

Incentive reporting within Partner Center

Partner incentive programs



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 tint.

Introduction

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

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

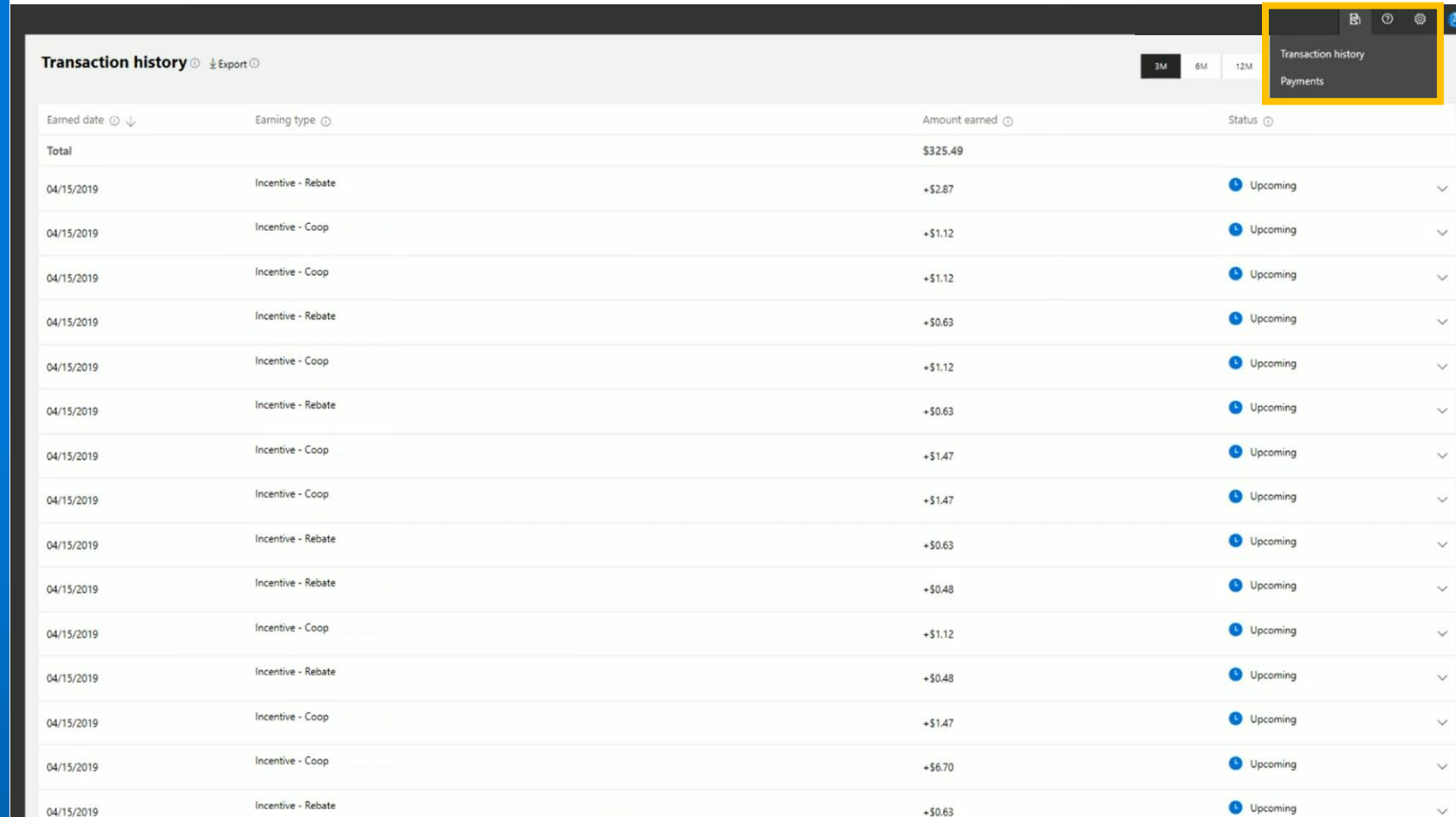
Contents

1. Introduction and objectives
2. Navigating the **Transaction history** pages
3. Navigating the **Payments** pages
4. Using the **Export** functionality
5. Support and resources
6. Summary
7. Appendix

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 



Earned date	Earning type	Amount earned	Status
Total		\$325.49	
04/15/2019	Incentive - Rebate	+\$2.87	Upcoming
04/15/2019	Incentive - Coop	+\$1.12	Upcoming
04/15/2019	Incentive - Coop	+\$1.12	Upcoming
04/15/2019	Incentive - Rebate	+\$0.63	Upcoming
04/15/2019	Incentive - Coop	+\$1.12	Upcoming
04/15/2019	Incentive - Rebate	+\$0.63	Upcoming
04/15/2019	Incentive - Coop	+\$1.47	Upcoming
04/15/2019	Incentive - Coop	+\$1.47	Upcoming
04/15/2019	Incentive - Rebate	+\$0.63	Upcoming
04/15/2019	Incentive - Rebate	+\$0.48	Upcoming
04/15/2019	Incentive - Coop	+\$1.12	Upcoming
04/15/2019	Incentive - Rebate	+\$0.48	Upcoming
04/15/2019	Incentive - Coop	+\$1.47	Upcoming
04/15/2019	Incentive - Coop	+\$6.70	Upcoming
04/15/2019	Incentive - Rebate	+\$0.63	Upcoming

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

The screenshot shows the 'Transaction history' interface. At the top right, there are tabs for '3M', '6M', '12M', and 'Custom', with '3M' selected. A 'Filters' button is also present. The table below has four columns: 'Earned date', 'Earning type', 'Amount earned', and 'Status'. The first row is a 'Total' row showing a total amount of \$325.49. Subsequent rows list individual transactions with dates (all 04/15/2019), earning types (Incentive - Rebate and Incentive - Coop), amounts, and a status of 'Upcoming'. Annotations are placed on the interface: '1' points to the date range tabs, '2' points to the filters button, and '3' points to the 'Earning type' column.

Earned date	Earning type	Amount earned	Status
Total		\$325.49	
04/15/2019	Incentive - Rebate	+\$2.87	Upcoming
04/15/2019	Incentive - Coop	+\$1.12	Upcoming
04/15/2019	Incentive - Coop	+\$1.12	Upcoming
04/15/2019	Incentive - Rebate	+\$0.63	Upcoming
04/15/2019	Incentive - Coop	+\$1.12	Upcoming
04/15/2019	Incentive - Rebate	+\$0.63	Upcoming
04/15/2019	Incentive - Coop	+\$1.47	Upcoming
04/15/2019	Incentive - Coop	+\$1.47	Upcoming
04/15/2019	Incentive - Rebate	+\$0.63	Upcoming
04/15/2019	Incentive - Rebate	+\$0.48	Upcoming
04/15/2019	Incentive - Coop	+\$1.12	Upcoming
04/15/2019	Incentive - Rebate	+\$0.48	Upcoming
04/15/2019	Incentive - Coop	+\$1.47	Upcoming
04/15/2019	Incentive - Coop	+\$6.70	Upcoming
04/15/2019	Incentive - Rebate	+\$0.63	Upcoming

Transaction history

Filter options include:

- MPN ID
- Incentive program
- Payment ID
- Earning type
- Lever
- Status

MPN ID

Custom Filters

MPN ID

IND (MPN ID: 123456)

All MPN ID's

Program

Payment ID

Earning type

Lever

Status

Program

Custom Filters

MPN ID

Program

Program 1

Program 2

All Programs

Payment ID

Earning type

Lever

Status

Payment ID

Custom Filters

MPN ID

Program

Payment ID

123456

23456789

4567890

345678

123123123

456456456

678678

2345678910

123456123456

Earning Type

Custom Filters

MPN ID

Program

Payment ID

Earning type

COOP

FEE

PAYMENT ADJUSTMENT

REBATE

All Earning types

Lever

Status

Lever

Custom Filters

MPN ID

Program

Payment ID

Earning type

Lever

Lever 1: Core

Lever 2

Lever 3: Power BI

Lever 4

Lever 5

Lever 6: Usage

All Lever types

Status

Status

Custom Filters

MPN ID

Program

Payment ID

Earning type

Lever

Status

PENDING TAX INVOICE

SENT

UPCOMING

All statuses

Transaction history

4. Drill down for more information

Transaction history ⓘ ⚙️ Export ⓘ

3M

6M

12M

Custom

Filters ⌵

Earned date ⓘ ⌵	Earning type ⓘ	Amount earned ⓘ	Status ⓘ
Total		\$325.49	
04/15/2019	Incentive - Rebate	+\$2.87	Upcoming
04/15/2019	Incentive - Coop	+\$1.12	Upcoming
<div><div><div>More details</div><div><div>Product Name 123</div><div>\$22.32</div><div>Lever 1: Core</div></div></div><div><div></div><div></div><div></div></div><div>UnprocessedUpcomingPayment sent</div></div>			
04/15/2019	Incentive - Coop	+\$1.12	Upcoming
04/15/2019	Incentive - Rebate	+\$0.63	Upcoming
04/15/2019	Incentive - Coop	+\$1.12	Upcoming
04/15/2019	Incentive - Rebate	+\$0.63	Upcoming
04/15/2019	Incentive - Coop	+\$1.47	Upcoming
04/15/2019	Incentive - Coop	+\$1.47	Upcoming
04/15/2019	Incentive - Rebate	+\$0.63	Upcoming
04/15/2019	Incentive - Rebate	+\$0.48	Upcoming
04/15/2019	Incentive - Coop	+\$1.12	Upcoming
04/15/2019	Incentive - Rebate	+\$0.48	Upcoming

Transaction history

Status possibilities

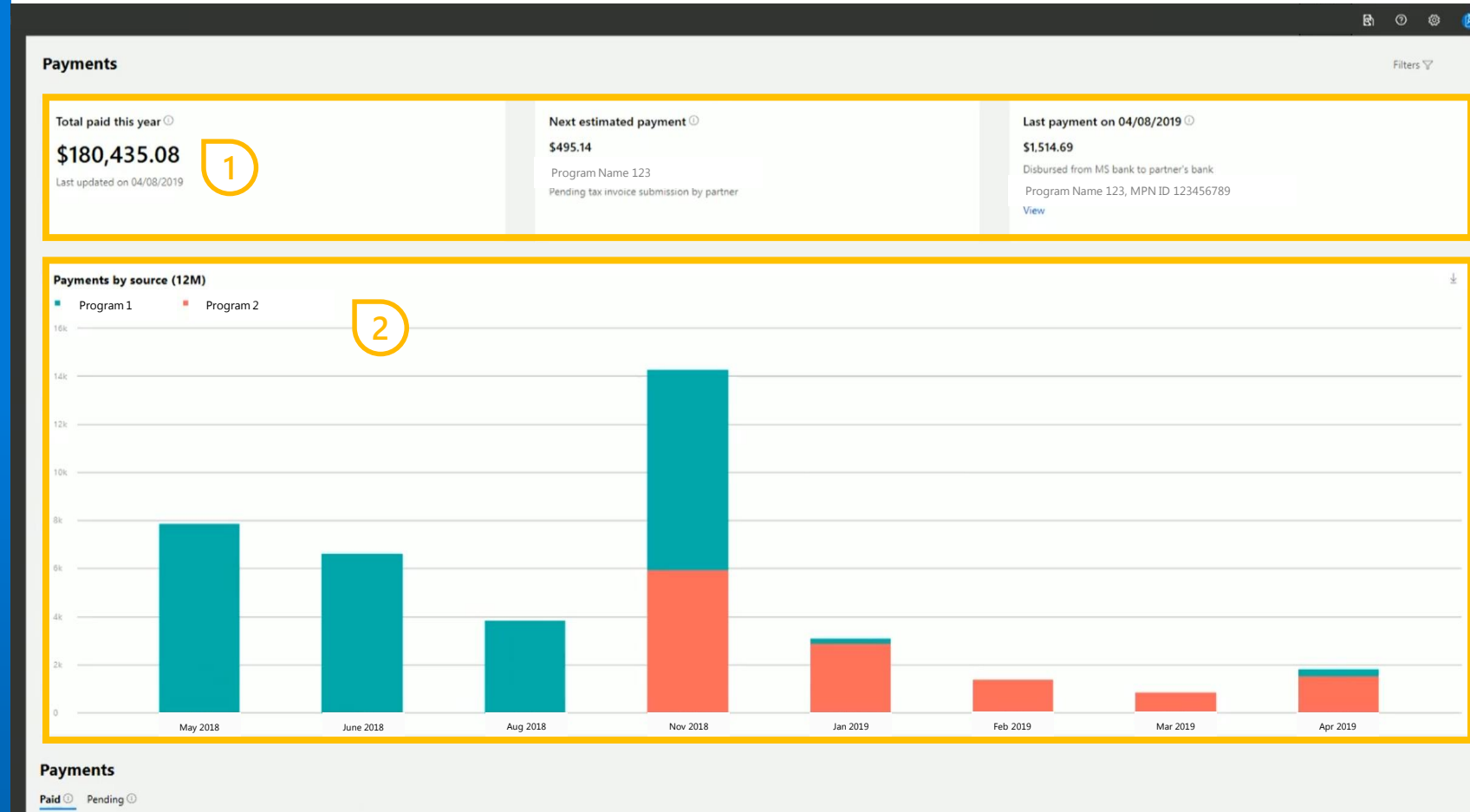
Status	Reason	Action Required?
Unprocessed	Pre-earning state	No
Upcoming	Earning eligible for payment	No
Tax invoice under review	Tax invoice review in progress. On approval payment will be released	No
Pending tax invoice	Tax invoice incomplete or invalid	Update tax invoice
Tax invoice rejected	Tax invoice 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 do not apply to this information
2. Payment information graphic
 - Note: Filters do 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

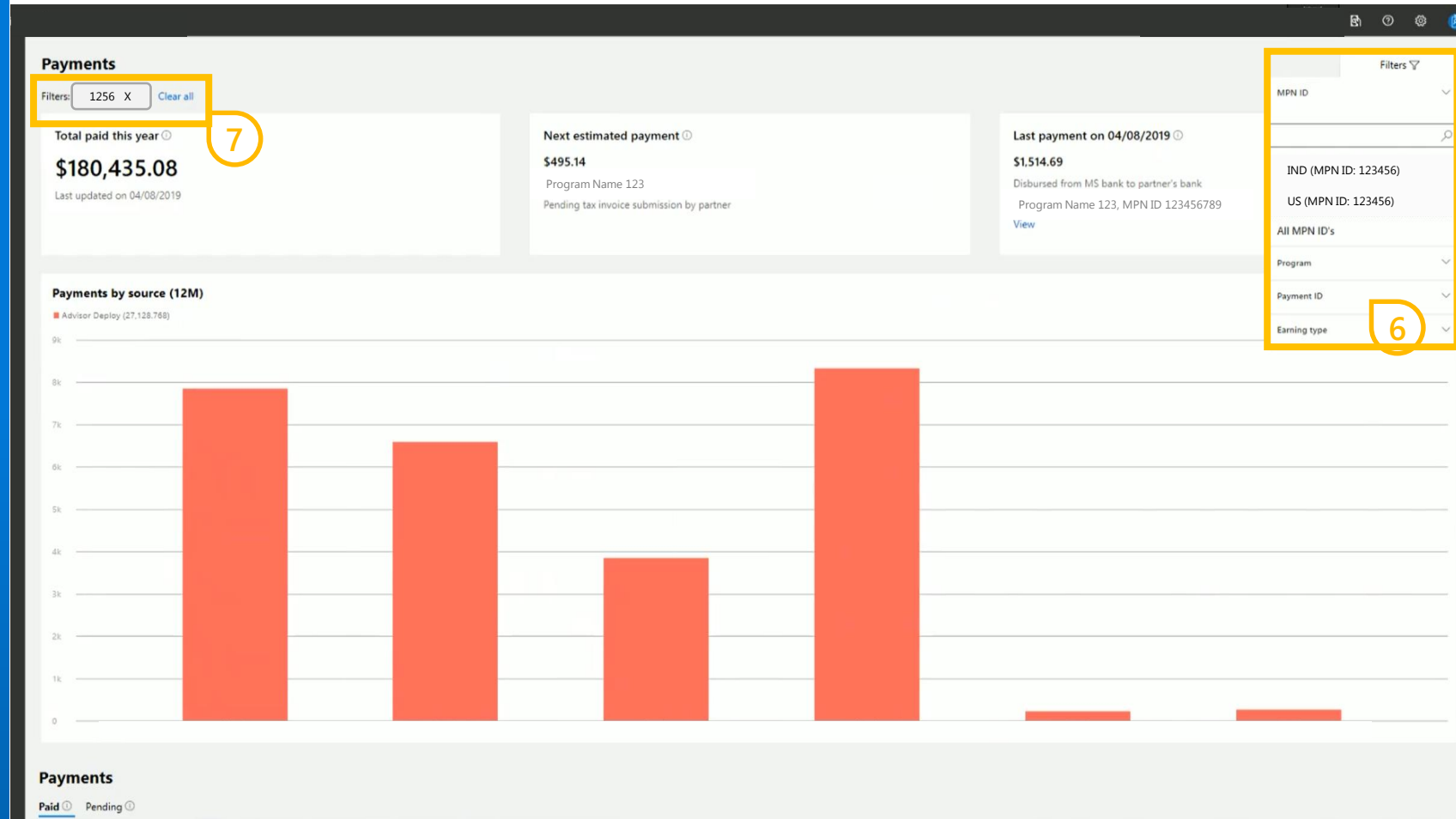
4. Select **view** to open a new tab and see transaction level detail for an individual payment

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

Payments					
Paid ⓘ Pending ⓘ		3			
All ▼					
Payments ↓	Earned (USD)	Earned	Taxes withheld	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 Download 4
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 Download
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.

Transaction history Export

3M 6M 12M Custom Filters

Earned date	Earned date	Amount earned	Status
Total		\$325.49	
04/15/2019	Incentive - Rebate	+\$2.87	Upcoming
04/15/2019	Incentive - Coop	+\$1.12	Upcoming
<div><div>More details</div><div>Product: Product Name 123 Revenue amount: \$22.32 Lever: Lever 1: Core</div></div> <div><div>Unprocessed</div><div>Upcoming</div><div>Payment sent</div></div>			
04/15/2019	Incentive - Coop	+\$1.12	Upcoming
04/15/2019	Incentive - Rebate	+\$0.63	Upcoming
04/15/2019	Incentive - Coop	+\$1.12	Upcoming
04/15/2019	Incentive - Rebate	+\$0.63	Upcoming
04/15/2019	Incentive - Coop	+\$1.47	Upcoming
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04/15/2019	Incentive - Coop	+\$1.12	Upcoming
04/15/2019	Incentive - Rebate	+\$0.48	Upcoming

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"

The screenshot shows the 'Export data' page. At the top, there's a 'Start download' button (callout 3) and a filter selection area with options: 3M, 6M, 12M, 36M, Custom, and a 'Filters' dropdown. Below this is a tabbed interface with 'Transaction history' and 'Payments' (callout 2). The 'Requests submitted' table lists a single request with columns for ID, Submitted date, Last data refresh date, Filters applied, Status, and Links. The 'Links' column for the 'Completed' status has 'Download' and 'Delete' buttons (callout 4).

ID	Submitted date ↓	Last data refresh date	Filters applied	Status	Links
	05/20/2019 11:24:22 AM	05/20/2019 11:24:36 AM	payoutStatusUpdateTS ge '2019-02-21' and payoutStatusUpdateTS lt '2019-05-20'	Completed	Download Delete

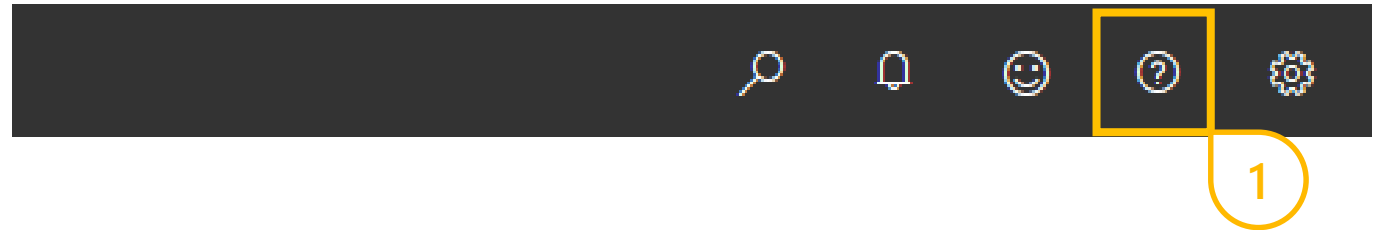
Note:

- 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

Summary

You should now be able to:

- List the reporting options available within Partner Center
- Navigate the reporting experience.
- Access support.

