



Microsoft Commerce Incentives (MCI) – Claiming Guide

June 2025



Contents

1

Introduction &
Claiming Scenarios

2

Proof of Execution
(POE) Guidelines

3

Proof of Execution
(POE) Examples

4

How to Enroll &
Engage

5

How to Claim
(Activities)

6

How to Claim (CPOR)

7

Conflicting Claims
(CPOR)

8

Non-incentivized
Claims (CPOR)

9

Support & Resources

The purpose of this guide is to provide information on how to access, enroll and submit claims Microsoft Commerce Incentive (MCI) engagements using the following claiming processes:



MCI Partner Activities Claims

What it is:

MCI Partner Activities is a process through which Microsoft partners engage in pre/post-sales engagements with customers, helping drive cloud solution adoption and earning incentives for their efforts.

When to use it:

Partners use this process when they are working with a customer in the Inspire & Design stage of a Microsoft cloud solution journey and want to receive recognition and incentives for delivering value-added pre-sales engagements.

Why it matters:

- *Incentive Earnings:* Partners can earn specific incentive fees for completing eligible activities.
- *Customer Impact:* Supports customers in making informed decisions through guided solution assessments, demos, or workshops.
- *Performance Tracking:* Helps Microsoft track partner-led engagements and their impact on customer cloud adoption.

Key Steps:

- *Nominate a Customer:* Partner submits a nomination for a pre and post-sales engagement through the MCI platform. s
- *Deliver the Engagement:* Partner completes the approved engagement (e.g., workshop, accelerator, etc.).
- *Earn Incentives:* Upon successful validation, the partner receives the applicable incentive payment.



Claiming Partner of Record (CPOR)

What it is:

CPOR is a Microsoft partner association process that enables a partner to be officially recognized for providing ongoing services for a customer's Microsoft cloud environment.

When to use it:

Partners use CPOR when they are actively managing or supporting a specific Microsoft cloud workload (e.g., Microsoft 365, Dynamics 365) for a customer and want to be acknowledged for their role in driving customer success.

Why it matters:

- *Recognition:* CPOR ensures the partner is credited for their impact on the customer's cloud adoption and usage.
- *Incentive Earnings:* Partners can earn specific incentive fees for completing eligible activities.
- *Performance and Insights:* Helps Microsoft track partner-customers associations and their impact on customer cloud adoption.

Note:

Only one partner can be the CPOR for a specific workload or subscription, but multiple partners can be associated with the same customer across different workloads or subscriptions.

Claiming Scenarios



MCI Partner Activities



Other (CPOR)

Claiming Incentives

Engagements	Claiming Process	Purpose	Engagements	Claiming Process	Purpose
Modern Work Partner Activities	MCI Partner Activities	Pre/Post sales Incentives			
Security Partner Activities	MCI Partner Activities	Pre/Post sales Incentives	Security Usage Incentive	CPOR	Post-sales incentives
Business Applications Partner Activities	MCI Partner Activities	Pre/Post sales Incentives			
Azure Partner Activities	MCI Partner Activities	Pre/Post sales Incentives	Business Applications Pre-Sales Advisor	CPOR	Pre-sales incentives

Other (Non-Incentivized)

Engagements	Claiming Process	Purpose	Engagements	Claiming Process	Purpose
Business Application Usage Recognition	CPOR	Post-sales non incentivized recognition	Modern Work Usage	CPOR	Post-sales non incentivized usage recognition
Business Application Revenue Recognition/Enterprise	CPOR	Pre-sales non incentivized revenue recognition	Security Usage	CPOR	Post-sales non incentivized usage recognition
Business Application/CSP	CPOR	Pre-sales non incentivized deal recognition	Security Managed Services	CPOR	Post-sales non incentivized usage recognition

POE Guidelines – Core Requirements Partner Activities

POE Components – Partner Activities



Proof of Execution for **Partner Activities** engagement claims consists of 4–5* components. You will not be able to submit your claim for review until all required components are completed in the claim.

- i. Partner Attestation
- ii. Customer Attestation*
- iii. Invoice in USD
- iv. POE document(s) (aka POE Template)
- v. Public Sector Disclosure**

The POE document/POE template requirements vary with each engagement. Content requirements may include but are not limited to:

- ✓ Customer usage data
- ✓ Customer business requirements
- ✓ Screenshots of activity results in the customer's environment
- ✓ Estimated Azure revenue projections
- ✓ We recommend that you review the engagement's POE template requirements with the customer prior to requesting consent

*Some engagements may not require certain components. Please see the [MCI Program Guide](#) for details.

** See Terms & Conditions in [MCI Program Guide](#) to determine whether your customer is subject to Public Sector Disclosure requirement.

POE Guidelines – Core Requirements – CPOR

POE Components - CPOR



What constitutes valid proof of execution

1 A customer signature or contain proof of customer acknowledgment to validate your involvement with the customer.

- **Acceptable material:** The signature for agreements can be captured in various formats, including:
 - Physically signed paper documents in image files or PDFs, where the submitted POE file contains the signature and identifying information for the corresponding agreement
 - Signatures can be in .MSG or .PDF (email) format, e.g. using the email acknowledgment from the customer as a signature. Must ensure that the customer domain is correct regardless of the format
 - A valid, secure, and verifiable electronic signature (eSignature)
- **Insufficient Material:** Customer e-mails concerning licensing purchases and e-mails forwarded from customers. All flat e-mail signatures will be rejected (i.e. JPEG files or screenshots of signatures).

2

The name of the claiming partner and the corresponding customer clearly visible

3

Activities driving pre-sales/or usage growth need to be explicitly stated in detail.

The below items constitute acceptable and unacceptable material for detailing activities and ongoing work within the POE document in your claim:

- **Acceptable material:** Number of users or infrastructure impacted per workload, timelines of the proposed work, documentation describing challenges with current process technology and how the partner's work will support these challenges, detailed explanation of the services and technology provided in relation to each product group (e.g. for Business Applications: F&O, Customer Engagement, or Low Code and Activity & Device) or Modern Work +Security workload being claimed.
- **Insufficient material:** General product benefits taken from technical or promotional materials, list of high-level tasks (e.g., "testing, ongoing support"), and generic POE templates submitted on other partner claims.

4

Connection between workloads mentioned in the POE and what is being claimed.

5 Dates.

Signature or customer acknowledgement in your proof execution must not be older than 12 months (usage only). POE documents with signatures aging more than 12 months, will need to have a recent POE or customer acknowledgement confirming active engagement with the customer (this can be an e-mail confirmation describing the work).

Pre-Sales only: Please submit proof of engagement with the customer prior to the transaction. If a claim includes upsell opportunities, indicating that a new POR is driving upsell for the customer, we will approve claims even in the absence of prior proof of engagement. Example of supporting POE to submit : An e-mail, demos, pilots of the customer acknowledging (in depth) these pre-sales activities.

6

Public Sector (only applicable for Modern Work & Security usage incentive claims where the partner is servicing a public sector customer)

- Public Sector is defined as government, healthcare, and education customers.
- Partners may not earn incentives for public sector customers if the customer resides in one of the restricted countries listed in the Public Sector Country Ineligibility List. The Public Sector Definition and Country Ineligibility List can be found on the Microsoft Licensing Terms and Documentation website.

Puerto Rico and the United States

In Puerto Rico and the United States, Partners are eligible to earn, Online Services Usage incentives, for transactions segmented as Public Sector, provided that:

For Partners claiming themselves as Claiming Partner of Record, it is required for the Partner to disclose to the customer the potential fees, commission or compensation that Partner will receive from Microsoft, if any, in connection with the products or services being procured. Where the customer is a public sector entity, such disclosure will be in writing, and acknowledged by the customer in writing. All such disclosure and customer acknowledgment will be reviewed by Microsoft. A failure to comply with these disclosure requirements may prohibit Microsoft from paying such amounts to the Partner or require those amounts to be paid back to Microsoft.

Note that partners may utilize optional POE templates provided by Microsoft as long as the core requirements outlined in this slide are included. Microsoft recommends uploading supplemental documentation in addition to the templates to streamline processing and likelihood for approval.

POE Submission Guidelines for CPOR



These documents will not be accepted as proof of execution

- A transactional contract for the licensing sale of Microsoft products.
- Pricing quotes.
- E-mail from the partner where the customer does not accept or approve Partner's claimed or proposed work. Original .msg email communication between Partner and Customer that does not show clear proof of work activity.
- Purchase orders.
- Master services agreements that do not contain recent documentation proving the engagement with the customer.
- Documents without customer acknowledgment.
- Copying/pasting physical signatures.
- Proof of execution that does not contain specifications or mention of the activities that the partner is driving in the customer's workloads.
- ECIF documentation with high-level description of the activities and workloads being delivered. If you plan to submit ECIF as your POE, please ensure there that your ECIF documents contain valid details describing workload and activities performed. ECIF documents do not contain customer acknowledgment. Partners would need to provide a separate customer acknowledgement related to the ECIF work performed.

POE Examples – Incentives - CPOR

Example: Valid POE

1. Customer acknowledgement
2. Partner and customer name
3. Dates



Valid for use in the following MCI incentives:
Security Usage

Section 3. (Required): Partner and Customer Contact Information	
Partner Company Name	Fabrikam 2
Customer Company Name	Contoso
Customer Signatory Name (printed)	John Doe
Customer Signatory Role or Job Title	Chief Information Security Officer
Engagement Start and End Date	June 1, 2025 – September 10, 2025 3
Section 3.1 (Required): Customer Acknowledgment*	
*Customer acknowledgement must be dated within 12 months of claim submission. Applicable for Dates Signed field below.	
1	E-Signed by: <i>John Doe</i>
Signature	Date Signe 6/5/2025

098C77187874542ABA164484C281E7731

Example: Valid POE

4. Connection between products mentioned in POE and what is being claimed

5. Activities driving pre-sales/or usage growth to be explicitly stated *in detail*

4



Valid for use in the following MCI incentives:
Security Usage

Section 1 (Required): Select product(s)/workload(s) and activity type

<input type="checkbox"/> Microsoft Entra ID P2 (formerly AADP P2)	<input type="checkbox"/> Deployment <input type="checkbox"/> Implementation <input type="checkbox"/> Adoption/Change Mgmt.
<input type="checkbox"/> Microsoft Defender for Endpoint (MDE)	<input type="checkbox"/> Deployment <input type="checkbox"/> Implementation <input type="checkbox"/> Adoption/Change Mgmt.
<input type="checkbox"/> Microsoft Purview Information Protection (MIP)	<input type="checkbox"/> Deployment <input type="checkbox"/> Implementation <input type="checkbox"/> Adoption/Change Mgmt.
<input checked="" type="checkbox"/> Microsoft Intune	<input checked="" type="checkbox"/> Deployment <input type="checkbox"/> Implementation <input type="checkbox"/> Adoption/Change Mgmt.
<input type="checkbox"/> Microsoft Purview Insider Risk Management (IRM)	<input type="checkbox"/> Deployment <input type="checkbox"/> Implementation <input type="checkbox"/> Adoption/Change Mgmt.
<input type="checkbox"/> Microsoft Defender for Identity	<input type="checkbox"/> Deployment <input type="checkbox"/> Implementation <input type="checkbox"/> Adoption/Change Mgmt.
<input type="checkbox"/> Microsoft Defender for Office 365	<input type="checkbox"/> Deployment <input type="checkbox"/> Implementation <input type="checkbox"/> Adoption/Change Mgmt.
<input type="checkbox"/> Microsoft Defender for Cloud Apps (formerly MCAS)	<input type="checkbox"/> Deployment <input type="checkbox"/> Implementation <input type="checkbox"/> Adoption/Change Mgmt.

Section 2 (Required): Scope of Work Details

Describe in detail the work performed following the product and activity selection in Section 1:

Generic high-level descriptions will not be accepted.

- Contoso is using an endpoint management solution but not leveraging MDM features.
- All mobile devices are issued, but users can use them as personal devices.
- No protection is in place for corporate data on mobile devices (both user-owned and corporate-owned).
- Plans are in place to retire the current endpoint management tool and replace it with a modern solution, i.e. Microsoft Intune
- Approximately 1000 users:
 - ~900 Windows 10 workstations

Prepare Phase (weeks 6-9)

- Complete deployment/configuration of systems
- Provide input to the test plan
- Jointly track and resolve issues/defects
- Jointly test phase results
- Manage Hybrid Azure AD join and Group Policy for Windows 10 enrollment
- Manage any required DNS or firewall changes
- Sign-off on Prepare phase completion

Transform Phase (weeks 10-13)

- Confirmation of pilot users and all end-user communications
- Configuration of endpoints
- Logging and triage of issues
- Evaluation of the environment against the critical success factors
- Sign-off on Transform phase completion

Project	Week 1	Week 2	Week 3	Week 4	Week 5	Week 6	Week 7	Week 8	Week 9	Week 10	Week 11	Week 12	Week 13	Week 14
Modern Endpoint														
Establishment														
Plan														
Prepare														
Transform														
Transition														

Contoso is responsible for:

- Completing any required upgrades or patching.
- End-user communications and support

5

Example: Invalid POE

1. Ambiguous customer acknowledgement
2. Unclear activity
3. Generic, high-level description of activity
4. Lacking dates

Hello,

We agree that Fabrikam will be our partner on M365 solutions.

Best,
John Doe

Chief Information Security Officer
Contoso

[Reply](#) [Forward](#)

☺ ↩ Reply ↩ Reply all → Forward 📎 📄 📅 ⋮
Tue 6/10/2025 9:35 AM



Valid for use in the following MCI incentives:
Security Usage

Section 1 (Required): Select product(s)/workload(s) and activity type			
<input type="checkbox"/> Microsoft Entra ID P2 (formerly AADP P2)	<input type="checkbox"/> Deployment	<input type="checkbox"/> Implementation	<input type="checkbox"/> Adoption/Change Mgmt.
<input type="checkbox"/> Microsoft Defender for Endpoint (MDE)	<input type="checkbox"/> Deployment	<input type="checkbox"/> Implementation	<input type="checkbox"/> Adoption/Change Mgmt.
<input type="checkbox"/> Microsoft Purview Information Protection (MIP)	<input type="checkbox"/> Deployment	<input type="checkbox"/> Implementation	<input type="checkbox"/> Adoption/Change Mgmt.
<input checked="" type="checkbox"/> Microsoft Intune	<input checked="" type="checkbox"/> Deployment	<input checked="" type="checkbox"/> Implementation	<input checked="" type="checkbox"/> Adoption/Change Mgmt.
<input type="checkbox"/> Microsoft Purview Insider Risk Management (IRM)	<input type="checkbox"/> Deployment	<input type="checkbox"/> Implementation	<input type="checkbox"/> Adoption/Change Mgmt.
<input type="checkbox"/> Microsoft Defender for Identity	<input type="checkbox"/> Deployment	<input type="checkbox"/> Implementation	<input type="checkbox"/> Adoption/Change Mgmt.
<input type="checkbox"/> Microsoft Defender for Office 365	<input type="checkbox"/> Deployment	<input type="checkbox"/> Implementation	<input type="checkbox"/> Adoption/Change Mgmt.
<input type="checkbox"/> Microsoft Defender for Cloud Apps (formerly MCAS)	<input type="checkbox"/> Deployment	<input type="checkbox"/> Implementation	<input type="checkbox"/> Adoption/Change Mgmt.

Section 2 (Required): Scope of Work Details	
<p>Describe in detail the work performed following the product and activity selection in Section 1:</p> <p><i>Generic high-level descriptions will not be accepted.</i></p>	<p>Assistance for license assignment, deployment setup and guidance. Advisory and remediation activities, support tickets, adoption training and providing adoption materials.</p> <p>Provides remote guidance for:</p> <ul style="list-style-type: none"> Licensing your end users Configuring identities used by Intune by leveraging either on-premises Active Directory or cloud identities (Microsoft Entra ID) Adding users to your Microsoft Intune subscription, defining IT admin roles, and creating user and device groups Configuring MDM authority based on management needs

Section 3. (Required): Partner and Customer Contact Information	
Partner Company Name	Fabrikam
Customer Company Name	Contoso
Customer Signatory Name (printed)	John Doe
Customer Signatory Role or Job Title	Chief Information Security Officer
Engagement Start and End Date	

How to Enroll & Engage

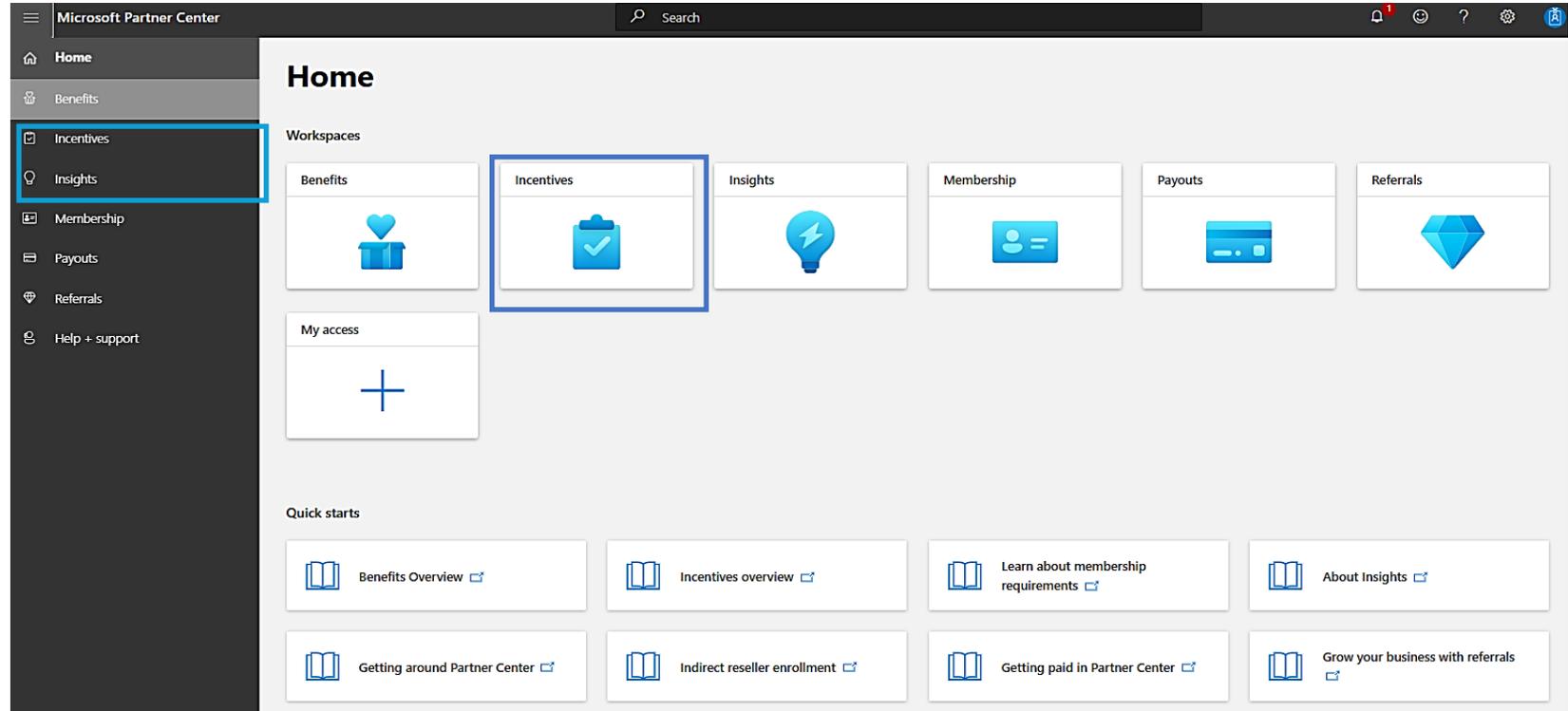
Partner Center Workspaces

Partner Center is the home of Microsoft Commerce Incentives and Partner Activities Engagements claims. This guide is focused on activities in the **Incentives** Workspace specific to MCI Engagements Partner Activities incentive claims. You can also use various other Partner Center Workspaces to:

- i. Manage your Microsoft **account and users**
- ii. See **earnings** and **payouts**
- iii. **Engage with customers**
- iv. Build relationships with **other partners**
- v. **Manage customer subscriptions**
- vi. **Contact support**
- vii. Publish or explore offers in the **Microsoft commercial marketplace**

For more details on accessing, navigating and understanding Partner Center Workspaces, please visit [Microsoft Learn](#) to review the following articles:

- [Get around Partner Center](#)
- [Manage your Partner Center account](#)



Incentives User Management

To work with incentives in Partner Center, your Partner Center user account must have Incentive Admin or Incentive User role permissions.

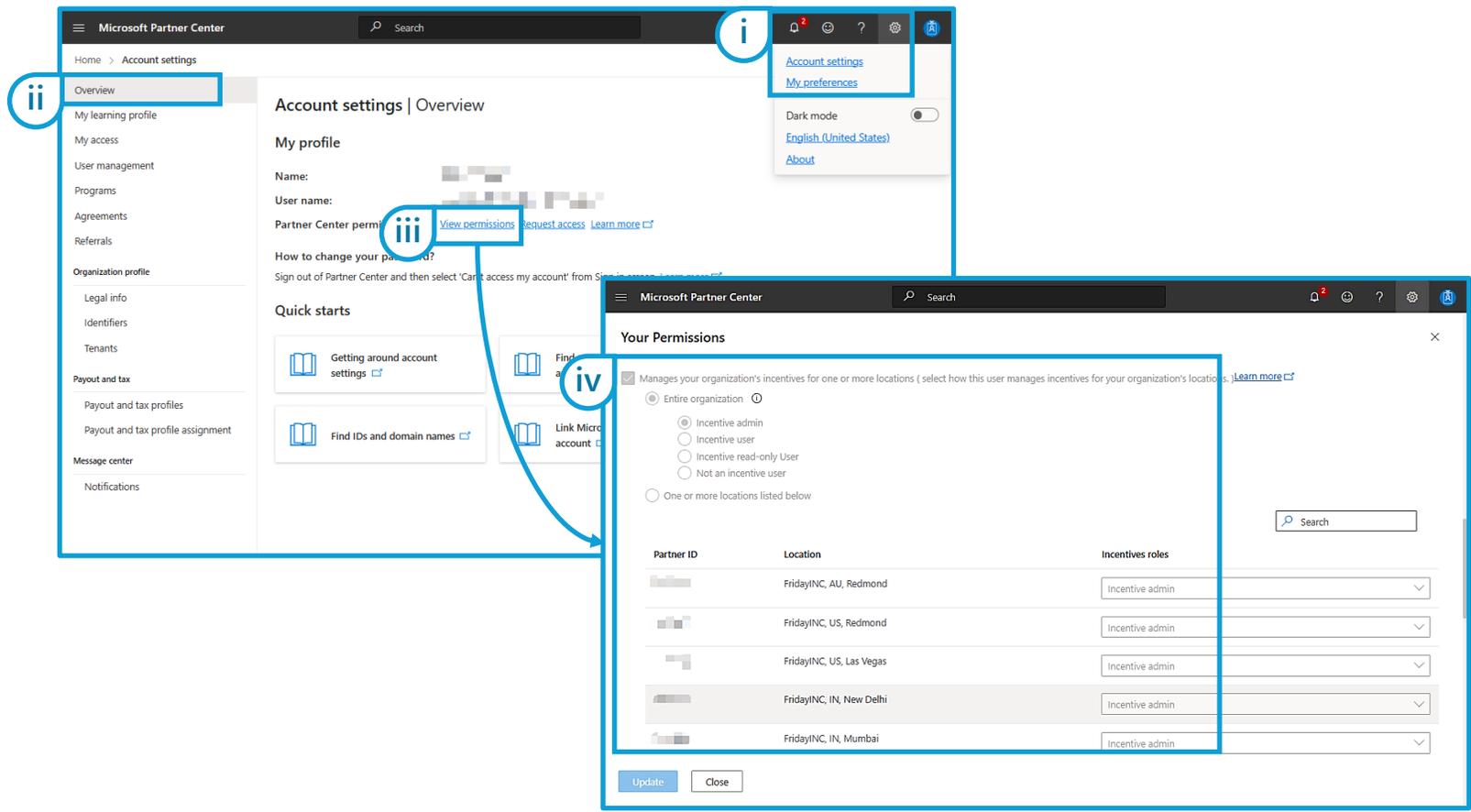
If you do not have Incentive Admin or User permissions for a location, you will not be able to access or manage incentive activity for that location, even if the location is enrolled in and eligible for an Incentive Program.

To find the roles you've been assigned:

- i. Sign into **Partner Center** and select the **Settings** (gear) icon, then **Account Settings**.
- ii. Select **Overview**.
- iii. In **Partner Center permissions**, select **View permissions**.
- iv. Scroll down in the Your Permissions pop-in to review your **access roles** for each workspace and location.

For more details on workspace roles, please visit [Microsoft Learn](#) to review the following articles:

- [Find your workspaces, roles, and admins in Partner Center](#)
- [Assign roles and permissions to users - Manage incentives](#)



Enrolling in MCI

To become eligible to claim incentives for MCI Engagements, you must first enroll in Microsoft Commerce Incentives (MCI). MCI is an open enrollment program, so all eligible locations are automatically invited.

Incentive Admins can enroll eligible locations in MCI as follows:

- i. Navigate to **Incentives > Overview**
- ii. Scroll down to **Enrollments**
- iii. Search or filter for **Microsoft Commerce Incentives**
- iv. In Actions Required column, select **Enroll**.

A bank and tax profile must be completed by an Incentive Admin for each enrolled and eligible location. This payment profile will be used to payout incentive earnings accrued by that location.

For more details on user management and program enrollment for all incentives programs, resources are available to download here: [Partner Center Incentives Resources](#)

Incentives | Overview

A summary of your incentive earnings, payments and programs.

Total earned 0.00 USD
[View earnings](#)

Total paid 0.00 USD

Enrollments

View enrollment status, actions required, and earnings or payments by location and program. [Learn more about enrollment status](#). If you see that program enrollments are missing, sign in to Partner Center with your work account and check your incentive permissions on the [User Management](#) page. Your company global or account admin can edit these permissions.

All incentive programs | By location | By program

Program name	Partner ID	Country/Region	Earned	Paid	Status	Actions required	Program resources
Microsoft Commerce Incentives	MPN FridayTest, CN, Beijing	China	0.00 USD	0.00 USD	Invited	Enroll	Program guide
Microsoft Commerce Incentives	MPN Naraina Industria, IN, New Delhi	India	0.00 USD	0.00 USD	Invited	Enroll	Program guide
Microsoft Commerce Incentives	MPN Microsoft Informática Ltda, BR, São Paulo	Brazil	0.00 USD	0.00 USD	Invited	Enroll	Program guide
Microsoft Commerce Incentives	MPN Microsoft, BR, Sao Paulo	Brazil	0.00 USD	0.00 USD	Invited	Enroll	Program guide
Microsoft Commerce Incentives	MPN FRIDAYINC, ES, valencia	Spain	0.00 USD	0.00 USD	Invited	Enroll	Program guide
Microsoft Commerce Incentives	MPN Microsoft India Pvt Limited, IN, Hyderabad	India	0.00 USD	0.00 USD	Invited	Enroll	Program guide

Filter enrollments

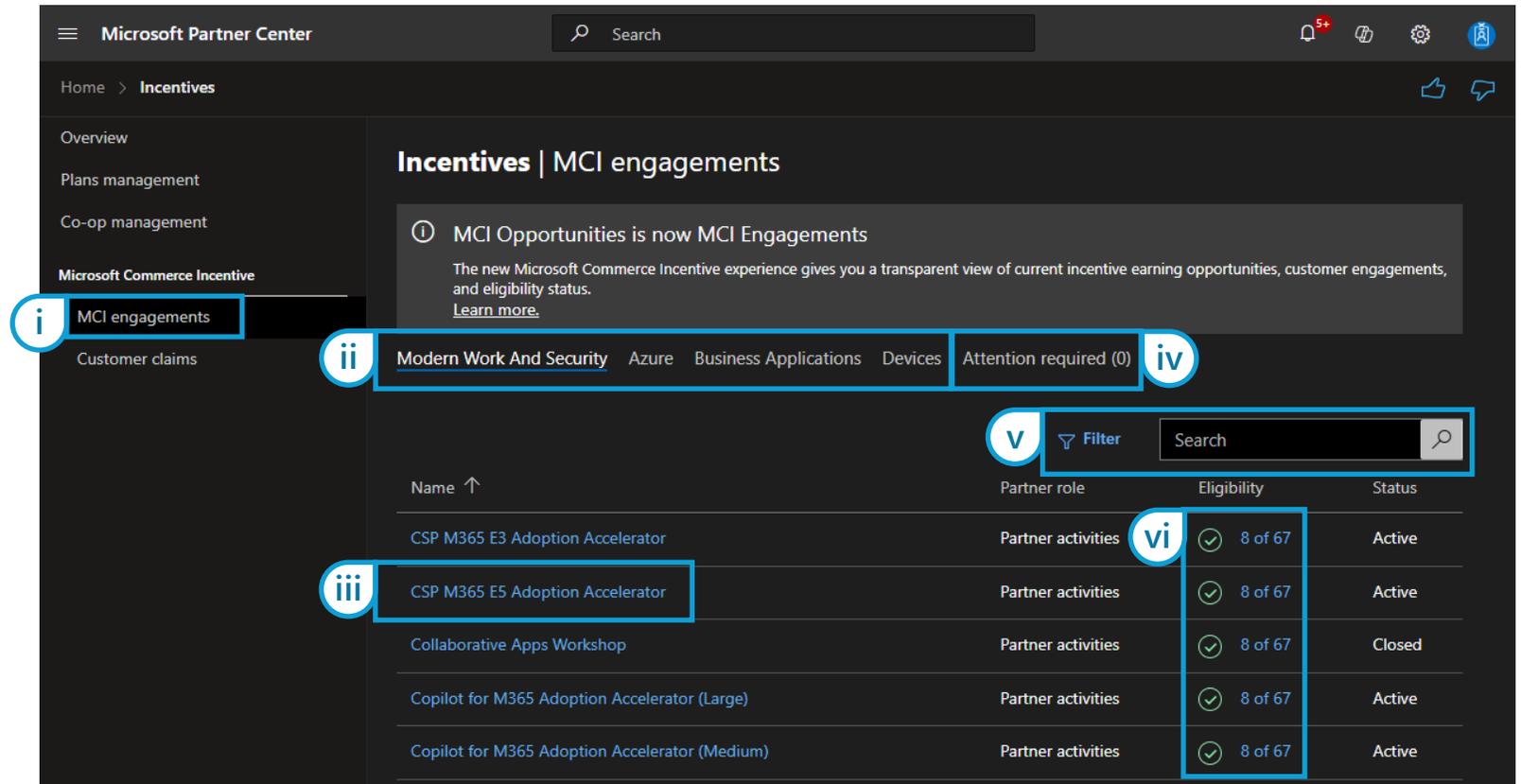
- Action required
- Invitations

Engagements home page

The MCI Engagements home page within the Incentives Workspace lists all your available earning opportunities*, organized by Solution Area.

- i. Click to view **MCI Engagements**
- ii. Click to navigate between engagement **Solution Areas**
- iii. Click an engagement's **Name** to open that engagement's Summary page
- iv. Click to navigate to **Attention Required**
- v. Filter and search **engagements**
- vi. Count of eligible and enrolled **locations** for which your account has Incentives user or admin access. Click **eligible locations count** for an engagement to navigate to that engagement's Eligibility view.

* Some engagements manage their partner eligibility via private list. These engagements will not appear in your overview unless you have Incentives User or Incentives Admin access for one or more locations on the engagement's eligibility list. See **MCI Program Guide** for eligibility details.



Engagement Summary view

The Summary page for each engagement shows an overview of all details and requirements specific to this engagement.

- i. Click to navigate to the **Customers** management page or the Partner location **Eligibility** page.
- ii. Review **summary description** of the engagement activities, the Partner and Customer qualification criteria, and any other policies specific to this engagement
- iii. Review engagement-specific POE requirements and **access or download** most recent version of this engagement’s POE templates or other delivery materials.

AMMP App/Data Modernization (Small) | Summary

AMMP Partner-led for App and Data Modernization (Small Project Size)

Azure Migration and Modernization Program (AMMP) helps accelerate and simplify customer migration and modernization projects. In this engagement, partners will provide expert guidance to help modernize a customer's applications. The following patterns are supported: (i) new/cloud native app builds, (ii) modernization of existing web apps and (iii) modernizing integration solutions (e.g. Apigee, Mulesoft).

Hybrid deployments with Azure Arc are also supported. Finally, the setup of Azure security services to support the workloads may be included in the scope. The partner will perform specific milestones in the AMMP project, including landing zone buildout (or review of an existing landing zone) and deployment activities.

Engagement requirements

Deliver a small-sized project by validating estimated ACR consumption:

- Project size: **\$25K - \$125K/year** planned Azure consumption. Please refer to [Azure Pricing Calculator](#) to estimate consumption
- The Azure Consumption for this project must be the Annual Run Rate that will be calculated 12 completed months from the date of production.

The following activities must be completed for your customer engagement to be considered fully delivered:

- Application Compatibility Assessment/Review
- Landing Zone Setup or Review
- Modernization activities (including Arc-enablement as required)
- Azure security deployment and setup (recommended)

Partner criteria

Partner must have Azure Specialization in either of the following:

- Modernization of Web Applications to Microsoft Azure
- Kubernetes on Microsoft Azure

Customer criteria

- Enterprise, SMC-Corporate and select SMB with a valid TPID detected by Microsoft internal systems

Payout structure

- FY23 Activity rates: Market A = \$15,000 Market B = \$12,000 Market C = \$7,500**
- See [MCI Program Guide](#) for more information
- Microsoft reserves the right to reject future engagements or remove partners from the AMMP program if the Azure Run Rate (ARR) is found to be inaccurate when verified against the size of opportunities submitted

Claim Timeline

- For **Small Engagements**, Partner has **120 days** from date of receiving customer consent to submit proof of execution

Proof of Execution requirements

- Customer Survey (Triggered by Partner, completed by Customer)
- Partner Survey (completed by Partner)
- Sign and Upload [template](#)
- Upload partner invoice

*If your claim is for a **Public Sector Customer located in India, United States, or Puerto Rico**, you must include proof of Public Sector Disclosure (PSD) in your claim documents. We recommend that you use this [template for PSD](#).*

[Explore AMMP Partner-led](#)

**Market A countries are Australia, Austria, Belgium, Canada, Denmark, Finland, France, Germany, Iceland, Ireland, Luxembourg, Netherlands, New Zealand, Norway, Sweden, Switzerland, United Kingdom, United States, Japan

Market B countries are UAE, Bahamas, Bahrain, Bosnia and Herzegovina, Brunei, Cayman Islands, Côte d'Ivoire, Estonia, Hong Kong SAR, Italy, Israel, Jordan, Jamaica, Kuwait, Lebanon, Mauritius, Oman, Qatar, Puerto Rico, Saudi Arabia, Senegal, Singapore, Spain, Slovenia

Market C countries will include all other countries/regions eligible for Microsoft Commerce Incentives.

Engagement Customers view (1/2)

The **Customers** page for each Partner Activities Engagement shows a list of all eligible and ineligible customers for this specific engagement.

For **fixed payout** engagements, the Customers view will show you all the customers who have previously given consent to you on at least one fixed payout engagements claim, sorted into Eligible, Ineligible, and Complete lists.

For **variable payout** engagements, the Customers view will only show the list of active, unresolved, or complete claims.

If you do not see an expected customer in this view, please use the **Add Customer** function to add them to your selection options.

- i. View your list of customers for this engagement, organized into tabs by **Eligible, Ineligible** and **Complete** status
- ii. **Add new customer**
- iii. **Export** your customers list
- iv. Sort, **filter** and **search**
- v. Click prompts in claims grid to manage claims:
 - ✓ Click **Claim customer** to create new claim with existing customer (fixed payout only)
 - ✓ Click **Send email for customer consent** to request customer consent for engagement
 - ✓ Click **Claim ID** or **Submit claim** to view, edit, and submit POE for claim

Customers | Enable Frontline Workshop

Summary | Customers | Eligibility

Eligible | Ineligible | Complete

A summary of all customers eligible for the engagement along with status and action required. [Learn More](#)

Important: Customer consent emails are only sent once per day.

+ Add customer | 1M | 3M | 6M | Filter | Search by Customer name, Claim ID, PartnerID, Claim name

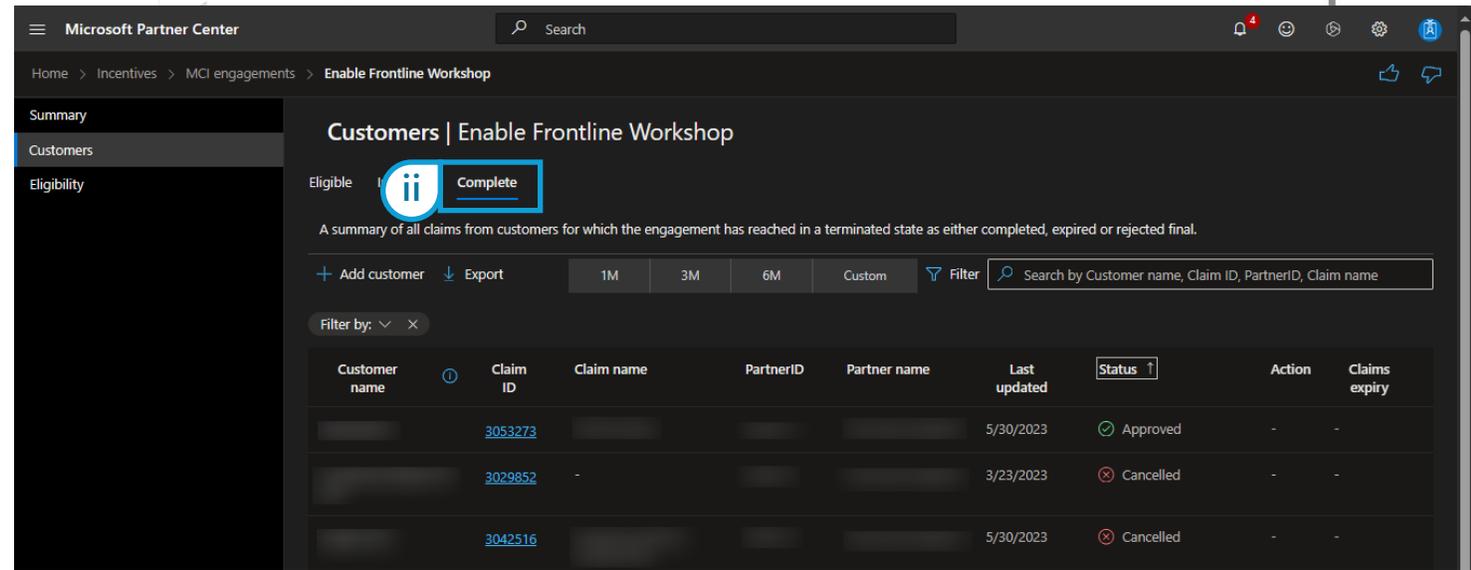
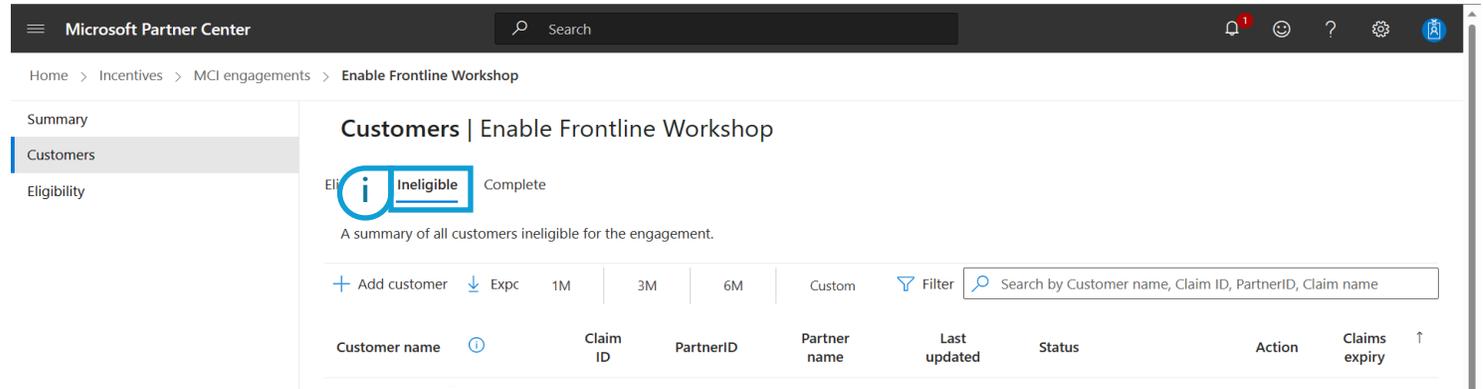
Customer name	Claim ID	PartnerID	Partner name	Last updated	Status	Action	Claims expiry
						Claim customer	
	3015125		FridayINC	2/8/2023	Customer claimed	Send email for customer consent	3/12/2023
	3008310		FridayINC	2/4/2023	Customer consent expired		
	3000008		FridayINC	11/12/2022	Customer consent received	Submit claim	2/12/2023
	1000551		FridayINC	11/15/2022	Submitted		
	3015123		FridayINC	2/9/2023	Customer claimed	Send email for customer consent	3/12/2023
	3003931		FridayINC	2/9/2023	Cancelled		
	3001583		FridayINC	1/4/2023	Customer consent received	Submit claim	2/22/2023
	1053610		FridayINC	11/12/2022	Rejected final		

< Previous 1 2 3 Next > 20

Engagement Customers view (2/2)

- i. The **Ineligible** tab shows all associated customers who are ineligible for Fixed Payout engagements. The ineligible tab will not have any detail for Variable Payout engagements. Customers may appear here for any of the following reasons:
 - ✓ The customer does not currently meet the eligibility criteria of the engagement
 - ✓ The customer has met the limit of active and approved claims allowed for this engagement

- ii. The **Complete** tab shows all Approved, Cancelled, Rejected Final, or Expired claims for this engagement.



Engagement Eligibility view

The Eligibility view for each engagement shows all your Partner ID locations which are enrolled or enrolling in MCI and displays each location's eligibility status for the specific engagement.

Each engagement has specific qualifying criteria for Partner locations. If a location's Eligibility status and Payee Profile status both show green check marks, that location is currently eligible to create and submit claims for this engagement.

- i. **Filter** by region, country, location, or eligibility status.
- ii. Click to review **Eligibility criteria**.
- iii. Click to **update bank & tax payee profile information**.

If you cannot see an expected location in this list, check your user account permissions in Partner Center Account Settings to confirm whether you have Incentive User or Incentive Admin permissions for that location.

The screenshot shows the Microsoft Partner Center interface. The breadcrumb trail is: Home > Incentives > MCI engagements > Usage-Defend Against Threats w/SIEM + XDR Workshop. The left sidebar has 'Eligibility' selected. The main content area is titled 'Usage-Defend Against Threats w/SIEM + XDR Workshop | Eligibility'. It features a table with columns: Region, Country, MPN ID, Eligibility status, Payee profile status, and Action. The table lists several locations with their respective eligibility and payee profile statuses. Annotations include a filter box at the top right, an information icon (i) pointing to the 'Eligibility requirements' pop-up, and icons (ii and iii) pointing to specific rows in the table.

Region	Country	MPN ID	Eligibility status	Payee profile status	Action
FridayINC, IN, New Delhi	India	[blurred]	Eligible	Complete	
FridayINC, MX, Mexico D.F. C.P.	Mexico	[blurred]	Ineligible	Complete	
FridayINC, US, Kirkland	United States	[blurred]	Ineligible		
FridayINC, IN, Mumbai	India	[blurred]	Ineligible		
FridayINC, YE, Yoman	Yemen	[blurred]	Ineligible	Bank and tax details incomplete	Update bank and tax details
FridayINC, DE, Germany	Germany	[blurred]	Ineligible	Bank and tax details incomplete	Update bank and tax details

Customer Claims view

The Customer Claims view aggregates all your existing claims for all MCI Engagement partner roles, including your Partner Activities claims.

Claims and claim creation options are automatically filtered and organized into tabs for each Solution Area.

You will only see claims created with location IDs for which your user account has an Incentives role.

- i. Navigate between engagement **Solution Areas**
- ii. **Add customers** for engagements in the Solution Area you have selected
- iii. **Export** your claims details
- iv. **Customize** the columns that appear in your view
- v. **Filter** and **search** your claims
- vi. Click **blue prompts** in claims grid to open or manage claims:
 - ✓ Click **Send/re-send email for customer consent** in Action column to request customer consent for engagement
 - ✓ Click **Claim ID** or **Submit claim** to view, edit, and submit POE for claim

If you or your customer lose eligibility for an engagement while you already have a claim in progress, you will not be able to create new claims for that customer and engagement, but you can still access the existing claim from this view so that you can complete the POE review process.

Microsoft Partner Center | Home > Incentives > Customer claims

Incentives | Customer claims

A summary of all customer associations (claims) across all engagements along with the status and action required.

Click [here](#) to ensure that you are claiming for the right customer engagement for CPOR claims.
Click [here](#) to learn more about claiming for build intent - partner activities.

Microsoft Commerce Incentive

Customer claims

Modern Work And Security | Business Applications | Azure | Devices

+ Add customer | Export | 1M | 3M | 6M | Customize | Filter | Search by Customer name, Claim ID, PartnerID, Customer ID, Claim

Claim ID	Engagement	Claim name	Customer name	Customer ID	PartnerID	Partner name	Last updated	Claims expiry	Status	Action
3079758	Sales - Defend Against Threats with SIEM Plus XDR						9/15/2023	12/14/2023	Customer consent received	Submit claim
3053273	Enable Frontline Workshop						5/30/2023	-	Approved	-

Customize columns

Show or hide available columns.

- Claim ID
- Engagement
- Claim name
- Customer name
- Customer ID
- Customer ID type
- Solution area
- Workload
- PartnerID
- Partner name
- Partner country
- Partner contact
- Last updated
- Claims expiry
- Status
- Action

Filters Panel

- Status**
 - Approved
 - Under review
- Engagement**
 - Surface - Customer Immersion Experience Workshop
- Partner country**
 - Australia

How to Claim – Partner Activities

Anatomy of a claim (1/2)

- i. Click **breadcrumbs** to quickly navigate through Incentives workspace views
- ii. **Submit** claim function will not activate until all required sections are complete
- iii. **Edit** customer or partner contact information
 - ✓ Customer name will auto-populate based on the organization name defined by your customer for their ID. If the customer wishes to change this name, we recommend that they review [this guidance](#).
- iv. If a **Referral** was generated for this claim during claim creation, the referral ID & link will appear under **Deal information**.
 - ✓ You must have user permissions to the **Referrals** workspace to open the referral link. This is separate from Incentives permissions. See [Incentives User Management](#) for details on Partner Center user permissions.
- v. Review actions needed in **Claim status** tracker.
 - ✓ Pending tasks will show a blue clock.
 - ✓ Completed tasks will show a green check.
 - ✓ Click **Claim Status ...** to open detailed claim state history sidebar.

The screenshot displays the Microsoft Partner Center interface for a claim. The breadcrumb navigation at the top is highlighted in yellow and includes an information icon (i). The claim title is "Claim 3042516 | F...". The "Submit claim" button is highlighted in yellow and has a "ii" annotation. The "Engagement Details" section includes "Customer information" and "Partner information", both with "Edit" links. The "Customer information" section has several fields, with the contact name and email fields highlighted in yellow and annotated with "iii". The "Partner information" section also has contact name and email fields highlighted in yellow. The "Deal information" section shows a referral ID and deal size, with the referral ID field highlighted in yellow and annotated with "iv". On the right, the "Claim status" tracker is highlighted in yellow and annotated with "v". The tracker shows a progress bar with stages: Editing (with a blue clock icon), Submitted, Under review, and Approved. The "Editing" stage is active, with sub-tasks: Upload Invoice (blue clock), Upload findings & recommendations report (green check), Partner survey complete (blue clock), and Customer survey complete (blue clock). A "History" sidebar is open, showing a table of actions:

Action type	Date	User
Approval	May 30, 2023 at 10:38 PM	Microsoft
Set under review	May 30, 2023 at 10:38 PM	Microsoft
Submission	May 30, 2023 at 10:37 PM	Alexa Barket
Document submission	May 30, 2023 at 10:37 PM	Alexa Barket
Customer consent approved	May 30, 2023 at 10:37 PM	-
Request customer consent	May 30, 2023 at 10:37 PM	Alexa Barket

Anatomy of a claim (2/2)

- i. **Download** optional invoice template, **upload** completed invoice.
- ii. **Upload** POE document(s) as specified by your engagement’s delivery guidance. See **Summary** page for engagement-specific POE instructions and POE template download links.
- iii. **Attestations**
 - ✓ Review survey **statuses**
 - ✓ **Send or re-send** Customer or Partner survey emails
 - ✓ **Access** Partner survey directly
- iv. Review **comment history** and add new comments
- v. Click to **Submit, Cancel, or Dispute**.
 - ✓ **Submit** action will be available when all required POE elements are completed/uploaded.
 - ✓ **Cancel** action is available at any point prior to first Submit action. Cancellation is not reversible.
 - ✓ **Dispute** action is available for 30 days following claim rejection by Microsoft POE review team.

Submit Proof of Execution

Note: When uploading POE documents with customer email addresses, please blur the customer personal information and keep it visible.

i Invoice*

Download Template | Upload proof of execution | Remove

Document Name	Type	Last activity
No documents available.		

Drag files here to upload

ii Findings and recommendations document*

Upload proof of execution | Remove

Document Name	Type	Last activity
[Blurred]	pdf	Updated by [Blurred] 2023
[Blurred]	pdf	Updated by [Blurred] 2023

Drag files here to upload

iii Surveys

Survey emails are only sent once per day.

Customer Survey: Not completed [Re-Send Customer Survey](#)

Partner Survey: Not completed [Re-Send Partner Survey](#) [Go to survey](#)

Optional comment

Add any additional information you want the reviewers to know about this claim.

iv Comment

Reclaim from previous expired [claim](#) 3001583

Save comments

v Comment history

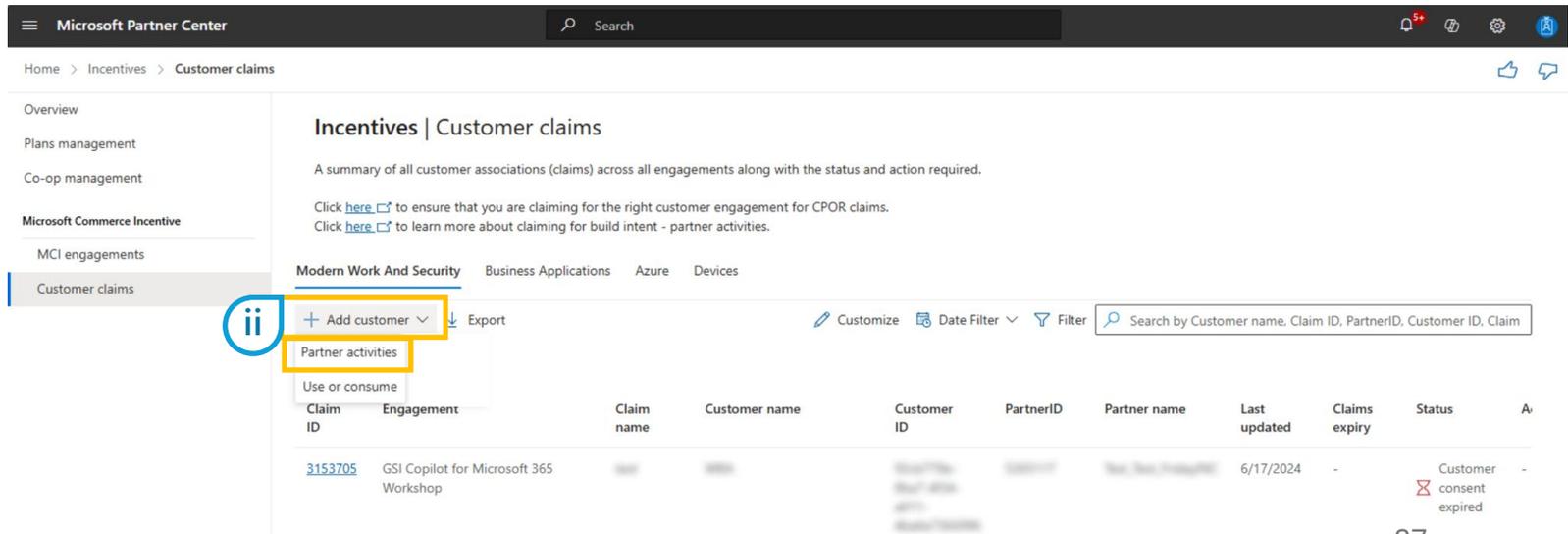
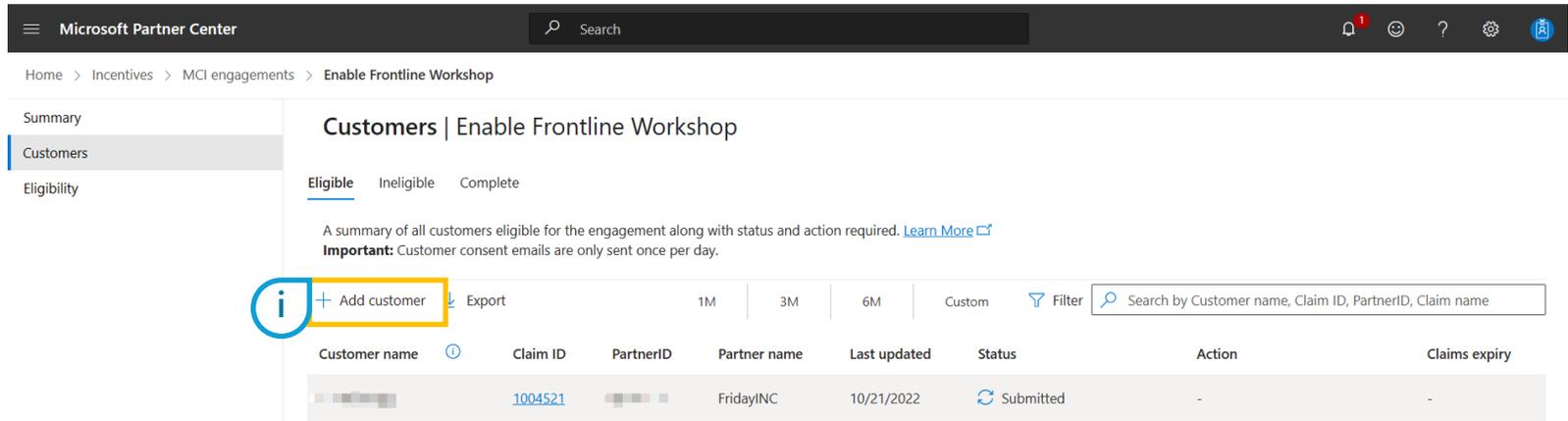
[Submit claim](#) [Dispute claim](#) [Cancel claim](#)

Launch Add Customer Workflow

- i. If you are starting from the **Customers view** of a specific engagement, click **+ Add customer**.
- ii. If you are starting from the **Customer Claims** view:
 - ✓ Select the relevant **Solution Area** tab for the desired engagement(s)
 - ✓ Click **+ Add customer**
 - ✓ Select partner role **Partner activities**.

Following either example i or ii as shown here will launch the Add Customer workflow pop-in, used to create claim(s) with the customer. The Add Customer workflow has 4 stages:

- ✓ Associate customer
- ✓ Associate engagement
- ✓ Contact Information
- ✓ Review and complete

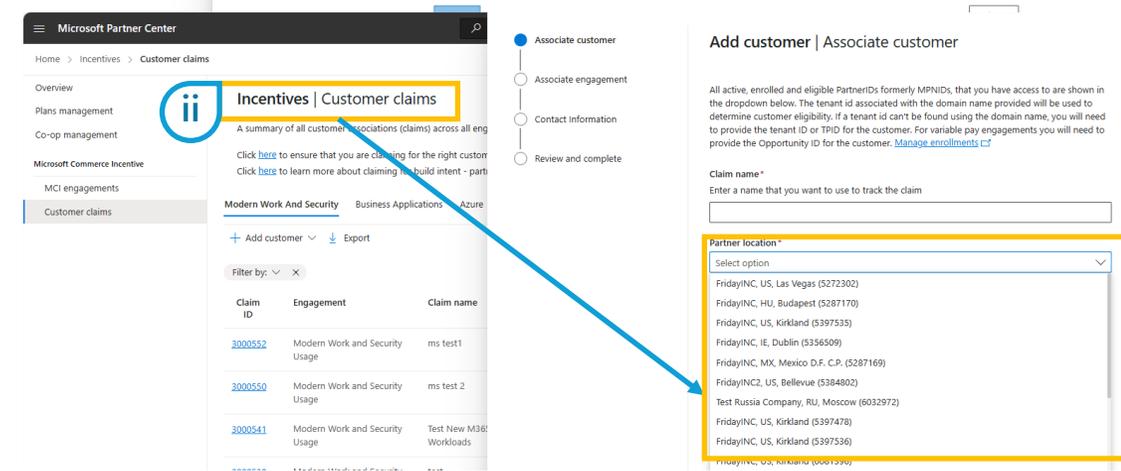
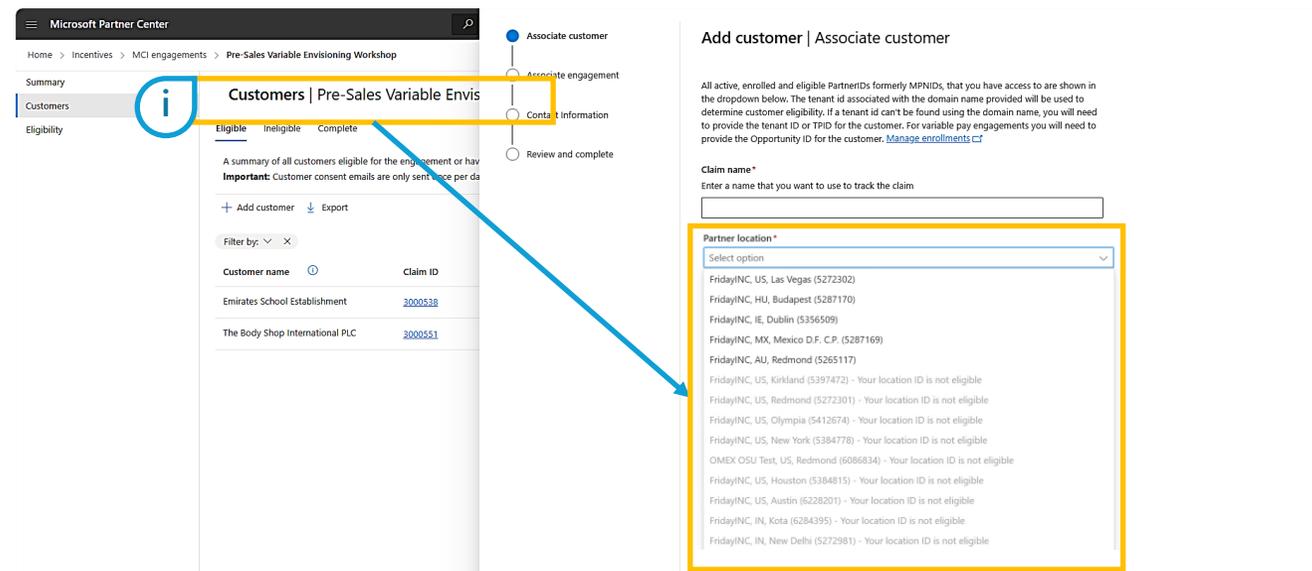


Add new customer - Associate Customer (1/3)

Select **Partner location** that you intend to use to deliver this engagement.

- i. If you are on an engagement's Customers page, the dropdown will allow you to select location IDs that meet all the following criteria:
 - ✓ Location is MCI enrolled
 - ✓ You have an Incentive user or admin role for the location
 - ✓ Location is eligible for that specific engagement
- ii. If you are on the Customer Claims page, the dropdown will allow you to select the location IDs that meet all the following criteria:
 - ✓ Location is MCI enrolled
 - ✓ You have an Incentive user or admin role for the location

NOTE: Partner Location ID and Customer ID cannot be changed once a claim has been created. If you determine later that you need to claim for this activity on a different partner location ID or customer ID, you will need to cancel the current claim, wait until it expires, or comment in the claim to request that the POE team reject the claim. Then, create a new claim with the correct ID values.



Add new customer - Associate Customer (2/3)

- i. Enter **Claim name** and select **Partner location**.
- ii. Select **Customer ID type**.
 - ✓ See **next slide** for table of allowed customer ID types by solution area and engagement type
- iii. Enter the **Customer ID** (must be of the type selected in step ii)
- iv. Click **Next** to proceed through each step. The Next button is only clickable once you have filled in all required fields.

Add customer | Associate customer

All active, enrolled and eligible PartnerIDs formerly MPNIDs, that you have access to are shown in the dropdown below. The tenant id associated with the domain name provided will be used to determine customer eligibility. If a tenant id can't be found using the domain name, you will need to provide the tenant ID or TPID for the customer. For variable pay engagements you will need to provide the Opportunity ID for the customer. [Manage enrollments](#)

Claim name *
Enter a name that you want to use to track the claim

Contoso - Enable Frontline

Partner location *
FridayINC, US, Las Vegas (5272302)

Customer ID type *
Domain name

Customer ID *
Enter domain name (e.g., enter test.com if customer email address is abc@test.com)

contoso.com

Customer ID type *

- Domain name
- Domain name**
- Tenant ID
- TPID
- Opportunity ID
- Azure subscription ID

Next

Add new customer - Associate Customer (3/3)

Multiple options for Customer ID are available to select during the associate customer process. The adjacent table outlines the different scenarios for each Customer ID type.

- i. For Domain names, do not include domain prefixes or email aliases such as “https://”, “www.”, or “user@”. Customer domain name field should contain domain name and suffix(es) only.
- ii. Office 365 Tenant IDs and customer domain names have a parent-child relationship in Microsoft’s systems. Although each customer may own multiple Tenant IDs, and each Tenant ID may be associated as a parent to multiple domain names, each domain name can only belong to one Tenant ID.
- iii. In some circumstances, customers may be granted eligibility for a Partner Activities engagement via a tenant ID that is not associated to their primary domain name. Additionally, Partner Center is not able to match domains to their grandparent TPIDs, only to the domain’s direct parent tenant ID.

Solution Area	Type	Allowed Customer ID Types
Azure	Fixed payout	TPID, Azure Subscription ID
Business Applications	Fixed payout	TPID, Domain name or Tenant ID
Business Applications	Variable payout	Opportunity ID
Modern Work	Fixed payout	Domain name or Tenant ID
Security	Microsoft Sentinel Migrate & Modernize	TPID, Domain name or Tenant ID
Security	Data Security, Threat Protection	Domain name or Tenant ID

Add new customer - Associate Engagement (1/2)

The Solution Area associated to the page you are on, the Partner Location and the Customer ID entered in the Associate Customer stage determine what engagements will be available for you to select in this stage.

If you are on a specific engagement's Customers page, that engagement will be pre-selected. If you are on the Customer Claims view, no engagements will be pre-selected.

i. If the customer ID is a TPID, Tenant ID, Subscription ID, or domain, you may be able to select multiple **Fixed Payout** engagements and create claims for each engagement in this action.

- ✓ **Select** one or more eligible Fixed Payout engagements that you intend to deliver to this Customer.

ii. If the customer ID is an Opportunity ID, you will only be able to select one **Variable Payout** engagement at a time.

- ✓ For Variable Payout engagements, you must also enter the **Requested hours** for the engagement. This value cannot be changed once the claim has been created.

The screenshot shows the 'Add customer | Associate engagement' interface. On the left, a progress bar indicates the current stage is 'Associate engagement'. The main area displays a list of eligible engagements under the 'Eligible' tab. The selected engagement is 'Azure Innovate PL: Analytics Deployment (Large)'. A callout box labeled 'ii' provides a detailed view of this engagement, showing the 'Pre-Sales Variable Envisioning Workshop' selected and 'Requested hours' set to 10.

Add new customer - Associate Engagement (2/2)

If a desired engagement is not eligible or available to select in this stage, one or more of the following reasons may apply:

- ✓ The customer ID type selected is not valid for the engagement type
- ✓ The engagement belongs to a different Solution Area than the page or view you used to launch the Add Customer workflow
- ✓ The customer's ID does not currently meet the eligibility criteria or was not included in the engagement's eligible customers list
- ✓ Your location ID does not currently meet the eligibility criteria or was not included in the engagement's eligible partners list
- ✓ The customer has already met the allowed limit of active and approved claims for the engagement
- ✓ The engagement has ended or is otherwise closed to new claims

If you have questions about why an engagement isn't available, please create a Partner Center Support request to the support team at <https://aka.ms/partnercentersupport>. To expedite resolution, it is recommended to include screenshots or recordings of the Associate Customer AND Associate

Add new customer - Contact Information

Enter the contact details for the customer and yourself.

- i. We will email a consent request link to the **customer contact** provided, so they can confirm their intention to proceed with the engagement.
- ii. We will email notifications of claim status updates to the **partner contact** provided.
- iii. If the customer ID type entered in **Associate customer** was Tenant ID or domain, and the customer contact email domain entered here does not match that Tenant ID or domain, you will now be prompted to provide a reason why the customer is being contacted with an email whose domain does not match the Tenant ID/domain associated to the claim.
- iv. For **variable payout engagements**, this page will also display the proposed payout amount based on the variable payment calculation established for that engagement in the **MCI Program Guide**. By proceeding to create the claim, you are agreeing to accept the proposed payout amount shown as your maximum possible earnings for that claim.

Add customer

- Associate customer
- Associate engagement
- Contact Information**
- Review and complete

Add customer | Contact Information

Please provide contact information for the primary customer and partner contacts for this engagement. We will email a consent request to the customer contact provided, so they can confirm their intention to proceed with the engagement. We will email notifications of claim status updates to the partner contact provided.

i Customer contact name *
Susie Jones

Customer contact email *
susie@contoso.com

Customer contact work title
IT Systems Administrator

ii Partner contact name *
Priya Kaur

Partner contact email *
pkaur@fridayinc.com

Previous Next

iv **Proposed payout (USD):** 1956

Please provide contact information for the primary customer and partner contacts for this engagement. We will email a consent request to the customer contact provided, so they can confirm their intention to proceed with the engagement. We will email notifications of claim status updates to the partner contact provided.

iii Domain mismatch reason *
The customer's primary domain is not currently hosted on a Microsoft tenant

Previous Next

Add new customer - Review and complete claim creation

Review and confirm the claim details. You can click the Edit links or use the Previous button to navigate back through each stage to modify as needed.

✓ For **Variable Payout** claims, the proposed payout amount will be listed. By proceeding to create the claim, you are agreeing to accept the proposed payout amount shown as your maximum possible earnings for that claim.

Once you are satisfied that the details shown are correct, click the **Add Customer** button.

You will see a **confirmation message** stating “Customer successfully claimed.” Click **Done** to close the Add Customer workflow.

This action will create a claim for each of the engagements you selected, and a 30-day countdown will begin to obtain the customer’s consent on each claim.

Next, you must **request customer consent**. If you do not obtain consent from a newly added customer on at least one claim within 30 days of adding them, the claim will **expire**, and the customer will disappear from your Customers list(s).

Add customer | Review and complete

You will need to send the email for customer consent separately for each engagement from the respective customer page or from the customer claims page. By continuing, you agree to the language in the applicable program guide.

[Edit Associate customer](#)

Claim name: Test Claim

Partner location: FridayINC, US, Kirkland

Tenant ID: [Redacted]

[Edit Associate engagement](#)

Engagements: ROITestFixedPayCase

[Edit Associate engagement](#)

Engagements: Pre-Sales Variable Envisioning Workshop

Requested hours: 10

Proposed payout (USD): 1630

[Edit Contact Information](#)

Customer contact name: [Redacted]

Customer contact email: [Redacted]

Domain mismatch reason: test

Customer contact work title: [Redacted]

Partner contact name: [Redacted]

Partner contact email: [Redacted]

[Previous](#) [Add Customer](#)

Microsoft Partner Center

Home > Incentives > MCI engagements >

Summary

Customers

Eligibility

Add customer

- ✓ Associate customer
- ✓ Associate engagement
- ✓ Contact Information
- ✓ Review and complete

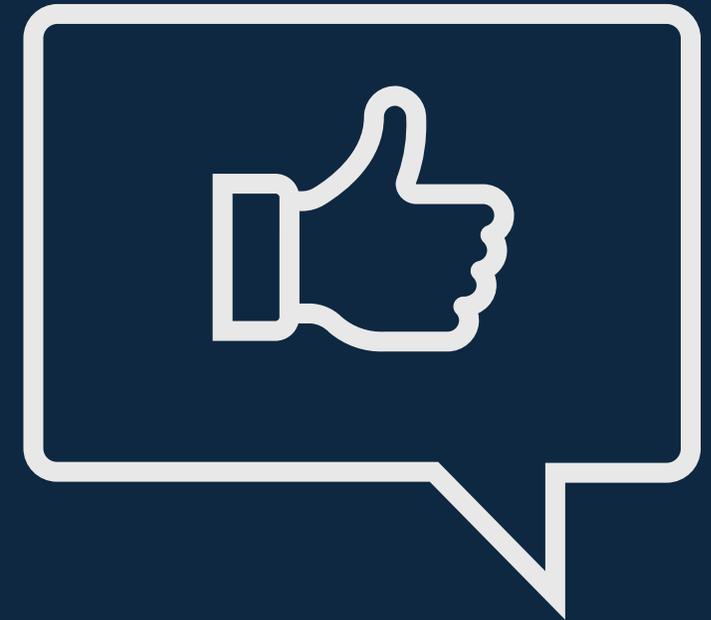
Customer successfully claimed

[Done](#)

Customer Consent Policies

If you want to deliver a **Partner Activities** Engagement to a customer, then you need to obtain their consent, which is an agreement to participate in the engagement.

- ✓ You have **30 days** to obtain affirmative customer consent after adding a new customer to an engagement OR creating a new claim with a previously added customer.
- ✓ Customer consent responses must be requested and recorded via Partner Center, using the process described in the following slides. **Proof of customer consent sent in by email or via other means will not be accepted.**
- ✓ If you do not obtain consent from the customer **within 30 days of claim creation**, the claim will expire. You will then need to create a new claim to proceed. **If a claim expires, it cannot be reactivated.**
- ✓ If the customer has never previously given you consent for a Partner Activities Engagement, they will also drop off your Customers list(s) if consent is not obtained. You will need to re-add them if you wish to make a new claim.
- ✓ The 30-day consent expiration window applies to all **Partner Activities** claims, regardless of Solution Area.
- ✓ **There are no extensions or exceptions to these policies.**



Launch Claim Customer Workflow (Fixed payout only)

For **fixed payout** engagements, the Customers view will show you all the customers who have previously given consent to you on at least one fixed payout engagements claim, sorted into Eligible, Ineligible, and Complete lists.

For **variable payout** engagements, the page will only show the list of active, unresolved claims. All variable pay claims must use the **Add New Customers** workflow each time, even if a previous claim was created for this customer + engagement ID combination.

To create a new **fixed payout** claim with an existing customer, or to reclaim the same customer after a claim has expired, been cancelled, or been rejected, do as follows:

- i. Navigate to the desired **engagement**
- ii. Open the engagement's **Customers** view
- iii. Search, sort, or filter the **Eligible** list as needed to identify the intended customer.
- iv. Under the Action column, click **Claim Customer**.

Following these steps will launch the Add Customer workflow pop-in, with the customer details pre-populated from your previous claim for this customer's ID.

The screenshot shows the Microsoft Partner Center interface for the 'Enable Frontline Workshop' engagement. The 'Customers' view is active, displaying a table of eligible customers. The table has the following columns: Customer name, Claim ID, PartnerID, Partner name, Last updated, Status, Action, and Claims expiry. The 'Action' column for the first customer (Claim ID 3001583) has a 'Claim customer' button highlighted with a yellow box and a circled 'iv' icon. Other customers in the list include those with Claim IDs 3015123, 3003931, 3000008, and 3015125, with various statuses like 'Cancelled' or 'Not submitted claim expired'.

Customer name	Claim ID	PartnerID	Partner name	Last updated	Status	Action	Claims expiry
[Redacted]	-	-	-	-	-	Claim customer	-
[Redacted]	3001583	[Redacted]	FridayINC	2/10/2023	Customer consent received	Submit claim	2/22/2023
[Redacted]	3015123	[Redacted]	FridayINC	2/10/2023	Cancelled	-	-
[Redacted]	3003931	[Redacted]	FridayINC	2/9/2023	Cancelled	-	-
[Redacted]	-	-	-	-	-	Claim customer	-
[Redacted]	3000008	[Redacted]	FridayINC	2/11/2023	Not submitted claim expired	-	-
[Redacted]	-	-	-	-	-	Claim customer	-
[Redacted]	3015125	[Redacted]	FridayINC	2/8/2023	Customer claimed	Send email for customer consent	3/12/2023

Claim previously added customer - Associate Customer (Fixed payout only)

- i. Select **Partner location ID** that you intend to use to deliver this engagement. The dropdown will allow you to select the location IDs that meet all the following criteria:
 - ✓ Location is MCI enrolled
 - ✓ You have an Incentive user or admin role for the location
 - ✓ Location is eligible for that specific engagement
- ii. The Customer ID field will display the customer ID type and value used when you originally added the customer to your Customers lists.
 - ✓ This is the same ID value currently being used to check the customer’s eligibility.
 - ✓ Partner Location ID and Customer ID cannot be changed once a claim has been created. If you determine later that you need to claim for this activity on a different partner location ID or customer ID, you will need to cancel the current claim, wait until it expires, or comment in the claim to request that the POE team reject the claim. Then, create a new claim with the correct ID values.

The **Customer ID** field is not editable when creating a new claim for an existing customer. If a previously added customer is not appearing in the Eligible list for a desired engagement, but you have confirmation from your Microsoft subsidiary or PDM that the customer was granted eligibility, their new eligibility is likely associated to a different ID. You will need to **add** that ID as a new, separate customer entity.

Claim previously added customer - Associate Engagement (1/2) (Fixed payout only)

The Solution Area associated to the page you are on, the Partner Location and the Customer ID shown in the Associate Customer stage determine what engagements will be available for you to select in this stage.

If you are on a specific engagement's Customers page, that engagement will be pre-selected. If you are on the Customer Claims view, no engagements will be pre-selected.

- i. Select one or more eligible **fixed payout** engagements that you intend to deliver to this Customer.

Add customer | Associate engagement

Select the engagements that you are ready to offer to this customer. You will only be able to select an engagement and create a claim if both you and the customer are currently eligible.

Eligible Ineligible

- Azure Innovate PL: Analytics Deployment (Small)
- Azure Innovate PL: Analytics Deployment (Medium)
- Azure Innovate PL: Analytics Deployment (Large)
- Azure Innovate PL: Analytics Pilot/POC
- Azure Innovate PL: AI Apps Pilot/POC
- Azure Innovate PL: AI Apps Deployment (XS)
- Azure Innovate PL: AI Apps Deployment (Small)
- AMM PL for ISV SAP RISE (S)
- AMM PL for ISV SAP RISE (M)
- AMM PL for ISV SAP RISE (L)

Previous Next

Claim previously added customer - Associate Engagement (2/2) (Fixed payout only)

If a desired engagement is not eligible or available to select in this stage, one or more of the following reasons may apply:

- ✓ The customer ID type selected is not valid for the engagement type
- ✓ The engagement belongs to a different Solution Area than the page or view you used to launch the Add Customer workflow
- ✓ The customer's ID does not currently meet the eligibility criteria or was not included in the engagement's eligible customers list
- ✓ Your location ID does not currently meet the eligibility criteria or was not included in the engagement's eligible partners list
- ✓ The customer has already met the allowed limit of active and approved claims for the engagement
- ✓ The engagement has ended or is otherwise closed to new claims

If you have questions about why an engagement isn't available, please create a Partner Center Support request to the Engagements support team at <https://aka.ms/partnercentersupport>. To expedite resolution, it is recommended to include screenshots or recordings of the Associate Customer AND Associate Engagement stages.

Claim previously added customer - Contact Information (Fixed payout only)

Enter the contact details for the customer and yourself.

- i. We will email a consent request link to the **customer contact** provided, so they can confirm their intention to proceed with the engagement.
- ii. We will email notifications of claim status updates to the **partner contact** provided.
- iii. If the customer ID type entered in **Associate customer** was Tenant ID or domain, and the customer contact email domain entered here does not match that Tenant ID or domain, you will now be prompted to provide a reason why the customer is being contacted with an email whose domain does not match the Tenant ID/domain associated to the claim.

Add customer

- Associate customer
- Associate engagement
- Contact Information**
- Review and complete

Add customer | Contact Information

Please provide contact information for the primary customer and partner contacts for this engagement. We will email a consent request to the customer contact provided, so they can confirm their intention to proceed with the engagement. We will email notifications of claim status updates to the partner contact provided.

i Customer contact name *
Susie Jones

Customer contact email *
susie@contoso.com

Customer contact work title
IT Systems Administrator

ii Partner contact name *
Priya Kaur

Partner contact email *
pkaur@fridayinc.com

Previous Next

Add customer

- Associate engagement
- Contact Information**
- Review and complete

Please provide contact information for the primary customer and partner contacts for this engagement. We will email a consent request to the customer contact provided, so they can confirm their intention to proceed with the engagement. We will email notifications of claim status updates to the partner contact provided.

Customer contact name *
Susie Jones

Customer contact email *
susie@contoso.com

Customer contact work title
IT Systems Administrator

Partner contact name *
Priya Kaur

Partner contact email *
pkaur@fridayinc.com

iii Domain mismatch reason *
The customer's primary domain is not currently hosted on a Microsoft tenant

Previous Next

Claim previously added customer - Review and complete (Fixed payout only)

Review and confirm the claim details. You can click the Edit links or use the Previous button to navigate back through each stage to modify as needed.

Once you are satisfied that the details shown are correct, click the **Add Customer** button.

You will see a **confirmation message** stating “Customer successfully claimed.” Click **Done** to close the Add Customer workflow.

This action will create a claim for each of the engagements you selected, and a 30-day countdown will begin to obtain the customer’s consent on each claim.

Next, you must **request customer consent**. If you do not obtain consent from your customer within 30 days of creating this claim, the claim will **expire** and cannot be reactivated.

Add customer

- Associate customer
- Associate engagement
- Contact Information
- Review and complete

Add customer | Review and complete

You will need to send the email for customer consent separately for each engagement from the respective customer page or from the customer claims page. By continuing, you agree to the language in the applicable program guide.

[Edit Associate customer](#)
Partner location: FridayINC, IN, New Delhi ()
Customer domain name: contoso.com
Tenant ID (or TPID): ()

[Edit Associate engagement](#)
Workshops: Sales - Protect and Govern Sensitive Data Workshop,Sales-Mitigate Privacy Risks Workshop,Microsoft 365 Digital Workforce Workshop

[Edit Contact Information](#)
Customer contact name: Susie Jones
Customer contact email: susie@contoso.com
Customer contact work title: IT Systems Administrator
Partner contact name: Priya Kaur
Partner contact email: pkaur@fridayinc.com
Domain mismatch reason: The customer's primary domain is not currently hos tenant

Previous Add Customer

Add customer

- Associate customer
- Associate engagement
- Contact Information
- Review and complete

Customer successfully claimed

Done

Invoice Requirements

i. Download optional Invoice template.

- ✓ Partners are encouraged to use their own invoices. Use of Microsoft template not required.

ii. Upload completed invoice.

iii. Each claim must have a separate, unique invoice with the following minimum required elements

- ✓ Engagement Claim ID
- ✓ Partner company name
- ✓ Invoice amount (Incentive rate) in US Dollars

Invoice amount must match payout amount for Partner Market + engagement combination as shown in **MCI Program Guide** and must be shown in USD. VAT is not required.

Payments will be processed based on your claiming location's payment profile. If your payment profile details differ from the invoice details, your payment profile will take precedent.

If your invoice format requires fields beyond the 3 required points specified above, we would recommend that you use the details that are configured in your location's payment profile to complete those fields.

Submit Proof of Execution

Note: When uploading POE documents with customer email addresses, please blur the customer personal information and keep the domain information visible.

Invoice

i Download Template Upload proof of execution ii move

<input type="checkbox"/>	Document Name ↑	Type	Last activity
<input type="checkbox"/>	address		
<input type="checkbox"/>	AnotherDoc		

MCI Engagements - Claim Invoice Template & Guidelines



Microsoft Partner Incentives

MCI Engagements

CLAIM INVOICE

Friday Inc

New Delhi, IN
Phone +1-111-555-1234
Contact E-mail pkaur@fridayinc.com

DATE: 2022-11-13

MCI ENGAGEMENT CLAIM ID #	ENGAGEMENT NAME	PRE-TAX FEE AMOUNT
3016006	Enable Frontline Workshop	\$1,000.00 USD

Global Requirements

Please upload an invoice to your MCI Engagement claim using either this optional template, or an invoice generated from your accounting system. To be approved, your invoice must contain the following minimum required elements:

1. Claim ID
2. Partner Name associated with location ID
3. Correct earnings amount for this engagement in USD
 - a. **Pre-tax** amount listed must match the correct engagement fee amount for your

Customer Attestation (1/3) – Sending survey request

Your Customer must complete a survey about their engagement experience. Customer survey responses and survey questions are confidential to Microsoft. The survey questions vary based on the engagement, and Microsoft reserves the right to update the survey questions at any time to align with the business needs of the program.

- i. Review Customer survey **status**
- ii. Click to **Send or re-send** unique, one-time-use Customer survey link email
 - ✓ Each claim has a maximum limit of 1 customer survey email send actions per day. If you have already attempted to send the survey email today, please wait 24 hours before your next attempt.
- iii. Click to **Edit** customer contact details

If you need to change the Customer contact details after triggering the survey, you will need to re-send the survey, as a new survey form is generated for each combination of claim ID + customer contact email. Any previously sent survey links will be disconnected from the claim.

Once a set of completed customer survey responses have been recorded to the claim, the customer contact details cannot be changed, and the survey cannot be re-sent on this claim.

Surveys

Customer Survey: i Not Initiated ii ▶ Send Customer Survey

Partner Survey: Not Initiated ▶ Send Partner Survey Go to survey

Microsoft Partner Center Search

Home > Incentives > MCI engagements > NextGen Windows Workshop > Customers > [blurred]

Claim 3002956 ▶ Submit claim

Summary of your engagement claim. You must submit your claim with all of the required information before M

Engagement Details

Customer information iii Edit

Customer name: [blurred]

Customer consent date: December 13, 2022

Customer contact name: [blurred]

Customer contact email: [blurred]

Customer contact title: IT Program Manager

Customer domain name: [blurred]

Customer TPID/Tenant ID: [blurred]

Tenant domain name mismatch reason: [blurred]

Claim status

- L Editing
- U Upload in
- U Upload fin
- L Partner su
- L Customer
- O Submitted
- O Under review
- O Approved

Customer information ×

You may only edit the fields below for this claim.

Customer contact name*

Customer contact email*

Customer contact title

Save changes

Customer Attestation (2/3) – Customer respondent experience

- i. The customer contact specified in the claim will receive an email with the following details:
 - ✓ **Subject line:** “Action required: Complete customer survey for the [Engagement Name]”
 - ✓ **From:** microsoft-noreply@microsoft.com
 - ✓ **Body:** See example – The email will reference the engagement name and the Partner Name associated with your Partner Location.
- ii. Customer must click **blue survey link** in email body to open unique, one-time-use web form link in a browser instance
 - ✓ Customer should be sure to only use the most recently sent/received survey link. If the customer attempts to use an older survey link to respond after a new survey link has been generated due to a contact email change in the claim, their responses will not be recorded to the claim as complete.

Action required: Complete customer survey for the Enable Frontline Workshop

Microsoft
To: Susie Jones (sjones@contoso.com) 3:43 PM

If there are problems with how this message is displayed, click here to view it in a web browser.

Microsoft

Please complete this customer survey for the Enable Frontline Workshop

Thanks for participating in the **Enable Frontline Workshop with FridayINC.**

As part of the engagement completion process, each customer is required to fill out a brief survey to monitor engagement quality. Please select **survey** to provide your response.

If you have questions about Microsoft solutions and your engagement, we encourage you to reach out to your partner, FridayINC.

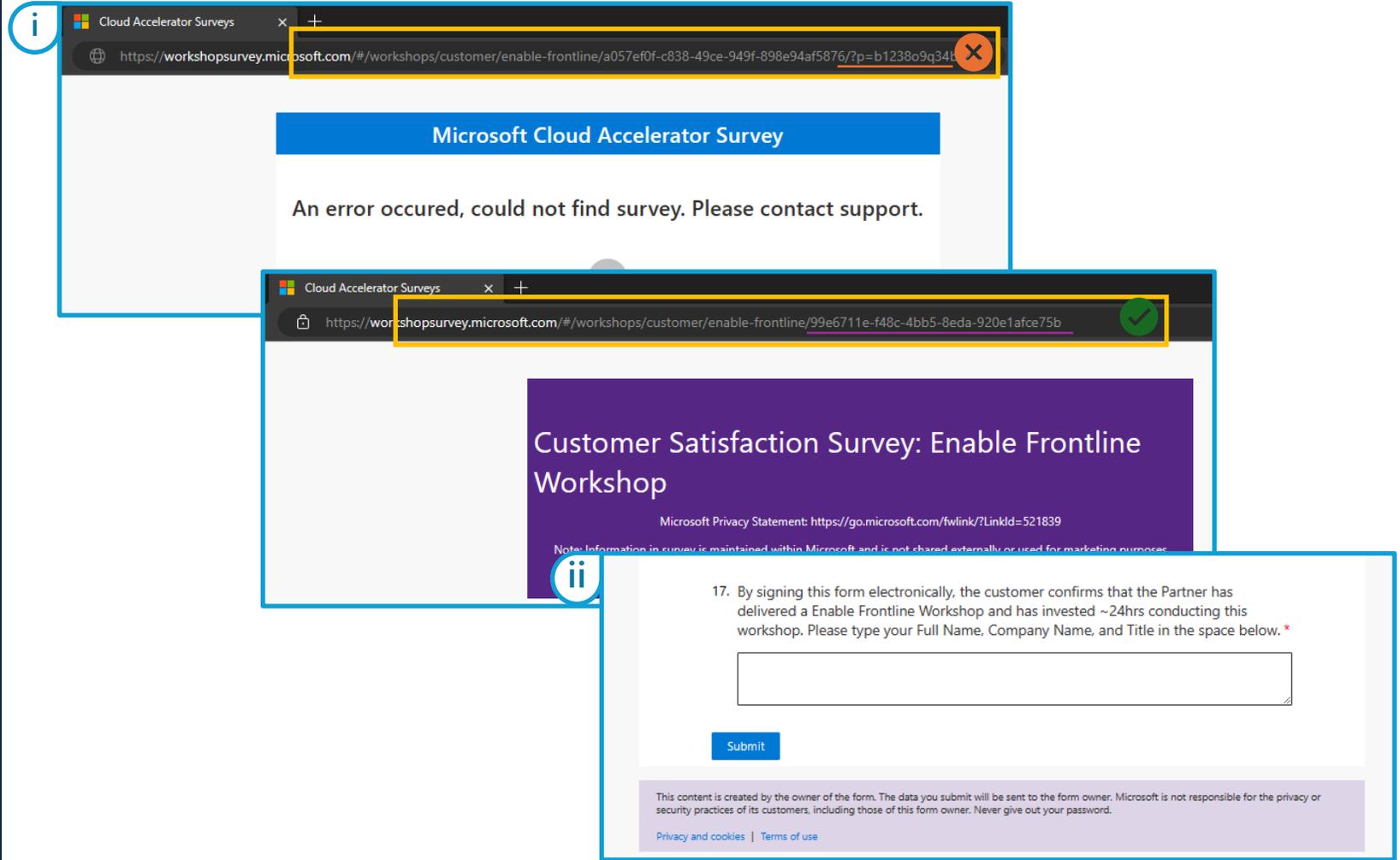
[Privacy Statement](#)
Microsoft Corporation, One Microsoft Way, Redmond, WA 98052

Microsoft

Customer Attestation (3/3) – Customer respondent experience

- i. If the customer sees an error when they try to access the survey, they should:
 - ✓ Ensure that no extra characters or encryption have been added to the URL following their unique 32-character survey GUID
 - ✓ Confirm with you that they are using the most recently generated survey link from the email sent to the contact currently listed in the claim.
 - ✓ To help troubleshoot, support team will need to confirm the exact URL where respondent encountered the error message. Please ensure that any screenshots or issue descriptions provided to support teams include this diagnostic detail.

- ii. Although the content and length of the Customer Attestation will vary with each engagement, the final question on all Customer Attestations contain a prompt for **electronic signature** as the final question, requesting that the respondent type in their full name, company name, and job title.
 - ✓ NOTE: If the Customer Attestation signature is not valid with all required elements per this prompt's instructions, the claim may be rejected.



Partner Attestation (1/3) – Accessing or emailing the survey form

You must complete a survey about your engagement experience. Partner survey responses and survey questions are confidential to Microsoft. The survey questions vary based on the engagement, and Microsoft reserves the right to update the survey questions at any time to align with the business needs of the program.

- i. Review Partner survey **status**
- ii. Send or re-send **Partner Attestation email**
 - ✓ Each claim has a maximum limit of 1 partner survey email send action per day. If you have already attempted to send the survey email today, please wait 24 hours before your next attempt, or access the survey form directly using Go to survey link
- iii. Access Partner survey form directly via **Go to survey link**
- iv. **Edit contact details**
 - ✓ Partner contact details can be edited until claim is submitted, even if a survey response has been recorded.

Surveys

Customer Survey: Not Initiated [▶ Send Customer Survey](#)

Partner Survey: i Not Initiated ii [▶ Send Partner Survey](#) iii [Go to survey](#)

Microsoft Partner Center

Home > Incentives > MCI engagements > NextGen Windows Workshop > Customers > [blurred]

Customer contact name	[blurred]	○ Submitted
Customer contact email	[blurred]	○ Under review
Customer contact title	IT Program Manager	○ Approved
Customer domain name	[blurred]	
Customer TPID/Tenant ID	[blurred]	
Tenant domain name mismatch reason	[blurred]	

Partner information iv [Edit](#)

Partner location: AUS, Redmond, (MPN: [blurred])

Partner name: FridayINC

Partner contact name: [blurred]

Partner contact email: [blurred]

Submit Proof of Execution

Note: When uploading POE documents with customer email addresses, please blur the customer personal info

Partner information ×

You may only edit the fields below for this claim.

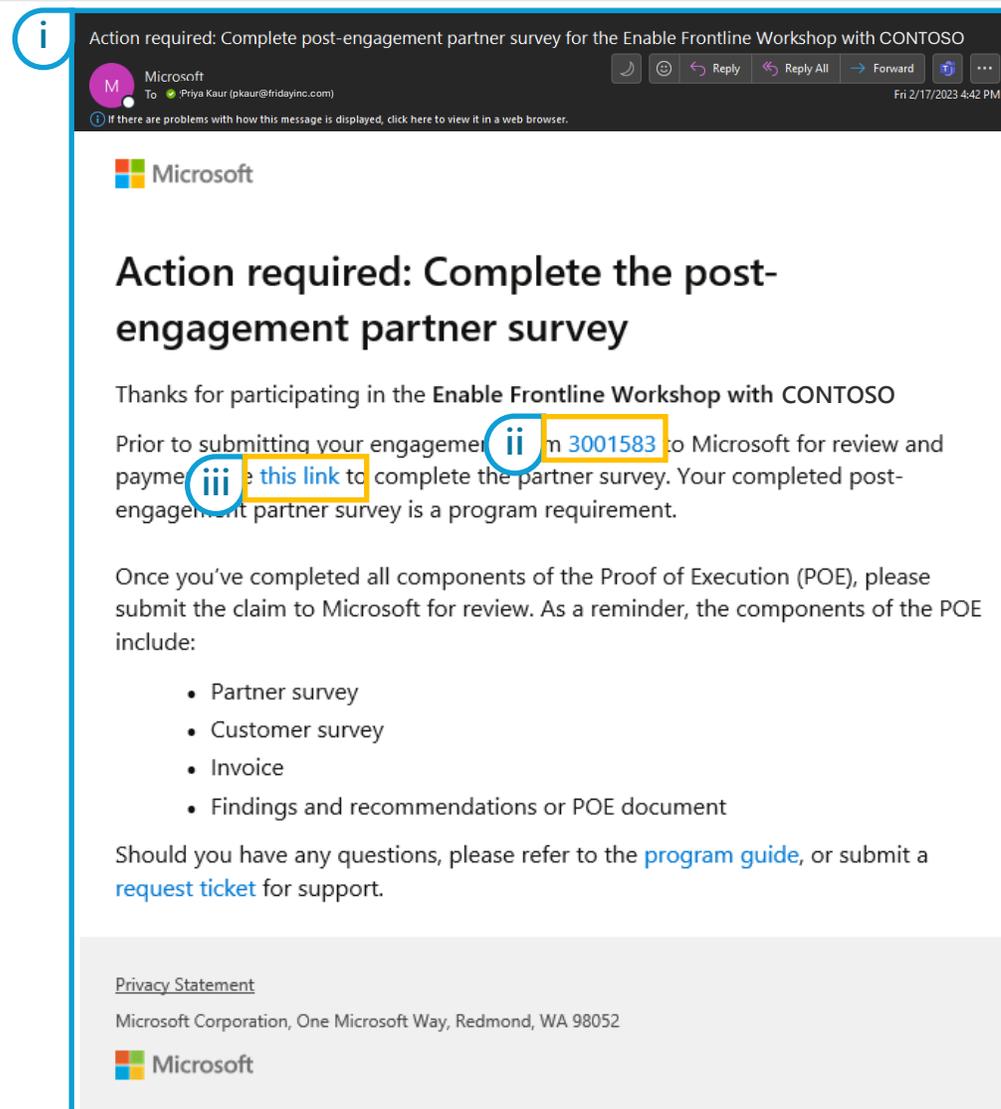
Partner contact name*

Partner contact email*

Save changes

Partner Attestation (2/3) – Partner respondent experience

- i. If you click **Send Partner Attestation** link in the claim, the partner contact specified in the claim will receive an email with the following details:
 - ✓ Subject line: “Action required: Complete post-engagement partner survey for the [Engagement Name] with [Customer name]”
 - ✓ From: microsoft-noreply@microsoft.com
 - ✓ Body: See example
- ii. Click to access **claim** – Sign into Partner Center with location-based Incentive role permissions required to view claim.
 - ✓ Attestation respondents who have Incentive role permissions in Partner Center for the claim’s location ID may access the survey via the emailed link OR by opening the claim in Partner Center and clicking the direct link embedded in the claim.
- iii. Click to access **survey form** – No sign-in needed. Attestation form link is unique for each claim.
 - ✓ Attestation respondents who do not have Incentive role permissions in Partner Center for the claim’s location ID must click the blue survey link in the email body to open this claim’s survey web form in a browser instance.



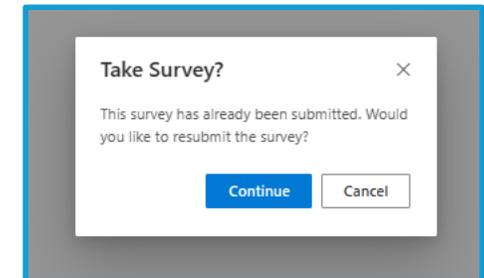
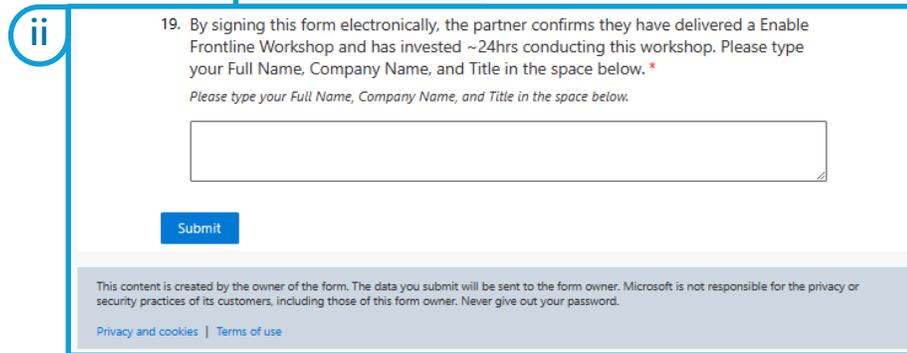
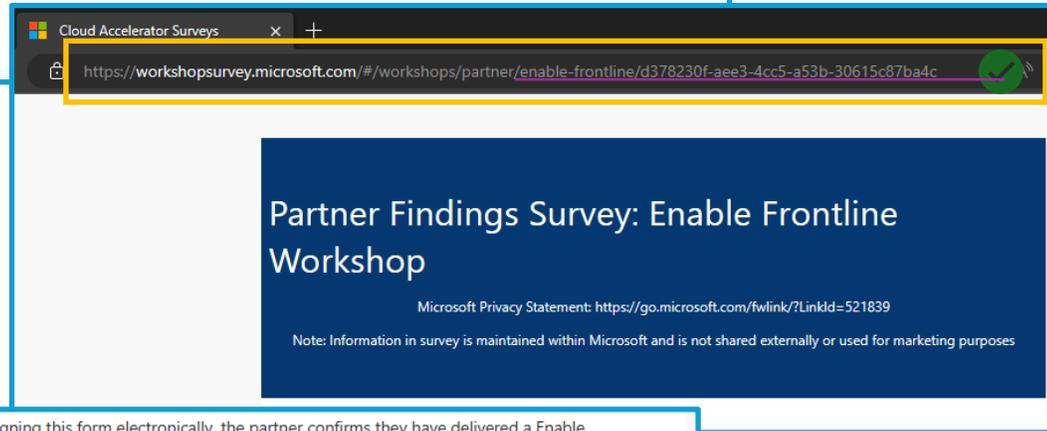
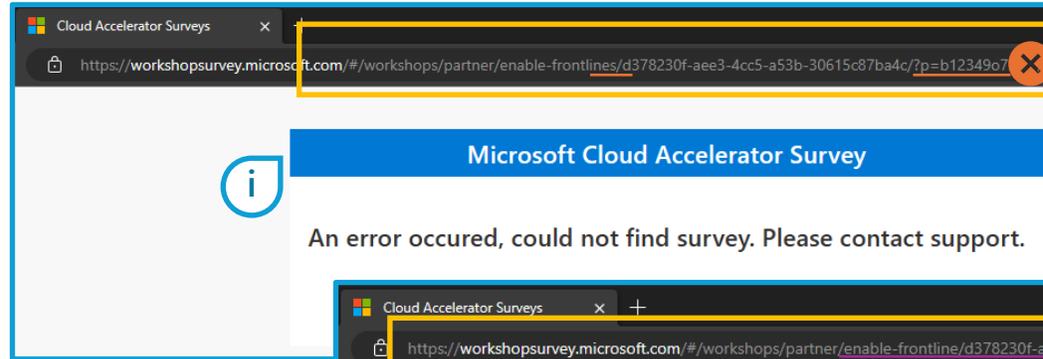
Partner Attestation (3/3) – Partner respondent experience

i. If the survey respondent sees an error when they try to access the survey, they should:

- ✓ Ensure that no extra characters or encryption have been added to the URL following the unique 32-character survey GUID generated for this claim
- ✓ Confirm that they are using the most recently generated survey link from this specific claim.
- ✓ To help troubleshoot, support team will need to confirm the exact URL where respondent encountered the error message. Please ensure that any screenshots or issue descriptions provided to support teams include this diagnostic detail.

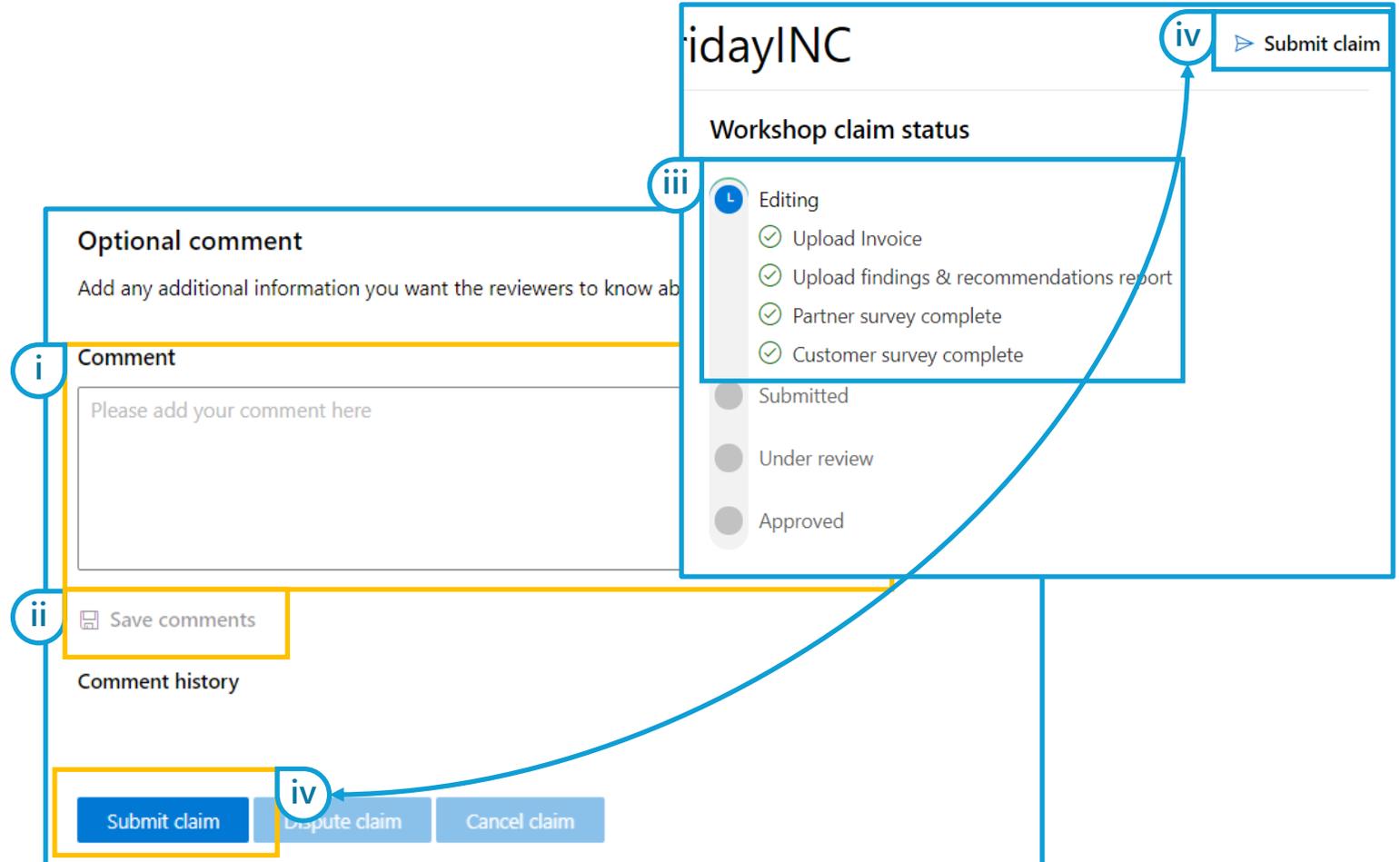
ii. Although the content and length of the Partner Attestation will vary with each engagement, the final question on all Partner Attestations contain a prompt for **electronic signature** as the final question, requesting that the respondent type in their full name, company name, and job title.

- ✓ NOTE: If the Partner Attestation signature is not valid with all required elements per this prompt's instructions, the POE review team may request that you re-take your survey response to provide a valid electronic signature to approve your claim.



Add Comments and Submit

- i. You may add optional comments on the claim for Microsoft to consider as part of the claim.
- ii. Click to **save comments**.
- iii. Scroll to top of claim to review actions needed.
 - ✓ Pending actions will show a **blue clock icon**.
 - ✓ Completed actions will show a **green check icon**.
- iv. Once all four action items are Completed with a green check icon, the **Submit** button will activate at the top and bottom of claim. Click either one to submit claim to Microsoft for review.
 - ✓ NOTE: If a claim is still in Customer consent received status on the next expiry date, it will expire and cannot be reactivated. See **Claim Expiration Timelines**.



Claim status change notification emails

When Microsoft changes the status of your claim to Action required, Approved, or Rejected, microsoftnoreply@microsoft.com will send an email notification alerting you to the status change.

This email will be sent to the partner contact provided for this claim, along with the Incentive Admin or Incentive User who added/claimed this customer.

- i. Notification sent when claim status is changed to **Action required**
- ii. Notification sent when claim status is changed to **Approved**
- iii. Notification sent when claim status is changed to **Rejected**

i **Subject:** Additional proof of execution details needed for Microsoft Teams
Preheader: Please provide the additional POE details.

 Microsoft

Additional POE details needed for Microsoft Teams

Thanks for participating in the Microsoft Commerce Incentive (MCI) Program.

We've reviewed the claim [1001468](#) that you submitted for the Microsoft Teams with Contoso, and we've identified issues with your claim documentation that are preventing claim approval.

You must take the following actions for us to continue processing your claim:

1. Sign in to Partner Center and go to claim 1001468.
2. Review all comments in the claim to understand the issues that are preventing claim approval.
3. Update your claim document in Microsoft in the claim comments.
4. Add additional comments (optional).
5. Resubmit your claim (the status will then change to Under Review).

As a reminder, we can't take action on your claim until the status changes to Under Review. If your claim status changes to Under Review, you can expect the review timeline that's defined in the program guide.

For details about the program, refer to the [program guide](#) or contact support.

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Microsoft Corporation, One Microsoft Way, Redmond, WA 98052



iii **Subject:** Claim for Microsoft Teams workshop engagement was rejected
Preheader: Notice: Engagement claim not approved.

 Microsoft

Notice: Claim for Microsoft Teams workshop wasn't approved

Due to an unresolved issue with components of the Proof of Execution (POE), this email is to inform you that your claim [1001468](#) for the Microsoft Teams workshop with Contoso wasn't approved.

For details explaining why this claim wasn't approved, sign in to Partner Center and open the claim link to review the comments.

For additional information, please refer to the [program guide](#) or contact support.

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Microsoft Corporation, One Microsoft Way, Redmond, WA 98052



ii **Subject:** Notice: Claim for the engagement was approved
Preheader: Your claim for Engagement Name with Contoso was approved.

 Microsoft

Approved! Your claim for the Engagement Name was approved

This email is to inform you that your claim [1001468](#) for the Engagement Name with Contoso has been approved by Microsoft. You can expect the payment for the claim in the next payment cycle for the Microsoft Commerce Incentive Program.

As always, thanks for your continued partnership. To learn more about our expanding portfolio of engagements, please see our <https://aka.ms/incentivesguide> or submit a [request ticket](#) for additional support.

[Privacy Statement](#)
Microsoft Corporation, One Microsoft Way, Redmond, WA 98052



Action required: Responding to reviewer

If the POE reviewer is unable to approve based on your initial submittal, the following will occur:

- i. The claim status will be changed to **Action Required** in Partner Center.
 - ✓ Claim status emails will be sent to the partner contact provided for this claim, along with the user who added/claimed this customer.
- ii. Review the **Comment history** to determine what elements were found to be missing by the reviewer.
 - ✓ Click **Show More** to expand.
- iii. **Upload** any requested corrected documents.
 - ✓ NOTE: If a part of a POE document must be corrected, the entire document with the corrected element must be uploaded as a single contiguous file.
 - ✓ Add and save any clarifying comments as needed.
- iv. Click **Submit**. If you do not click Submit, the claim will remain in Action Required status and any changes will not be reviewed.
 - ✓ NOTE: If a claim is still in Action Required status on the next expiry date, it will expire and cannot be reactivated. See **Claim Expiration Timelines**

The screenshot displays the Partner Center interface for a claim in 'Action Required' status. It includes a progress bar, comment history, a document upload section, and action buttons.

Claim status

- Editing
- Submitted (November 14, 2022)
- Under review (November 15, 2022)
- Action required**
- Approved

Comment history

Microsoft (September 20, 2021 06:19 PM)
Dear Partner,
At this time the Workshops POE review process does not support documentation review ...
[Show More](#)

Comment history (Expanded)

Microsoft (September 20, 2021 06:19 PM)
Dear Partner,
At this time the Workshops POE review process does not support documentation review in languages other than English. We are unable to review your claim, because the following documentation contains information that is not presented in English:
Alternative Terms for Incentives
You must take the following actions to continue processing your claim:
• Upload English language version of documentation specified above.
• Add additional comments (optional)
• Resubmit your claim (status will then change to Under Review)
As a reminder, we cannot take any action on your claim while it is in Action Required status. Claim review can resume once you have resubmitted and the claim status changes to Under Review. If your claim is not completed and approved within 120 days of customer consent, the system will automatically reject your claim.
Best regards,
Workshops - POE Validation Team
[Show Less](#)

Findings and recommendations document

[Upload proof of execution](#) [Remove](#)

<input type="checkbox"/>	Document Name ↑		
<input type="checkbox"/>	Alternative Terms for Incentives	pdf	Updated by [redacted] on August 18, 2021
<input type="checkbox"/>	AnotherDoc	pdf	Updated by [redacted] on August 18, 2021

iv [Submit claim](#) [Dispute claim](#) [Cancel claim](#)

Claim approval

If your claim is approved, the following will occur:

- ✓ The claim status will change to **Approved** in Partner Center.
- ✓ Claim status emails will be sent to the partner contact provided for this claim, along with the user who added/claimed this customer.
- ✓ Approved claims will appear in the **Complete** list of the respective Engagement's Customers view.
- ✓ Earnings for approved claims will be included in your next standard MCI payment processing cycle.
- ✓ You will receive payment via wire transfer to the bank account in your claiming location's payment profile.

Claim 1019468 [Submit claim](#)

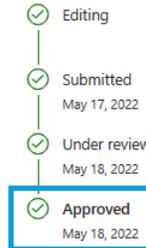
Summary of your engagement claim. You must submit your claim with all of the required information before Microsoft can review it. [Learn More](#)

Engagement Details

Customer information [Edit](#)

Customer name: [Redacted]
 Customer consent date: May 17, 2022
 Customer contact name: [Redacted]
 Customer contact email: [Redacted]
 Customer contact title: [Redacted]
 Customer domain name: [Redacted]
 Customer TPID/Tenant ID: [Redacted]

Claim status



Partner information [Edit](#)

Partner location
 Partner name
 Partner contact name
 Partner contact email

- Summary
- Customers**
- Eligibility

Customers | Rapidly Build Apps-in-a-day Workshop

Eligible Ineligible **Complete**

A summary of all customers for whom the engagement has been completed.

+ Add customer Export 1M 3M 6M Custom Filter Search by Customer name, Claim ID, PartnerID, Claim name

Customer name	Claim ID	PartnerID	Partner name	Last updated	Status	Action	Claims expiry
[Redacted]	1019468	[Redacted]	FridayINC	5/18/2022	Approved	-	-

Claim rejection

If your claim is rejected, the following will occur:

- ✓ The claim status will change to **Rejected** in Partner Center.
- ✓ A detailed rejection reason specific to your claim's circumstances will be provided in the **Comment history** of the claim, as shown in the example screenshot.
- ✓ Claim status notification emails will be sent to the partner contact provided for this claim, along with the user who added/claimed this customer.
- ✓ You will have 30 days to click **Dispute** and **Submit** to have your dispute response reviewed.
- ✓ If your claim status was changed to **Rejected** more than 30 days ago, or is in **Rejected final** status, you will need to re-claim the customer to the engagement in order to proceed.
- ✓ When a customer consents to a claim, any other open claims for the same engagement + customer ID from other partners will be automatically rejected. **Disputes are not accepted for this scenario.**

The screenshot displays the Microsoft Partner Center interface for a claim with ID 3008309. The breadcrumb trail is: Home > Incentives > MCI engagements > Microsoft Syntax Workshop > Customers > [Redacted]. The page title is "Claim 3008309" with a "Submit claim" link. A summary states: "Summary of your engagement claim. You must submit your claim with all of the required information before Microsoft can review it. [Learn More](#)".

Engagement Details

Customer information (with an "Edit" link):

- Customer name: [Redacted]
- Customer consent date: [Redacted]
- Customer contact name: [Redacted]
- Customer contact email: [Redacted]
- Customer contact title: [Redacted]
- Customer domain name: [Redacted]
- Customer TPID/Tenant ID: [Redacted]
- Tenant domain name mismatch reason: [Redacted]

Partner information (with an "Edit" link):

- Partner location: AUS, Redmond, (MPN: [Redacted])
- Partner name: FridayINC
- Partner contact name: [Redacted]
- Partner contact email: [Redacted]

Claim status (dropdown menu):

- Editing (checked)
- Submitted (July 25, 2022)
- Under review (July 27, 2022)
- Rejected (August 18, 2022)** (highlighted with a red box)

Comment history (highlighted with a blue box):

- M** Microsoft (September 20, 2021 06:43 PM)

Dear Partner,

As per Microsoft policies, Partners and Partner affiliate entities are not eligible to receive or retain incentives for activity connected to a customer that is a partner affiliate, a customer that the partner owes agency of fiduciary duty, or for any services where the Partner themselves or Microsoft is the end customer. Please note your claim has been rejected.

If additional assistance is needed, you can create a support ticket within the Incentives Online Support Experience on Partner Center.

<https://partner.microsoft.com/dashboard/support/servicerequests/create?category=incentives>

Best regards,

[Redacted]

Workshops - POE Validation Team
[Show Less](#)

Disputing a rejection

- i. If your claim is rejected, you will have a 30-day window in which to dispute the rejection action. Taking the dispute action will return the claim to the review queue.
- ii. Open claim and scroll to the bottom. Click **Dispute** claim to initiate dispute process.
- iii. Review the dispute resubmittal deadline and click **Dispute** to proceed or **Close** to abandon the dispute action.
- iv. Please be sure you have thoroughly reviewed the claim comments to ensure your dispute response and updated documentation addresses and resolves all the reasons given for the original rejection.
- v. Once you have updated the claim's POE documents, click **Submit** at either the top or bottom of the interface to return your disputed claim to the review queue.
 - ✓ **NOTE:** If you do not update the disputed claim's contents and click **Submit** within 30 days of your original rejection, your claim will expire.
 - ✓ If your submitted dispute is rejected, this is a final decision.

The screenshot shows the Microsoft Partner Center interface. At the top, there is a navigation bar with a search bar and a 'Workspaces' toggle. Below this, a breadcrumb trail reads: Home > Incentives > MCI engagements > Threat P... (partially visible). The main content area shows an email-style message starting with 'Dear Partner,' followed by a paragraph: 'We are writing to inform you that a decision has b... Pro...'. Below the text is a 'Show More' link and a 'Submit claim' button. A blue box highlights the 'Dispute claim' button, with an arrow pointing to a modal dialog. The modal dialog has a title 'Do you want to dispute the rejected claim?' and an 'Important' notice: 'You must resubmit the claim before Nov 25, 2021 06:21:58 PM UTC. Microsoft cannot review any dispute if the claim is not submitted.' At the bottom of the modal are 'Dispute' and 'Close' buttons. Below the modal, another breadcrumb trail is visible: Home > Incentives > MCI engagements > Hybrid Cloud Security Workshops > Customers >. A blue box highlights a list of instructions:

- Review all guidance provided in previous reviewer comments in this claim, and update your POE documentation to resolve all issues identified during review.
- Scroll to the bottom of the claim interface, click the Dispute button, upload your updated documentation to the claim, and submit your dispute for review.
- Provide any additional dispute justification via claim comment as needed.

 Below the instructions, it states: 'Disputes will be reviewed and responded to within 5 calendar days of re-submittal to review queue. POE review standards can be reviewed in the POE template for this workshop (available for download on the Summary view of this Engagement) as well as in the Partner Center Incentive Guide and MCI Engagements Training Guide. Program Guides are available for download here: https://partner.microsoft.com/en-US/membership/partner-incentives'. The message ends with 'Best regards,' and a signature: 'MCI Engagements - Workshops POE Review Team'. At the bottom of the page, a blue box highlights the 'Submit claim' button, with a 'Dispute claim' button next to it.

Allowed claim actions by user type and claim status

Allowed Actions	View*	Comment*	Edit contacts	Request consent	Consent response	Send survey emails	Complete partner survey	Complete customer survey	Add or delete files	Download files*	View survey responses*	Change claim status
Claim Status												
Customer claimed	Partner, Microsoft	Partner, Microsoft	Partner	Partner	-	-	-	-	-	-	-	Partner
Awaiting customer consent	Partner, Microsoft	Partner, Microsoft	Partner	Partner	Customer	-	-	-	-	-	-	Customer
Customer consent received	Partner, Microsoft	Partner, Microsoft	Partner	-	-	Partner	Partner	Customer	Partner	Partner, Microsoft	-	Partner
Submitted, Under review	Partner, Microsoft	Partner, Microsoft	-	-	-	-	-	-	-	Partner, Microsoft	Microsoft	Microsoft
Partner action required	Partner, Microsoft	Partner, Microsoft	-	-	-	-	Partner	Customer	Partner	Partner, Microsoft	Microsoft	Partner
Rejected	Partner, Microsoft	Partner, Microsoft	-	-	-	-	-	-	-	Partner, Microsoft	Microsoft	Partner
Disputed	Partner, Microsoft	Partner, Microsoft	-	-	-	-	-	-	Partner	Partner, Microsoft	Microsoft	Partner
Approved, Cancelled, Consent rejected, Expired (any), Rejected final	Partner, Microsoft	Partner, Microsoft	-	-	-	-	-	-	-	Partner, Microsoft	Microsoft	-

How to Claim – CPOR

1. Create Customer Association
2. Status of an association
3. Claim review & resolution
4. Disputing a claim
5. Disassociation from a claim
6. Request Customer consent
7. Business Applications Scenarios
8. Revenue Association
9. Referral creation

Creating a customer association (for new or existing customers)

Creating an association

To create an association, you must follow the steps below:

- Visit **Partner Center Dashboard**
- Under **Incentives**, select **Customer claims**.
- Select **+The Solution Area** (Modern Work and Security or Business Applications)
- **Select Add Customer**

Note:

- A new window will open where you provide information about your association.
- Only the following users in Partner Center can view and create associations.
 - Incentive Admin
 - Incentive User

- Note; partners must re-enroll upon expiration of a contract/subscription, if they want to continue to receive incentives/recognition, once a new contract/subscription has been signed

Home > Incentives > Customer claims

Overview

Plans management

Co-op management

Customer associations

Programs

Microsoft Commerce Incentive

MCI engagements

Customer claims

Incentives | Customer claims

A summary of all customer associations (claims) across all engagements along with the status a

To ensure that you are claiming for the right customer engagement for CPOR claims, [click here](#)

Modern Work And Security Business Applications Azure Devices

+ Add customer Export 1M

Claim ID	Engagement	Claim name	Customer name
3000400	Microsoft Online Service Usage (OSU) – Modern Work	test	MICROSOFT

Creating an association

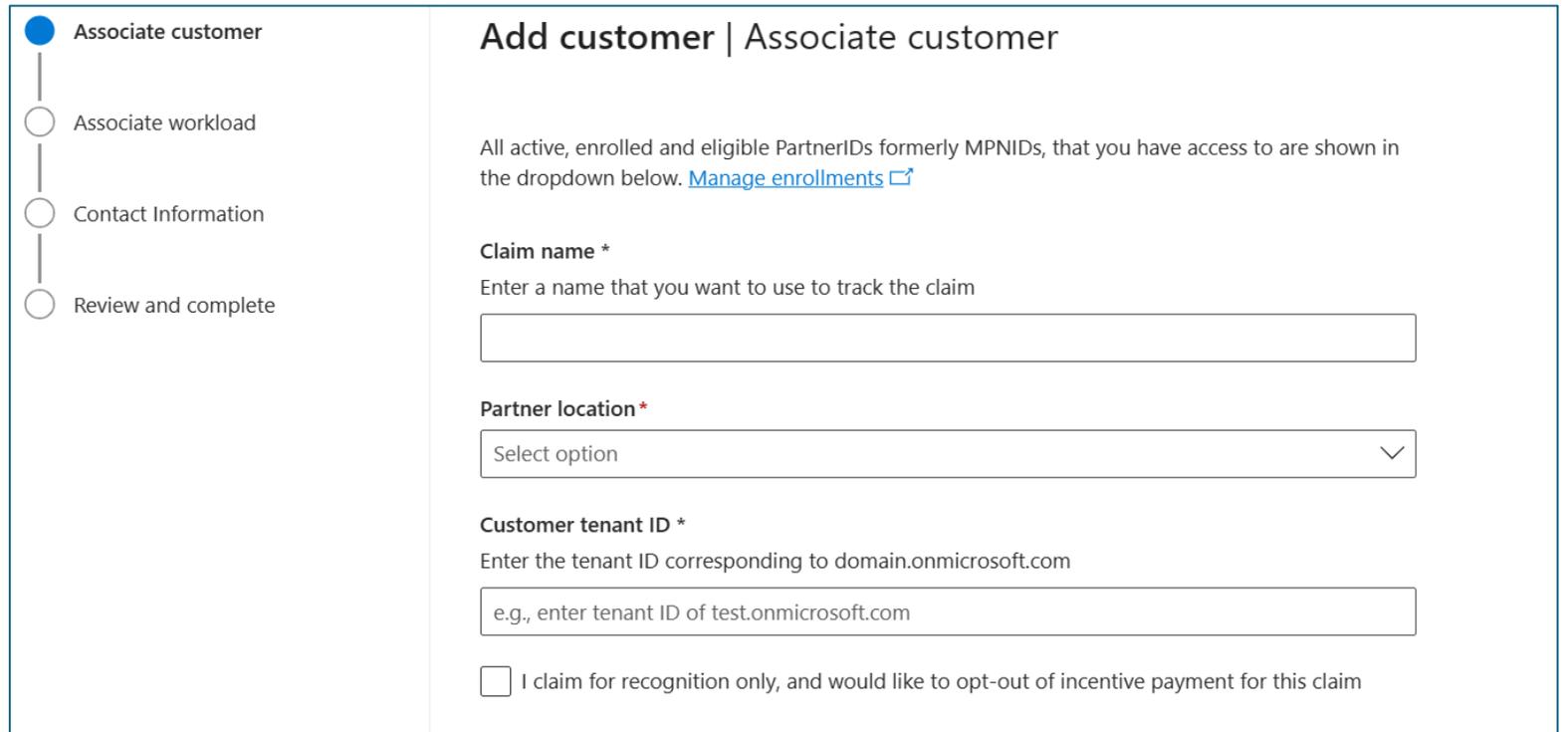
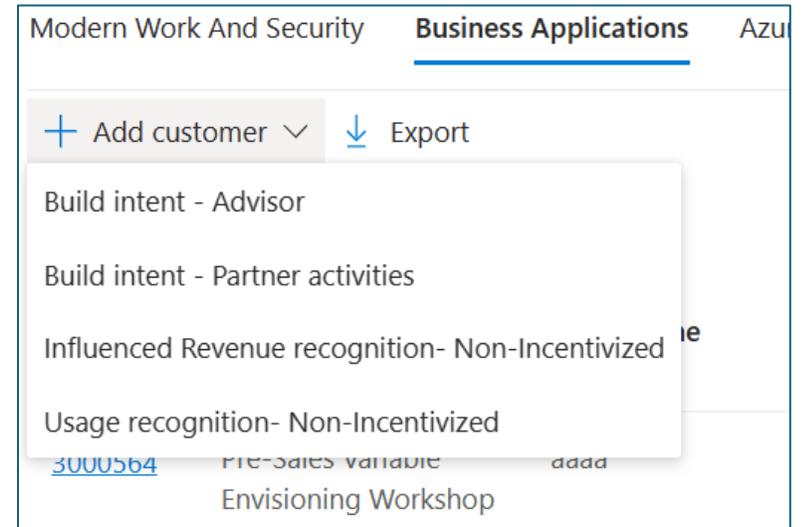
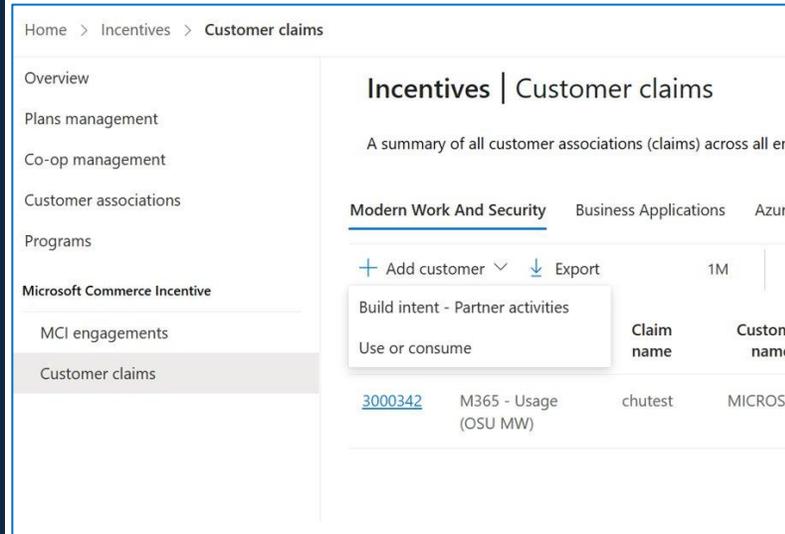
To create an association, you must follow the steps below:

A new window opens. Filling out these details will determine the type of association you create.

- Select Solution area
- Select **Add Customer**
- Select Partner Role
- Select **Continue**
- **Add claim details to associate to customer**

Note:

- This screen changes based on your selection.



Creating an association

- To create an association, you must follow the steps below:
- Associate the customer
- Associate the workload
- Complete the customer contact information
- Review and complete the claim
- Select **Add Customer**.
- Note:
 - Customer tenant must have an active subscription.
 - “No Products Available” will appear if customer tenant does not have an active subscription.

Add customer | Contact Information

Please provide your customer's primary contact information and your own company's contact information for this customer.

Customer contact name *
Enter the customer contact name

Customer contact email *
Enter the customer contact email id

Customer contact work title
Enter the customer contact work title

Partner contact name *
Enter your name

Partner contact email *
Enter your email

Add customer

- Associate customer
- Associate workload
- Contact Information
- Review and complete

Add customer | Review and complete

Review

[Edit Associate customer](#)

Claim name:

Partner location:

Customer domain name:

Customer tenant ID:

[Edit Associate workload](#)

Workloads: DYNAMICS 365 SALES ENTERPRISE EDITION,COMMON DATA SERVICE DATABASE CAPACITY,DYNAMICS 365 CUSTOMER SERVICE ENTERPRISE,POWER AUTOMATE PER USER PLAN

[Edit Contact Information](#)

Customer contact name:

Customer contact email:

Customer contact work title:

Partner contact name:

Partner contact email:

- Associate customer
- Associate workload
- Contact Information
- Review and complete

Add customer | Associate customer

All active, enrolled and eligible PartnerIDs formerly MPNIDs, that you have access to are shown in the dropdown below. [Manage enrollments](#)

Claim name *
Enter a name that you want to use to track the claim

Partner location *
Select option

Customer tenant ID *
Enter the tenant ID corresponding to domain.onmicrosoft.com
e.g., enter tenant ID of test.onmicrosoft.com

I claim for recognition only, and would like to opt-out of incentive payment for this claim

Add customer

- Associate customer
- Associate workload
- Contact Information
- Review and complete

Add customer | Associate workload

Select the workload(s) supported by your proof of execution (POE).

Workload	Association
<input type="checkbox"/> DYNAMICS 365 MARKETING ADDNL CONTACTS TIER 5	
<input type="checkbox"/> DYNAMICS 365 SALES ENTERPRISE EDITION	Associated to another partner
<input type="checkbox"/> COMMON DATA SERVICE DATABASE CAPACITY	
<input type="checkbox"/> DYNAMICS 365 CUSTOMER SERVICE ENTERPRISE	
<input type="checkbox"/> POWER AUTOMATE PER USER PLAN	
<input type="checkbox"/> DYNAMICS 365 MARKETING ATTACH	

Creating an association

To create an association, you must follow the steps below:

- Add the claim name
- Select the partner location from the dropdown
- Enter the customer domain name
- Enter the customer tenant ID
- Select **Next**

Note:

For privacy reasons, Microsoft will notify the customer to give them the option of declining association after the claim is approved.

The following contacts are notified:

- Customer contact provided

Please note the e-mail provided in the “Your Company Information” will receive all communications for a claim. This cannot be changed once submitted.

The screenshot shows the Microsoft Partner Center interface for adding a customer. The breadcrumb trail is Home > Incentives > Customer claims. The left sidebar shows navigation options: Overview, Plans management, Co-op management, Microsoft Commerce Incentive (MCI engagements), and Customer claims (selected). The main content area is titled 'Incentives | Customer claims' and provides a summary of all customer associations. It includes links to ensure you are associated with the correct customer and to learn more about the process. Below this, there is a '+ Add customer' button and a 'Filter by' dropdown. A table lists existing customer claims with columns for Claim ID and Engagement. The table contains four entries, all for 'Modern Work and Security Usage' with claim IDs 3000565, 3000563, 3000552, and 3000550. To the right of the table is a vertical progress indicator with four steps: Associate customer (active), Associate workload, Contact Information, and Review and complete. The 'Add customer | Associate customer' form is displayed on the right, featuring a text input for 'Claim name *', a dropdown for 'Partner location *', and a text input for 'Customer tenant ID *'. A checkbox at the bottom allows the user to opt-out of incentive payment for recognition-only claims.

Microsoft Partner Center

Home > Incentives > Customer claims

Overview
Plans management
Co-op management
Microsoft Commerce Incentive
MCI engagements
Customer claims

Incentives | Customer claims

A summary of all customer associations

Click [here](#) to ensure that you are associated with the correct customer. Click [here](#) to learn more about the process.

Modern Work And Security Usage

+ Add customer ↓ ↓ Export

Filter by: ↓ ×

Claim ID	Engagement
3000565	Modern Work and Security Usage
3000563	Modern Work and Security Usage
3000552	Modern Work and Security Usage
3000550	Modern Work and Security Usage

Associate customer
Associate workload
Contact Information
Review and complete

Add customer | Associate customer

All active, enrolled and eligible PartnerIDs formerly MPNIDs, that you have access to are shown in the dropdown below. [Manage enrollments](#)

Claim name *
Enter a name that you want to use to track the claim

Partner location *
Select option

Customer tenant ID *
Enter the tenant ID corresponding to domain.onmicrosoft.com
e.g., enter tenant ID of test.onmicrosoft.com

I claim for recognition only, and would like to opt-out of incentive payment for this claim

Creating an association

To create an association, you must follow the steps below:

The next window appears where you select the products for this association.

- Select products/workload
- Select **Continue**.

Subscription status must be active or in grace period to claim.

Note:

- Only select products you are actively engaged with the customer on. Otherwise your association may be rejected or delayed.
- Business applications products/workloads can only be claimed for products purchased via specific licensing types.

Business Applications

Add customer | Associate workload

Select the workload(s) supported by your proof of execution (POE).

Workload	Association
<input checked="" type="checkbox"/> DYNAMICS 365 SALES ENTERPRISE - GCCHIGH	<input type="checkbox"/>

Select subscription(s)

- 61E1C528-94FA-4776-A7F7-A9F2D4666053

Microsoft 365

Add customer | Associate workload

Select the workload(s) supported by your proof of execution (POE).

Workloads

- AZURE ACTIVE DIRECTORY PREMIUM 2
- AZURE ACTIVE DIRECTORY PREMIUM CONDITIONAL ACCESS - Associated to you
- EXCHANGE ONLINE - Associated to you
- INSIDER RISK MANAGER - Associated to you
- INTUNE - Associated to you
- MANAGED SECURITY SERVICES
- MICROSOFT 365 APPS - Associated to you
- MICROSOFT DEFENDER ENDPOINT - Associated to you
- MICROSOFT DEFENDER FOR CLOUD APPS - Associated to you
- MICROSOFT DEFENDER FOR IDENTITY - Associated to you
- MICROSOFT DEFENDER FOR OFFICE - Associated to you
- MICROSOFT INFORMATION PROTECTION - Associated to you
- OUTLOOK MOBILE - Associated to you
- SHAREPOINT ONLINE - Associated to you
- TEAMS - Associated to you
- TEAMS APPS - Associated to you
- TEAMS FOR FRONTLINE WORKERS
- TEAMS MEETINGS - Associated to you
- TEAMS PHONE ENABLED USERS - Associated to you
- TEAMS ROOMS
- VIVA CONNECTIONS - Associated to you
- VIVA ENGAGE - Associated to you
- VIVA GOALS
- VIVA INSIGHTS - Associated to you
- VIVA LEARNING - Associated to you
- VIVA TOPICS - Associated to you

Creating an association

To create an association, you must follow the steps below:

A new window may appear asking for the Subscription ID when there are multiple subscription IDs tied to a product.

- Select the applicable Subscription ID
- Select **Next**
- The system will then validate the subscription selected.

Pre-requisite to claim for Business Applications :

- Subscription ID will need to be obtained from if the customer has multiple subscriptions of a single product or the product(s) selected don't exist on the Tenant ID provided. Contact the customer associated with this claim for subscription information.
- The customer must have purchased the subscription. Please note you must wait 48hrs after subscription activation to claim.

*Only applicable for Business Applications

✓ Associate customer

● Associate workload

○ Contact Information

○ Review and complete

Add customer | Associate workload

Select the workload(s) supported by your proof of execution (POE).

Workload	Association
<input checked="" type="checkbox"/> DYNAMICS 365 SALES ENTERPRISE - GCCHIGH	

Select subscription(s)

61E1C528-94FA-4776-A7F7-A9F2D4666053

Previous Next

Creating an association

To create an association, you must follow the steps below:

- Enter customer contact name, email, title, and contact name
- Enter partner contact name and email
- Select **Next**
- The association page displays. You can see all the information have just entered related to the claim
- Review and select **Add Customer**

- Associate customer
- Associate workload
- Contact Information
- Review and complete

Add customer | Associate customer

All active, enrolled and eligible PartnerIDs formerly MPNIDs, that you have access to are shown in the dropdown below. [Manage enrollments](#) ↗

Claim name *
Enter a name that you want to use to track the claim

Partner location *
Select option ▼

Customer tenant ID *
Enter the tenant ID corresponding to domain.onmicrosoft.com

I claim for recognition only, and would like to opt-out of incentive payment for this claim

- Associate customer
- Associate workload
- Contact Information
- Review and complete

Add customer | Review and complete

Review

[Edit Associate customer](#)

Claim name: FY24 CPOR Claim

Partner location: FridayINC, US, Las Vegas (5272302)

Customer tenant ID: 45e6435d-dc1c-42e3-89be-e72e6c8f072d

I claim for recognition only, and would like to opt-out of incentive payment for this claim:
No

[Edit Associate workload](#)

Workloads: AZURE ACTIVE DIRECTORY PREMIUM 2,MANAGED SECURITY SERVICES,TEAMS FOR FRONTLINE WORKERS,TEAMS ROOMS

[Edit Contact Information](#)

Customer contact name: John Doe

Customer contact email: Johndoe@fridayinc.com

Customer contact work title: Sales Enablement

Partner contact name: Friday Inc

Partner contact email: Fridayinc@fridayin.com

Domain mismatch reason: N/A

Status of a claim

Claim Status

- You can check the status of your CPOR association claim at any time by using the [Customer Associations Dashboard](#) (sign-in required).
 - Here are the statuses and their meanings:

Claim Status	Appears When
Drafted	Your CPOR association claim has been created. It stays in this state until you upload the proof of execution document and submit the claim for approval.
Cancelled	The partner has option to cancel the claim prior to submission and has elected to cancel the claim.
Submitted	The partner has successfully submitted their CPOR association claim, however Microsoft has not yet started the review process.
Under Review	Microsoft has started validating your POE documentation. You should expect a response within five business days. Please note, your claim may be in “Under Review” status if additional review is required, or if the customer is already associated to another Partner. This will result in longer review time because both associations are evaluated.
Rejected	Your POE was insufficient, or you didn't respond within fourteen days per the POE review guidelines, and the claim has been denied. Claims can be disputed up to 30 days after rejection. Once a claim is “Final Rejected”, partners will not be able to dispute the claim again and will have to submit a new claim.
Approved	Claim has been approved. Once approved, the customer is notified and given the opportunity to opt out of the association. Although your claim will show as approved, the customer can opt-out of the association at any time. If a claim is partially approved, a new claim will be created for the workloads that were not approved and the partner will have fourteen calendar days to provide the requested information if partner action is required.
Partner Action Required	Microsoft has reviewed your claim and determined more information is needed to approve. You have fourteen calendar days to resubmit your claim with the requested information or it is automatically rejected.
Customer Consent Declined	The customer has an option to deny or cancel the association at any time and has elected to deny the association.
Disputed	This feature is only available for partners to dispute a rejected claim. Please click “submit” after a dispute to enable Microsoft to review any additional comments/uploads by the partner for a rejected claim. Resubmitted claims can be expected to be in submitted status for up to 5 business days. Please note that this feature is not available for disassociated claims.

Status of an Association:

To check the status of a claim after submission, you must follow the steps below.

- Open your claim. The **Submitted** status is active in the status section.
- A claim will remain in submitted status while it awaits Microsoft review.

Engagement Details

Customer Information

[Edit](#)

Customer name:	BRK AMBIENTAL
Customer consent date:	January 26, 2022
Customer contact name:	Alexa Barket
Customer contact email:	v-abarket@microsoft.com
Customer contact title:	test
Customer domain name:	microsoft.com
Customer TPID/Tenant ID:	6611f2b2-2bd4-4ba7-bfd2-e5ef43880468
Tenant Domain name mismatch reason:	test

Partner Information

[Edit](#)

Partner location:	AUS, Redmond, (MPN: 5265117)
Partner name:	FridayINC
Partner contact name:	test
Partner contact email:	v-abarket@microsoft.com

Claim status



Editing

Submitted
June 8, 2022

Under review



Approved

Status of an Association:

To check the status of a claim after submission, you must follow the steps below.

- If your claim is flagged for POE review your claim status will change to “Under Review”
- You should expect a response from Microsoft within five business days after your claim status is changed to “Under Review”
- Microsoft will either approve the claim or request additional information.
- Please note, your claim may be in Under Review status for fourteen calendar days if the customer is already associated to another Partner. This will result in longer review time because both associations are evaluated.

Engagement Details

Customer Information



Edit

Customer name:	BRK AMBIENTAL
Customer consent date:	January 26, 2022
Customer contact name:	Alexa Barket
Customer contact email:	v-abarket@microsoft.com
Customer contact title:	test
Customer domain name:	microsoft.com
Customer TPID/Tenant ID:	6611f2b2-2bd4-4ba7-bfd2-e5ef43880468
Tenant Domain name mismatch reason:	test

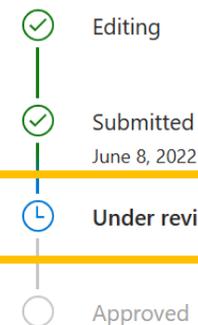
Partner Information



Edit

Partner location:	AUS, Redmond, (MPN: 5265117)
Partner name:	FridayINC
Partner contact name:	test
Partner contact email:	v-abarket@microsoft.com

Claim status



Status of an Association:

To check the status of a claim after submission, you must follow the steps below.

Once you re-submit your claim and provide all the relevant information, Microsoft will review it again.

If no further action is required, your status section will update to show that your claim is **Approved**.

After your association is approved a notification will be sent to the customer giving them the opportunity to deny your association. The customer will still be able to opt out Microsoft approval.

Note:

Approved indicates the association was approved previously, not the status of the payment or current association status.

Engagement Details

Customer information

[Edit](#)

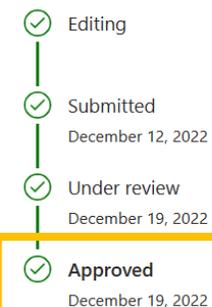
Customer name	PT SISTECH KHARISMA
Customer contact name	Bobby Gouw
Customer contact email	bobby_gouw@sistech.co.id
Customer contact title	CEO
Customer domain name	sistech.co.id
Customer tenant ID	662ea254-88af-4fe3-839c-22ebc51c0a01

Partner information

[Edit](#)

Partner location	USA, Kirkland, (MPN: 5397535)
Partner name	FridayINC
Partner contact name	Khairi
Partner contact email	v-mbinmohamm@microsoft.com

Claim status ...



Partner Action Required

To check the status of a claim after submission, you must follow the steps below.

- If further action is required, your status will be changed to “Partner Action Required.”
- You will be notified, and the upload area will re-activate.
- You will be able to edit Partner information, customer information, Product/Workload Selection (and Subscription when applicable), and upload additional POE.
- If you cannot provide additional POE for Products/Workloads within your claim, these should be removed by editing your claim.
- Once you have addressed the feedback, Select **Submit claim**.

Note:

- Claims will not be processed unless the claim is resubmitted.
- If you do not resubmit your claim within fourteen calendar days your claim will be Rejected.

Engagement Details

Customer information

 Edit

Customer name MICROSOFT
 Customer contact name asdf
 Customer contact email a@microsoft.com
 Customer contact title asdf
 Customer domain name microsoft.com
 Customer tenant ID 72f988bf-86f1-41af-91ab-2d7cd011db47

Partner information

 Edit

Partner location MEX, Mexico D.F. C.P., (MPN: 5287169)
 Partner name FridayINC

Claim status ...



Optional comment

Add any additional information you want the reviewers to know about this claim.

Comment

 Save comments

Comment history

Acknowledgements

I acknowledge that my proof of execution (POE) includes customer acknowledgement and details on the workloads selected in this claim. Claims with POE missing information may be subject to additional review and potential rejection.

Submit claim Dispute claim Cancel claim

Dispute a claim

Dispute a Claim

1. If your claim is rejected, you can dispute this decision in Partner Center.
2. The dispute button is only available for 30 days after the rejection date.
3. After 30 days, a new claim will need to be submitted if you wish to reclaim.
4. In order to initiate the dispute process, click “Dispute” at the bottom of the page

Optional comment

Add any additional information you want the reviewers to know about this claim.

Comment

 Save comments

Comment history

Acknowledgements

I acknowledge that my proof of execution (POE) includes customer acknowledgement and details on the workloads selected in this claim. Claims with POE missing information may be subject to additional review and potential rejection.

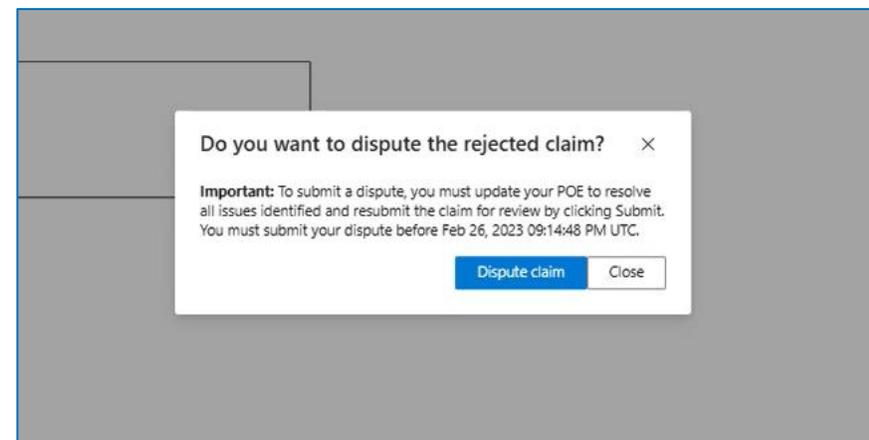
Submit claim

Dispute claim

Cancel claim

Dispute a Claim

1. A pop-up window will appear where the user will need to provide business justification and any additional POE to support the claim
2. Once dispute button is clicked, the claim status will change to 'disputed'
3. Please hit "submit" to enable Microsoft to review any additional comments/uploads by the partner for a rejected claim.
4. Microsoft will review resubmitted claims within 5 business days



Engagement Details

Customer information

Customer name	MICROSOFT
Customer contact name	asdf
Customer contact email	a@microsoft.com
Customer contact title	asdf
Customer domain name	microsoft.com
Customer tenant ID	72f988bf-86f1-41af-91ab-2d7cd011db47

Partner information

Partner location	MEX, Mexico D.F. C.P., (MPN: 5287169)
Partner name	FridayINC
Partner contact name	partner
Partner contact email	partner@microsoft.com

Claim status ...

- Editing
- Submitted
January 27, 2023
- Rejected
January 27, 2023
- Disputed
January 27, 2023
- Under review
- Approved

Association Status

Status of an Association:

To help you better understand your current Partner of Record status for approved claims, you can view your association status, by product/workload, in your claims.

In the claim, you can do this by viewing “Workload Information” within the claim details.

Engagement Details

Customer information [Edit](#)

Customer name	MICROSOFT
Customer contact name	cust
Customer contact email	cust@microsoft.com
Customer contact title	
Customer domain name	microsoft.com
Customer tenant ID	72f988bf-86f1-41af-91ab-2d7cd011db47
Opt-out of incentive payment	No

Partner information [Edit](#)

Partner location	USA, Kirkland, (MPN: 5397535)
Partner name	FridayINC
Partner contact name	part
Partner contact email	part@microsoft.com

Workload information [Edit](#)

Workload	Subscription ID	Association	Associated on	Disassociated on
DYNAMICS 365 MARKETING	250F3C86-1FED-42CF-A7DA-AE8ECAE09342	Associated to you	January 10, 2023	January 10, 2023
DYNAMICS 365 MARKETING	D8D4C16D-E2E5-4E9B-BB86-A07639FCA91A	Associated to another partner	January 10, 2023	January 10, 2023
MICROSOFT DYNAMICS CRM ONLINE	C4E637C3-25C0-44F6-BFF1-5E0967B4B725	Associated to another partner	January 10, 2023	January 10, 2023

Disassociate a Claim

1. In order to disassociate an approved claim, click 'Disassociate Customer'
2. Pop-up window will appear. Click to confirm the dissociation.

Note

- Disassociating will remove you as Partner of Record for all workloads/product(s) specified in the claim. The tool does not currently support disassociation for specific products within a claim.
- Use this feature if you no longer want to be associated to a customer.

Microsoft Partner Center fridayincentives004.com test_test

Claim 002 (1005562)

Claim details

Claim ID	1005562
Date created	March 18, 2019
Solution area	Business Applications
Activity	Pre-sales
Location	FridayINC, MX, Mexico D.F. C.P. (MPN: 5287169)
Partner	Joe (lirazore@microsoft.com)
Customer tenant ID	72F988BF-86F1-41AF-91AB-2D7CD011DB47
Customer domain name	microsoft.com
Customer contact	Tom (lirazore@microsoft.com)
Product(s)	DYNAMICS 365 ENTERPRISE EDITION - ADDITIONAL PORTAL (QUALIFIED OFFER) View details

Claim status

- Submitted
- Reviewed
- Approved

Proof of execution [Download template](#)

Document name	Comment	Last activity
 Drag or browse files to upload		

Optional comment

Add any additional information you want to provide the reviewer regarding your claim.

Please add your comment here

Disassociate Customer [Save comments](#)

You will no longer be associated to this customer. Are you sure you want to continue?

Disassociating will remove you as a partner of record for this customer and applicable products/workloads.

[Disassociate from claim](#) [Cancel](#)

Preparing your customer to consent

When discussing plans with a customer in the pre-engagement phase, please be sure that the customer understands and accepts the following details **before consenting**:

- ✓ The customer contact listed in the claim will receive automated emails from Microsoft, containing links to the consent response form and post-engagement survey form. These links are unique, one-time-use URLs that lead to browser-based forms. **We recommend that customers add microsoft-noreply@microsoft.com to their allowed senders list** to avoid these time-sensitive emails being quarantined or flagged as spam, and ensure that their organization's security policies will not prohibit them from clicking an emailed link to a browser-based form.
- ✓ Each engagement's Proof of Execution (POE) template may require some sensitive customer details to be included. The contents of a submitted POE are confidential between the customer, the partner, and Microsoft. **We recommend that you review the engagement's POE documentation requirements with the customer before consent** to ensure they understand and agree to the details you'll be required to include for incentive earning approval.
- ✓ If the customer is a Public Sector entity (typically government, healthcare, or education,) please be sure to review the **Terms & Conditions > Public Sector Disclosure** requirements in the **[MCI Program Guide](#)**. If a Public Sector customer from a country with specific Public Sector restrictions is not able to agree to those additional POE requirements, **you will not be able to earn incentives for working with them**.
- ✓ Each engagement must be completed and submitted for POE review within a specific deadline based on the customer consent date, as specified in the **[MCI Program Guide](#)**. If any deadline is not met and the claim expires, **you will need to create a new claim and the customer will have to provide an updated consent response and survey response**.

Request consent – Launch consent workflow (1/4)

To request Customer consent for an engagement claim, navigate to the **Customers** view of the engagement or to the relevant **Solution Area tab** of the **Customer claims** view.

- i. Look for claims in **Customer claimed** or **Awaiting customer consent** status.
- ii. Under Action, click **Send email for customer consent** or **Re-send customer consent email**.

The image shows two screenshots of the Microsoft Partner Center interface. The top screenshot is titled 'Customers | AMMP Virtual Desktop Infrastructure (Large)'. It features a table with columns for Customer name, Claim ID, PartnerID, Partner name, Last updated, Status, Action, and Claims expiry. A row is highlighted with a status of 'Customer claimed'. A blue circle highlights the 'Customer claimed' status, and a blue arrow points from it to the 'Send email for customer consent' link in the Action column. Another blue circle highlights the 'ii' icon in the top right, with an arrow pointing to the 'Re-send customer consent email' link in the Action column of the bottom screenshot.

The bottom screenshot is titled 'Incentives | Customer claims'. It features a table with columns for Claim ID, Engagement, Claim name, Customer name, Tenant ID/TPID, PartnerID, Partner name, Last updated, Claims expiry, Status, and Action. Two rows are visible. The first row has a status of 'Pending customer consent' and a 'Re-send customer consent email' link in the Action column. The second row has a status of 'Customer claimed' and a 'Send email for customer consent' link in the Action column. Blue circles and arrows highlight these specific elements, mirroring the instructions in the text.

Request consent – Provide contact details (2/4)

- i. Review the contact details you provided when you added the customer and created the claim and **edit** as needed.
 - ✓ These details will be used to send the consent request email, customer survey email and partner survey email.
 - ✓ If the customer ID type in the claim is Tenant ID or domain, and the customer contact email domain entered here does not match that Tenant ID or domain, you will now be prompted to provide a reason why the customer is being contacted with an email whose domain does not match the Tenant ID/domain associated to the claim.
- ii. Click **Next**.

The screenshot shows a 'Customer consent' form with the following fields:

- Contact details:**
 - Customer contact name *: Fred Martinez
 - Customer contact email *: f.martinez@contoso.com
 - Customer contact work title: IT Systems Administrator
- Your company information:**
 - Partner contact name *: Priya Kaur
 - Partner contact email *: pkaur@fridayinc.com

Annotations in the image:

- A blue box highlights the 'Customer contact email' field and the 'Reason for different email domain' field. An arrow points from the email field to the reason field.
- The 'Reason for different email domain' field contains the text: 'Enter reason for different email domain' and a red error message: 'Domain email address is different. We need a reason for this change.'
- A second blue box highlights the 'Reason for different email domain' field with the text: 'Customer's primary email domain is not associated with eligible tenant'.
- A yellow box highlights the 'Next' button at the bottom right of the form.

Request consent – Provide deal information (3/4)

i. Provide the estimated deal size in US Dollars (\$) that is associated to this claim.

- ✓ Provide the best possible estimate of the deal size. This field **can't be updated** after the claim is sent for customer consent.
- ✓ Please enter the value in whole US dollars. If the deal size and customer details provided match internal criteria determined by Microsoft, a **Partner Center Referral** will be created and linked within your claim. If the internal criteria is not met, the claim can proceed normally through POE review and approval, but no associated referral will be automatically created.
- ✓ This field should be used in the same manner as the **estimated value** deal detail required in the creation of Partner Center referrals. It should reflect the estimated license, seat or consumption revenue to be gained from the first 12 months use of this incentive associated to the claimed customer.
- ✓ The information that you provide in this field won't affect the claim's eligibility or payout. Microsoft is working to enhance MCI to support relationships with partners and help guide Microsoft ability to co-sell with partners.

ii. Click **Next**.

Customer consent | Deal information

Please provide the deal information associated with this customer claim.

Deal size*
Provide the size of the deal in USD that you are pursuing with this customer for this engagement. Note that this cannot be updated later.

Enter deal size

If your customer provides consent and certain criteria are met, Microsoft will create a Partner Center Referral and attach it to your claim.

Previous Next Close

Request consent – Review and complete (4/4)

- i. Review the contact details and deal size provided. Click the blue **Edit** prompts to make changes as needed.
- ii. Review the privacy statement regarding Microsoft’s use of the contact information provided. **Check the box** to affirm you agree with the statement.
 - ✓ If you cannot agree to the terms presented here, you will not be able to proceed with your claim.
- iii. Click **Send for consent** to trigger a consent request email to be sent to the customer contact email alias provided.

Manage consent requests

- i. A **success message** will appear when the consent email has been successfully sent.
- ii. If your customer did not receive the consent email or you need to change the customer contact, click **Re-send customer consent email**.
- iii. Review the contact information and **Edit** if needed.
 - ✓ Partner Location ID and Customer ID cannot be changed once a claim is created.
- iv. Click **Send for consent** to trigger another consent request email.

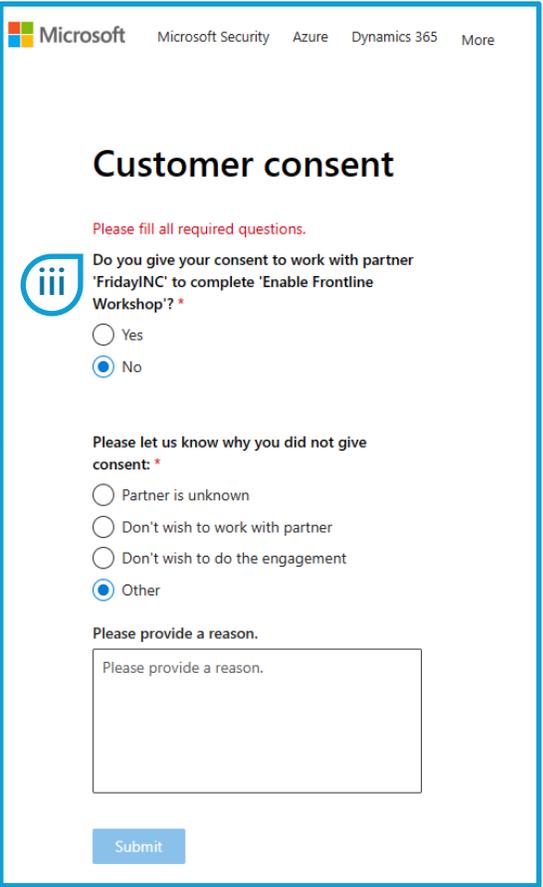
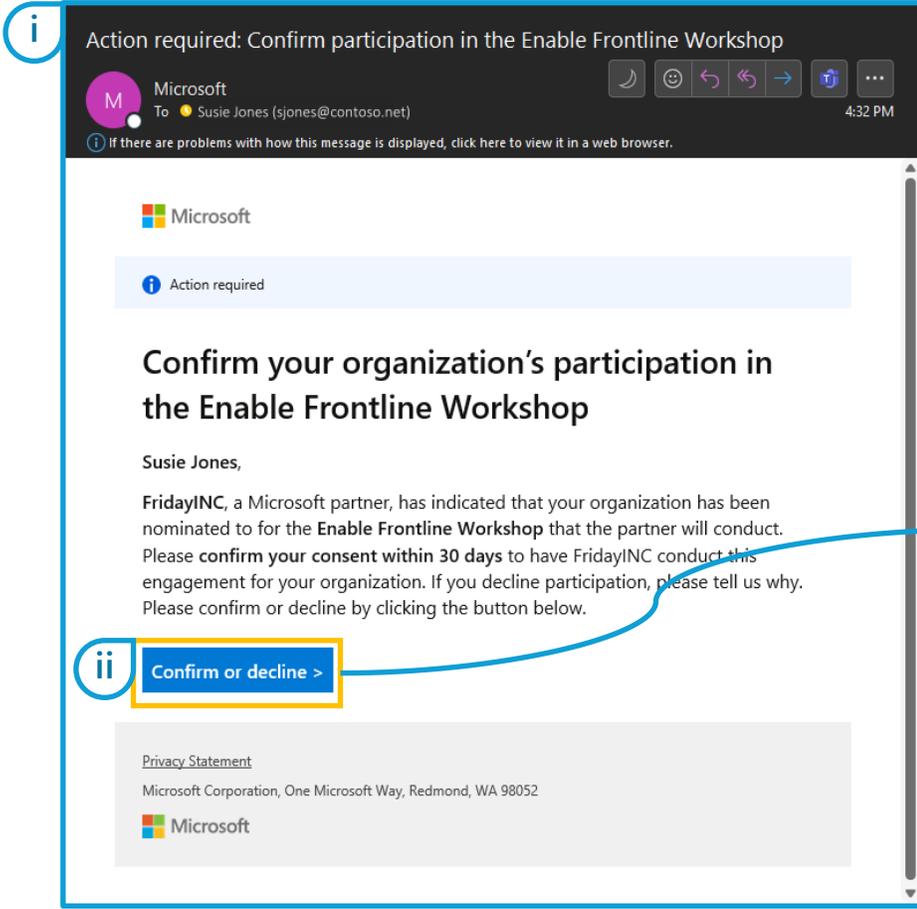
Partner Center’s automated email system will send a maximum of one consent request for each claim per day. If you have already sent a consent request for a claim today, please wait 24 hours before sending another request on the same claim.

The screenshot displays the Microsoft Partner Center interface for managing consent requests. At the top, a navigation bar shows the path: Home > Incentives > MCI engagements > Enable Frontline Workshop. A success message is visible: "Consent email successfully sent to customer". Below this, a table lists customer consent requests with columns for Customer name, Claim ID, PartnerID, Partner name, Last updated, Status, Action, and Claims expiry. A modal window titled "Customer consent" is open, showing contact details for a customer named Susie Jones at FridayINC. The modal includes an "Edit" button and a "Send for consent" button. Arrows indicate the flow from the table to the modal and from the modal back to the table.

Customer name	Claim ID	PartnerID	Partner name	Last updated	Status	Action	Claims expiry
FridayINC	3015949		FridayINC	2/12/2023	Pending customer consent	Re-send customer consent email	3/14/2023
FridayINC	1004521		FridayINC	10/21/2022	Submitted	-	-
FridayINC	3001583	5265117	FridayINC	2/10/2023	Customer	submit claim	2/22/2023

Customer experience (1/2) - consent request and response

- i. The customer contact specified in the claim will receive an email with the following details:
 - ✓ **Subject line:** “Action required: Confirm participation in the [Engagement Name]
 - ✓ **From:** microsoft-noreply@microsoft.com
 - ✓ **Body:** See example – The email will reference the engagement name and the company name associated with your Partner Location.
- ii. Customer must click **Confirm or decline >** to open unique, one-time-use link to consent web form in a browser instance
- iii. Customer must confirm or decline their consent in web form and click **Submit**.
 - ✓ If they decline to work with you for this engagement, they must select a reason for declining. **Their reason for declining is confidential to Microsoft and will not be shared externally or with partners.**

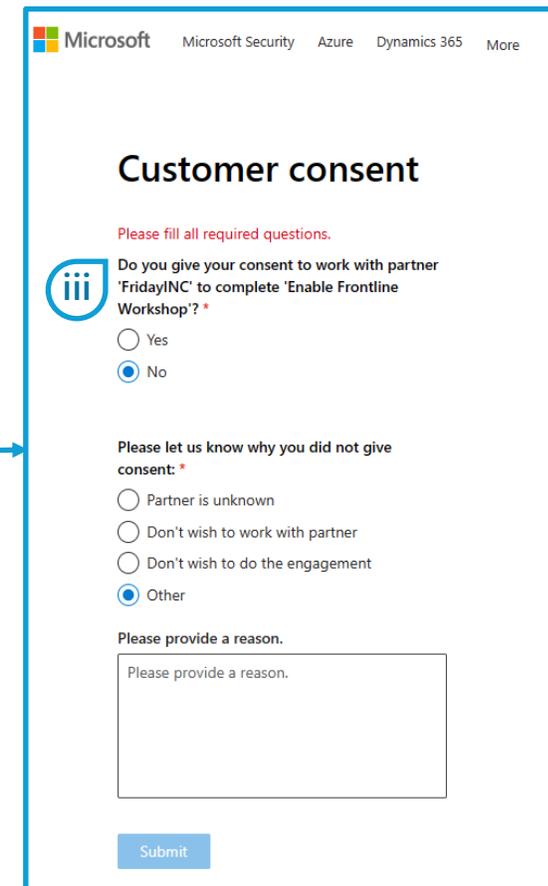
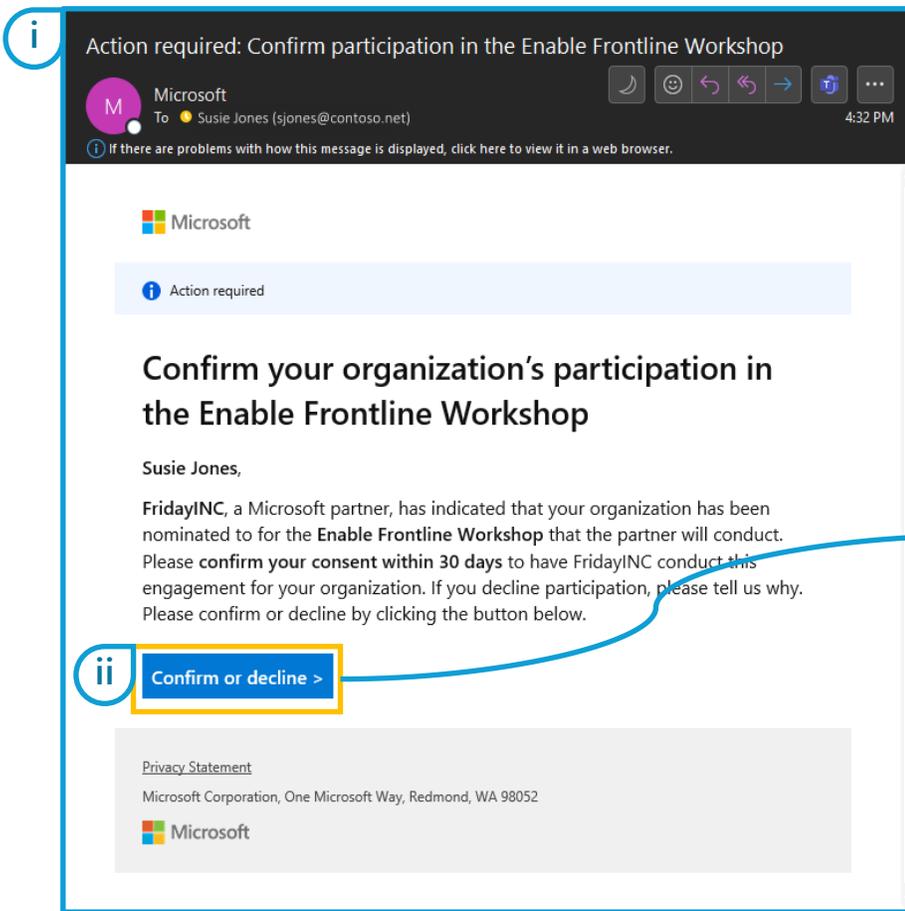


Customer experience (2/2) – Policies and troubleshooting

If the customer does not provide an affirmative consent response using this unique web form linked via email within 30 days of claim creation, the claim will expire.

If the customer attempts to access a consent form after the associated claim has expired, or if they have already granted consent to another partner for the same engagement and same customer ID, no consent response will be recorded, and the customer may see an error message in the consent form.

This is the only method available for recording customer consent on MCI Partner Activities Engagement claims. If the customer’s security or email policies prevent them from providing consent using this process, then you will not be able to proceed with an incentive claim for this engagement.



Claim Expiration Timelines

Once the customer provides consent, you can conduct the engagement.

You must deliver the engagement, complete all required POE elements, and submit your claim to review by clicking the Submit button within the deadline shown here.

If one of the deadline scenarios shown here occur, your claim will expire with the corresponding expiration status. You will receive reminder emails to submit or get consent as your next deadline approaches. **You will not receive an email notification if your claim expires.**

Expired claims cannot be reactivated. To proceed, you will need to create a new claim with an updated consent response and POE. **This is per system design and no exceptions are possible.**

Partner activity type*	Expiration statuses			
	Customer consent expired	Not submitted claim expired	Post submission claim expired	Disputed claim expired
Assessments	Occurs 30 days after claim creation date if claim status has not changed to one of the following states: <ul style="list-style-type: none"> Cancelled Customer consent declined Customer consent received 	Occurs 60 days after Customer consent received if claim status has never changed to Cancelled or Submitted	Occurs 90 days after Customer consent received if claim status is Action required	Occurs 30 days after claim is Rejected if partner initiated the Dispute process by changing claim state to Disputed , but did not click Submit to move the disputed claim back into the review queue.
Standard timeline		Occurs 90 days after Customer consent received if claim status has never changed to Cancelled or Submitted	Occurs 120 days after Customer consent received if claim status is Action required	
XS, Small Projects		Occurs 120 days after Customer consent received if claim status has never changed to Cancelled or Submitted	Occurs 150 days after Customer consent received if claim status is Action required	
Medium Projects		Occurs 200 days after Customer consent received if claim status has never changed to Cancelled or Submitted	Occurs 230 days after Customer consent received if claim status is Action required	
Large, XL, XXL Projects		Occurs 260 days after Customer consent received if claim status has never changed to Cancelled or Submitted	Occurs 290 days after Customer consent received if claim status is Action required	

*Submittal deadlines may vary by a combination of both activity type and size. Please review the Summary page for each engagement to understand the exact timelines permitted for that engagement.

Customer Notification

For privacy reasons, Microsoft will notify the customer contact to provide them with the option of denying your access to their subscription. Microsoft sends a notification to the customer contact on the claim in Partner Center as well as the contact in org details (technicalNotificationMails) within Azure Active Directory tenant for that customer tenant id.

The customer will receive the consent email.

- If the customer does not deny the association request, the association to the partner is established upon claim approval.
- **Customers can deny or cancel the request at any time.**
- If the customer denies consent, the status of your customer association will change from **Approved** to **Customer consent denied**.
- If customers have questions, they can reach out to the partner contact provided.

Note:

Customer consent opt-out emails are not sent for revenue association requests.

Please note that the claiming partner is not copied on this notification.

A partner has submitted a customer association request regarding Dynamics 365

a Microsoft partner, has submitted a customer association request indicating that they're assisting **test** at your organization with your implementation of **Microsoft Dynamics 365**. If associated, the partner will be able to access information regarding your implementation, including and limited to the usage (active entitlements) and the sold seats (qualified entitlements) for the product that they're implementing.

To help Microsoft improve your Dynamics 365 experience, please provide some [quick feedback](#) about the partner. **This is a program requirement.**

You may [deny or cancel](#) this association. If you accept the association, you don't need to take any action.

If you have questions, please engage the partner or customer contacts:

Customer name: test

Customer contact email:

Tenant/directory ID:

Domain: microsoft.com

Subscriptions: [DYNAMICS 365 SUPPLY CHAIN MANAGEMENT, Unknown]

Partner organization:

Partner contact:

Partner contact email:

Customer Notification

This is what the customer will see if they choose to deny or cancel the association per the email.

If a customer denies your association the status will change to Customer Consent Declined.

[Microsoft 365](#)[Azure](#)[Office 365](#)[Dynamics 365](#)[SQL](#)[Windows 10](#)

We are denying the request to associate with this partner

Let us know why you don't want this subscription associated with this partner.

We don't want to share our data.

Partner is unknown

Other

Comments optional

Deny Request

Requirement to select the applicable subscription (Business Applications)

When selecting product(s) for Business Applications associations **you may be required to select the subscription when there are multiple subscriptions for a product.**

If you are not sure about which subscription to choose, then contact the customer associated with this claim for this information. Customers can find this information by

1. Logging into the M365 portal at: <https://portal.office.com/>
2. Selecting Billing > Your Products
3. The subscription name will appear in the URL (see highlighted section in the screen-shot).

Add customer

- Associate customer
- Associate workload**
- Contact Information
- Review and complete

Add customer | Associate workload

Select the workload(s) supported by your proof of execution (POE).

Workload	Association
<input type="checkbox"/> DYNAMICS 365 CUSTOMER SERVICE DIGITAL MESSAGING AND VOICE ADD-IN	
<input type="checkbox"/> DYNAMICS 365 OPERATIONS - SANDBOX TIER 4:STANDARD PERFORMANCE TESTING	
<input type="checkbox"/> MICROSOFT DYNAMICS CRM ONLINE	
<input checked="" type="checkbox"/> DYNAMICS 365 OPERATIONS - SANDBOX TIER 3:PREMIER ACCEPTANCE TESTING	
Select subscription(s)	
<input type="checkbox"/> 851C820E-2384-4367-8BCE-3052D1463967	
<input type="checkbox"/> 38DE7F00-ED9B-4308-895F-9C199252DCCE	
<input type="checkbox"/> DYNAMICS 365 ENTERPRISE EDITION - ADDITIONAL PORTAL (QUALIFIED OFFER)	
<input type="checkbox"/> DYNAMICS 365 SUPPLY CHAIN MANAGEMENT	
<input checked="" type="checkbox"/> DYNAMICS 365 CUSTOMER SERVICE ENTERPRISE	

Microsoft 365 admin center

Home > Your products > Products > Microsoft 365 Business Basic Trial

Microsoft 365 Business Basic Trial

Your monthly subscription will start when this trial ends on 5/9/2021. You'll be charged \$25.00/month for 5 licenses. [Add licenses](#) | [Remove licenses](#)

License	Subscription and payment settings	Purchase information
<p>2/25 assigned</p> <p>Assigned Available</p> <p>Buy paid subscription now</p> <p>Assign licenses</p>	<p>Recurring billing On, renews on 5/9/2021 with 5 paid licenses Edit recurring billing</p> <p>Payment method MasterCard ****3004 Edit payment method Replace payment method</p> <p>Subscription status Active Cancel subscription</p>	<p>Billing frequency Monthly, \$25.00 Edit billing frequency</p> <p>Expiration date 5/9/2021 Extend end date</p> <p>Initial purchase date 3/8/2021</p> <p>Purchase channel Commercial direct Download and install software</p>

Service usage address

17914 50TH AVE S
SEATAC, WA
US
[Edit service usage address](#)

Product details and upgrades

You're currently subscribed to Microsoft 365 Business Basic Trial.
[View apps and services included with this subscription](#)
[View upgrade for recommended for your org.](#)

Add-ons

Add-ons bring more value to subscription functionality. This subscription does not have any add-ons associated with it. [Find more add-ons](#)

Subscription Invalid or already claimed message (Business Applications)

If you receive the following error it could be for several reasons:

- The product selected doesn't exist on the customer's tenant
- The subscription provided is not for Dynamics
- The customer has not yet activated the products for that subscription
- The subscription has already been claimed
- The identifier provided is not a subscription ID

Associate customer

Enter your subscription(s) by product below. To access this information, contact the customer associated with this claim.

DYNAMICS 365 CUSTOMER ENGAGEMENT PLAN

 This subscription is invalid or has already been claimed.

[+ Add subscription](#)

[Back](#)

Cancel

Continue

Conflicting Claims - CPOR

Conflicting Claims Process

- Both the associated and the incoming partner who claims on a subscription that's been associated to another partner are both notified of the conflicting claim.
- Microsoft allows 14 calendar days for the associated partner to provide an up-to-date POE
- If no response or additional documents are submitted by the partner, the latest POE will get reviewed to make the final decision.

In case of a dispute on conflicting claims, the POE team reviews the proof of execution from the partners to determine which partner drove the most influence.

Microsoft may reach the Partner Development Managers (PDMs) from both partners and the Customer Account Manager to notify them of the claim, get insights into each partner's claim and make the final decision.

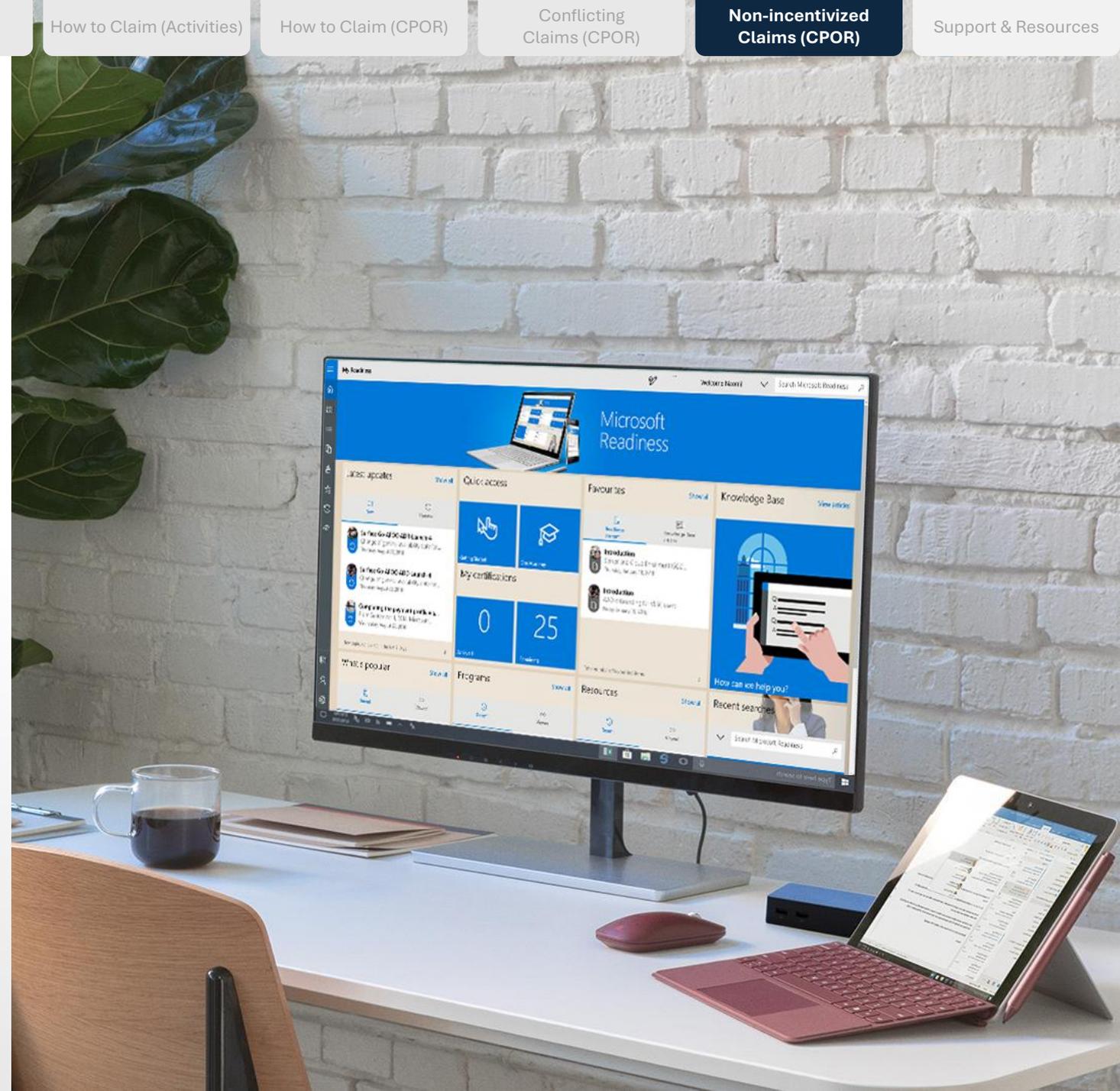
Non-incentivized - CPOR

What is Revenue only recognition?

Why claim Non-Incentivized, Influenced Revenue recognition?

This is available for *Business Applications* partners and is the primary way in which partners achieve revenue recognition and contribute to demonstrating impact with their customers. CPOR has a path for recognition without claiming incentives to achieve:

- Microsoft AI Cloud Partner Program recognition



What is Usage recognition?

Usage recognition allows you to claim for the work that you are driving with your customer and be recognized as their partner of record by Microsoft. Usage associations may not earn incentives. For the current list of workloads eligible to earn usage incentives, please see the Microsoft Commercial Incentives Guide.

Why claim this?

Usage recognition is an important measure for partner programs recognition. Establishing yourself as the partner of record for your customers will ensure you are recognized for the breadth of your work with your customers in the Microsoft AI Cloud Partner Program and other programs that use CPOR to identify partner-customer relationships.

Modern Work & Security workloads claimable for usage recognition:

- Microsoft Entra ID P2
- Microsoft Entra Conditional Access
- Exchange Online
- Insider Risk Manager
- Intune
- Managed Security Services
- Microsoft 365 Apps
- Microsoft Defender
 - Endpoint
 - For Cloud Apps
 - For Identity
 - For Office
- Microsoft Information Protection
- Outlook Mobile
- SharePoint Online
- Teams (standalone)
- Teams Apps
- Teams Meetings
- Team Phone Enabled Users
- Teams Rooms
- Viva Connections
- Viva Engage
- Viva Goals
- Viva Insights
- Viva Learning
- Viva Topics
- Microsoft 365 Copilot

Managed Security Services Attribution in CPOR

What are managed security services?

Managed security services (MSS) are a type of outsourcing service that provides cybersecurity solutions for organizations. MSS providers (MSSPs) offer various security functions, such as monitoring, detection, response, prevention, and compliance, to help their clients protect their networks, data, and users from cyber threats. MSSPs typically use a combination of people, processes, and technology to deliver their services, which can be customized to meet the specific needs and goals of each client.

When should partners claim?

A partner should claim this association when they are providing managed security services for their customers. This is a dedicated association for cybersecurity partners who provide managed security services.

Why should partners claim?

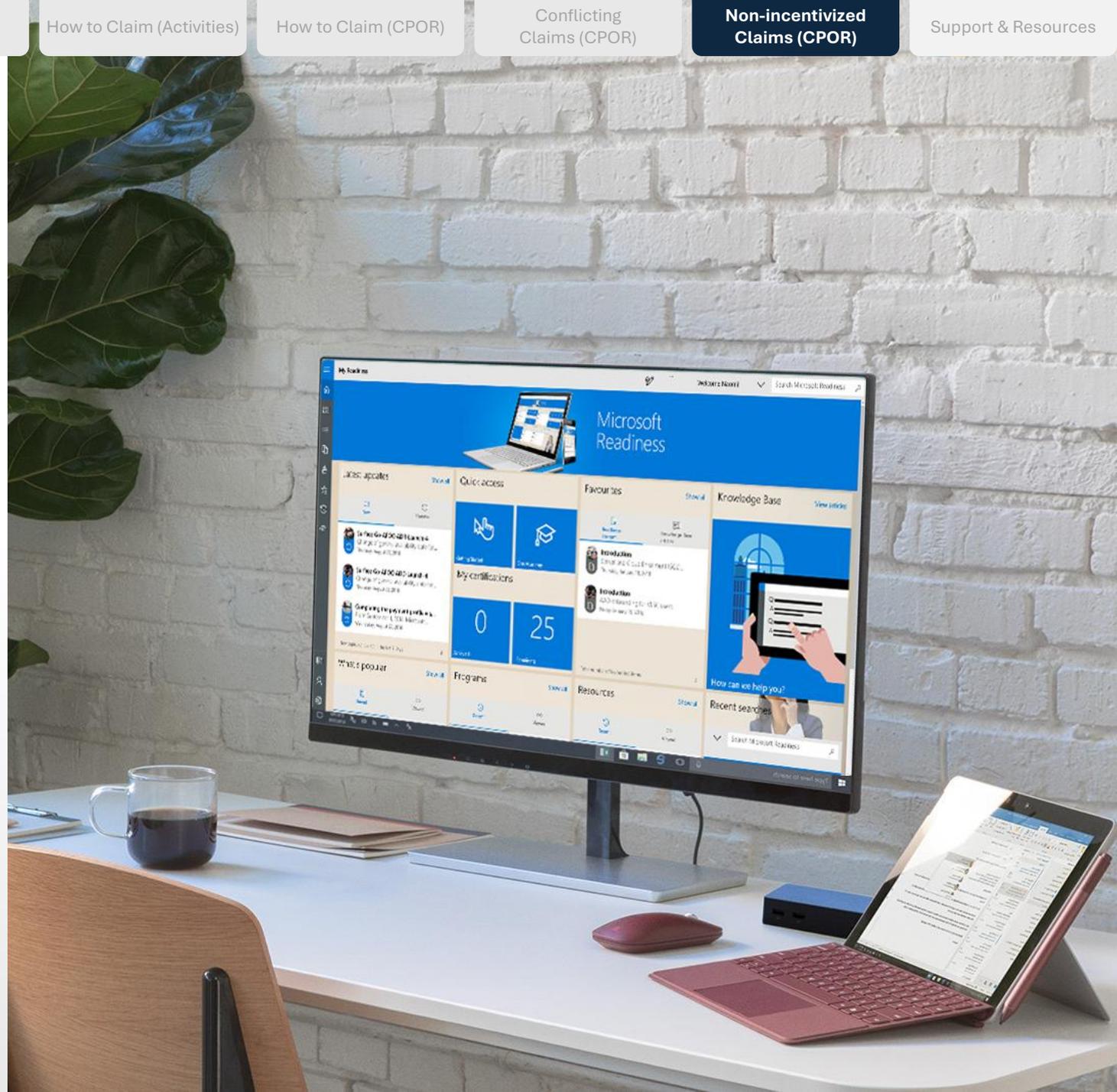
A partner should claim this association to associate themselves with a customer they are providing managed security services for. This association will enable Microsoft to attach future benefits for MSS partners. This is a non-compensatory association and is not attributed to Security Designation or Specialization.

How should partners claim?

A partner can claim the association by following the standard CPOR process to associate with a customer.

Activities not in scope of CPOR for managed security services

- Deployment and migration of Microsoft security products, including agent deployment and policy configurations. For instance, setting up Entra and Cloud sync, deploying MDE or MDI sensors, configuring Intune policies are not considered under this workload
- Technical support for troubleshooting and fixing product configurations
- OS update and patch management for devices
- Deployment and configuration of Azure infrastructure

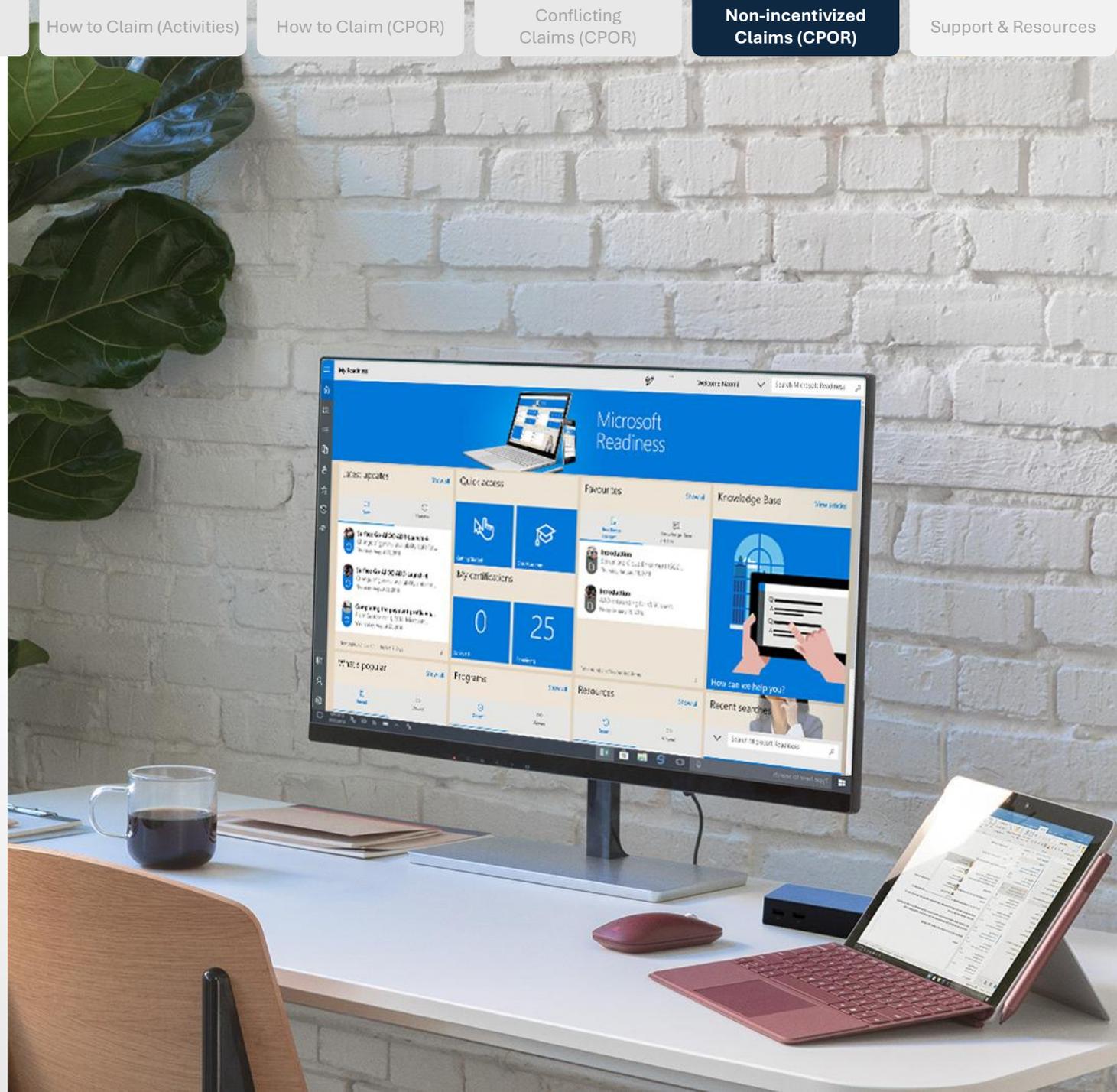


How to qualify for a Managed Security Services Attribution in CPOR

Qualifications:

1. Provides 24/7 SOC service to triage, investigate and remediate/respond to incidents and alerts in Microsoft 365 Defender* and/or Microsoft Defender for Cloud
2. Provides management of Microsoft Sentinel for SOC operations including, but not limited to, setting up Sentinel connectors, implementation of analytics, alert tuning, configuring automated playbooks and responding to incidents in Sentinel
3. Perform advanced threat hunting in Microsoft 365 Defender and Microsoft Defender for Cloud
4. Provide security configuration assessments across Microsoft 365 Defender and Microsoft Defender for Cloud. Optionally, manage those configurations if required by customer.
5. Perform alert tuning and custom detections in Microsoft 365 Defender and/or Microsoft Sentinel

*Scope should include Microsoft Defender for Endpoint at a minimum.



Support & Resources

At what point is our eligibility determined, upon submission of the claim or the approved date of the claim?

Our systems look at the claim submission date for incentive eligibility.

What happens if there is an existing partner of record on a claim that I've submitted?

Partners should claim and provide detailed proof of execution documentation as called out in the incentives guide. Microsoft will then review the documentation and determine which partner exerted the greatest influence in driving usage of the customer's workloads.

Can I claim CSP for Business Applications for revenue association?

With the launch of CPOR for CSP, Business Applications partners can now associate with the customers they support, even if they are not the ones transacting. This enables our BA partners to be recognized for every deal they play a role in closing and earn credit towards Solution Partner Designation, securing technical and commercial benefits that strengthen your business.

FAQs

I was disassociated, why? How do I fix this? I was expecting incentives, how do I escalate?

If you were disassociated, it is due to another partner claiming for the same subscription/workload. If you believe you are the right POR, we ask you to re-claim via CPOR providing updated POE that proves you are the partner driving the most influence to the customer's environment.

Why does Microsoft ask for additional POE for an approved claim?

If you're being asked to submit additional POE it is potentially due to another partner claiming for the same workload, missing information in POE documents, or additional clarity to fully assess the claim. Microsoft assesses partner of record adjudications based on the quality of POE. We recommend that you follow the POE guidelines outlined in this deck and in the Incentive Policy Guide for guidance on how to submit quality POE. Please submit any requested information within 14 days to minimize auto rejection due to no response.

We have many Partner IDs. Which one should we use for Modern Work & Security Incentives? I claimed for the wrong Partner ID, how do I fix it? I got paid lower rates?

You should claim with your partner location ID only. The Partner location ID must meet your program's eligibility criteria.

If you have claimed with the wrong Partner ID, you will need to submit a new claim.

Submitting an inquiry to Partner Center Support

- i. Click the **question mark icon** in the navigation bar
- ii. Click **Contact Support**
- iii. **Problem Summary:** Type brief explanation of issue
- iv. **Workspace:** Incentives
- v. **Problem Type:** Type key word such as "Engagements" or "Payouts" to filter for all relevant support subtopics and select the most relevant subtopic.
- vi. Click **Browse topics** or **Review Solutions**.

See [How to contact support for help with incentives - Microsoft Support](#) for more details

The image displays three sequential screenshots of the Microsoft Partner Center 'Help + support' interface, illustrating the steps to submit an inquiry. The interface includes a navigation bar with a question mark icon, a 'Help' dropdown, and a 'Start over' button.

- Step ii:** The 'Contact Support' button is highlighted in the bottom navigation bar.
- Step iii:** The 'Problem summary *' field is filled with 'Customer not eligible'.
- Step iv:** The 'Workspace *' dropdown menu is set to 'Incentives'.
- Step v:** The 'Problem type *' dropdown menu is set to 'Engagements', and the 'All Incentives topics' list is expanded, showing options like 'Engagements > Add customer'.
- Step vi:** The 'Browse topics' link and the 'Review solutions' button are highlighted at the bottom of the page.

Support & Escalation Scenarios

Scenario

Creating and submitting customer associations

Managing customer associations

Customer association issues



Support Solutions & Assistance

Site > Partner Center
Category > Incentives
Topic > Customer association
Subtopic > Creating and submitting customer associations

Site > Partner Center
Category > Incentives
Topic > Customer association
Subtopic > Managing customer associations

Site > Partner Center
Category > Incentives
Topic > Customer association
Subtopic > Customer association issues

Resources

Useful links

- Customer Association (CPOR) Support Articles – [here](#)
- Microsoft Partner Network: <https://partner.microsoft.com>
- Incentives page on the partner website: <aka.ms/partnerincentives>
- Partner Center incentives resources [asset collection](#) on the partner website
- Partner Center: <https://partner.microsoft.com/dashboard>
- **NEW:** CPOR for Business Applications in CSP [Overview](#)