

Partner Center

Incentives in Partner Center



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 color overlay.

Introduction

In this training we will show you how to use the Partner Center for your incentive programs.

Objectives

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

- Create Incentive Administrator(s) and Users.
- Navigate through the incentives pages on the Partner Center.
- Access help and support.

Content

1. A new incentive experience.
2. User management.
3. Navigating the incentives pages:
 - Overview tab.
 - Programs tab.
 - Co-op management (claims) tab.
 - Transaction history and Payments pages.
4. Support



A new incentive experience

Why a new incentive experience?

In Microsoft's efforts to make your incentives experience easier, we are moving all incentive programs to a single platform called the **Partner Center**.

This will be a centralized location where you can:

- Enroll in incentives programs.
- View program details
- View all your incentives earnings and payments.
- Manage your claims (where applicable).



User management

User management

To access the incentives section within Partner Center Dashboard, the Global Administrator or Account Administrator needs to set up your company users. They must assign an Incentive Administrator(s) and grant Incentive User permissions.

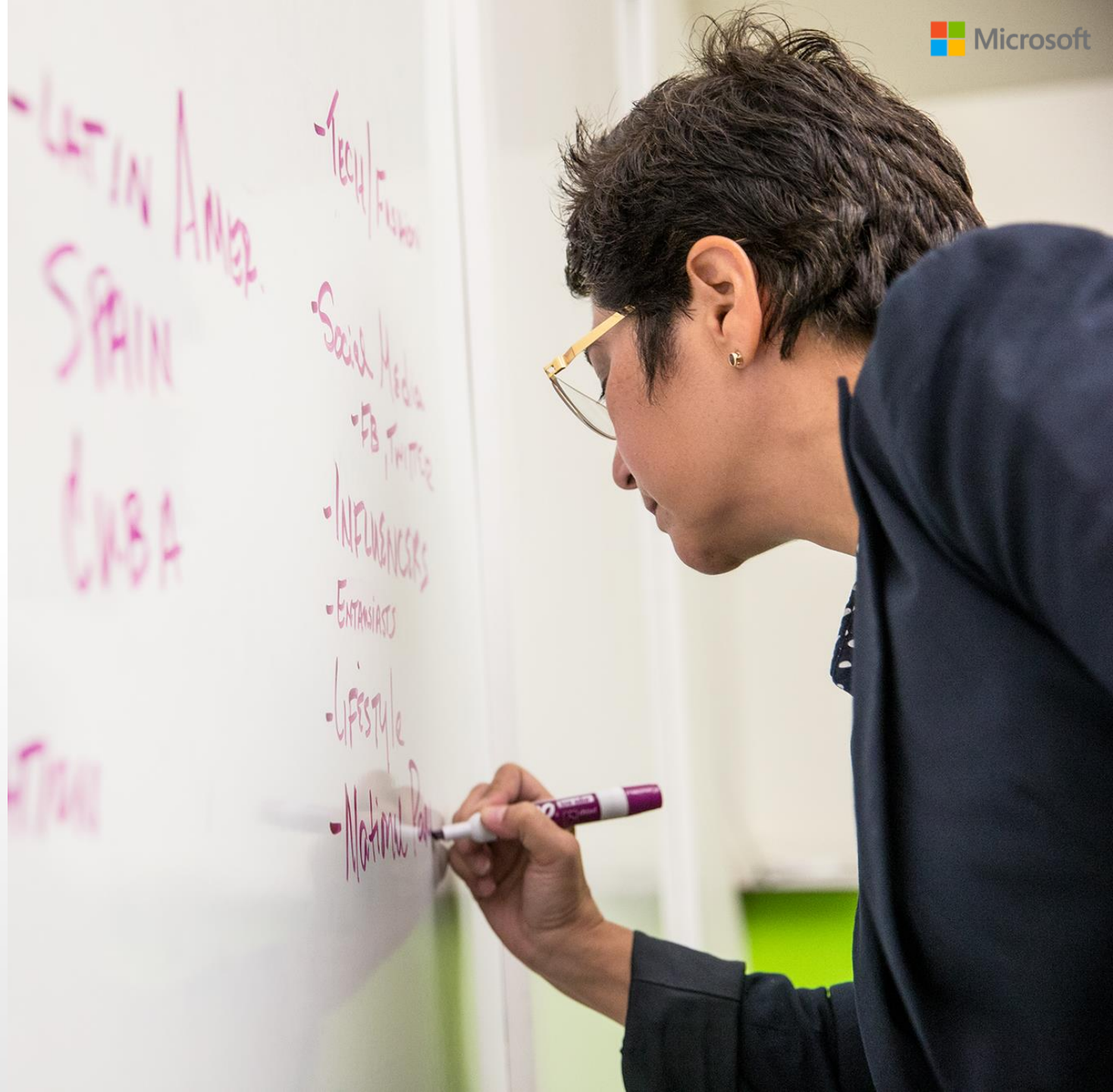
Please note that only the Incentive Administrator(s) and User(s) can access the incentives section.

User management is fully integrated into the Partner Center Dashboard. This allows for the:

- Addition of both the Incentive Administrator and user roles.
- Editing of permissions.
- Deletion of user profiles.

For more details on partner accounts, roles, and permissions – see the "[Learn more](#)" articles.

The Global Administrator can also set up your company users through the Azure Active Directory (AAD).



User management

Once your organization is eligible for incentives, the following users will receive an incentive enrollment invite:

- Global Administrator
- Account Administrator
- Incentive Administrator

The Incentive Administrator is the only user who can enroll in incentive programs. If there is no Incentive Administrator for your particular location, the Global Administrator and Account Administrator must assign one. The Incentive Administrator must be assigned for the location MPN IDs.

The Global Administrator or Account Administrator can also be assigned as the Incentive Administrator.

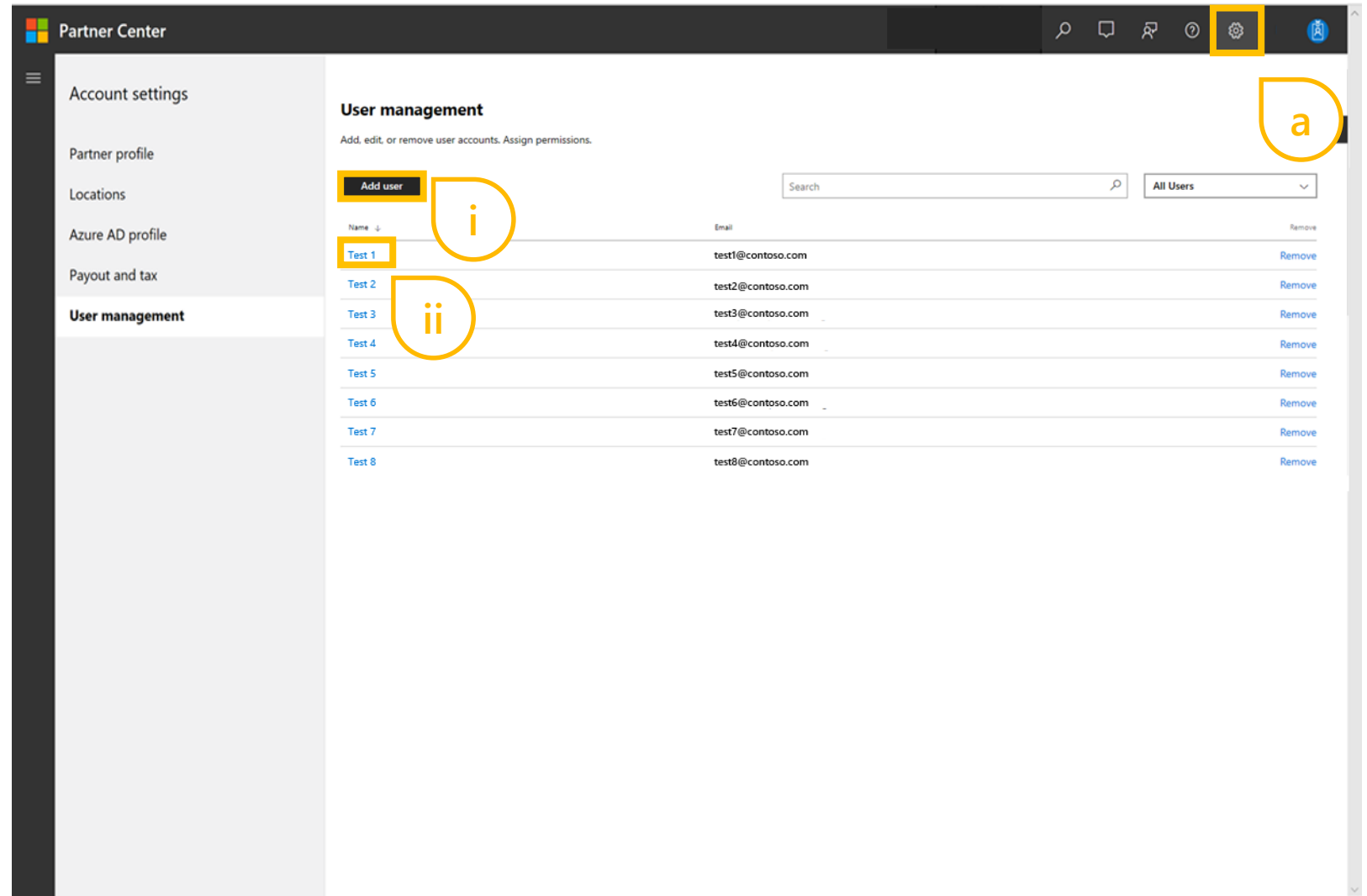
We will run through the process for assigning an Incentive Administrator in the next slides.



User management

To manage users within Partner Center, you need to follow these steps.

1. Navigate to the **User management** page.
 - Here, the Global Administrator can either:
 - i. Add a new user or
 - ii. Edit the roles and permissions of existing users by selecting a hyperlinked name.
 - a. The **User management** screen can be accessed at any time by selecting the cog wheel icon at the top right of the screen, selecting **Account settings** and then **User management**.



Note

Only users with the permissions of an "Incentive Administrator" can enroll in an incentive program. The Global Administrator must assign these permissions to either existing or new users.

User management

To manage users within the Partner Center Dashboard, you need to follow these steps.

2. To add a new user – enter the name and email address. The domain is prepopulated.
 - Once the user's details are entered, their incentive permissions can then be defined.
3. To do this the Global Administrator selects **Manage your organization's incentives for one or more locations**.

The screenshot shows the 'Add user' form in the Partner Center. The form is divided into two main sections: 'Add user' and 'Roles and permissions'. The 'Add user' section contains fields for 'Name' and 'Email'. The 'Email' field is prepopulated with '@company.com'. The 'Roles and permissions' section contains three checkboxes: 'Manages your organization's account as', 'Account admin', and 'Manages your organization's incentives for one or more locations'. The 'Add' button is highlighted with a yellow circle labeled '3'. The 'Cancel' button is also visible. A yellow circle labeled '2' is placed next to the 'Roles and permissions' section. A yellow circle labeled '3' is placed next to the 'Add' button.

Partner Center

Account settings

Partner profile

Locations

Azure AD profile

Payout and tax

User management

Add user

Name *

Email *

@company.com

Roles and permissions [Learn more](#)

☐ Manages your organization's account as

Select an account admin role

Select how this user administers your organization's Partner Center account.

☐ Account admin

Can manage your organization's users and locations

☐ Manages your organization's incentives for one or more locations

Select how this user manages incentives for your organization's locations.

Add Cancel

Note

If the checkbox to **Manage your organization's incentives for one or more locations** does not appear, please refresh the page.

User management

To manage users within the Partner Center Dashboard, you need to follow these steps.

The screen expands allowing the incentive permissions to be applied.

4. A user can be given either Incentive Administrator or Incentive User permissions at:
- An entire organization level.
 - At a location level.
 - At a program level.

To apply a permission level, the Global Administrator selects the radio button next to the applicable option.

Partner Center

Account settings

Partner profile

Locations

Azure AD profile

Payout and tax

User management

Add user

Name *

Test User

Email *

testuser@fridayincentives002.com

Roles and permissions [Learn more](#)

☐ Manages your organization's account as

Select an account admin role

Select how this user administers your organization's Partner Center account.

☐ Account admin

Can manage your organization's users and locations

☒ Manages your organization's incentives for one or more locations

Select how this user manages incentives for your organization's locations.

☒ Entire organization ☐ Incentive administrator ☐ Incentive user ☐ Not an incentive user for this location

☐ One or more locations listed below

MPN ID	Location	Incentive administrator	Incentive user	Not an incentive user for
0000001	The incentives, 001	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
0000002	The incentives, 002	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
0000003	The incentives, 003	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>

Note

For more information on the various user permissions visit the ["Learn More"](#) articles.

User management

To manage users within the Partner Center Dashboard, you need to follow these steps.

5. The functionality to offer permissions for one or more locations is also supported.
 - To apply a permission level select the radio button next to **One or more locations listed below**.
6. Then select the relevant role next to each location.

Partner Center

Select how this user administers your organization's Partner Center account.

☐ Account admin
Can manage your organization's users and locations

☒ Manages your organization's incentives for one or more locations
Select how this user manages incentives for your organization's locations.

☐ Entire organization ☐ Incentive administrator ☐ Incentive user ☒ Not an incentive user for this location

☒ One or more locations listed below

MPN ID	Location	Incentive administrator	Incentive user	Not an incentive user for this location
0000001	The incentives, 001	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
0000002	The incentives, 002	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
0000003	The incentives, 003	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
0000004	The incentives, 004	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
0000005	The incentives, 005	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
0000006	The incentives, 006	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>

Manages your organization's incentives for one or more offers

Update Cancel [Reset password](#)

User management

To manage users within the Partner Center Dashboard, you need to follow these steps.

7. Further customization of how your incentives are configured at a program level is also available from the **Manage your organization's incentives for one or more offers**.

Partner Center

Account settings

Partner profile

Locations

Azure AD profile

Payout and tax

User management

☐ Account admin
Can manage your organization's users and locations

☒ **Manages your organization's incentives for one or more locations**
Select how this user manages incentives for your organization's locations.

☒ Entire organization ⓘ ☒ Incentive administrator ☐ Incentive user ☐ Not an incentive user for this location

☐ One or more locations listed below

MPN ID	Location	Incentive administrator	Incentive user	Not an incentive user for this location
0000001	The incentives, 001	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
0000002	The incentives, 002	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
0000003	The incentives, 003	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
0000004	The incentives, 004	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
0000005	The incentives, 005	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
0000006	The incentives, 006	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>

[Manages your organization's incentives for one or more offers](#)

[Reset password](#)

7

Note

Locations need to be saved before you can update the program details.

User management

To manage users within the Partner Center Dashboard, you need to follow these steps.

8. This functionality allows the Global Administrator to restrict the incentive programs within the locations that the Incentive Administrator or User should access.

Partner Center

MPN
REFERRALS
INCENTIVES

Select access to programs by location

Select which programs this user should have access to for each of the locations listed below.

Filter locations by name or MPN ID Filter by country/region Filter by program enrollment Collapse all

Location/Enrollments	Number of enrollments
0000001 Hyderabad, IN <input type="checkbox"/> The incentives, 001 <input checked="" type="checkbox"/> The incentives, 002 <input checked="" type="checkbox"/> The incentives, 003	3 ^
0000002 Brisbane, AU <input checked="" type="checkbox"/> The incentives, 001 <input checked="" type="checkbox"/> The incentives, 002	2 ^
0000003 Las Vegas, US <input type="checkbox"/> The incentives, 001	1 ^

Save

8

Note

Locations need to be saved before you can update the program details.

User management

To manage users within the Partner Center Dashboard, you need to follow these steps.

9. Select **Update** to save the changes.
 - If these changes are being applied to an existing user – there is no further action required and within a few minutes the changes will be applied.

Partner Center

Select how this user administers your organization's Partner Center account.

☐ Account admin
Can manage your organization's users and locations

☒ Manages your organization's incentives for one or more locations
Select how this user manages incentives for your organization's locations.

☐ Entire organization [?] ☐ Incentive administrator ☐ Incentive user ☒ Not an incentive user for this location

☒ One or more locations listed below

MPN ID	Location	Incentive administrator	Incentive user	Not an incentive user for this location
0000001	The incentives, 001	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
0000002	The incentives, 002	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
0000003	The incentives, 003	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
0000004	The incentives, 004	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
0000005	The incentives, 005	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
0000006	The incentives, 006	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>

Manages your organization's incentives for one or more offers

Update [Reset password](#)

9

Note

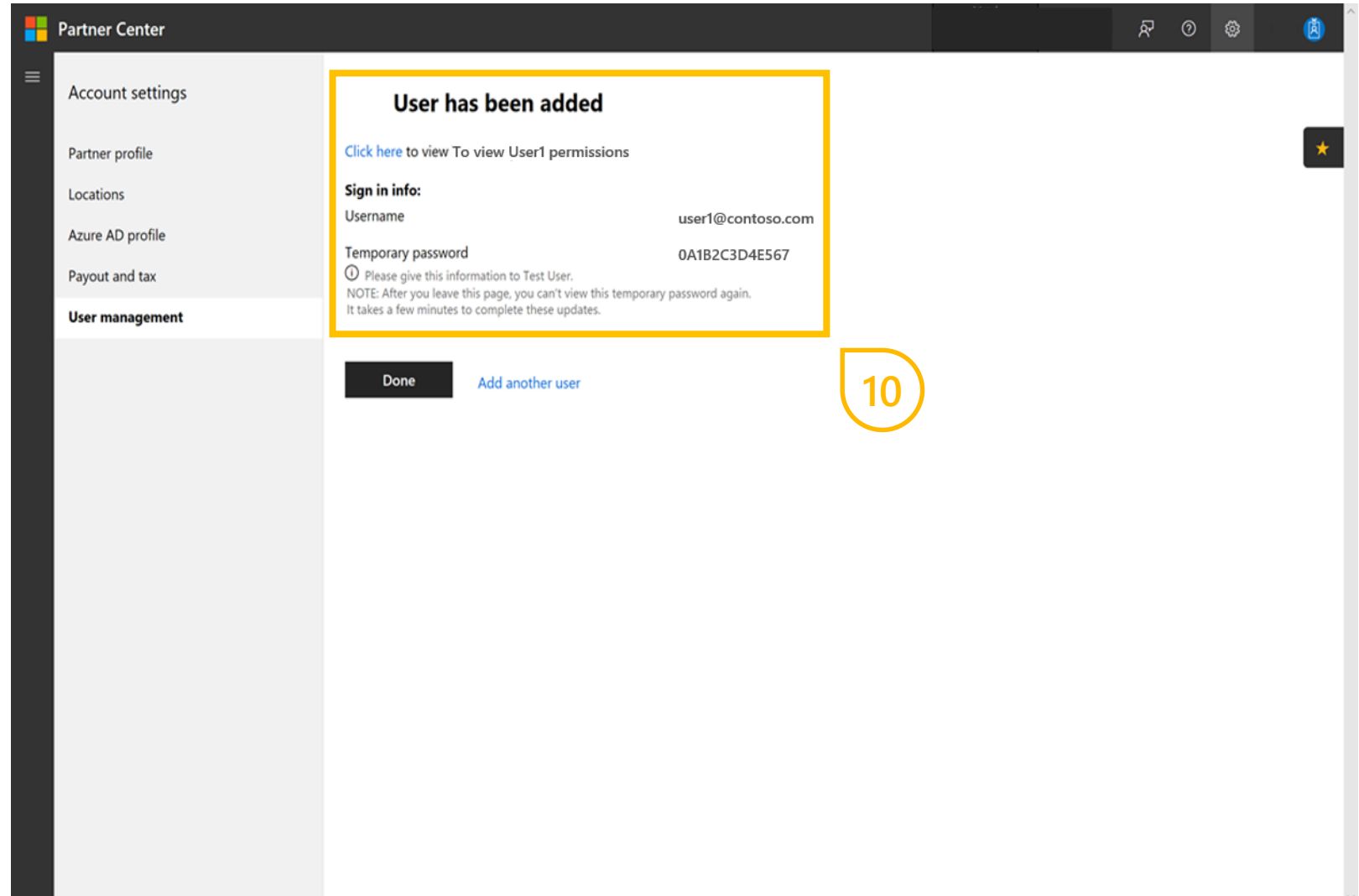
In the above screen, if a new user is being added – “**Update**” will be replaced with the word “**Add**”.

User management

To manage users within the Partner Center Dashboard, you need to follow these steps.

If a new user is added, an additional screen is shown.

10. This screen will detail confirmation of the user being added and a temporary password. This will need to be copied and sent to the user.
 - The new user would use this temporary password when logging in to Partner Center Dashboard for the first time. They will then be prompted to create a new password.



Note

After you leave this page, the temporary password cannot be viewed again.

User management

To manage users within the Partner Center Dashboard, you need to follow these steps.

11. You can search for a user by their permission type. Use the dropdown arrow to select and view the **Global admin** for your organization.

Account settings

Partner profile

Azure AD profile

Payout and tax

User management

User management

Add, edit, or remove user accounts. Assign permissions.

[Export report of users](#) who have access to Partner University or have associated Microsoft Learning account.

[Add user](#)

Name ↓	Email
Partner Name	IncentivePartner@company.com
Microsoft Office 365 Portal	

- Global admin
- All Users
- Manages your organization's account as
- Global admin**
- MPN partner admin
- Referrals admin
- Business profile admin
- Manages your organization's incentives as
- Incentive administrator
- Incentive user
- Account admin

11

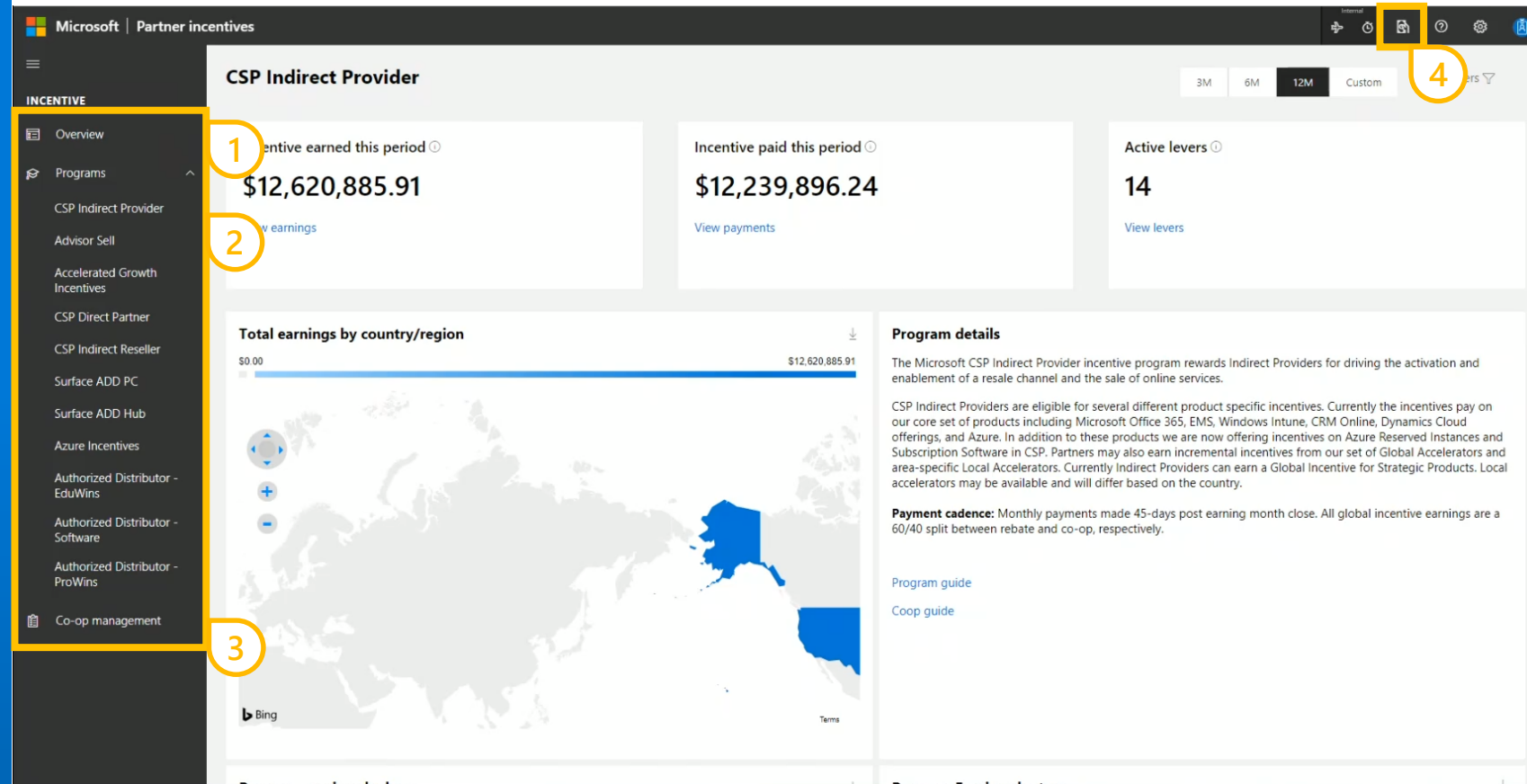
Navigating incentives information in Partner Center

Navigating the incentives pages

There are four main locations for incentives related information in Partner Center:

1. Overview tab
2. Programs tab
3. Co-op management tab (if applicable)
4. Transaction history and Payments pages

The following slides provide a high-level overview of each location and point you towards more detailed information.



Overview tab

In the overview tab, you can see all the incentive programs you have enrolled in and the latest status of each program.

1. The status will show if there are any actions required or if you have a pending invite.
2. Navigate to the bank and tax profile page to make any updates to your payment profile.

If you have a pending invite, you can enroll in that incentive program by selecting "Enroll" which will appear.

For a detailed walk-through of the enrollment process, see the [incentive enrollment in Partner Center guide](#).

<http://assetsprod.microsoft.com/partner-center-incentives-enrollment.pdf>

Microsoft | Partner incentives

Overview

A summary of your incentive programs.

All incentive programs Action required (0)

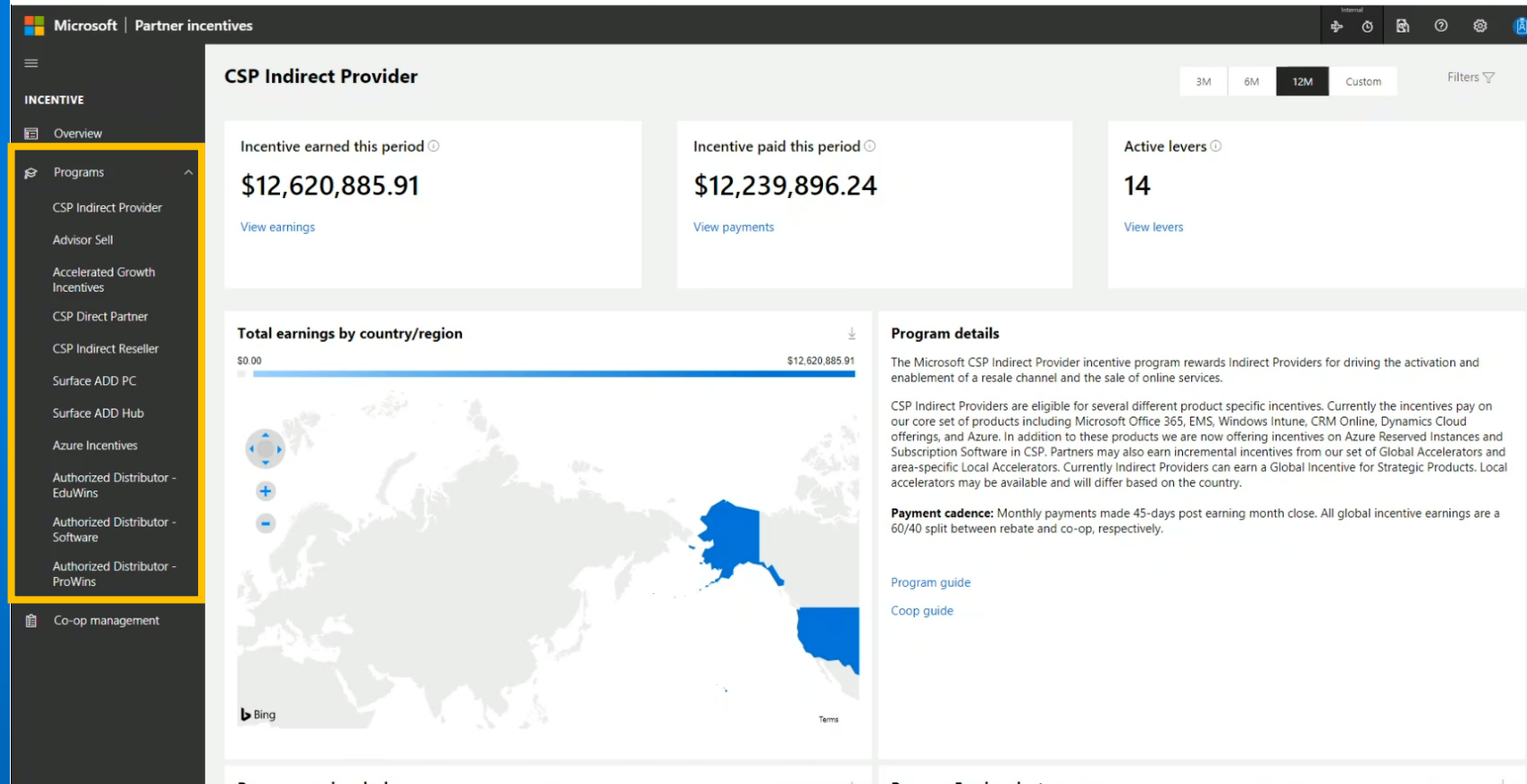
Program name	Location	Status
CSP Indirect Provider	Fremont, US MPN: 1540401	Enrolled
Advisor Sell	Fremont, US MPN: 1540401	Enrolled
Accelerated Growth Incentives	Fremont, US MPN: 1540401	Enrolled
CSP Direct Partner	Fremont, US MPN: 1540401	Enrolled
CSP Indirect Reseller	Fremont, US MPN: 1540401	Enrolled
Surface ADD PC	Fremont, US MPN: 1540401	Enrolled
Surface ADD Hub	Fremont, US MPN: 1540401	Enrolled
Azure Incentives	Fremont, US MPN: 1540401	Enrolling
Authorized Distributor - EduWins	Fremont, US MPN: 1540401	Enrolled
Authorized Distributor - Software	Fremont, US MPN: 1540401	Enrolled
Authorized Distributor - ProWins	Fremont, US MPN: 1540401	Enrolled

Manage bank and tax profile

Programs

Within the **Programs** tab is a program page for each incentive program you are currently enrolled in.

Here you can view information specific to the program you have selected. For detailed instructions see the [Incentive Programs within Partner Center guide.](#)



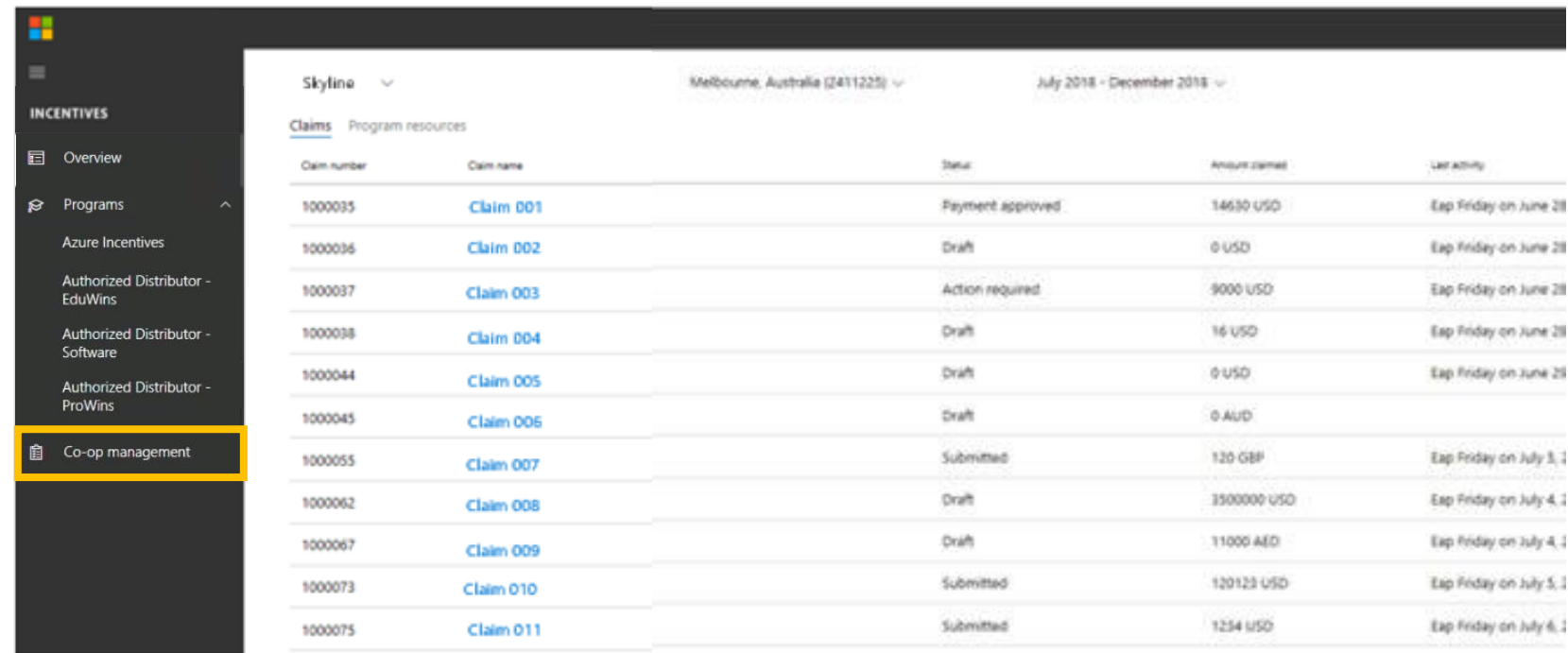
<https://assetsprod.microsoft.com/incentive-programs-partner-center.pdf>

Co-op management tab

From the Co-op management claims tab, you can:

- Create a claim
- Provide proof of execution
- Submit a claim
- Manage a claim

For detailed instructions on the actions above, please see the [incentive co-op claiming experience guide](http://assetsprod.microsoft.com/mpn/new-claiming-experience.pdf).



Claim number	Claim name	Status	Amount claimed	Last activity
1000035	Claim 001	Payment approved	14630 USD	Exp Friday on June 28
1000036	Claim 002	Draft	0 USD	Exp Friday on June 28
1000037	Claim 003	Action required	9000 USD	Exp Friday on June 28
1000038	Claim 004	Draft	16 USD	Exp Friday on June 28
1000044	Claim 005	Draft	0 USD	Exp Friday on June 29
1000045	Claim 006	Draft	0 AUD	
1000055	Claim 007	Submitted	120 GBP	Exp Friday on July 5, 1
1000062	Claim 008	Draft	3500000 USD	Exp Friday on July 4, 1
1000067	Claim 009	Draft	11000 AED	Exp Friday on July 4, 1
1000073	Claim 010	Submitted	120123 USD	Exp Friday on July 5, 1
1000075	Claim 011	Submitted	1254 USD	Exp Friday on July 6, 1

Transaction history and Payments pages

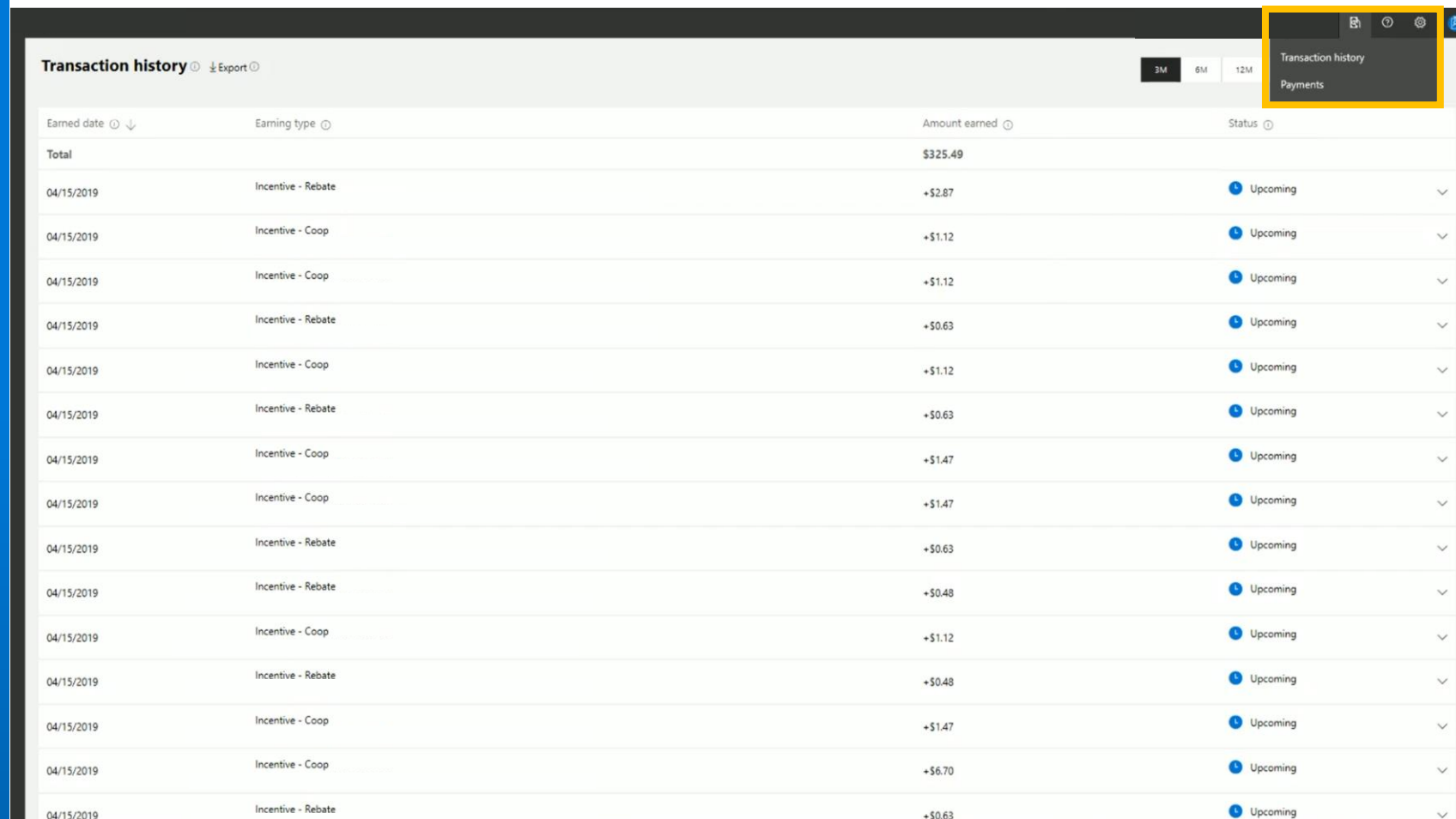
You can access incentive reporting information within the **Transaction history** and **Payments** pages. Navigate to these pages by selecting the money icon on the top navigation bar within Partner Center.

Select



To explore the reporting functionality available in these pages, please see the [incentive reporting guide](http://assetsprod.microsoft.com/mpn/new-incentive-reporting.pdf).

<http://assetsprod.microsoft.com/mpn/new-incentive-reporting.pdf>

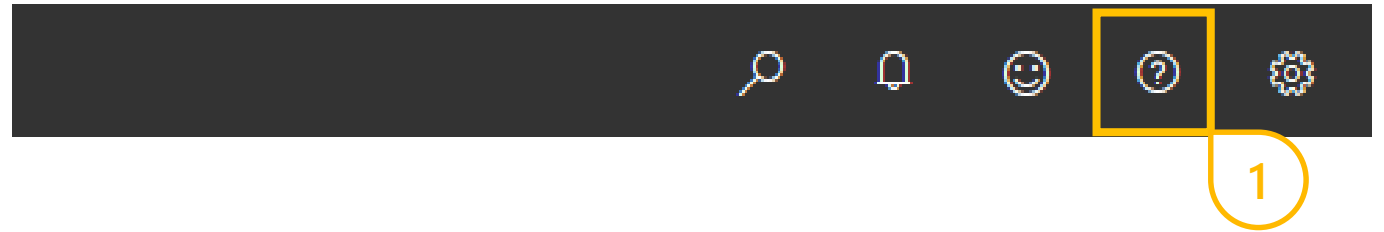
A screenshot of the 'Transaction history' page in the Microsoft Partner Center. The page has a dark header with a navigation bar on the right containing icons for 'Transaction history' and 'Payments'. The main content area shows a table with columns for 'Earned date', 'Earning type', 'Amount earned', and 'Status'. A summary row at the top shows a total amount earned of \$325.49. Below this, a list of transactions is shown, all dated 04/15/2019, with various earning types like 'Incentive - Rebate' and 'Incentive - Coop', and a status of 'Upcoming'. Each row has a dropdown arrow on the right.

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

Support

Support in Partner Center

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





Thank you.