Modern enrollment

Investment Plans in Partner Center

Introduction

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

Microsoft

The modern planning and execution of marketing funds process

Microsoft

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.

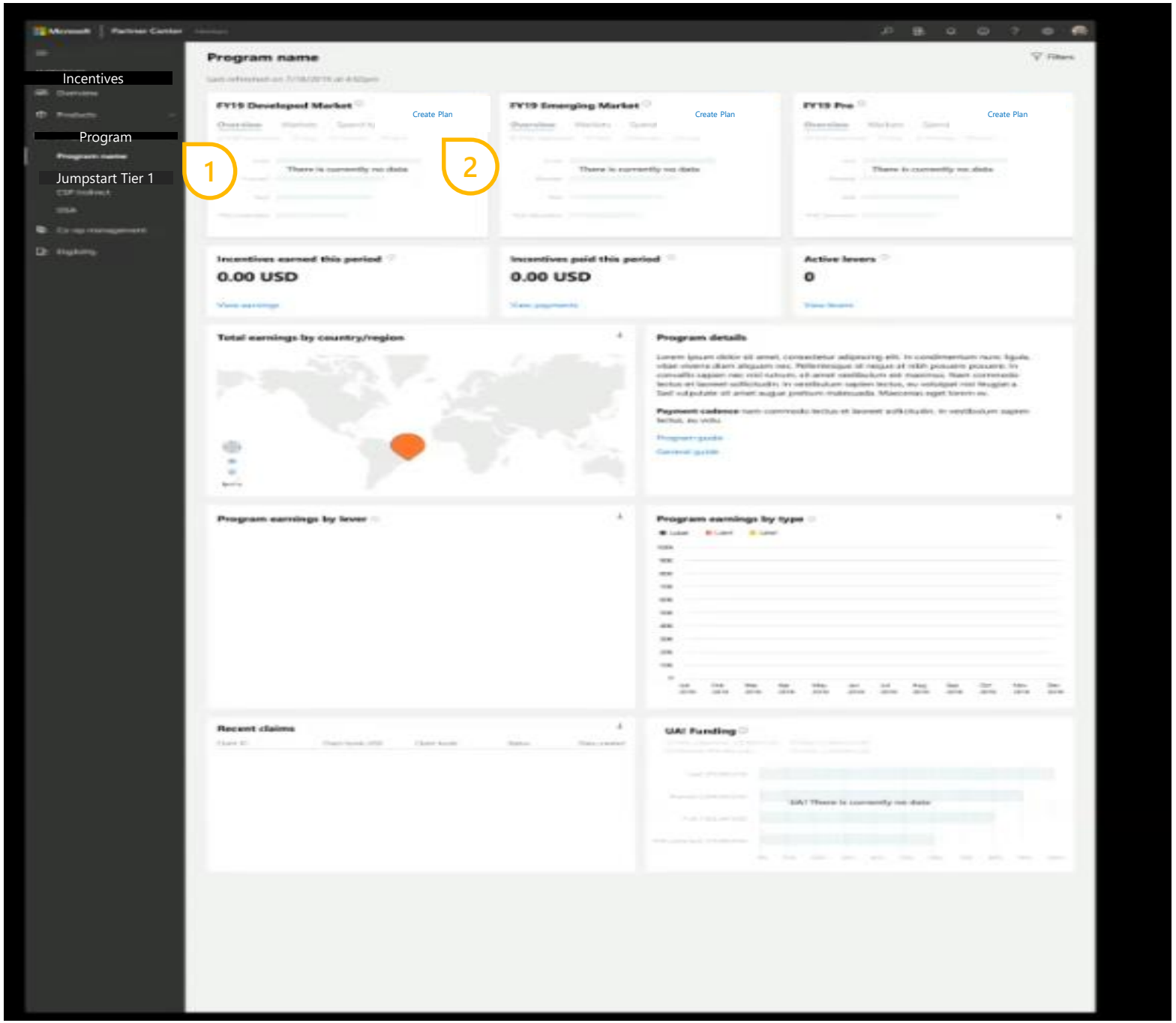
Plans from the CHIP system will NOT be migrated to Partner Center.

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.

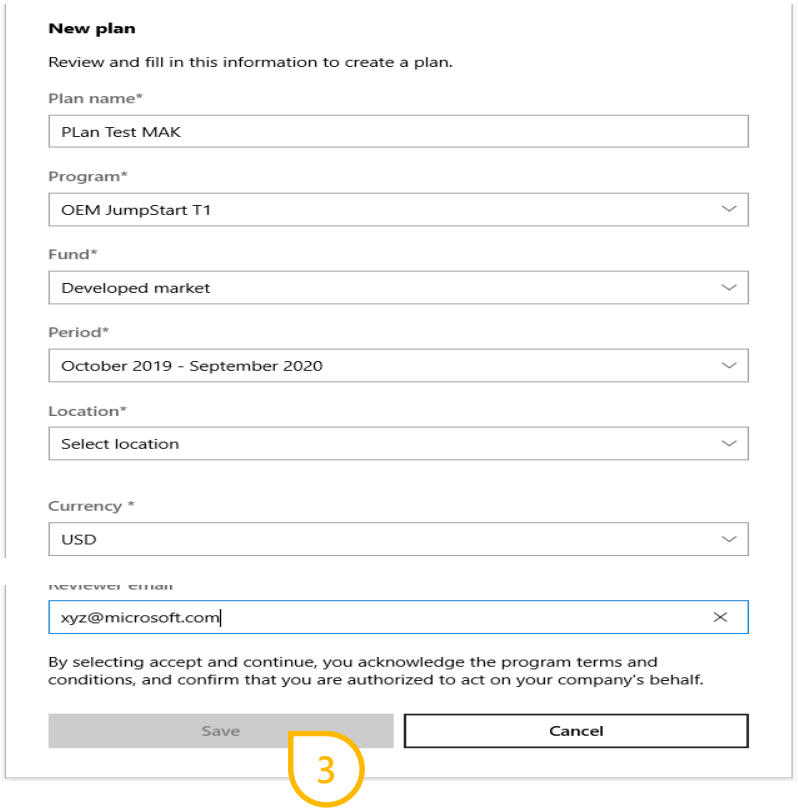


Plan Process

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.



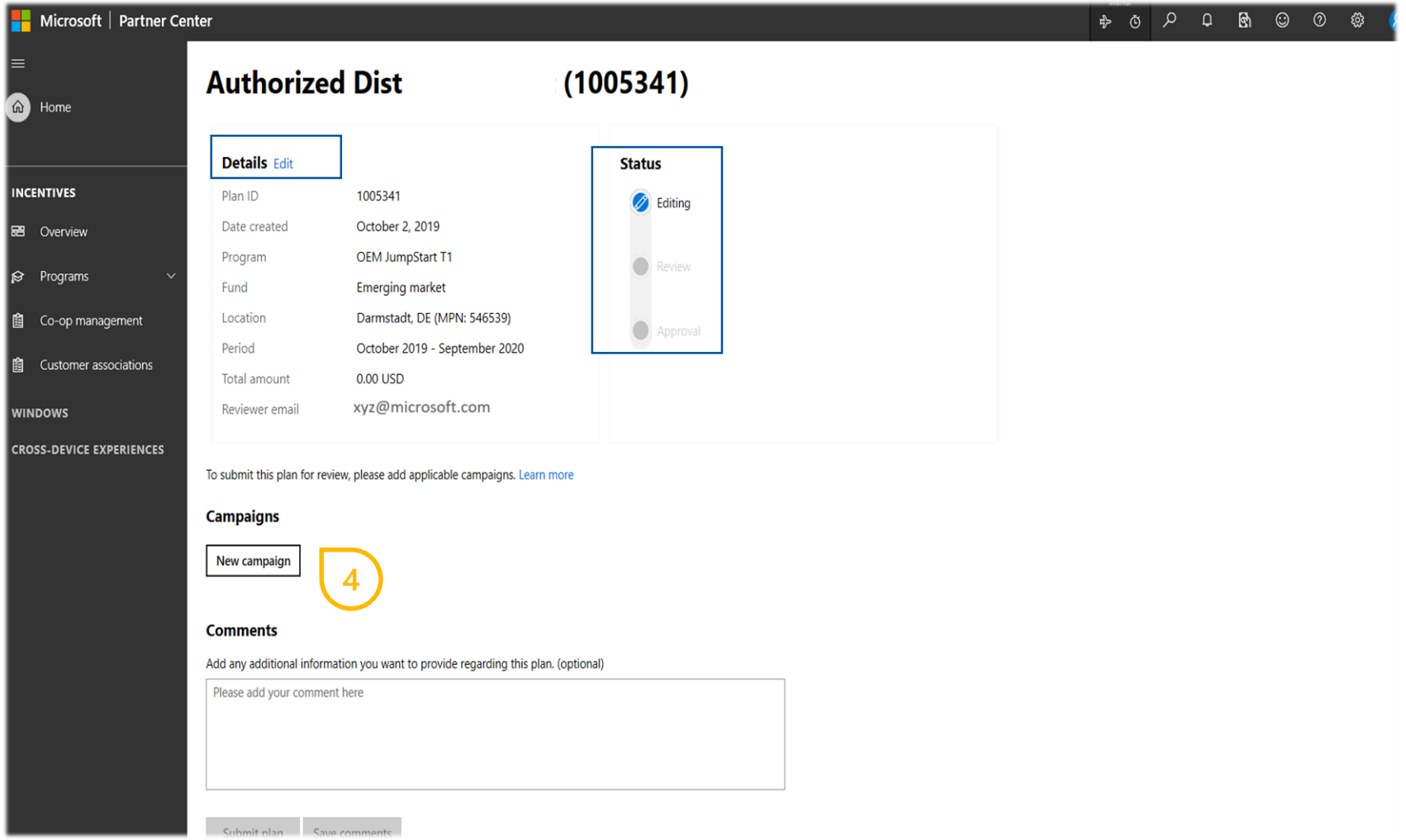
Note: When you select Save you are acknowledging the program terms and conditions as called out in the form.

Plan Process

4 Select New Campaign

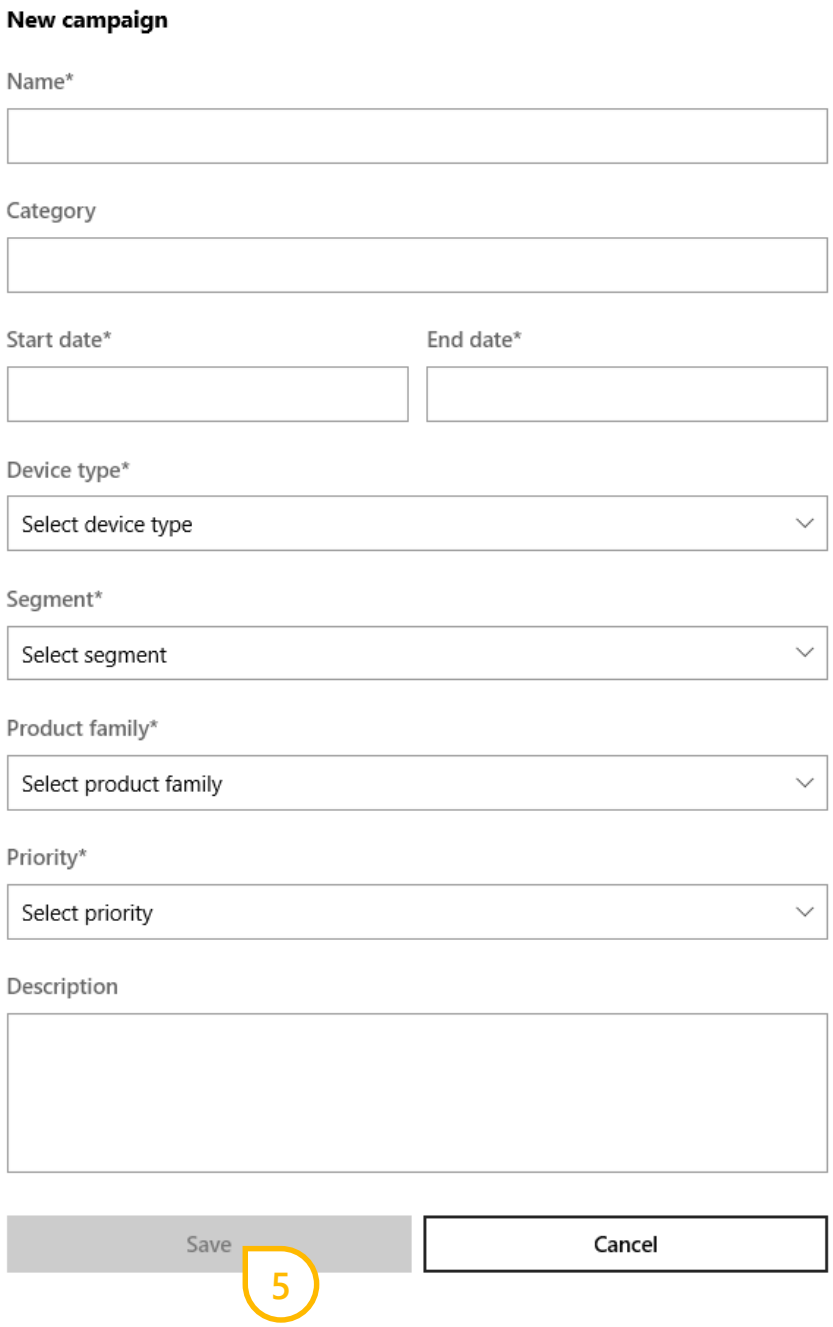
You can Edit the details by selecting Edit.

Note the progress bar in the top right corner.



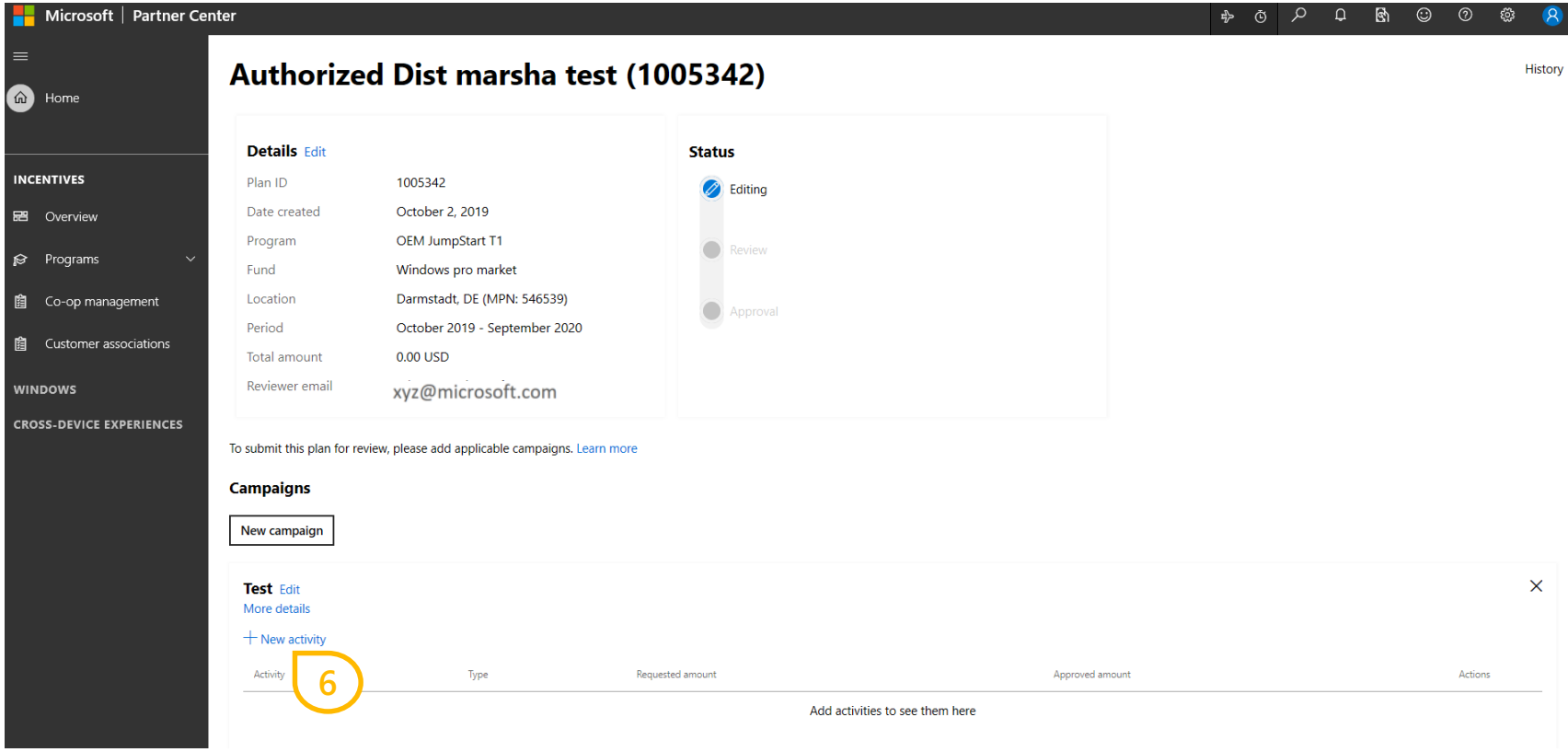
Plan Process

5 Complete and Save New campaign form.



Plan Process

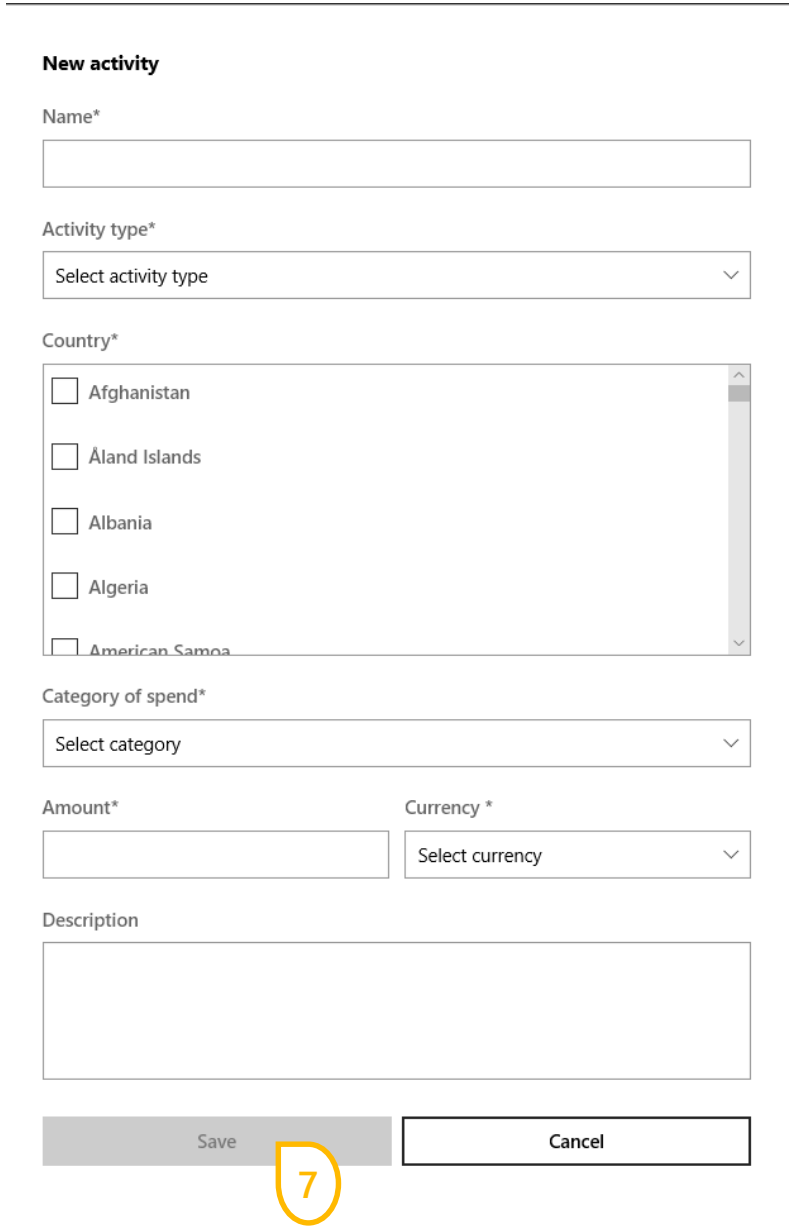
6 Select New Activity



Plan Process

7. Complete New Activity form and select Save.

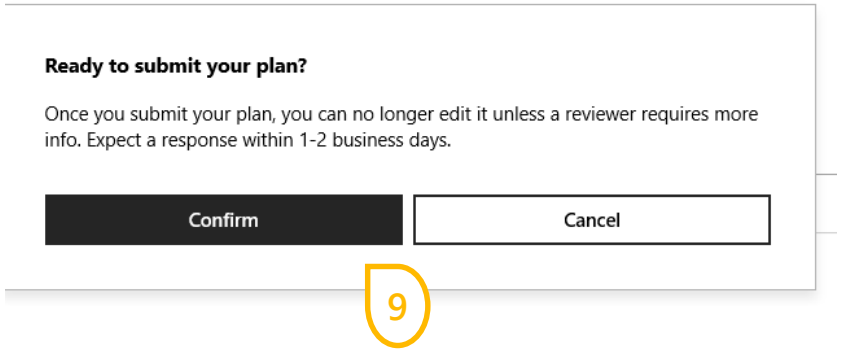
Note: Country is a multi select field.



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.



Plan Process

The plan must now be approved by Microsoft.

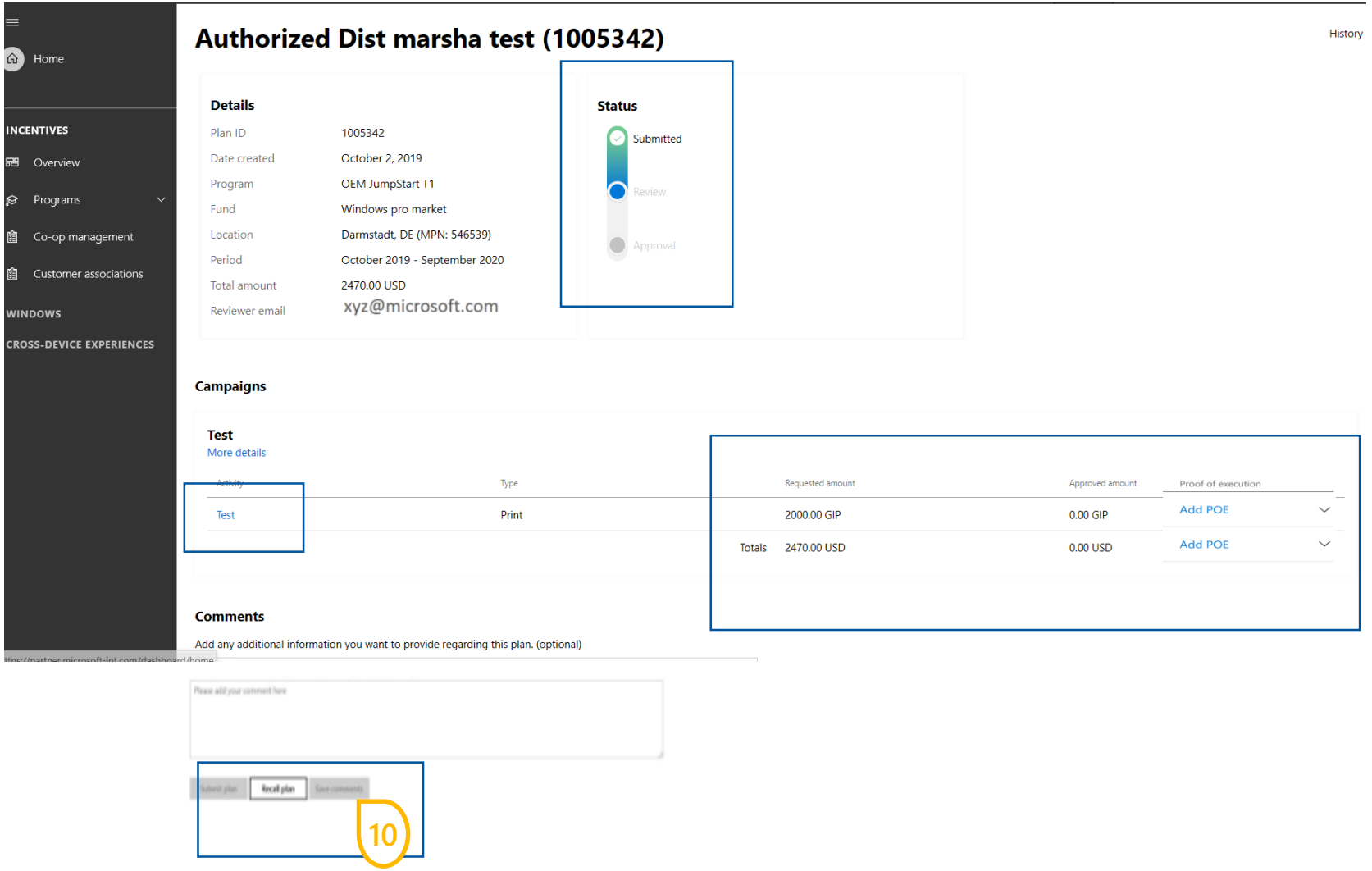
The plan submitter will receive an email when the plan is approved or more information needed. Any Incentive Admin will be able to action the plan from the action needed status.

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



Plan Process

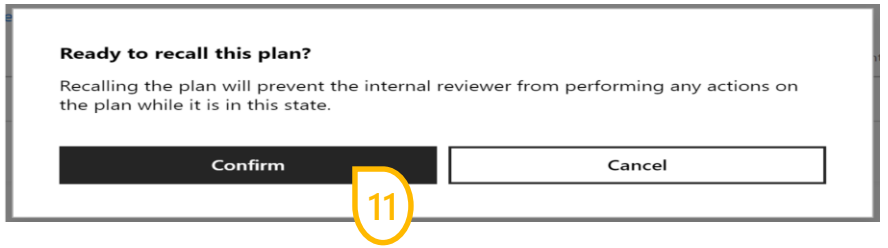
11. Select Confirm

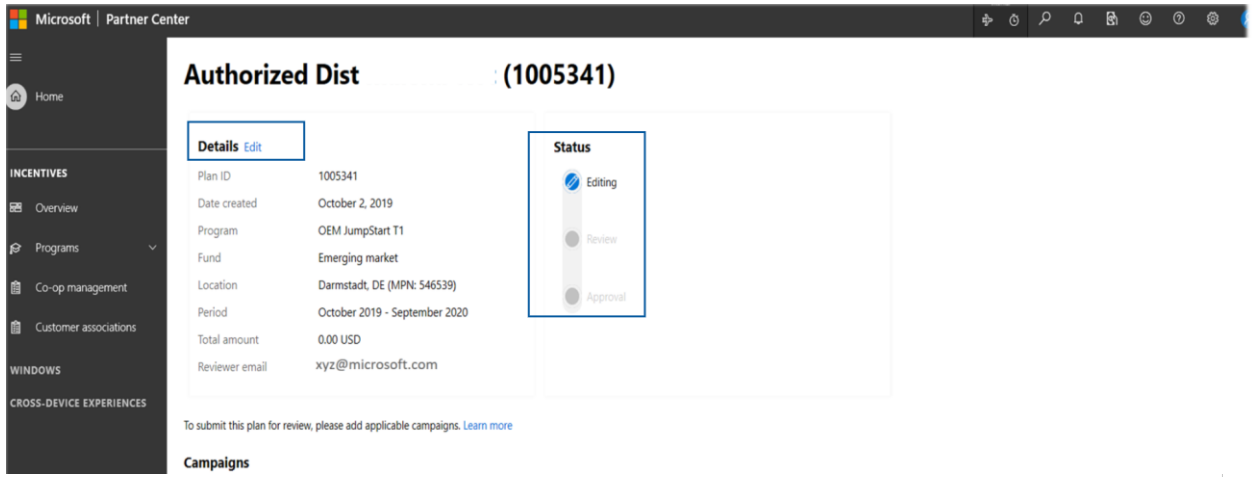
Note: this will stop the approval process.

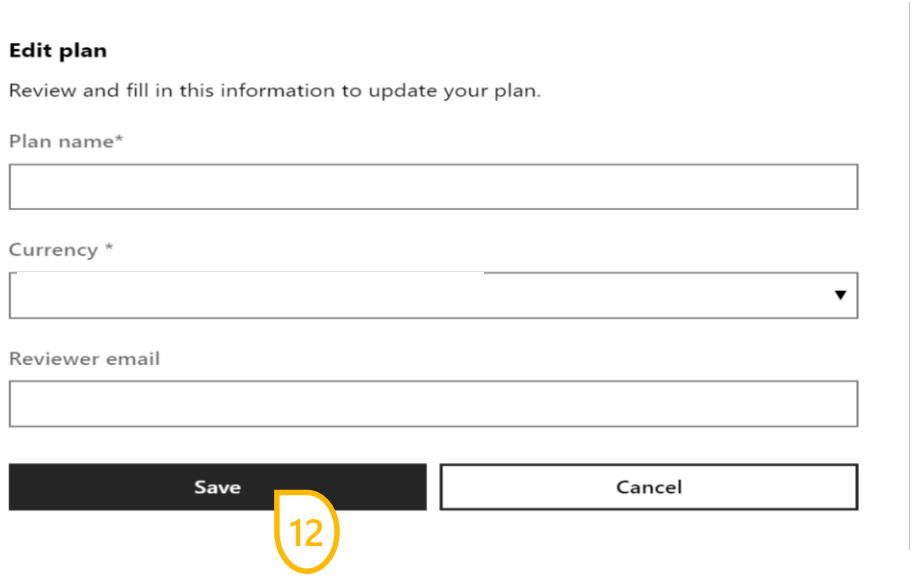
The Status will now reflect Editing.

12. Complete the Edit plan form and select Save.

The plan must now be approved by Microsoft.





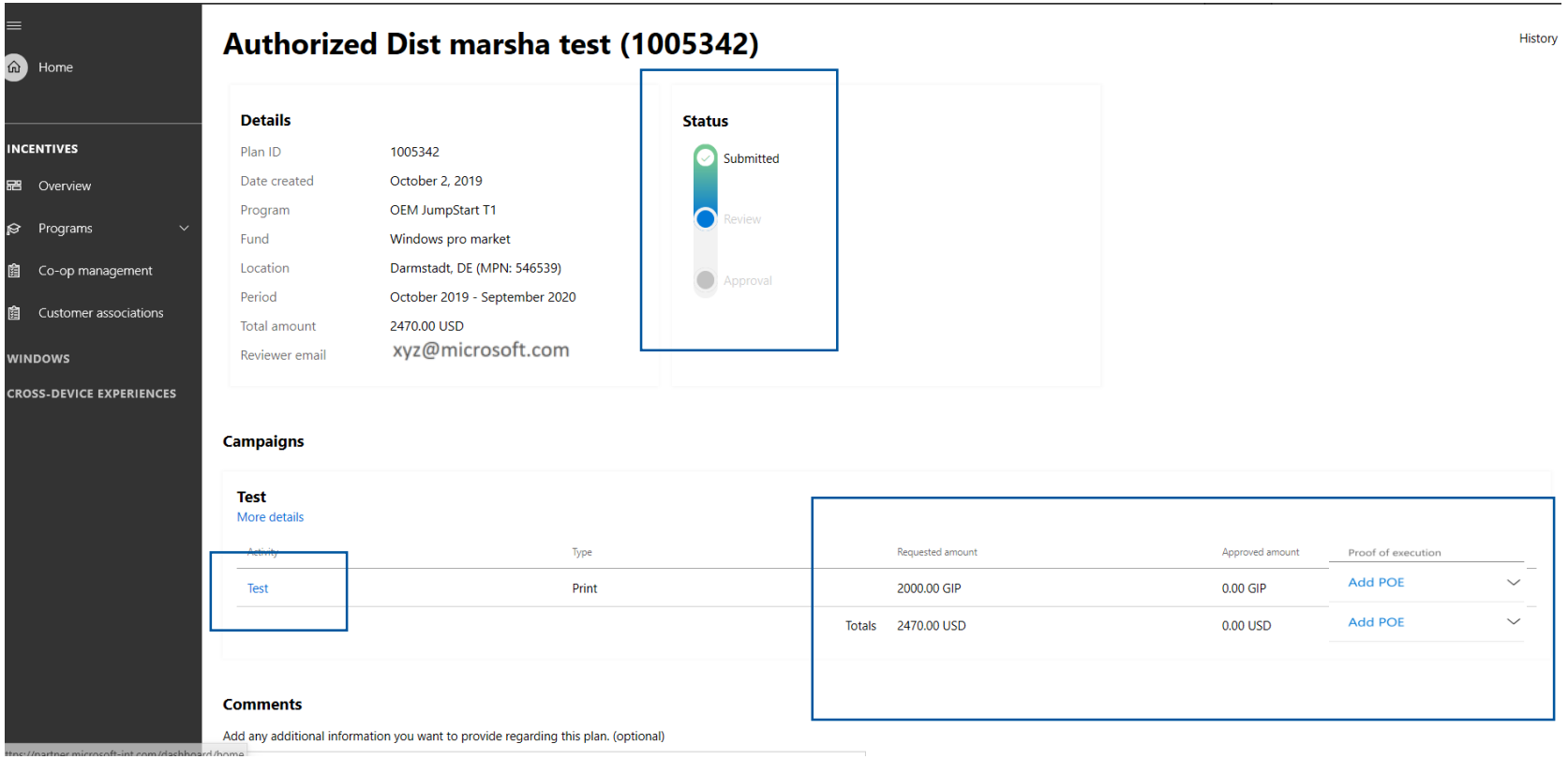


Plan Process

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

- Requested Amount
- Approved Amount
- Add POE

Note the progression of the status bar.



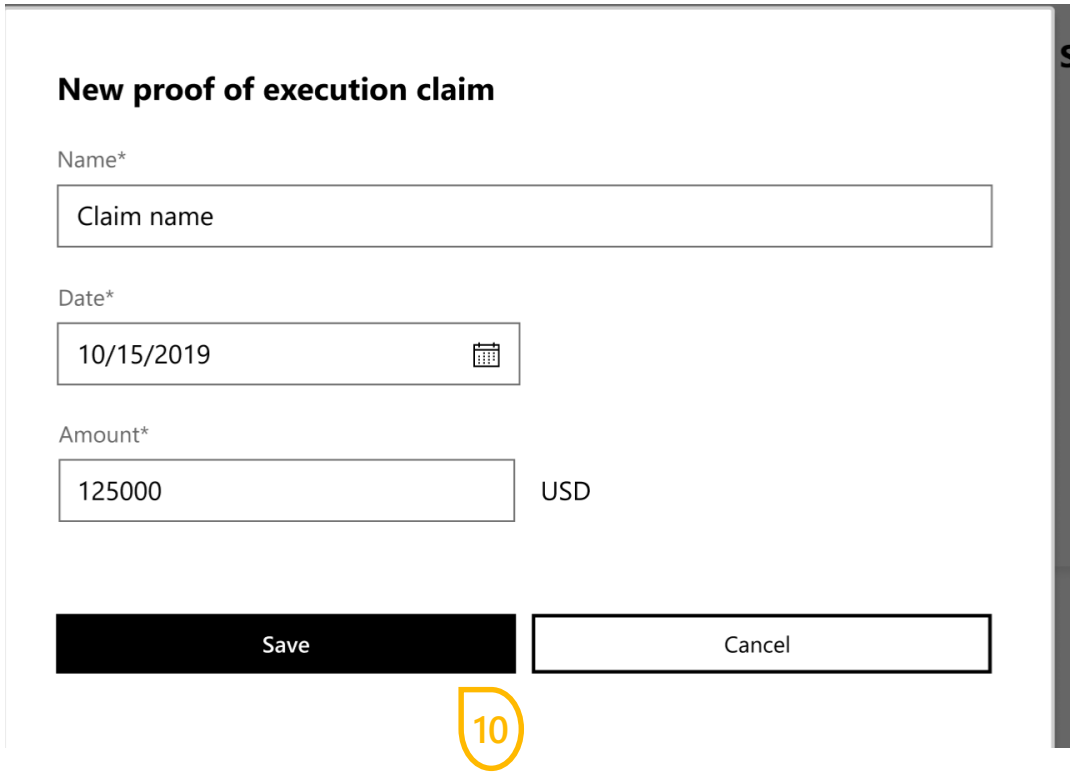
POE

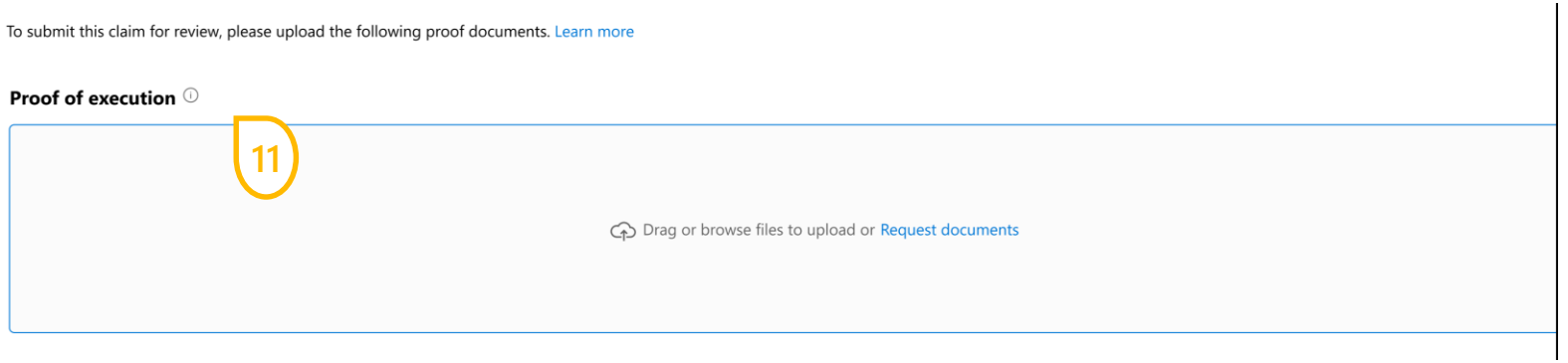
POE functionality will **not** be available until CY 2020

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.





Support and resources

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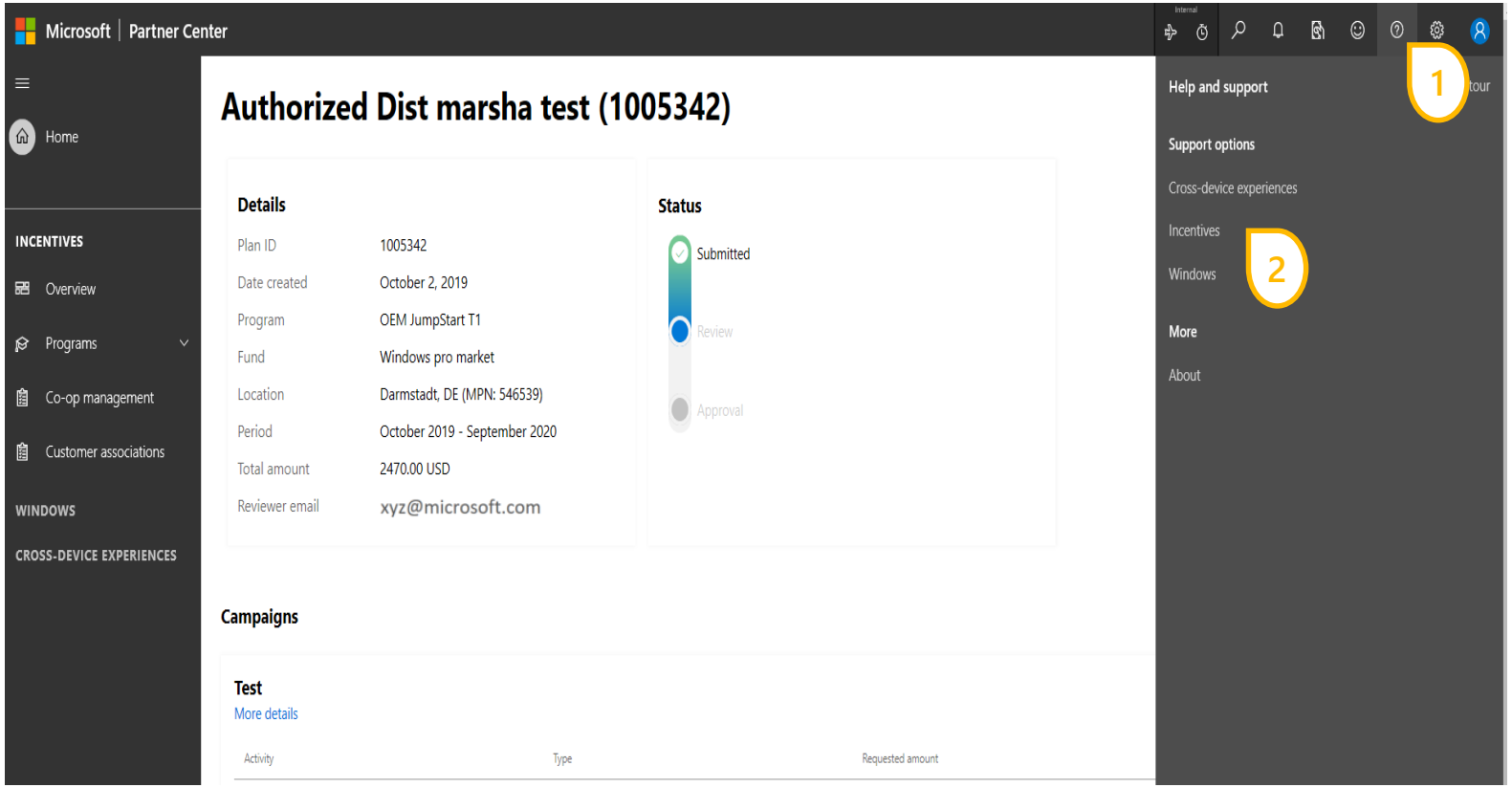
Support

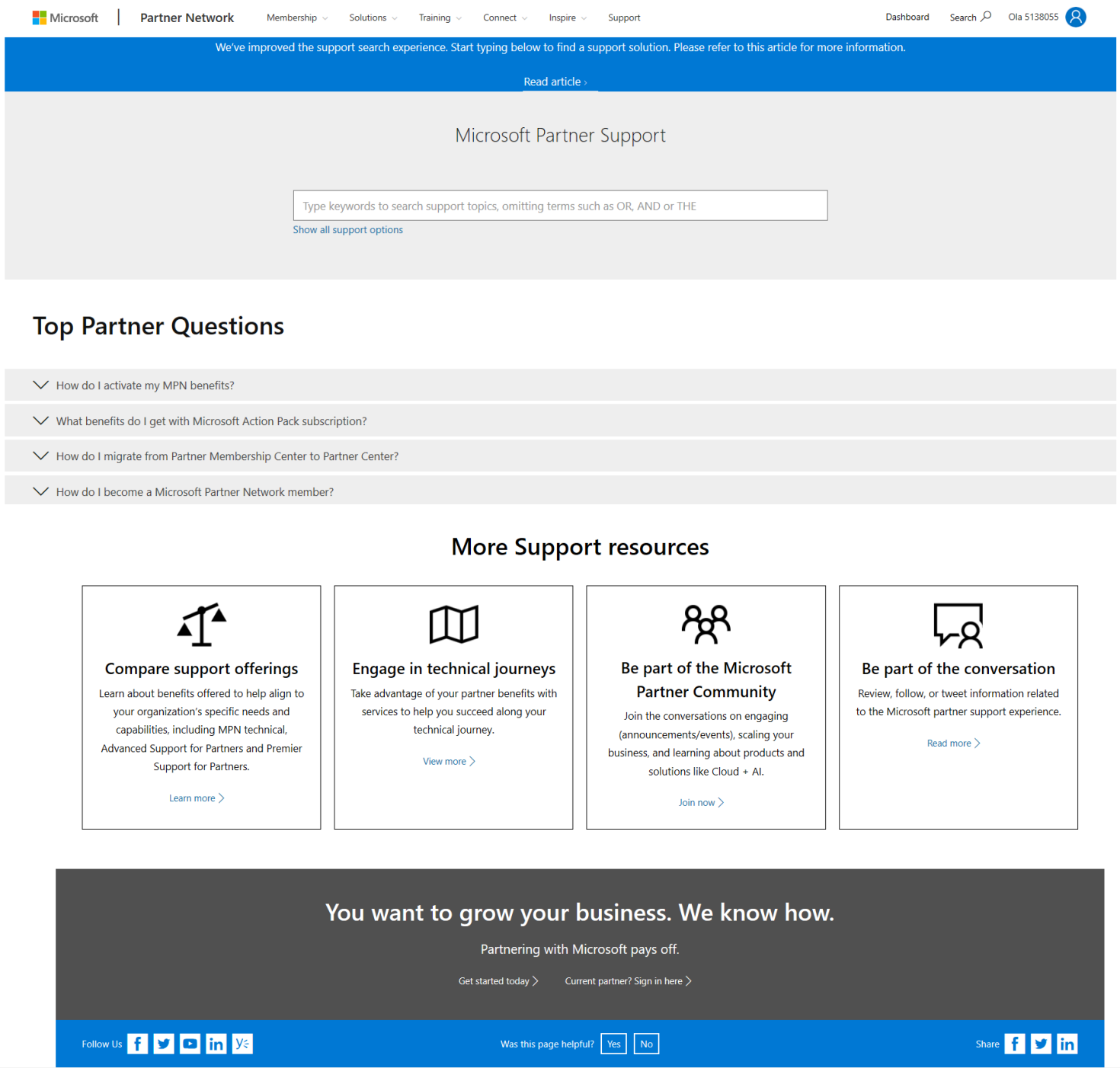
To access support follow these steps.

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



Support

Scroll down for more options.



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Thank you.