	View ④	Download
06/21/2018 Payment ID 6760147802, Advisor Deploy (MPN: 559196)	$6,591.01	₹447,521.21	₹0.00	₹447,521.21	View	Download
05/09/2018 Payment ID 6705052159, Advisor Deploy (MPN: 559196)	$7,851.71	₹524,180.18	₹44,422.00	₹479,758.18	View	Download ⑤
01/23/2018 Payment ID 6715023743, Advisor Deploy (MPN: 559196)	$6,651.25	₹426,752.69	₹36,165.00	₹390,587.69	View	Downlo
12/19/2017 Payment ID 6755013301, Advisor Deploy (MPN: 559196)	$5,979.69	₹385,256.25	₹0.00	₹385,256.25	View	Download
12/08/2017 Payment ID 6740014952, Advisor Deploy (MPN: 559196)	$6,113.49	₹393,876.82	₹0.00	₹393,876.82	View	Download
10/25/2017 Payment ID 6775018917, Advisor Deploy (MPN: 559196)	$5,824.71	₹382,661.48	₹0.00	₹382,661.48	View	Download
08/27/2017 Payment ID 6770013134, Advisor Deploy (MPN: 559196)	$43,827.59	₹2,809,567.40	₹0.00	₹2,809,567.40	View	Download
07/24/2017 Payment ID 6700288003, Advisor Deploy (MPN: 559196)	$6,183.13	₹399,283.34	₹0.00	₹399,283.34	View	Download
06/28/2017 Payment ID 6770012073, Advisor Deploy (MPN: 559196)	$6,777.88	₹436,699.03	₹0.00	₹436,699.03	View	Download

Payments

6. Apply filters. Options include:
   - MPN ID
   - Incentive program
   - Payment ID
   - Earning type

7. Remove individual filters or clear all
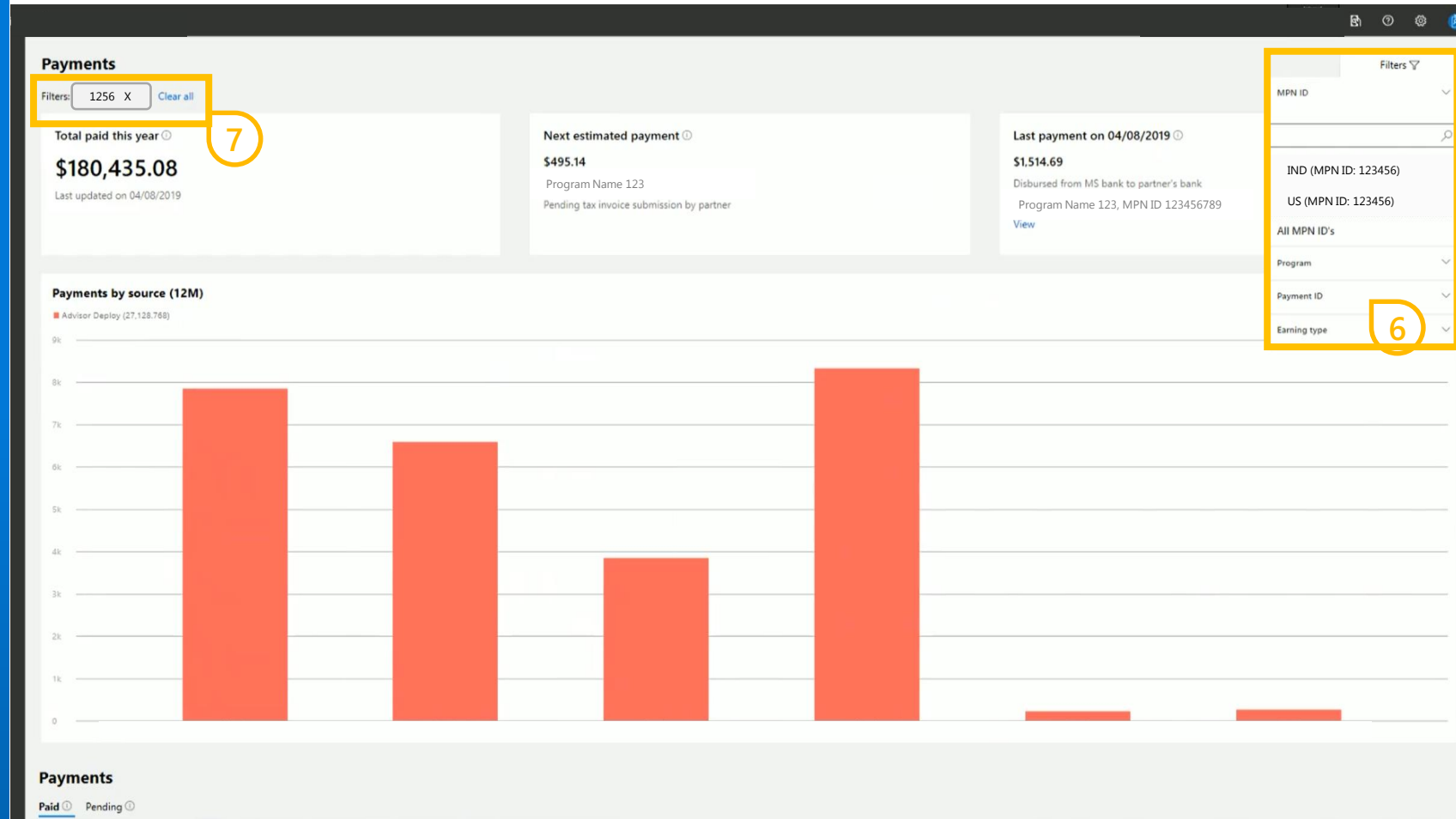
Export

Export

1. Select **export** to go to the export page, where data can be exported to a .csv file based on the filters applied.

Note: Reporting within the Partner Center experience is limited to 1000 records, however there is no such limitation in exported reports.

Export

This is where file downloads can be requested across all your organization's MPN IDs and incentive programs.

2. Select **Transaction history** or **Payments**

3. Apply filters and select **Start download** to request a new download

4. View existing and/or previously requested downloads, including when they were requested, and which filters were applied

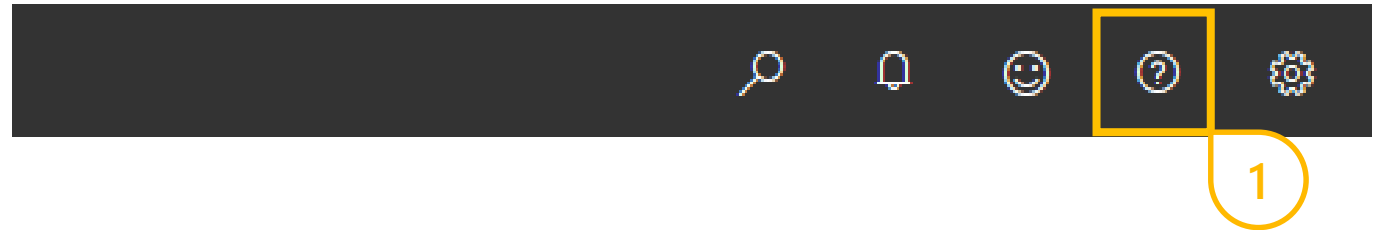   • Select **Download** once the status updates to "completed"

Note:
• Depending on the size, downloads will be available within minutes or a few hours
• You can download a maximum of 30 exports at any given time

Support

Support in the incentives tab

1. To access Support, select the "**?**" at the top right of the screen.

Summary

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Summary

You should now be able to:

- List the reporting options available within Partner Center

- Navigate the reporting experience.

- Access support.

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