

Modern enrollment

Enrollment in incentives programs in Partner Center



Introduction

In this training we explore the new enrollment process for partner incentive programs in the Partner Center Dashboard.



Objectives

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

- Creation of Incentive Administrator(s) and Users.
- Completion of incentive program enrollment.
- Access help and support.

Contents

1. Introduction.
2. A new incentive experience.
3. The modern enrollment process:
 - Step 1 – User management.
 - Step 2 – Incentive program enrollment.
4. Support and resources.
5. Summary.

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 Dashboard**.

This will be a centralized location where you can:

- View all your incentives earnings and payments.
- Discover new eligible incentive opportunities where applicable.
- Manage your claims where applicable.

As part of this, partners enrolling in a new incentive program will have a new and more streamlined experience through Partner Center Dashboard.



The modern enrollment process

The modern enrollment process

There are two steps involved in the modern enrollment process that require action on your part:

1. User management. This includes the set-up of the Incentive Administrator and user permissions in the Partner Center Dashboard.
2. Receiving your invite and enrolling in your incentive program.

Please note that in order to experience modern incentives on the Partner Center Dashboard, you must either:

- Migrate your existing Microsoft Partner Network (MPN) membership from Partner Membership Center (PMC) to Partner Center.
- Set up a new membership in Partner Center.



Step 1 – User management

User management

To enroll in an incentive program in the 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.

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 on the Partner Center Dashboard.

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.



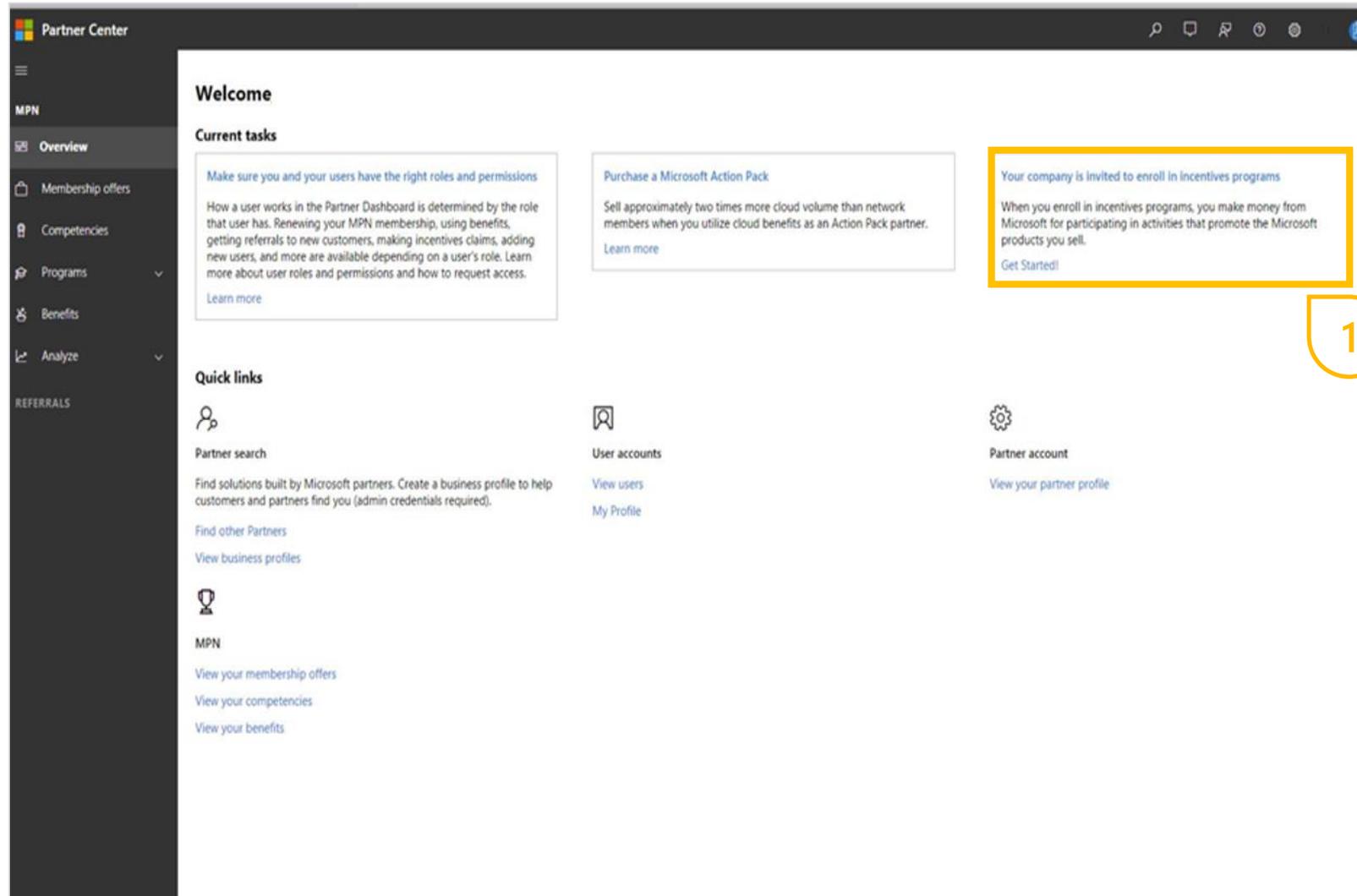
User management

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

When the organization is invited to enroll ***in an incentive program for the first time*** within Partner Center Dashboard, the Global Administrator or Account Administrator sees an action in the Current Tasks section of the dashboard.

(Please note that this section will disappear once it has been selected.)

1. Select **Get Started** to open the **User management** screen.



The screenshot shows the Microsoft Partner Center dashboard. The left sidebar contains navigation options: MPN (Overview, Membership offers, Competencies, Programs, Benefits, Analyze) and REFERRALS. The main content area is titled 'Welcome' and features a 'Current tasks' section. The first task is 'Make sure you and your users have the right roles and permissions'. The second task is 'Purchase a Microsoft Action Pack'. The third task, highlighted with a yellow border, is 'Your company is invited to enroll in incentives programs', with a 'Get Started!' button. Below the 'Current tasks' section are 'Quick links' for Partner search, User accounts, and Partner account. The MPN section at the bottom includes links for membership offers, competencies, and benefits.

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.

- The User management screen opens.
- 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**.

Partner Center

Account settings

Partner profile

Locations

Azure AD profile

Payout and tax

User management

User management

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

Add user

Search

All Users

Name ↓	Email	Remove
Test 1	test1@contoso.com	Remove
Test 2	test2@contoso.com	Remove
Test 3	test3@contoso.com	Remove
Test 4	test4@contoso.com	Remove
Test 5	test5@contoso.com	Remove
Test 6	test6@contoso.com	Remove
Test 7	test7@contoso.com	Remove
Test 8	test8@contoso.com	Remove

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 two input fields: 'Name' and 'Email'. The 'Email' field is prepopulated with '@company.com'. The 'Roles and permissions' section contains three checkboxes with corresponding roles: 'Manages your organization's account as', 'Account admin', and 'Manages your organization's incentives for one or more locations'. The 'Add' and 'Cancel' buttons are located at the bottom of the form. Annotations include a yellow box around the 'Add user' section labeled '2', and another yellow box around the 'Manages your organization's incentives for one or more locations' checkbox labeled '3'.

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

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

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.

The screenshot shows the Partner Center dashboard with the 'User management' section selected in the left sidebar. The main content area displays the 'Manages your organization's incentives for one or more locations' settings. A yellow box highlights the 'One or more locations listed below' radio button. Below this, a table lists six locations with columns for 'Incentive administrator', 'Incentive user', and 'Not an incentive user for this location'. A yellow circle with the number '5' points to the first row's 'One or more locations listed below' radio button. A larger yellow box highlights the table, and a yellow circle with the number '6' is in the bottom right corner. At the bottom, there are 'Update', 'Cancel', and 'Reset password' buttons.

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"/>

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

Update Cancel 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

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

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.

The screenshot shows the Partner Center dashboard with the 'User management' section selected in the left sidebar. The main content area displays a table of users and their roles across different locations. The table has columns for MPN ID, Location, Incentive administrator, Incentive user, and Not an incentive user for this location. The 'Update' button is highlighted with a yellow circle and the number 9.

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 Cancel Reset password

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.

Partner Center

Account settings

Partner profile

Locations

Azure AD profile

Payout and tax

User management

User has been added

[Click here](#) to view To view User1 permissions

Sign in info:

Username	user1@contoso.com
Temporary password	0A1B2C3D4E567

ⓘ Please give this information to Test User.
NOTE: After you leave this page, you can't view this temporary password again.
It takes a few minutes to complete these updates.

Done [Add another user](#)

10

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

Step 2 - Incentive program enrollment

The enrollment process

The Incentive Administrator is the only user that can enroll in an incentive program. They will receive an invite to enroll once they are eligible for incentives.

The Incentive Administrator should select Get Started from their invite. This will direct them to the Partner Center Dashboard.

To enroll in an incentive program, an Incentive Administrator needs to follow the steps on the following slides.



Note

You must use Partner Center credentials to login and get started.

The enrollment process

To enroll in an incentive program, an Incentive Administrator needs to follow these steps.

1. Log into the Partner Center Dashboard and navigate to the **Incentives** section on the left navigation bar. Select **Overview** to show all incentive program invitations.
2. The dashboard will also show any existing enrollments (if there are any).

Partner Center

Overview

A summary of your Incentive earnings, payments and programs.

Total earned **USD 0**
[View earnings](#)

Total paid **USD 0**
[View payment statements](#)

All incentive programs		Action required (1)	Invitations (1)		
Program name	Location	Total paid	Total earned	Status	
0000001	The incentives, 001 MPN: 11111110	-	-	Invited	Enroll
0000002	The incentives, 002 MPN: 11111112	USD 0	USD 0	Enrolled	
0000003	The incentives, 003 MPN: 11111113	USD 0	USD 0	Enrolled	
0000004	The incentives, 004 MPN: 11111114	USD 0	USD 0	Enrolled	

Note

The Incentives section in the navigation menu will only be visible to Incentive Administrators and Incentive Users. They will also see a Payout Statement tab that offers incentive reporting. This will be divided into three sections; Summary, Earnings, and Payments.

The enrollment process

To enroll in an incentive program, an Incentive Administrator needs to follow these steps.

3. To start the enrollment process, select the **Enroll** option for the specific program you wish to enroll in.

Partner Center

Overview

A summary of your Incentive earnings, payments and programs.

Total earned **USD 0**
[View earnings](#)

Total paid **USD 0**
[View payment statements](#)

All incentive programs Action required (1) Invitations (1)

Program name	Location	Total paid	Total earned	Status	
0000001	The incentives, 001 MPN: 1111110	-	-	Invited	Enroll
0000002	The incentives, 002 MPN: 1111112	USD 0	USD 0	Enrolled	3
0000003	The incentives, 003 MPN: 1111113	USD 0	USD 0	Enrolled	
0000004	The incentives, 004 MPN: 1111114	USD 0	USD 0	Enrolled	

Note

A program not yet enrolled will hold the status of invited and an **Enroll** hyperlink will be available. This link will remain until the Incentive Administrator has started the enrollment process.

The enrollment process

To enroll in an incentive program, an Incentive Administrator needs to follow these steps.

4. You will be presented with a confirmation of the incentive program, purpose, and a program summary.
5. Select **Continue** to proceed with the enrollment.

The screenshot shows the Microsoft Partner Center interface. The left sidebar contains navigation options: MPN, REFERRALS, INCENTIVES, Overview (selected), and Payout statement. The main content area is titled 'Overview' and shows a summary of incentive earnings and programs. A modal dialog titled 'Enroll in the Skyline incentive program' is open, displaying the following information:

- Total earned:** USD 0
- Program name:** The incentives, 002 (MPN: 1111112)
- Period:** July 1, 2018 - June 30, 2019
- Purpose:** Skyline and its offers provide partners with investment funds to drive increased sales and improve customer experience with Microsoft products.
- Need to Know:** Skyline and its offers have varying performance periods, incentive rates, program criteria and payment frequency. Proof of Execution may be required and all participating partners must report sales data to MS Sales.

At the bottom of the modal, there are two buttons: 'Close' and 'Continue'. The 'Continue' button is highlighted with a yellow box and a circled '5'. A circled '4' is also visible near the 'Enroll' button in the background.

The enrollment process

To enroll in an incentive program, an Incentive Administrator needs to follow these steps.

6. Additional information about the requirement for adding/updating bank and tax details is given.

This is a requirement for enrollment completion.

7. Select **Add bank and tax profile** to progress to the next step.

The screenshot shows the 'Partner Center' interface. The left sidebar contains navigation options: MPN, REFERRALS, INCENTIVES, Overview (selected), and Payout statement. The main content area is titled 'Overview' and contains a summary of incentive earnings and payments. A modal dialog box is open, titled 'Enroll in the Skyline incentive program'. The dialog contains the following text: 'The incentives, 002 (MPN: 1111112) July 1, 2018 - June 30, 2019'. Below this, it states: 'To complete your enrollment, you must **add or update your bank and tax profile** in your partner billing profile. Your organization's bank and tax profile is used for billing and payments from Microsoft. Remember to include your VAT if appropriate.' At the bottom of the dialog, it says 'Step 2 of 2' and provides two buttons: 'Close' and 'Add bank and tax profile'. A yellow box highlights the entire dialog, and another yellow box highlights the 'Add bank and tax profile' button. A yellow circle with the number 6 is positioned to the right of the dialog, and a yellow circle with the number 7 is positioned to the right of the 'Add bank and tax profile' button. In the background, a table lists incentive programs with columns for Program name, Total earned, and Total paid. The first row shows '0000001' with 'USD 0' in both columns. The second row shows '0000002' with 'USD 0' in both columns. The third row shows '0000003' with 'USD 0' in both columns. The fourth row shows '0000004' with 'USD 0' in both columns and a red 'Action required' label with a link to 'Update bank and tax profile'.

Note

Selecting **“Close”** without completing bank and tax details will take the user back to the overview page, displaying the prompt to **“Update bank and tax profile”**.

The enrollment process

To enroll in an incentive program, an Incentive Administrator needs to follow these steps.

You will be directed to the bank and tax setup page. You can assign both bank and tax profiles to a program from this page.

The steps to create/use an existing payment profile are covered in detail in the next two sections.

Partner Center

Payout and tax setup

Complete the tax profile and the bank profile in order to be eligible to get paid for incentives. Add a bank profile for each location where you do business. The profiles need to be complete by the deadline of the incentive program. Allow 48 hours for Microsoft to process your information. Payment occurs at the first payment cycle after your profiles are complete.

Programs

Status	MPN ID	Country/Region	Microsoft Entity	Tax profile	Payment type	Payment profile name	Currency
Not Valid	0011111	AU	Microsoft Regional Sales Corporation	Not Started	Electronic Bank Transfer	<input type="text" value="Create a new payment profile..."/>	<input type="text"/>

Tax Profile

Action	Status	MPN ID	Country/Region
Edit	Not Started	1011111	AU

Bank Profiles

Action	Status	Profile name	Bank name	Country/Region	Account number
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Note

If you are required to make an update in the bank and tax for a particular program and location, **“Action Required Update Bank and Tax Profile”** will be shown under "Status" on the overview page available from the left navigation bar.

Banking profiles

Banking profiles

Remember:

Banking profiles are created at an organization level and can be assigned across multiple MPN ID's within the same organization.

This allows for the same banking profile to be used. There may be exceptions when applying the banking profile to different countries, as different banking and tax rules may apply.



The enrollment process

To enroll in an incentive program, an Incentive Administrator needs to follow these steps.

1. Select the relevant program from the drop-down menu.
2. Create a new payment profile or select an existing preapproved profile (if one exists) for each MPN separately. If a payment profile that is already created for other locations is to be used for the newly onboarded program, choose this from the drop-down menu instead of creating a new profile.

Do not create duplicate bank profiles.

To return to the overview page – select **Overview** under **Incentives** on the left navigation bar.

Partner Center

Payout and tax setup

Complete the tax profile and the bank profile in order to be eligible to get paid for incentives. Add a bank profile for each location where you do business. The profiles need to be complete by the deadline of the incentive program. Allow 48 hours for Microsoft to process your information. Payment occurs at the first payment cycle after your profiles are complete.

Programs

Skyline

Status	MPN ID	Microsoft Entity	Tax profile	Payment type	Payment profile name	Currency
Not Valid	0011111	Microsoft Regional Sales Corporation	Not Started	Electronic Bank Transfer	Create a new payment profile...	

Tax Profile

Action	Status	MPN ID	Country/Region
Edit	Not Started	1011111	AU

Bank Profiles

Action	Status	Profile name	Bank name	Country/Region	Account number
--------	--------	--------------	-----------	----------------	----------------

Note

If you are required to make an update in the bank and tax for a particular program and location, **"Action Required Update Bank and Tax Profile"** will be shown under "Status" on the overview page available from the left navigation bar.

The enrollment process

To enroll in an incentive program, an Incentive Administrator needs to follow these steps.

Selecting **Create a new payment profile**, opens the setup pages.

Bank profile information is organized under three sections:

- i. Details.
- ii. Bank Account.
- iii. Beneficiary.
- iv. Progress status is tracked and displayed towards the right of the input section.

Partner Center

Account settings

Partner profile

Azure AD profile

Payout and tax

User management

Bank Profile

Click 'Cancel' to return to previous page. Cancel

Details

Profile name ⓘ

New Profile 4

Bank account location ** ⓘ

India

Disbursement currency ** ⓘ

India Rupee, INR

Payment method ** ⓘ

Electronic Bank Transfer

Microsoft's preferred payment method is electronic banking.

Next

Bank Account

! Input Pending

Beneficiary

! Input Pending

Session will expire in: 14:59

Click 'Cancel' to return to previous page. Cancel

iv

The enrollment process

To enroll in an incentive program, an Incentive Administrator needs to follow these steps.

3. Enter the payment details in the **Details** section.
 - **Profile name**
Enter a unique name to identify this payment profile.
 - **Bank account location**
The country in which your company's bank is located.
 - **Disbursement currency**
The currency in which Microsoft will pay you. Depending on the partner's bank account location this may be set or another currency can be selected from the drop down.
4. Select **Next** to save these details and move to the **Bank account** section.

Partner Center

Account settings

Partner profile

Azure AD profile

Payout and tax

User management

Bank Profile

Click 'Cancel' to return to previous page. [Cancel](#)

Details In Progress

Profile name ** ⓘ

Disbursement currency ** ⓘ

Bank account location ** ⓘ

Payment method ** ⓘ

Microsoft's preferred payment method is electronic banking.

[Next](#) 3

Bank Account ⓘ Input Pending

Beneficiary ⓘ Input Pending

Session will expire in: 14:59 Click 'Cancel' to return to previous page. [Cancel](#)

The enrollment process

To enroll in an incentive program, an Incentive Administrator needs to follow these steps.

5. Under Bank account, enter the bank identifier such as IBAN, BSB or SWIFT/BIC. The fields shown in this section will vary by country. The bank account information that relates to this identifier then appears on the page below. Next, enter additional details such as account number if they are not already shown.
6. Select **Next** to save these details and move on to the Beneficiary section.

Partner Center

Details

Complete

Account settings

Partner profile

Azure AD profile

Payout and tax

User management

Bank Account

In Progress

Indian Financial System Code ** ⓘ

Bank 1234567

Account number ** ⓘ

1234567890

Bank name

Bank 1

Bank branch name

Branch Bank 1

Bank Address

Main Street

SWIFT code

BANK1234

Next

Back

Beneficiary

Input Pending

Session will expire in: 18:54

Click 'Cancel' to return to previous page.

Cancel

5

6

The enrollment process

To enroll in an incentive program, an Incentive Administrator needs to follow these steps.

7. Next, complete the beneficiary information.

Beneficiary is the person in your company that the bank would contact if they need to discuss your account.

Complete all details. This includes entry of tax type and tax ID.

Partner Center

Account settings

Partner profile

Azure AD profile

Payout and tax

User management

Beneficiary

In Progress

Bank beneficiary contact

Contact phone ** ⓘ

Contact email ** ⓘ

Some banks require that you enter this information using Latin script. To receive payment, make sure the address below matches the information your bank has on file. By default, this form has been completed with the information you already provided.

Bank beneficiary location

Company name on bank account ** ⓘ

Address 1 ** ⓘ

Country/Region **

Address 2 ⓘ

Tax ID type **

Town/City ** ⓘ

Tax ID ** ⓘ

Postal code ** ⓘ

The enrollment process

To enroll in an incentive program, an Incentive Administrator needs to follow these steps.

8. Once all the beneficiary information has been entered, the Finish button will be available. Select Finish to save. A confirmation message appears. Select Confirm to agree to the validation and creation of a payment profile. At this point you are taken back to the Payout and tax setup page.

Partner Center

Account settings

Partner profile

Azure AD profile

Payout and tax

User management

Enter text

Enter text

Some banks require that you enter this information using Latin script. To receive payment, make sure the address below matches the information your bank has on file. By default, this form has been completed with the information you already provided.

Bank beneficiary location

Company name on bank account ** ⓘ

Enter text

Address 1 ** ⓘ

Country/Region **

Tax ID type **

Tax ID ** ⓘ

Enter text

Address 2 ⓘ

Town/City ** ⓘ

Postal code ** ⓘ

Finish

Back

Session will expire in: 19:23

Click 'Cancel' to return to previous page.

Cancel

8

Tax pages

Tax pages

Remember:

Taxes is a dynamic section. Depending on the details you enter under Setup (that is, the incorporation country of your company), Partner Center Dashboard will request you to enter the relevant tax information for that country.

Please reference official sources of tax information for your country if you require guidance regarding specific tax details to provide.

Only company details are to be entered on the taxes page. Personal details should **NEVER** be entered.

For partner companies in the Americas, if you require information on completing the W8 or W9 forms, the following addresses take you to the IRS site:

<http://www.irs.gov/pub/irs-pdf/iw8.pdf>

<http://www.irs.gov/pub/irs-pdf/iw9.pdf>



The enrollment process

To enroll in an incentive program, an Incentive Administrator needs to follow these steps.

If a new payment profile is being set-up the next step, having entered the banking details, is to add the tax profile.

1. To start the tax profile association, select **Edit**.

Partner Center

Account settings
Partner profile
Locations
Azure AD profile
Payout and tax
User management

Payout and tax setup

Complete the tax profile and the bank profile in order to be eligible to get paid for incentives. Add a bank profile for each location where you do business. The profiles need to be complete by the deadline of the incentive program. Allow 48 hours for Microsoft to process your information. Payment occurs at the first payment cycle after your profiles are complete.

Programs
Skyline

Status	MPN ID	Country/Region	Microsoft Entity	Tax profile	Payment type	Payment profile name	Currency
Not Valid	0011111	AU	Microsoft Regional Sales Corporation	Not Started	Electronic Bank Transfer	<input type="text"/>	<input type="text"/>

Tax Profile

Action	Status	MPN ID	Country/Region
Edit	Not Started	1011111	AU

Bank Profiles

Action	Status	Profile name	Bank name	Country/Region	Account number
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The enrollment process

To enroll in an incentive program, an Incentive Administrator needs to follow these steps.

The online tax form is dynamic and adjusts to the tax requirements of the country that the organization is incorporated within.

The form contains a minimum of four sections:

- Business Profile
 - Setup
 - Tax status
 - Additional documentation
2. In the **Business profile** section, add organization details such as names(s) and business numbers.
 3. Select **Next** to continue.

The screenshot shows the Microsoft enrollment interface. At the top, the Microsoft logo is visible. Below it, the word 'Taxes' is displayed. A 'Remember:' section contains three bullet points: 'Make sure you have all your tax information handy', 'Click **Next** after each step to save your information.', and 'Exclude sensitive information such as bank account details when submitting support queries.' The main section is titled 'Business profile' and shows a progress indicator 'In Progress'. The form fields are: 'Account type' (dropdown menu with 'Organization' selected), 'Organization type' (dropdown menu with 'Government Entity' selected), 'Organization name' (text input field with 'Enter text' placeholder), 'DUNS number' (text input field with 'Enter text' placeholder), and 'Doing Business As (DBA)' (text input field with 'Enter text' placeholder). A blue 'Next' button is located at the bottom of the form. A red warning icon and the word 'Required' are visible at the bottom right of the form. Three yellow callout boxes with numbers 2, 3, and 4 are overlaid on the image: callout 2 points to the 'Next' button, callout 3 points to the 'Required' warning, and callout 4 points to the 'Doing Business As (DBA)' field.

Note

1. You may not need to complete all sections, as this depends on the country of company incorporation.
2. The system alerts partners to the requirements in each section. A section may not appear if it is not required.

The enrollment process

To enroll in an incentive program, an Incentive Administrator needs to follow these steps.

4. In the **Setup** section, select the option that applies to your company:
 - The option on the left, relates to USA-incorporated companies only. If that status applies to your company, select this option.
 - If that status does not apply to your company, select the right hand option and choose the country/region of permanent residence of your company.
5. Select **Next** to continue.

Business profile ✓ Completed

Setup → In Progress

Complete the form below so we can verify the tax status of the party contracting with Microsoft:

If you are filling this out on behalf of your organization, select if any are true:

- You are a corporation that was incorporated in the USA
- You believe that you should fill out a Form W-9 (tax form)

Select if none of these apply to you or your organization

Permanent residence country/region *

Select

OR

If you are filling this out as an individual, select if any are true:

- You are a US citizen
- You were born in the USA
- You are a US resident (you have a green card)
- You file a joint tax return with a US taxpayer
- You have been in the USA more than 183 days in the past 3 years
- You believe that you should fill out a Form W-9 (tax form)

Next Back

Tax status ! Required

Cancel

The enrollment process

To enroll in an incentive program, an Incentive Administrator needs to follow these steps.

6. In the **Tax status** section, enter your details.

The information required is specific to the country of incorporation.

7. Select **Next** to save these details and continue.

Business profile ✔ Completed

Setup ✔ Completed

Tax status → In Progress

Permanent Account Number (PAN) *

Goods and Services Identification Number (GSTIN)

Service Tax Number

Tax Payer Identification Number (TIN)

Next

Additional documentation ! Required

The enrollment process

To enroll in an incentive program, an Incentive Administrator needs to follow these steps.

8. In the additional documentation section, complete the required fields.
9. Select **Next** to continue.

The screenshot displays a multi-step enrollment process. The top section shows 'Setup' and 'Tax status' as 'Completed' with green checkmarks. The 'Additional documentation' section is currently 'In Progress', indicated by a blue bar and a right-pointing arrow. Below this, a form titled 'Permanent residence' is highlighted with a yellow border. The form contains the following fields: 'Country/Region *' (a dropdown menu), 'Town/City *' (a text input), 'Address 1 *' (a text input with a clear 'x' button), 'Postal code *' (a text input), and 'Address 2' (a text input with the placeholder 'Enter text'). At the bottom of the form, a dark blue bar contains a blue 'Next' button and a grey 'Back' button. A yellow callout bubble with the number '8' points to the form area. Below the form, a grey bar shows 'Additional documentation' with a red exclamation mark icon and the word 'Required'. A yellow callout bubble with the number '9' points to the 'Next' button. At the very bottom, a 'Cancel' button is visible.

The enrollment process

To enroll in an incentive program, an Incentive Administrator needs to follow these steps.

Based on the country of incorporation additional documents may be required.

10. Select **Browse** to add each document. When the document name is shown, select **Upload** to complete the submission.

When you successfully upload a document, the **Remove** button is shown while the **Browse** and **Upload** buttons will no longer be shown.

11. Select **Finish** to save data and continue.

A pop-up message appears. If you select **Confirm**, the system redirects you back to the Payout and tax setup page.

Additional documentation → In Progress

Include the following required documentation:

Certificate of Incorporation (COI) ⓘ
Select a file, then click Upload.
Browse

Copy of PAN card ⓘ
Select a file, then click Upload.
Browse

Central Excise Registration / Service Tax Registration (if applicable) ⓘ
Select a file, then click Upload.
Browse

Copy of lower withholding tax certificate ⓘ
Select a file, then click Upload.
Browse

Certificate of Registration : Goods and Services Identification Number ⓘ
Select a file, then click Upload.
Browse

Finish **Back**

Review your incentive program enrollment

The enrollment process

Once the bank and tax details have been added, you can navigate back to the incentive overview page.

1. You can see the **Enrolling** status from the incentive programs dashboard.
2. After the bank and tax details have been approved by Microsoft, the status changes to **Enrolled**.
3. At this point, the program's details page can be accessed by selecting the relevant program under **Program name**.
4. Selecting the indicator dots on the right for each program offers the option to download the program incentive guide.

Partner Center

Overview

A summary of your Incentive earnings, payments and programs.

Total earned **USD 0** [View earnings](#)

Total paid **USD 0** [View payment statements](#)

All incentive programs Action required (1)

Program name	Location	Total paid	Total earned	Status
0000001	The incentives, 001 MPN: 1111110	USD 0	USD 0	Enrolling
0000002	The incentive's, 002 MPN: 1111112	USD 0	USD 0	Enrolled
0000003	The incentives, 003 MPN: 1111113	USD 0	USD 0	Enrolled
0000004	The incentives, 004 MPN: 1111114	USD 0	USD 0	Enrolled

The enrollment process

Once bank and tax details have been successfully added, you can navigate back to the incentive overview page.

From the program's details page of a program with no claiming element, the following information is available:

- i. The program Incentive Guide.

Partner Center

Skyline The Incentives, 002

Total earned **USD 0**
[View earnings](#)

Total paid **USD 0**
[View payment statements](#)

Program resources

Name	Date notified	Actions
Program guide	July 9, 2018	Download ⓘ

The enrollment process

Once bank and tax details have been successfully added, you can navigate back to the incentive overview page.

From the program's details page of a program with a claiming element, the following information is available:

- i. The program Incentive Guide.
- ii. Filtering on usage periods, location and date ranges.
- iii. A summary of "co-op earned" and "co-op claimed" based on selected location and date ranges.
- iv. Claims status.
- v. Additional program resources.

The screenshot shows the 'Skyline' program details page. The page is divided into several sections:

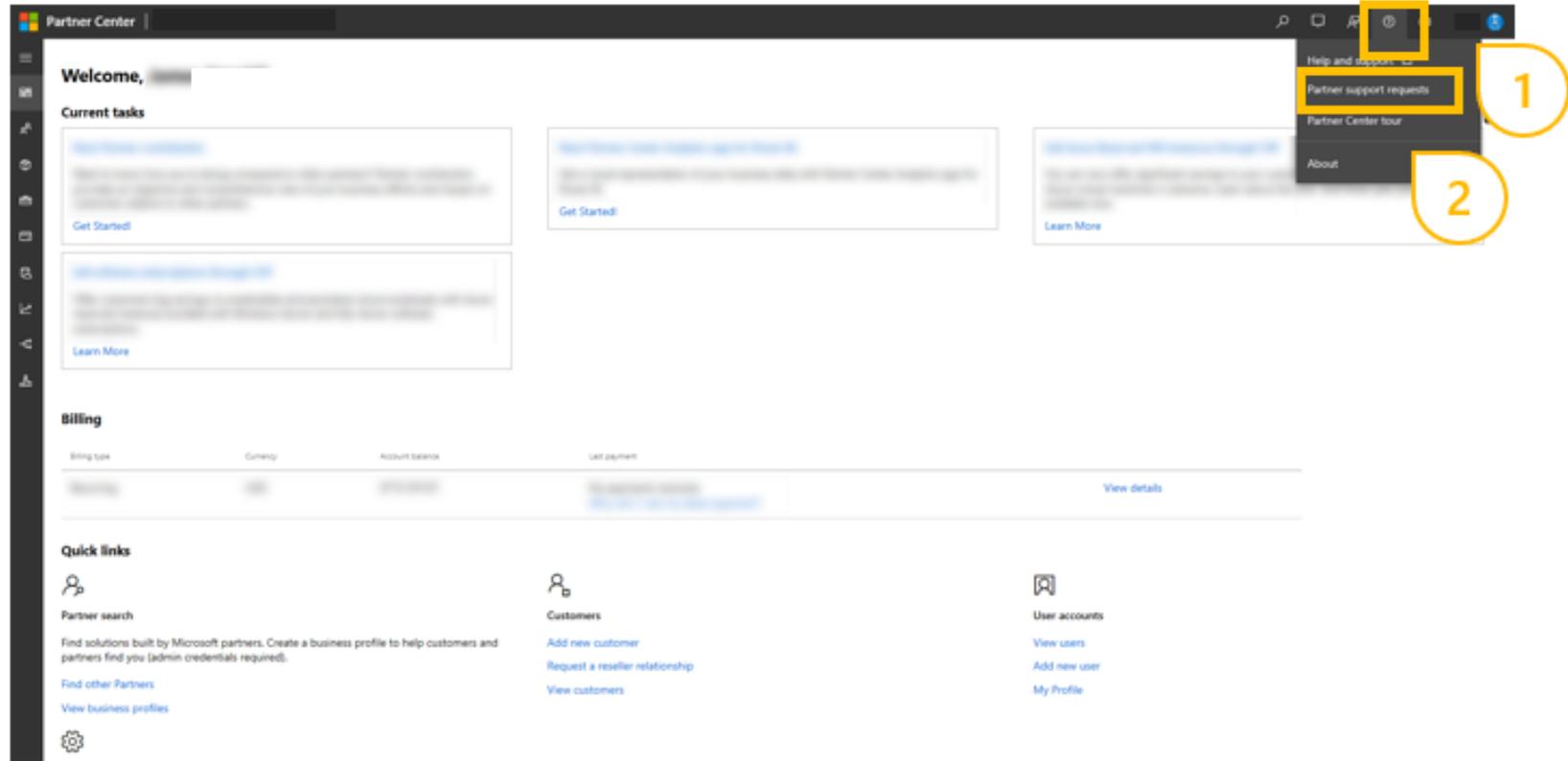
- Header:** 'Skyline' with options to '+ Create a claim' and 'Download program guide' (annotated with 'i').
- Filters:** 'AU, Melbourne' and 'July 2018 - December 2018 (current usage period)' (annotated with 'ii').
- Summary Cards:** Three cards showing 'Co-op earned 3,419,376.06 AUD', 'Co-op claimed 1,500 AUD', and a donut chart showing 'Claimed co-op: 1,500 AUD' and 'Remaining co-op: 3,417,876.06 AUD' (annotated with 'iii').
- Claims Table:** A table with columns 'Claim number', 'Claim', 'Status', 'Amount claimed', 'Last activity', and 'Due date'. The first row shows '0000001', 'M...', 'Submitted' (annotated with 'iv'), '1,500 AUD', 'Test1 on September 6, 2018', and 'September 11, 2018'. A 'Program resources' link is highlighted (annotated with 'v').

Support and resources

Support

To access support follow these steps.

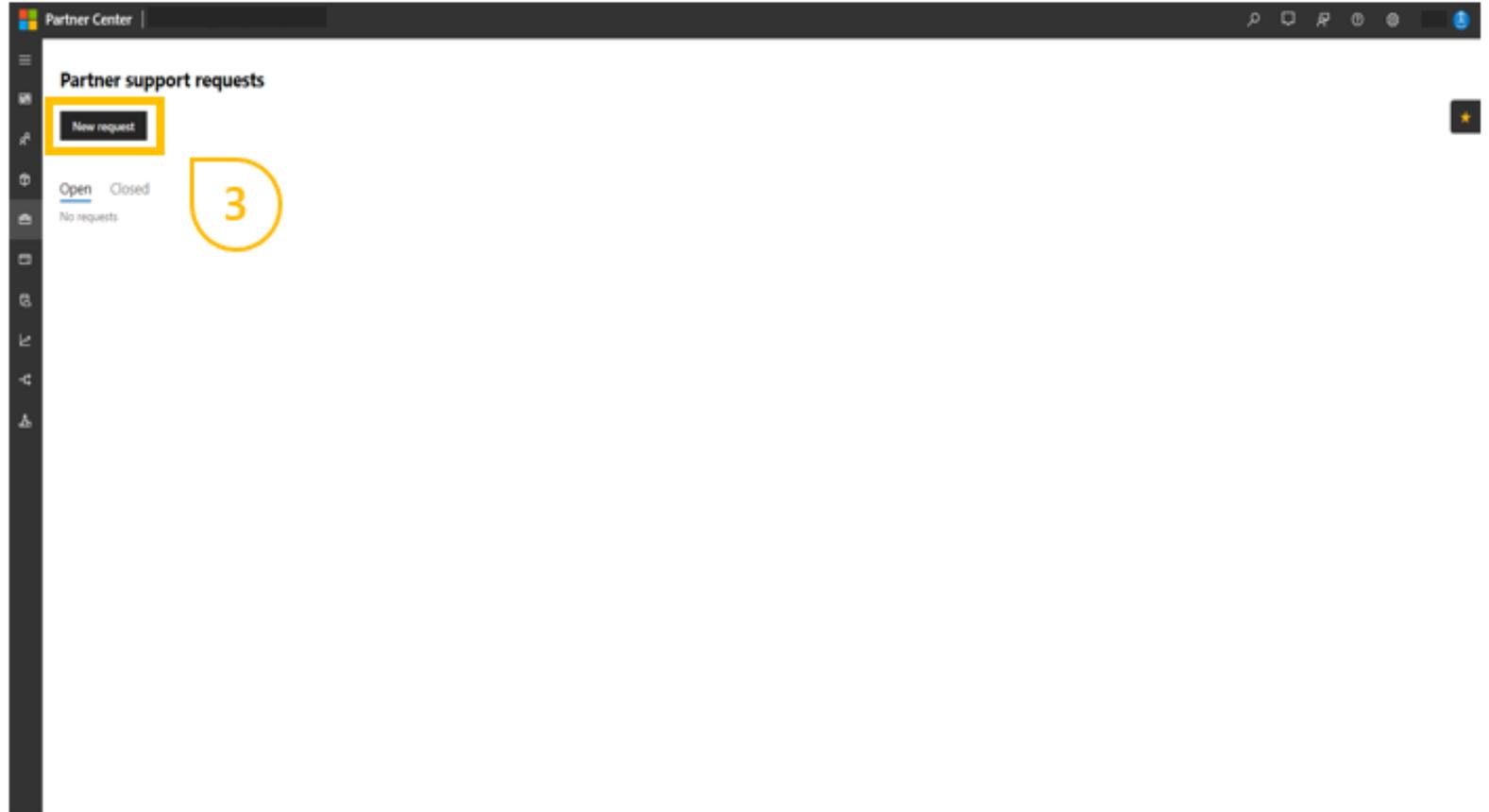
1. Select **?** from the top navigation bar.
2. Select **Partner support requests**.



Support

To access support follow these steps.

3. Select **New request**.



Support

To access support follow these steps.

4. From the **Type of problem** drop down, select **Managing incentives (for eligible/invited partners only)**.
5. Provide all other information requested and select **Submit**.

Partner Center | 10/9/2018 12:16 PM PST

Details

If you are experiencing issues with Partner Center, fill in the support request.

Type of problem *

- Enrolling or renewing a Partner membership
- Support for customer order provisioning (catalog, offers)
- Help with CSP program questions
- Managing Partner invoices, payments, or reconciliation files
- Help with using Partner Center APIs/SDK
- Help with errors in Partner Center
- Managing incentives (for eligible/invited partners only)
- Attaining or managing competencies
- Submitting WHI/WAI credit requests
- General question about Azure Reserved Instance
- Support for licensing or pricing questions
- Help with CSP Indirect Provider/ Indirect Reseller tasks
- Help with CSP line of credit

Impact *

Minimal

Description *

Email *

Attachments

Attach up to five files to this request

Add Files

Submit Cancel

4

5

Summary

Summary

You should now be able to carry out the:

- Creation of Incentive Administrators and Users.
- Completion of incentive program enrollment.
- Access help and support.





Thank you.