Microsoft

# MCI Engagements

## Partner Activities – Partner Center Claims Guide

## Incentive Users and Administrators

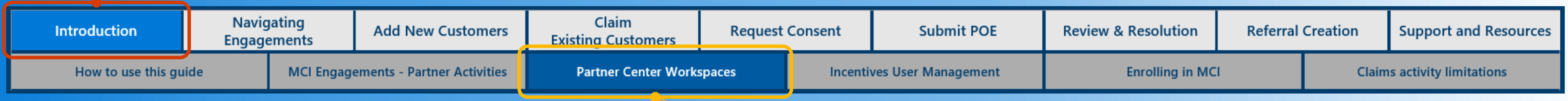
Last Updated: January 1, 2025

# How to use this guide

A dynamic navigation pane is included on each page of this guide. In addition to navigating one page at a time by scrolling through the pages, readers can click on each section or subsection button in the navigation pane to quickly jump to the relevant content they would like to view.

**Sections pane**

Select a **Section** button in this pane to quickly navigate to the process guidance relevant to your current task.




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

- ✓ Navigate Partner Center's Incentives workspace.
- ✓ Understand the MCI Engagements view within the Incentives workspace.
- ✓ Create incentive claims for **Partner Activities** engagements.
- ✓ Submit claims and respond to Partner Activities POE review tasks.
- ✓ Access support for Partner Activities Engagements.

**Subsections pane**

Each **Section** you select will display a different selection of options in its **Subsections** pane. Once you have selected a **Section** in the top pane, click through its **Subsection** buttons to navigate the slides regarding the specific content included in each section.

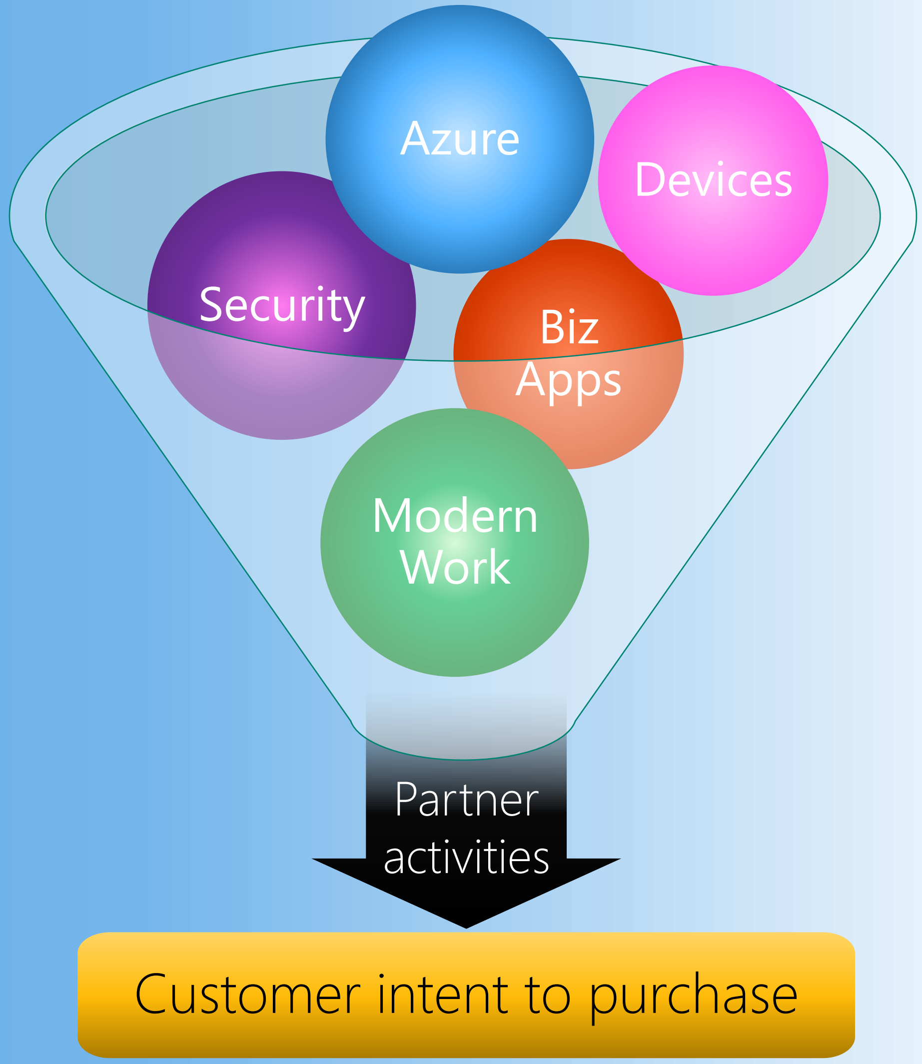
# MCI Engagements – Partner Activities

Within the Microsoft Commerce Incentives (MCI) program, Engagements are unique earning opportunities organized by Solution Area and Partner Role, with targeted, specific eligibility requirements for Partners and Customers.

This guide is focused on claims creation and management for Engagements Partner Role **Partner Activities.** These Engagements reward partners for delivering short term engagements or assessment activities designed by Microsoft, or for leading customers through longer-term partner-led projects for migration, modernization, and innovation using Microsoft and Azure services and products.

The claims process described here does not apply to all MCI Engagement Partner Roles. Some MCI Engagements incentives are administered via other models (Azure PAL Admin customer-led associations, CPOR claims, etc).

For complete details on all MCI Engagement association types and incentive opportunities, please visit **https://aka.ms/MCIResources.**



# 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**

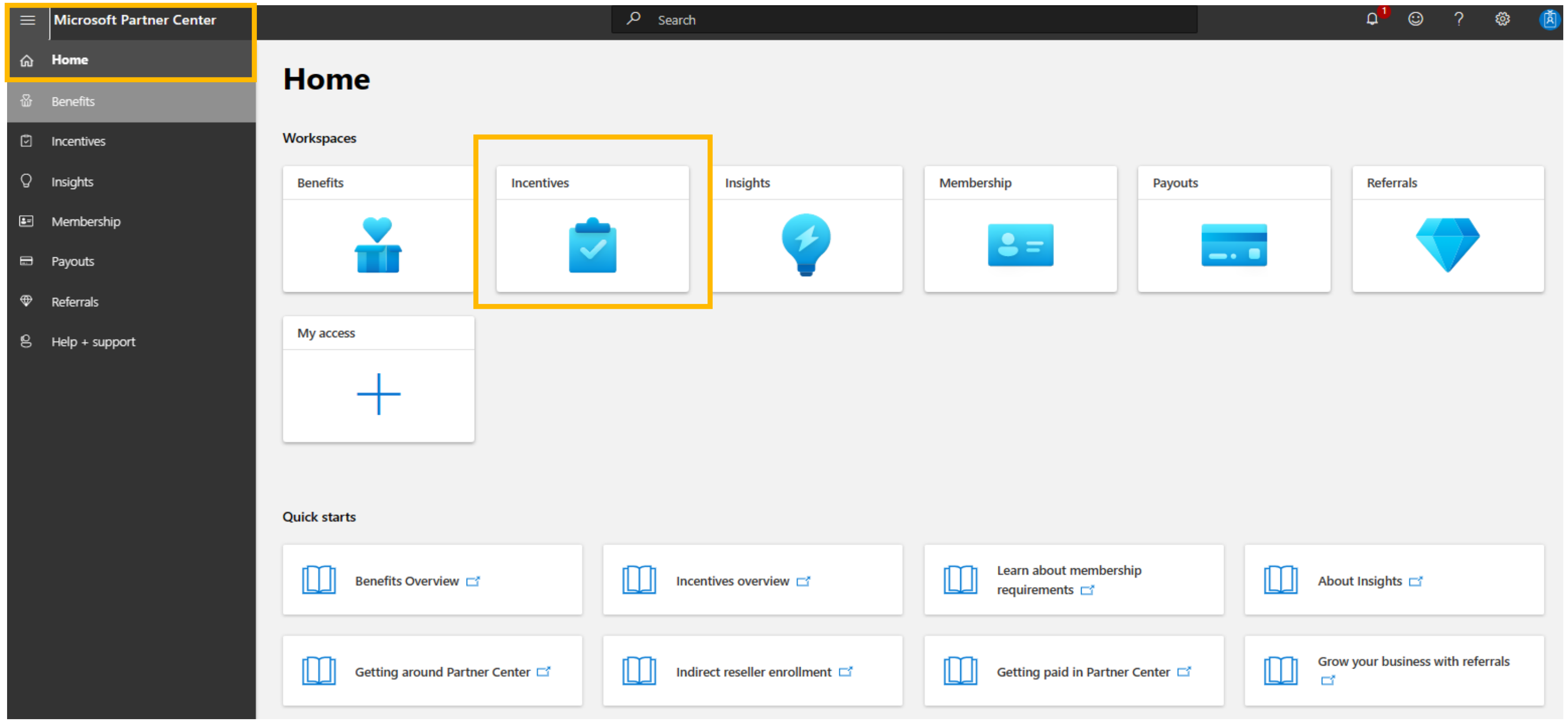
**v. Manage customer subscriptions**

**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.

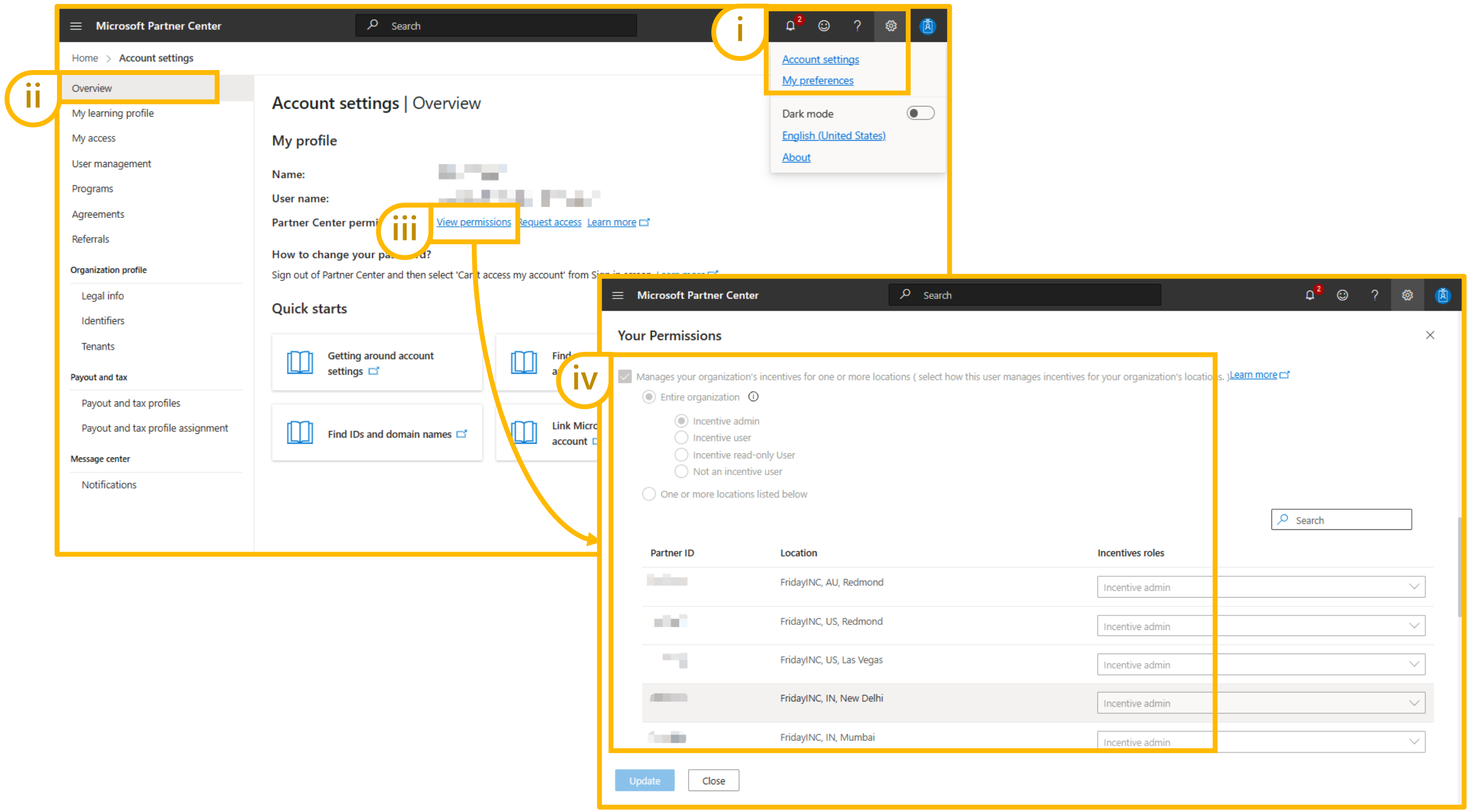
To find the roles you've been assigned:

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**

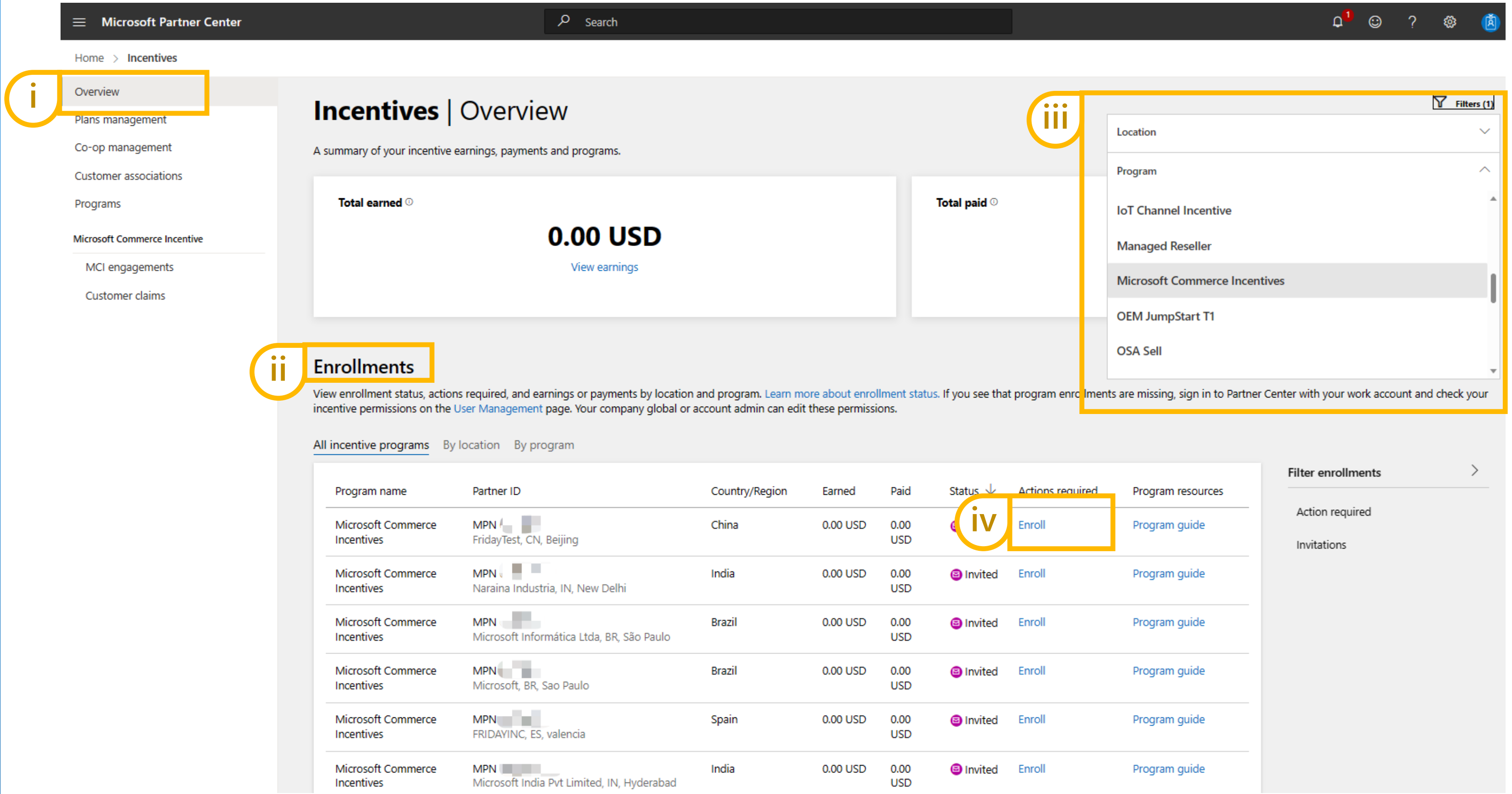
ii. Scroll down to **Enrollments**

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]*



# Claims activity limitations

Microsoft has defined a particular set of activity limits for each solution area and engagement, to ensure compliance with program rules and conditions. These limits are checked during the **Add Customer**/**Claim Customer** claim creation workflow.

- ✓ If these limitations are met on a particular engagement or solution area, you or your customer may become ineligible for association to new claims to that engagement, even if you or your customer would otherwise be eligible.
- ✓ If one or more of these limits are met and you attempt to make a new claim for the engagement, customer ID or partner ID where the limit was reached, the engagement will be listed as Ineligible during the **Associate Engagement** step of claim creation, with a corresponding ineligible reason shown.
- ✓ Microsoft reserves the right to update these limits at any time, in its sole discretion.

| Limit Description | Details |
|---|---|
| **Maximum open claims per Solution Area + Partner Global ID + Customer ID** | This limit applies at the SOLUTION AREA level, not per engagement. This limit controls how many open, unresolved claims for all engagements within that solution area a given Partner Global Account may have at any given time for the same customer ID, across all the locations. Azure = 10 claims; Business Applications = 4 claims; Modern Work & Security = 9 claims. |
| **Maximum customer consent quantity** | This limit applies at the ENGAGEMENT ID level. This limit controls how many total claims may receive affirmative customer consent for this engagement, regardless of whether the claim is ultimately approved, rejected, expired, or cancelled. When this limit is reached, no more claims can be created for the engagement by any partner. |
| **Maximum unique customers per partner, by partner country** | This limit applies at the ENGAGEMENT ID level. This limit controls how many unique customer IDs may be associated to the active & approved claim activity of a partner within a given country. If the partner's global account has multiple locations in the same country, all the unique customer IDs appearing in in-scope claims made by all the locations within that country will be added together to check this limit. |
| **Maximum Approved claims per customer ID*** | This limit applies at the ENGAGEMENT ID level. This limit controls how many claims may be **Approved** for this engagement for each customer. This limit is checked at the time of new claim creation. If it has been met or exceeded, you will not be able to create a new claim for that customer ID. |
| **Maximum concurrent claims per customer ID*** | This limit applies at the ENGAGEMENT ID level. This limit controls how many open, active claims may be associated to each customer for this engagement at any one time, by any partner. |

**For Fixed payout engagements, this limit may be applied to each distinct customer ID value, or to all the customer IDs that belong to the customer's TPID, as determined by the engagement program owner. For Variable payout engagements, this limit is always applied to each distinct customer ID value separately.*

# 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**

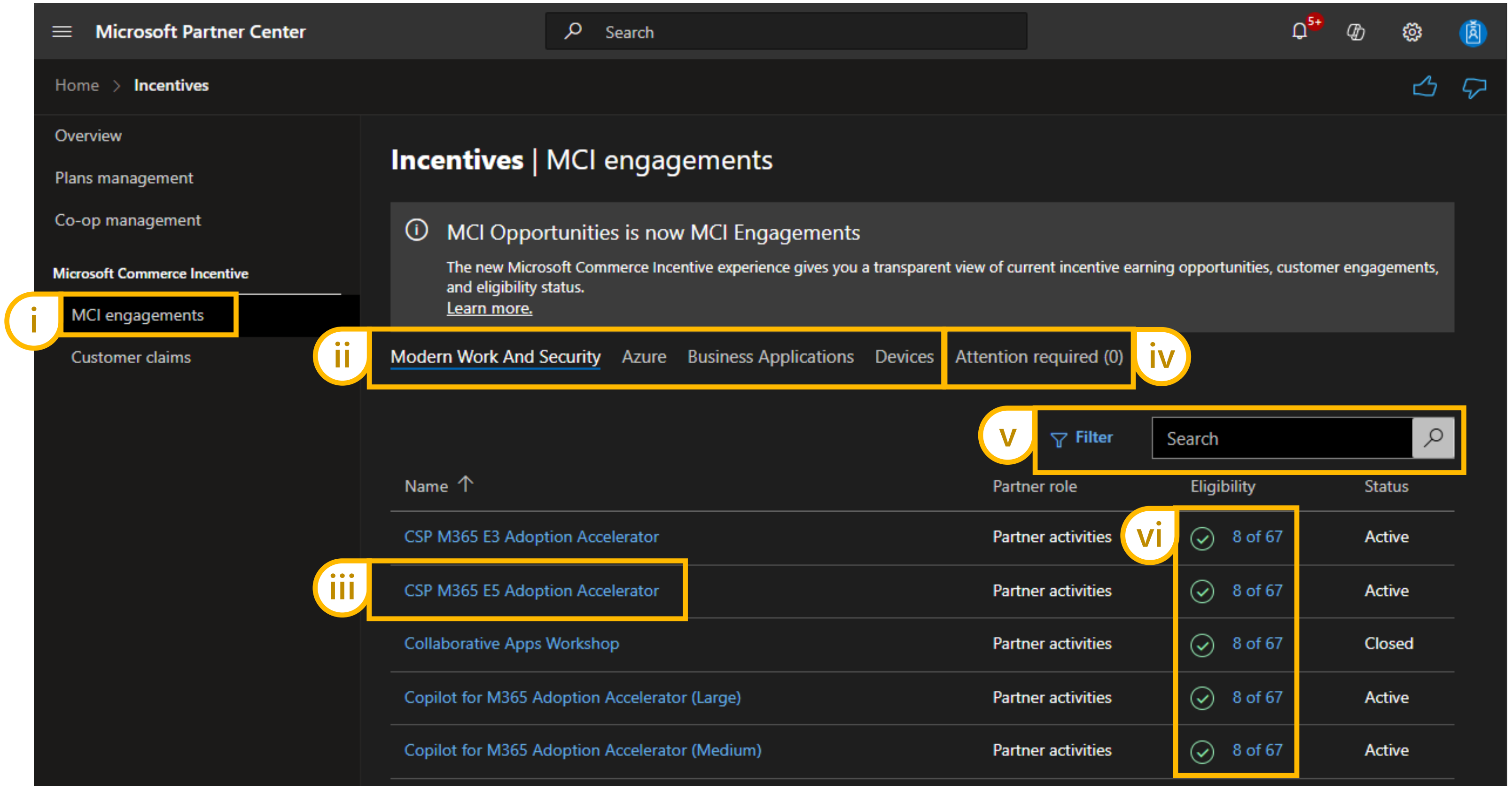
iii. Click an engagement's **Name** to open that engagement's Summary page

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.*



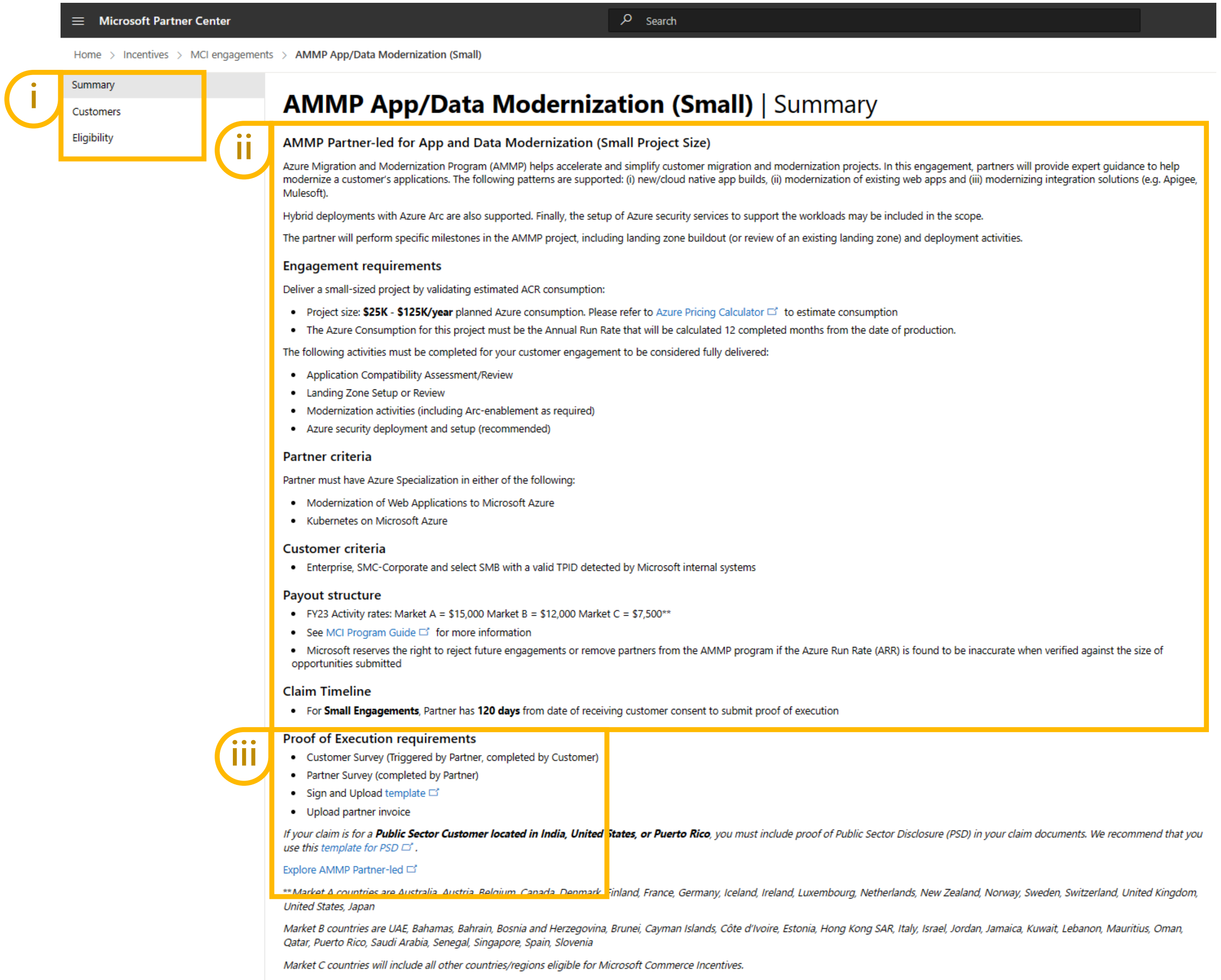
# Engagement Summary view

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.



# 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

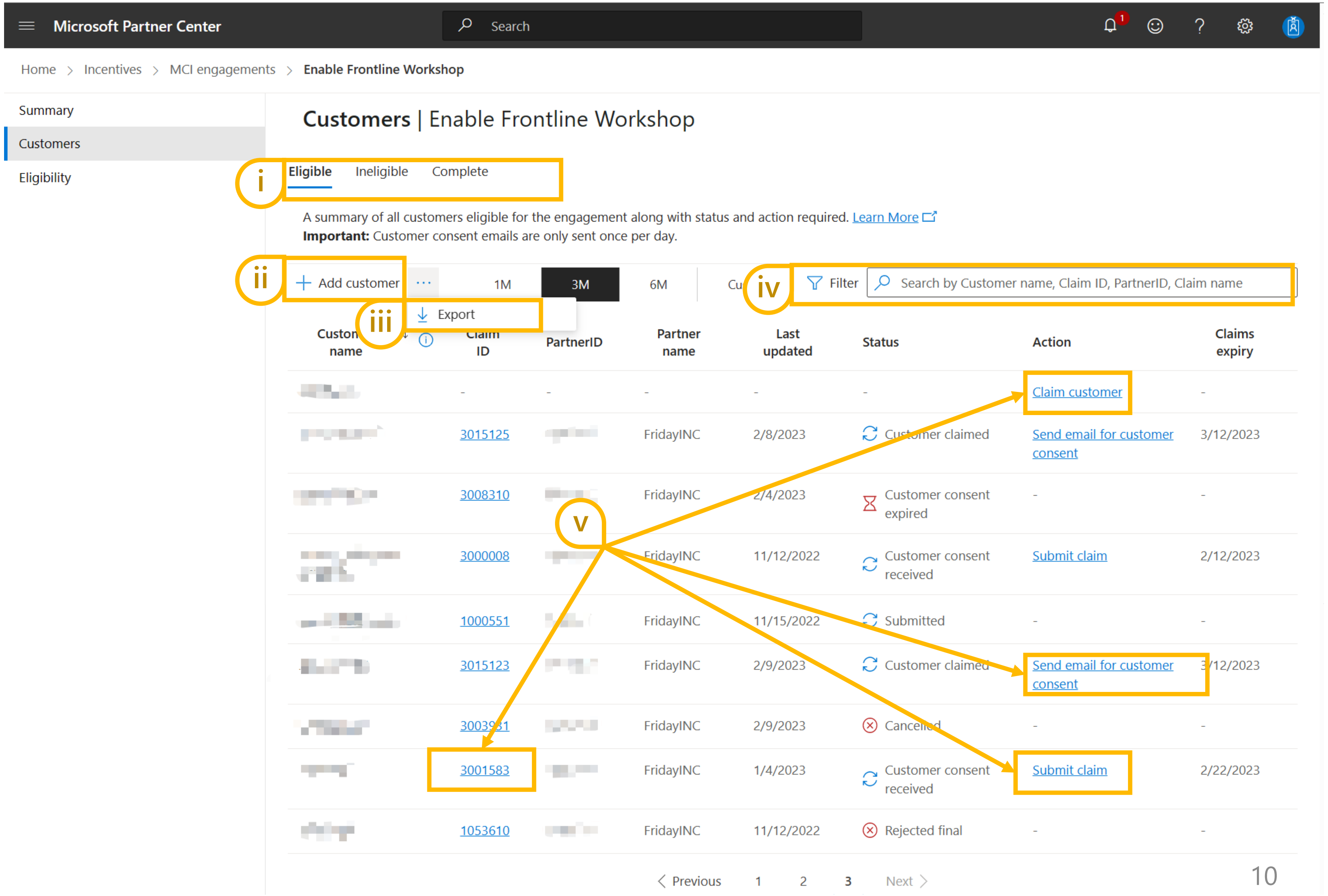
**ii. Add new customer**

**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

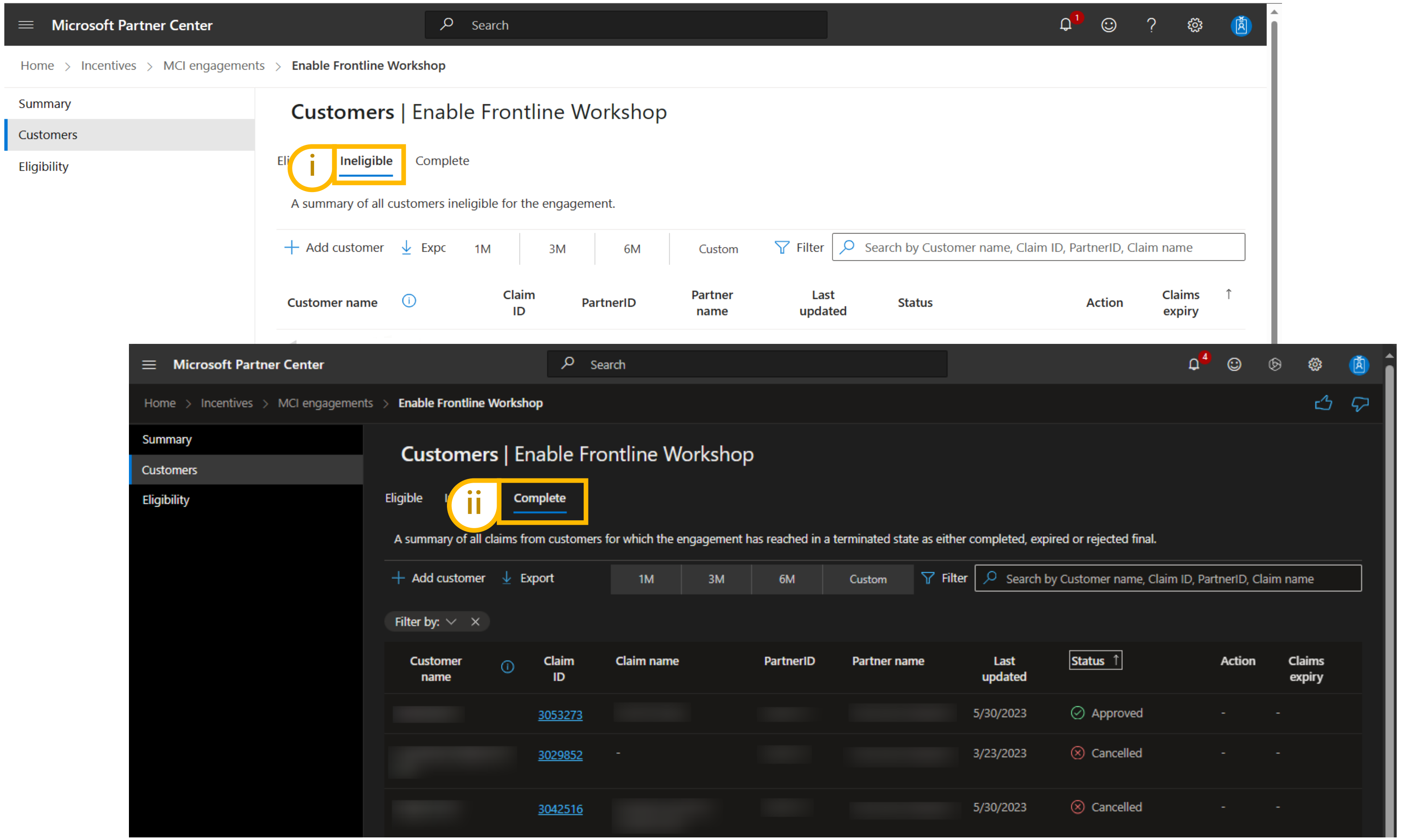


# Engagement Customers view (2/2)

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.

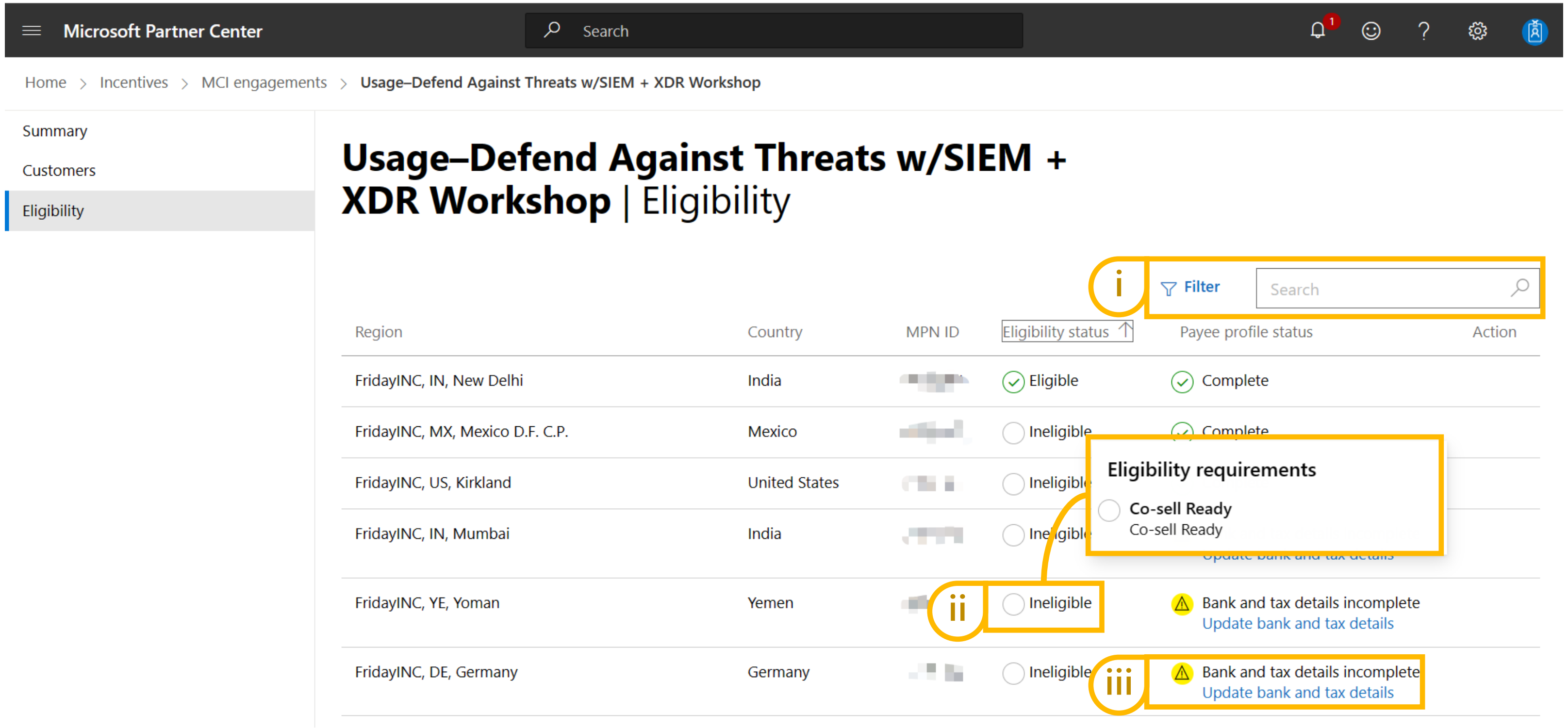
Each engagement has specific qualifying criteria for Partner locations. If a location's Eligibility status and Payee Profile status both show green check marks, that location is currently eligible to create and submit claims for this engagement.

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.



# 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

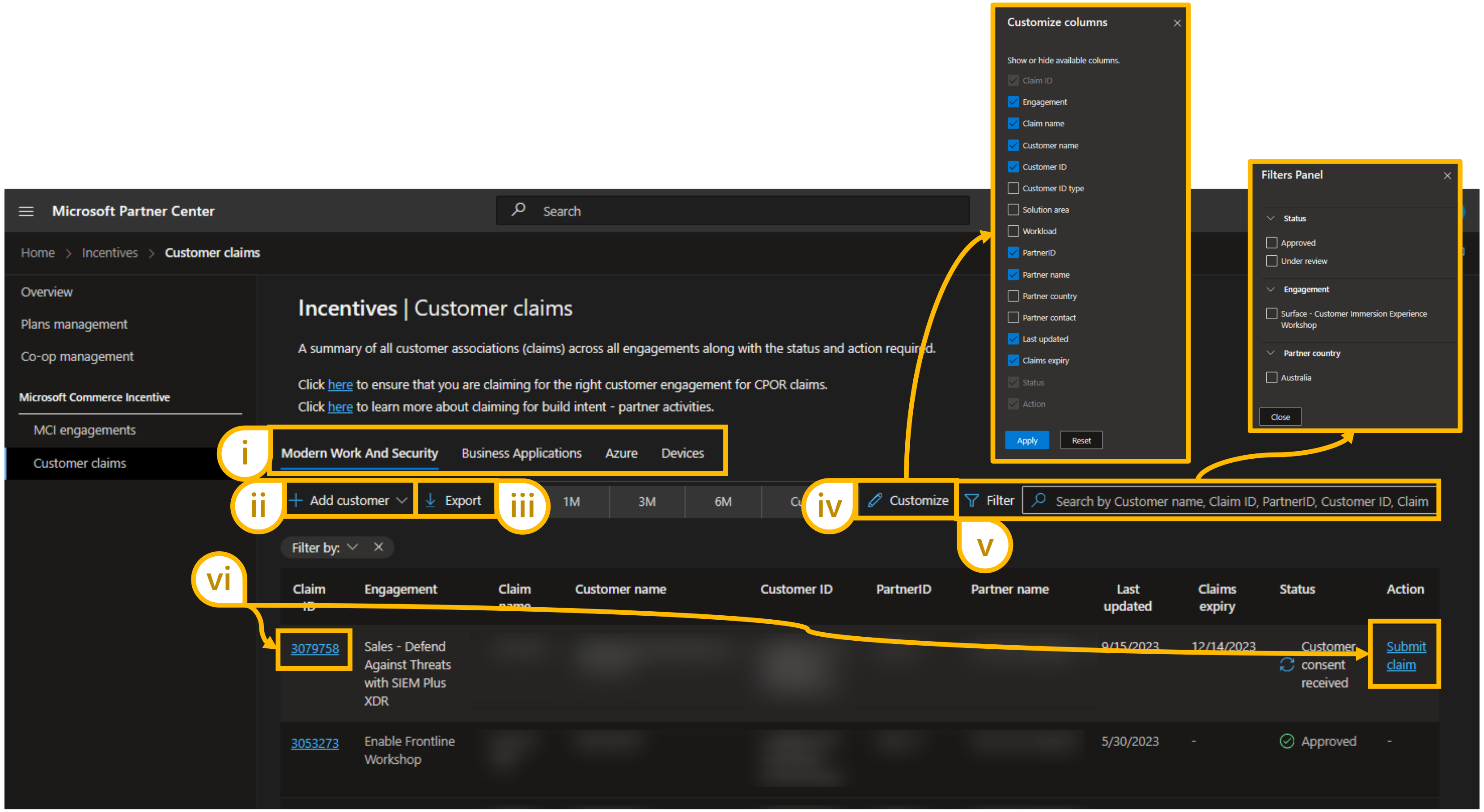
**iv. Customize** the columns that appear in your view

**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.



# Launch Add Customer Workflow

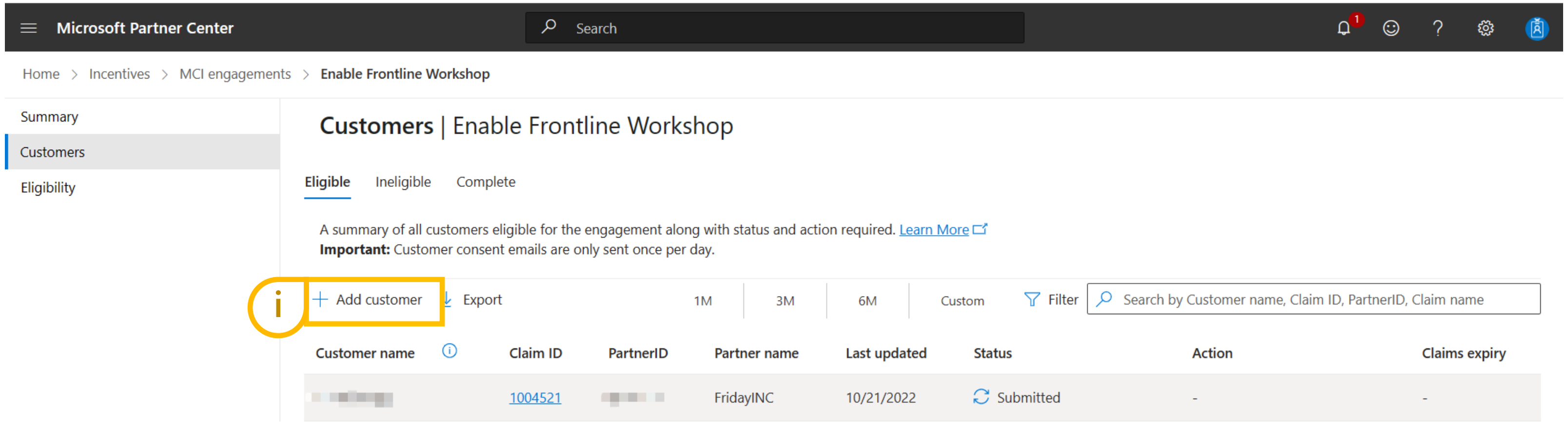
i. If you are starting from the **Customers view** of a specific engagement, click **+ Add customer.**

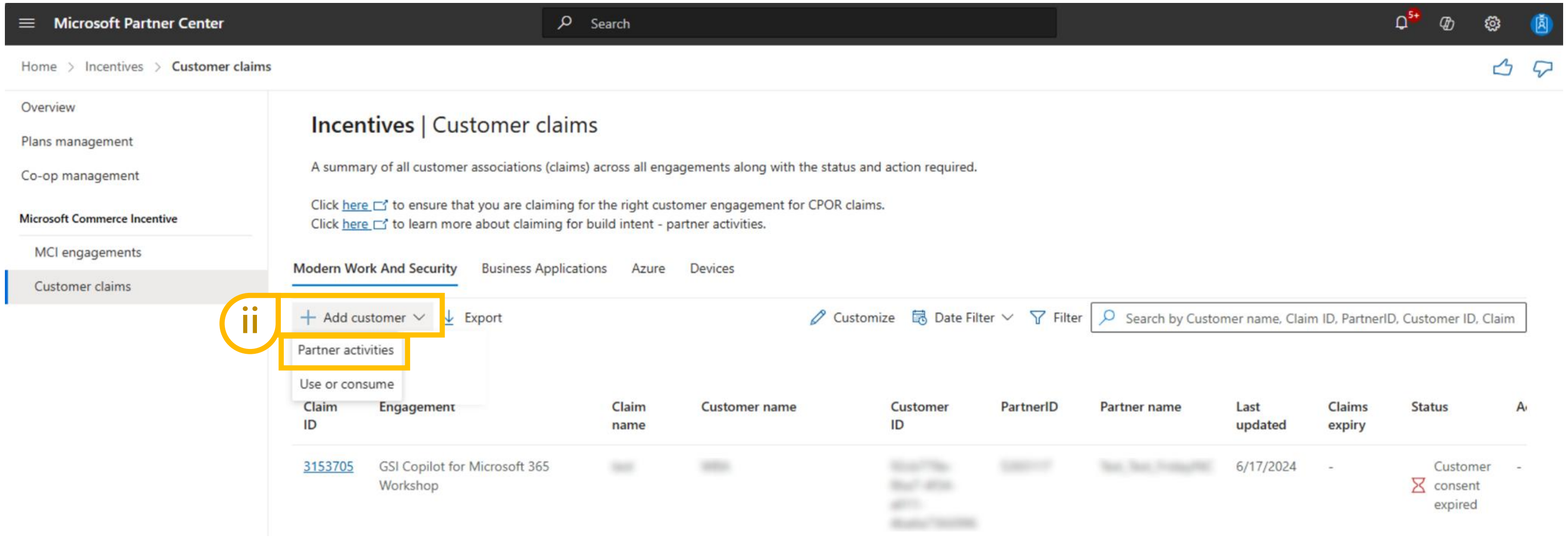
ii. If you are starting from the **Customer Claims** view:

- ✓ 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.

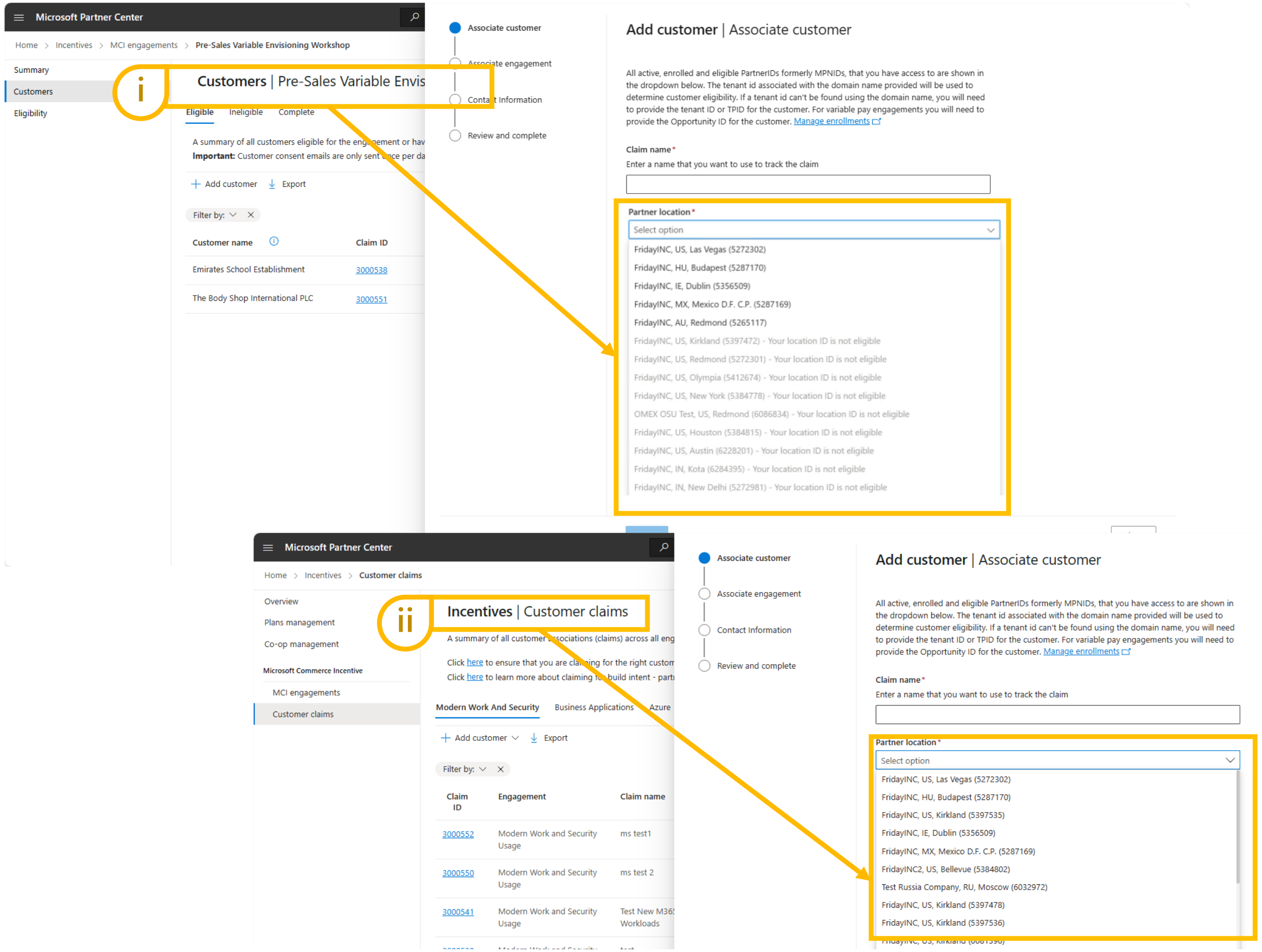
i. If you are on an engagement's Customers page, the dropdown will allow you to select location IDs that meet all the following criteria:

- ✓ 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)

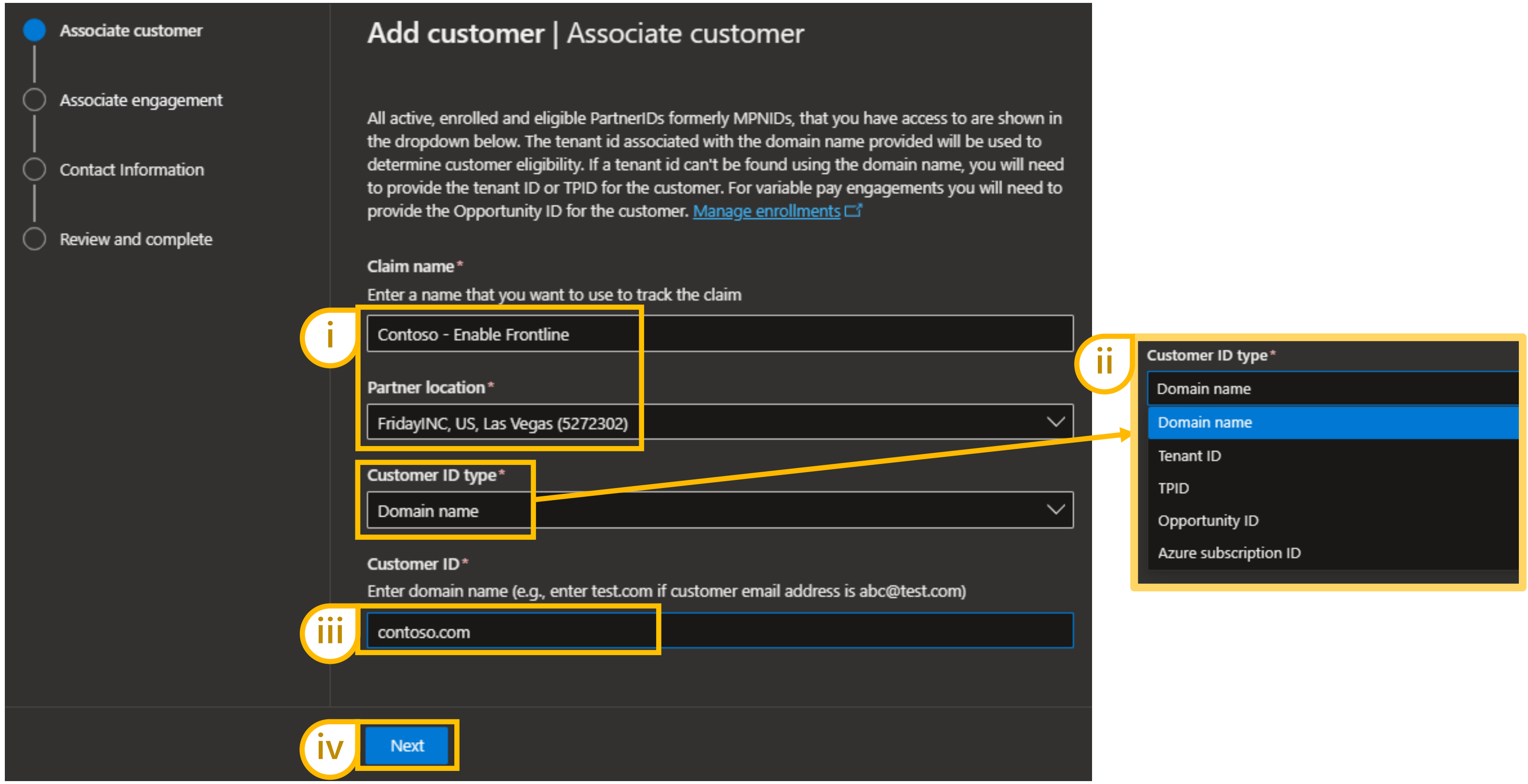
i. Enter **Claim name** and select **Partner location**.

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 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.

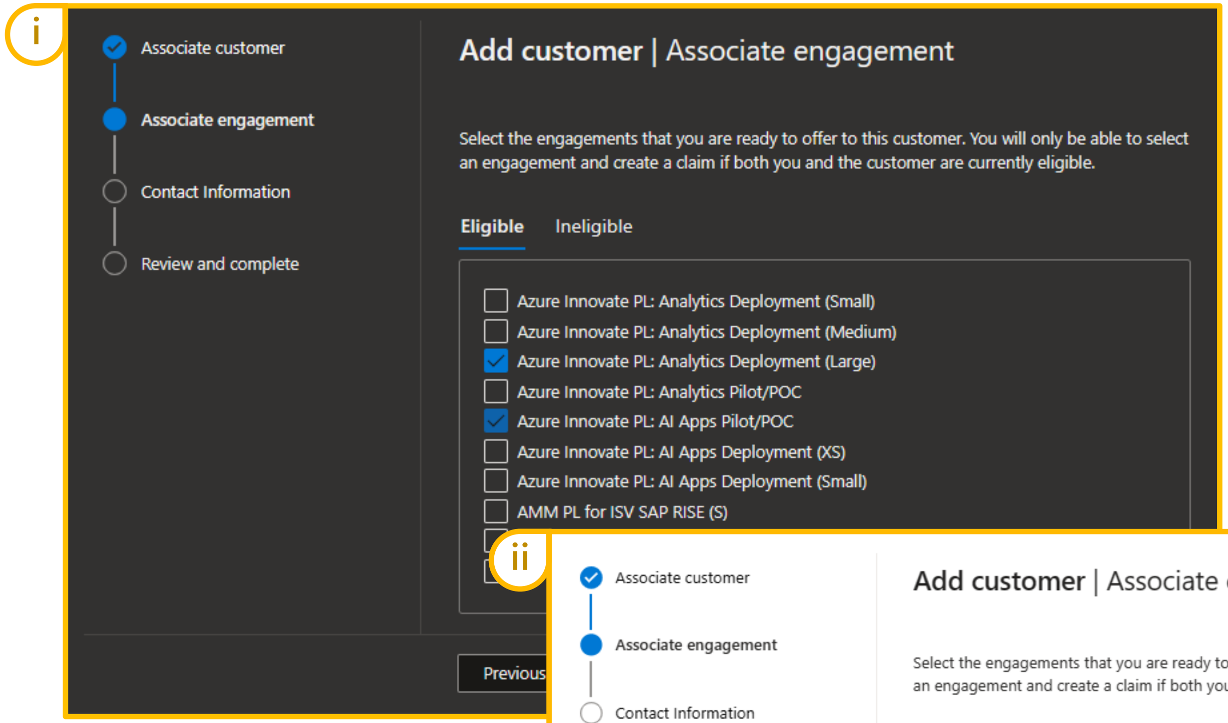
If you are on a specific engagement's Customers page, that engagement will be pre-selected. If you are on the Customer Claims view, no engagements will be pre-selected.

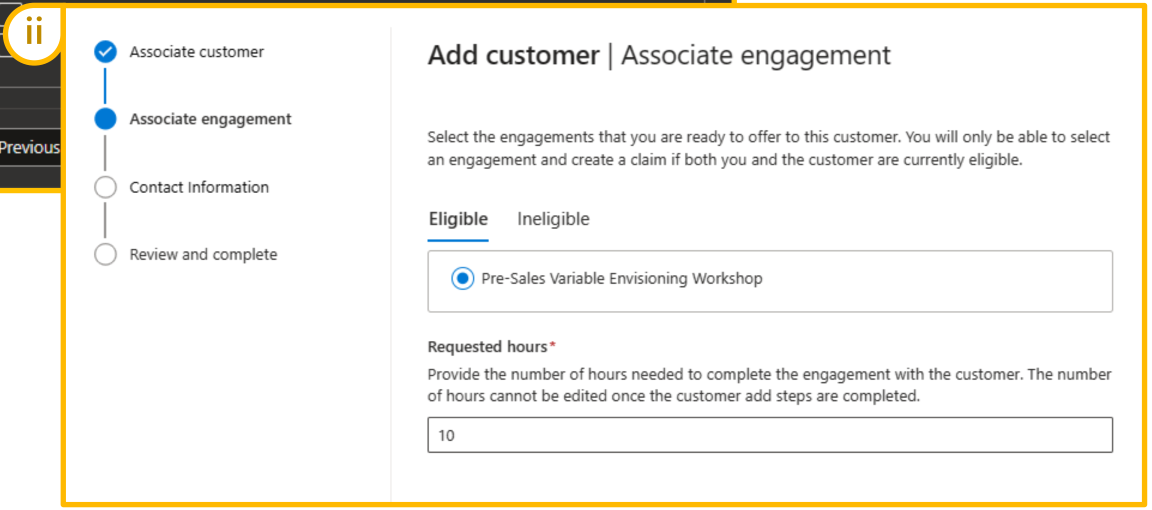
i. If the customer ID is a TPID, Tenant ID, Subscription ID, or domain, you may be able to select multiple **Fixed Payout** engagements and create claims for each engagement in this action.

  ✓ **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.



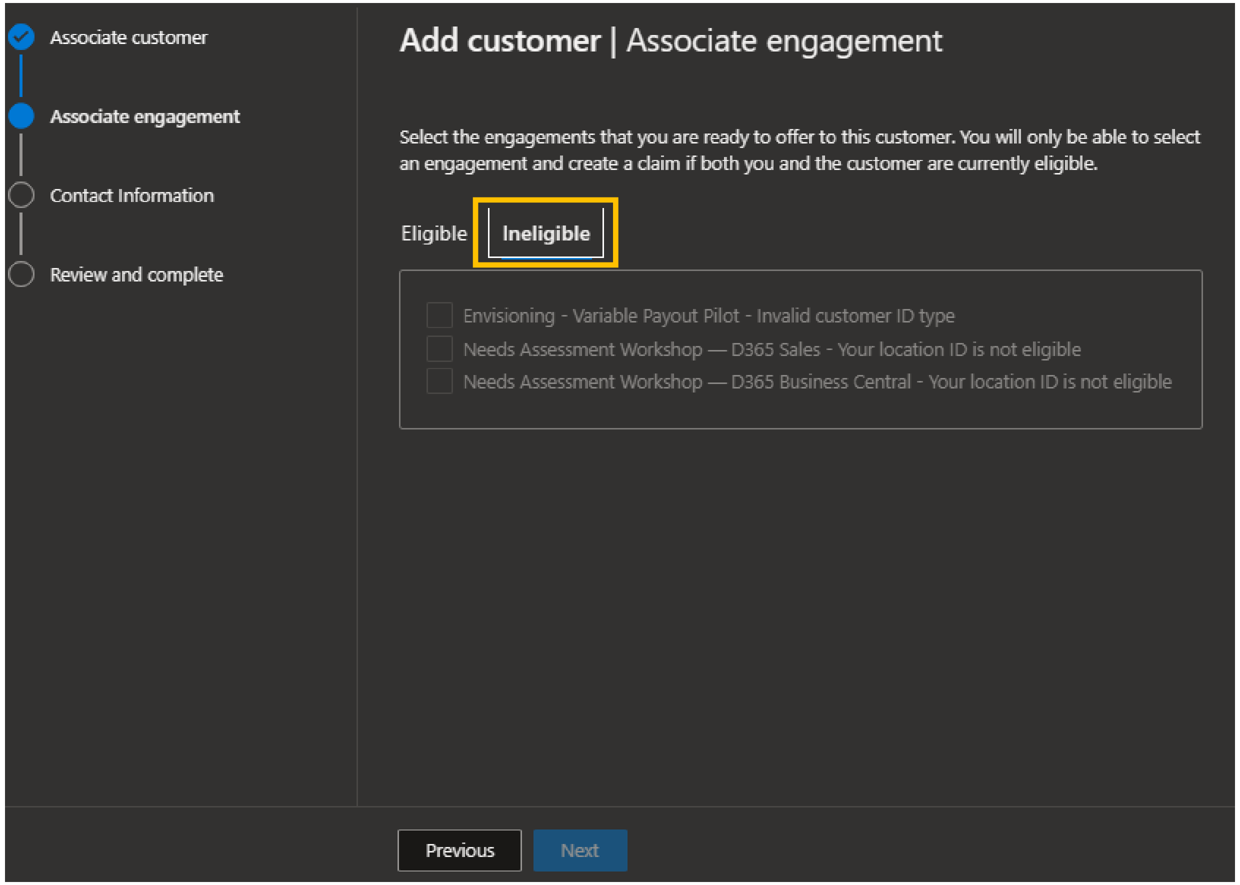



# Add new customer - Associate Engagement (2/2)

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 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.*



# Add new customer - Contact Information

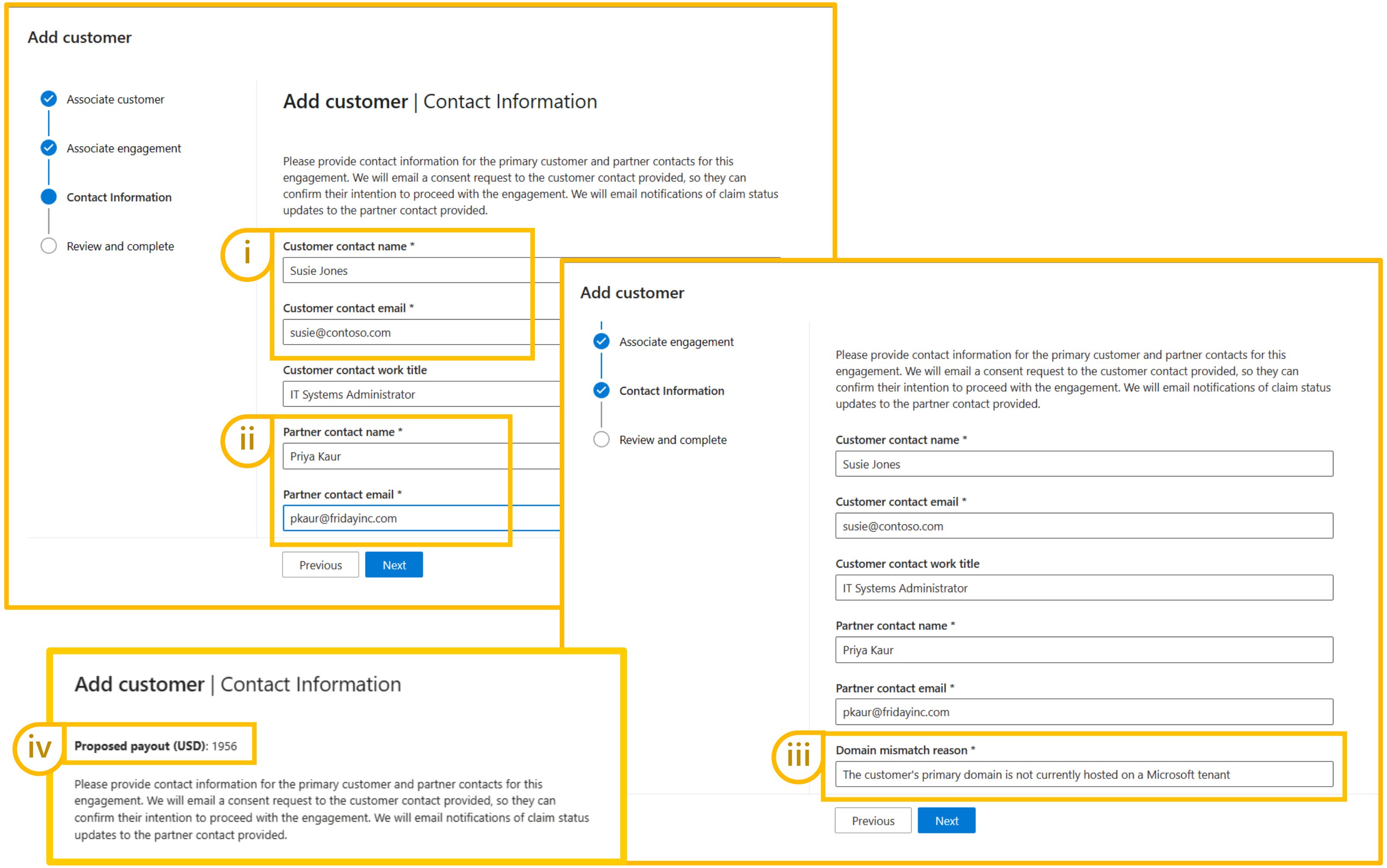
Enter the contact details for the customer and yourself.

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 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.

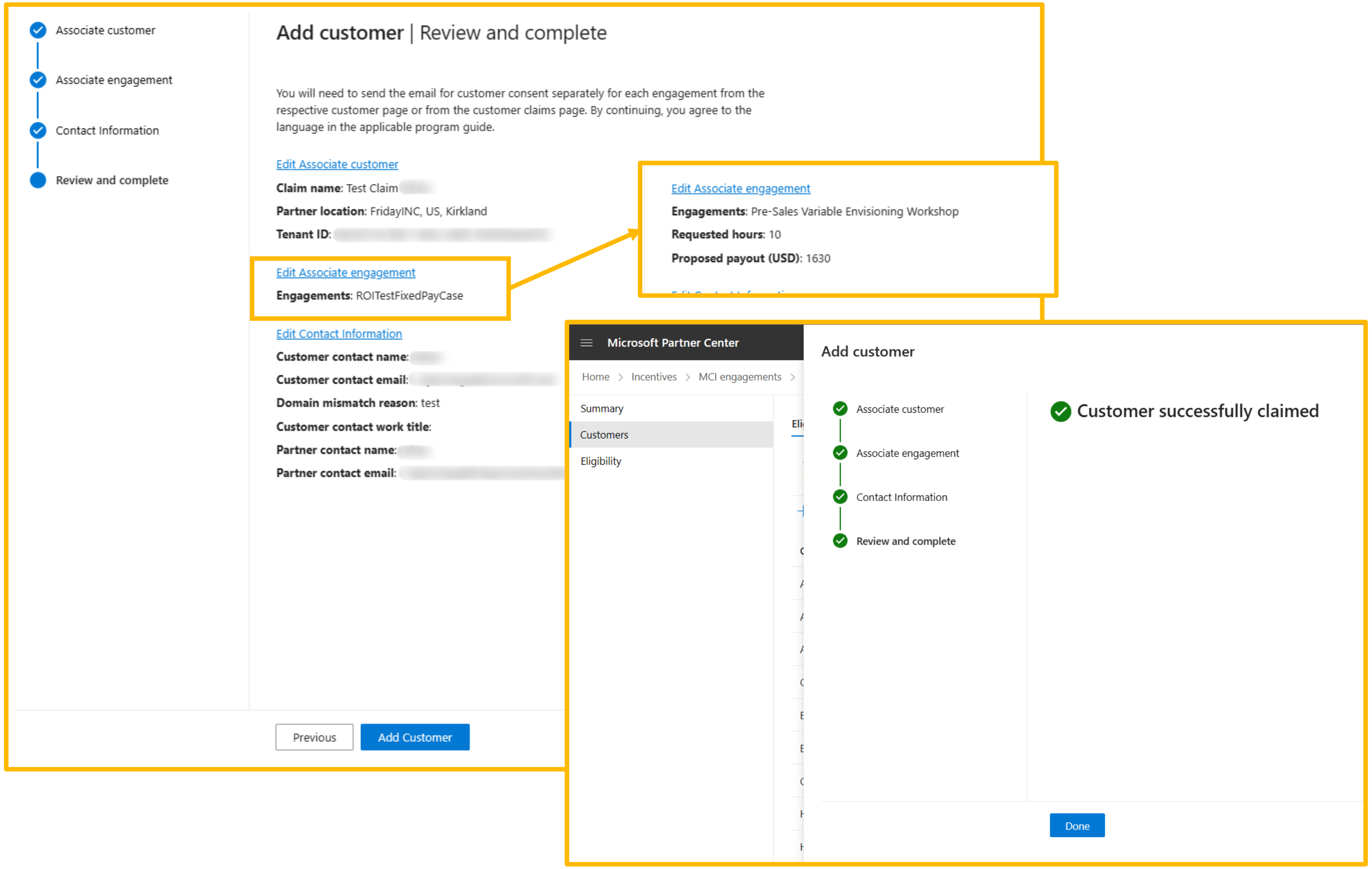
- ✓ For **Variable Payout** claims, the proposed payout amount will be listed. By proceeding to create the claim, you are agreeing to accept the proposed payout amount shown as your maximum possible earnings for that claim.

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).



# 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:

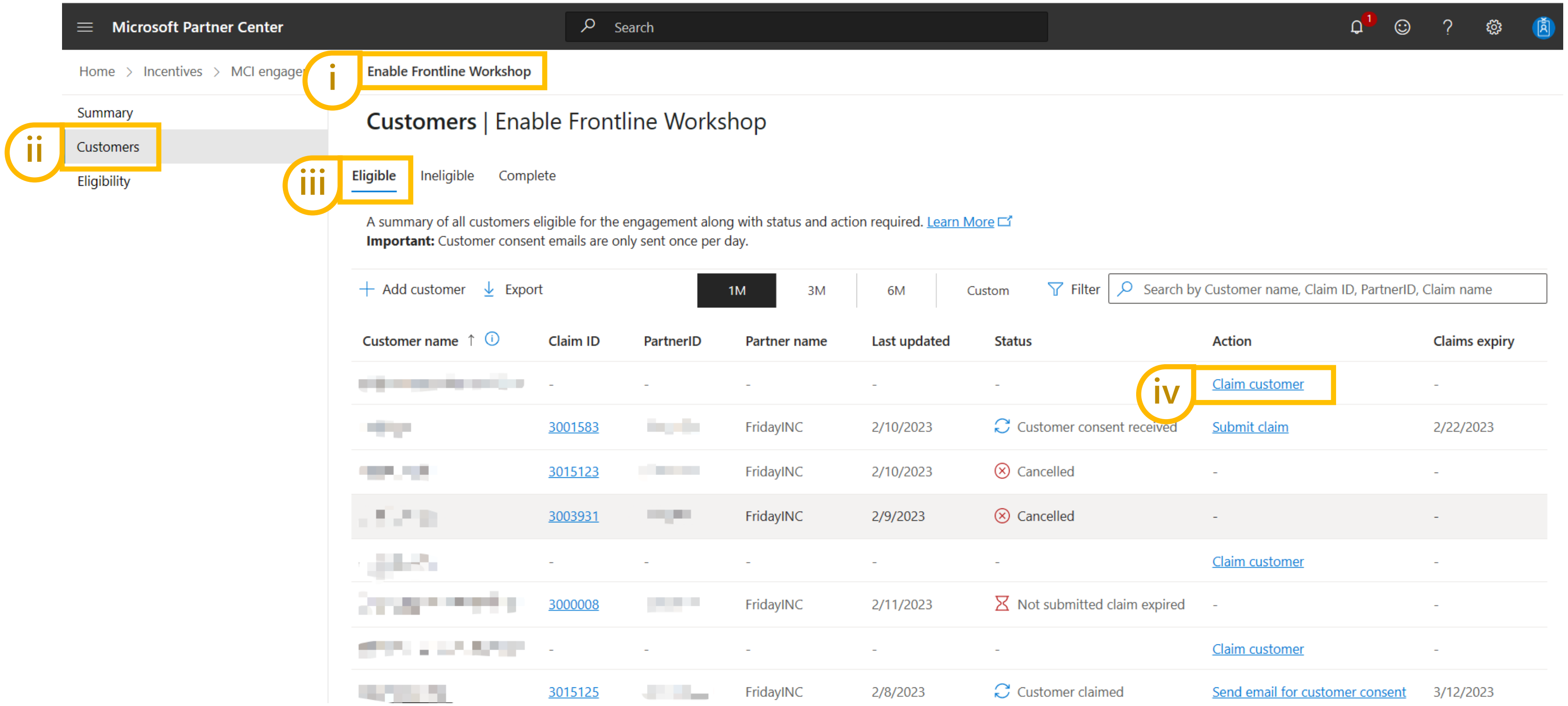
i. Navigate to the desired **engagement**

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.



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

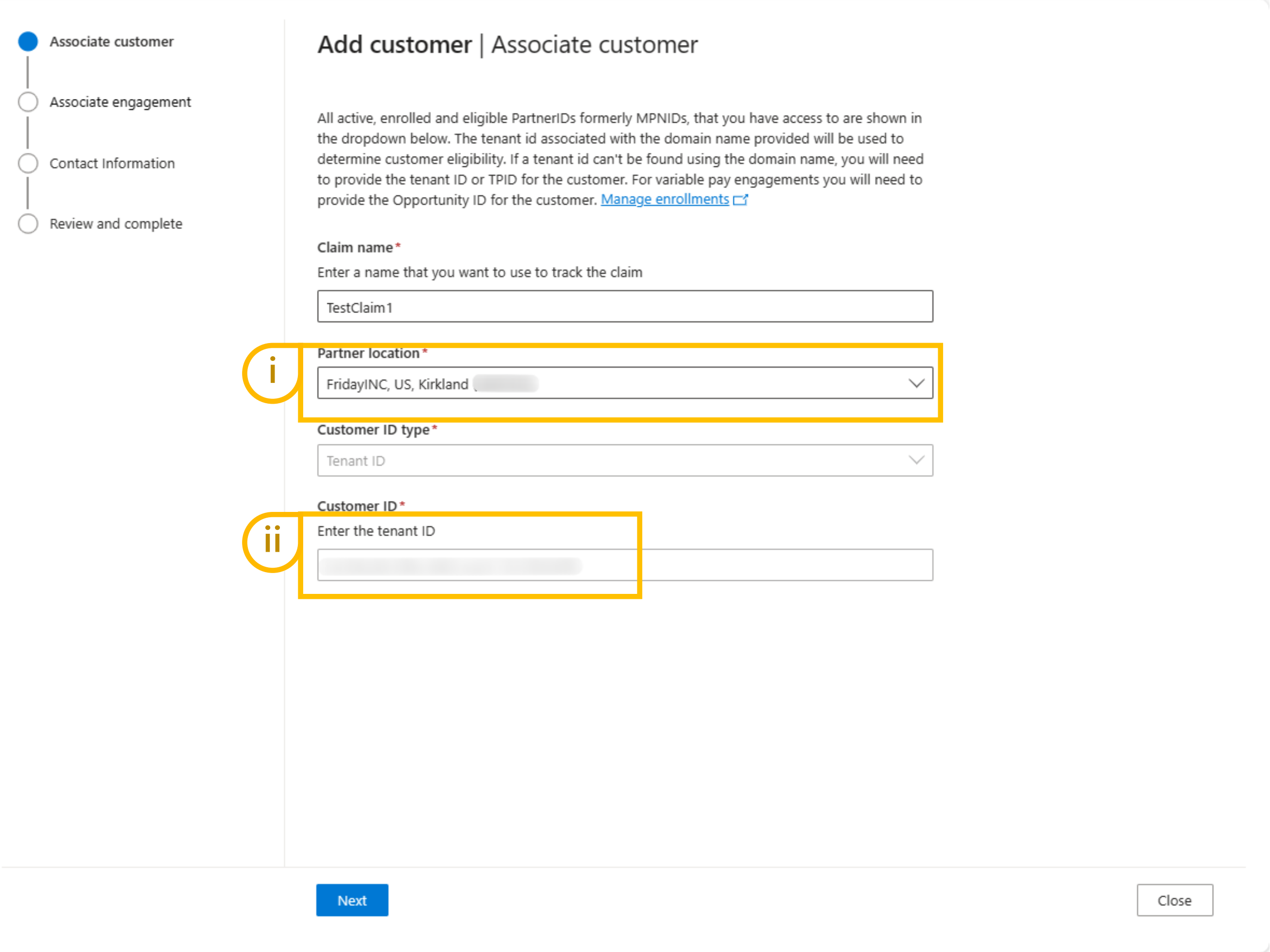
i. Select **Partner location ID** that you intend to use to deliver this engagement. The dropdown will allow you to select the location IDs that meet all the following criteria:

- ✓ 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.

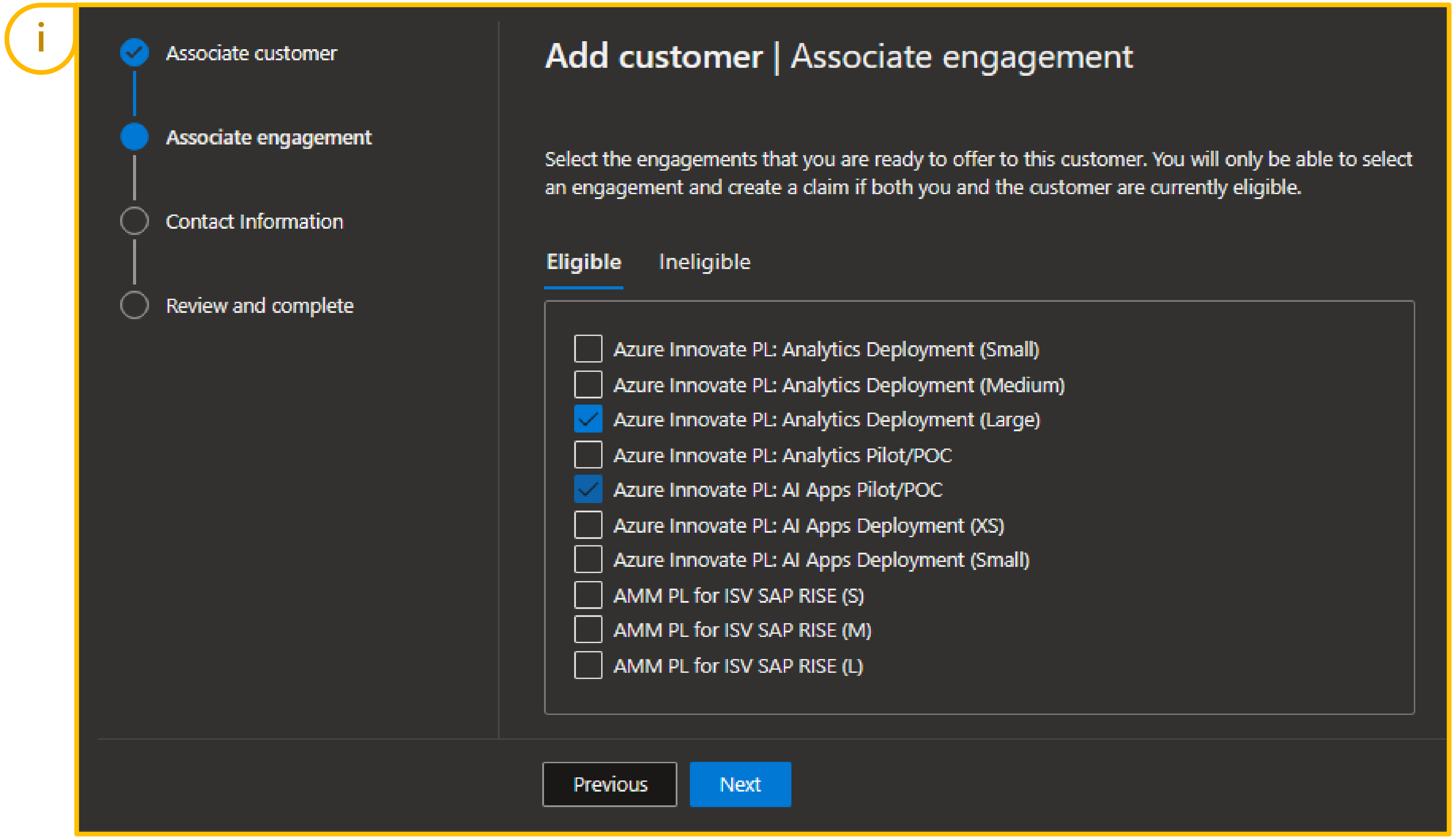


# Claim previously added customer - Associate Engagement (1/2) (Fixed payout only)

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.

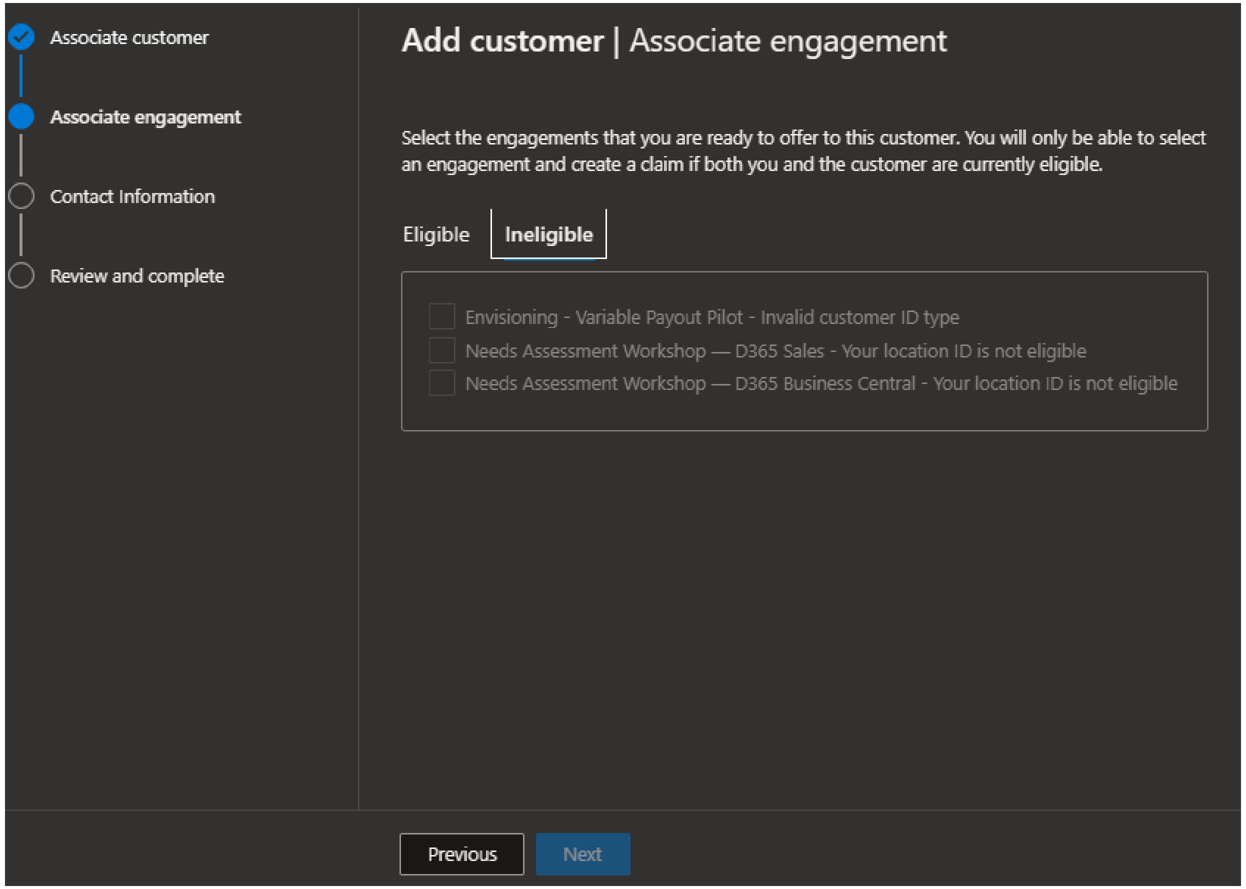


# Claim previously added customer - Associate Engagement (2/2) (Fixed payout only)

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.*



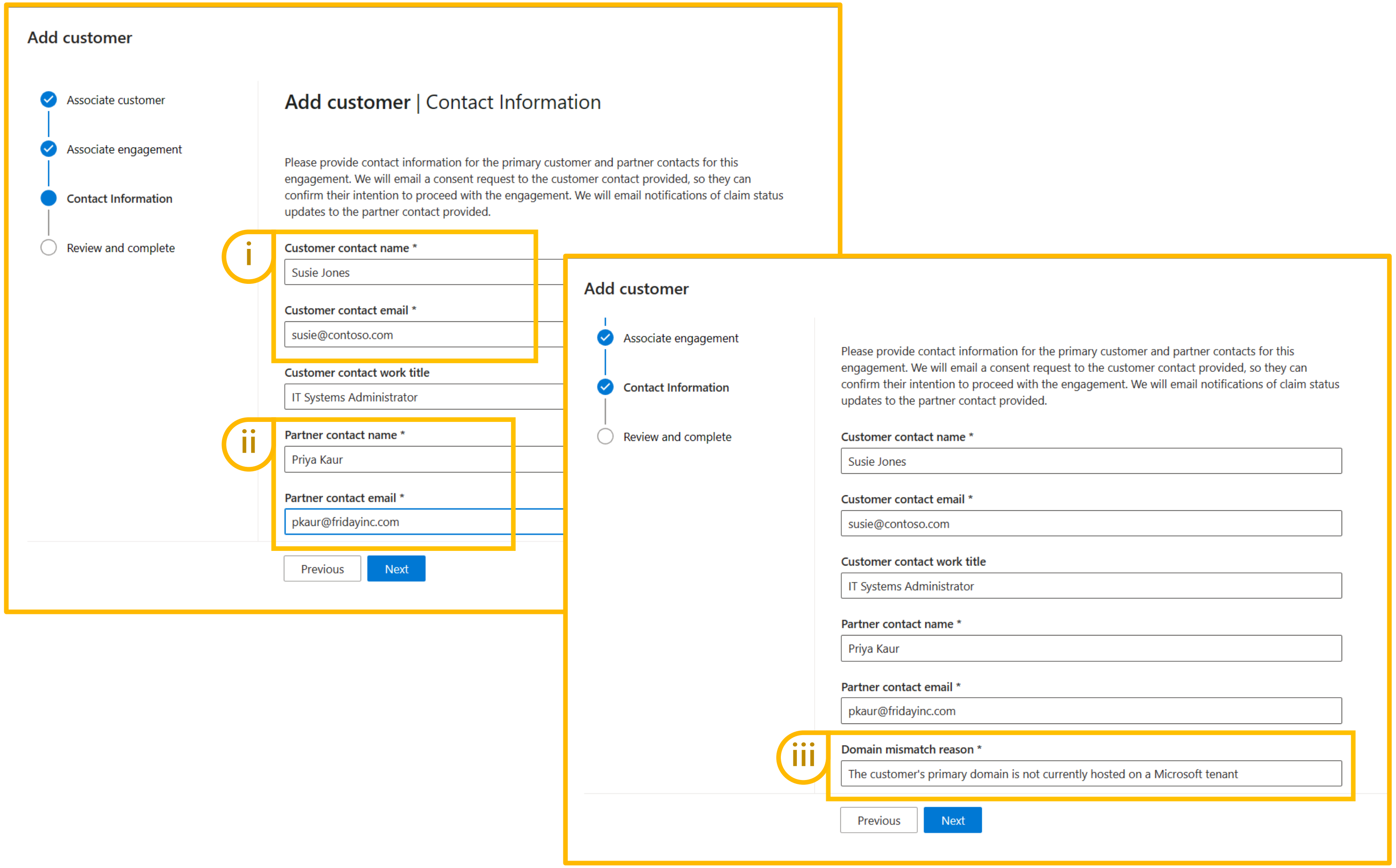
# Claim previously added customer - Contact Information (Fixed payout only)

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.



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

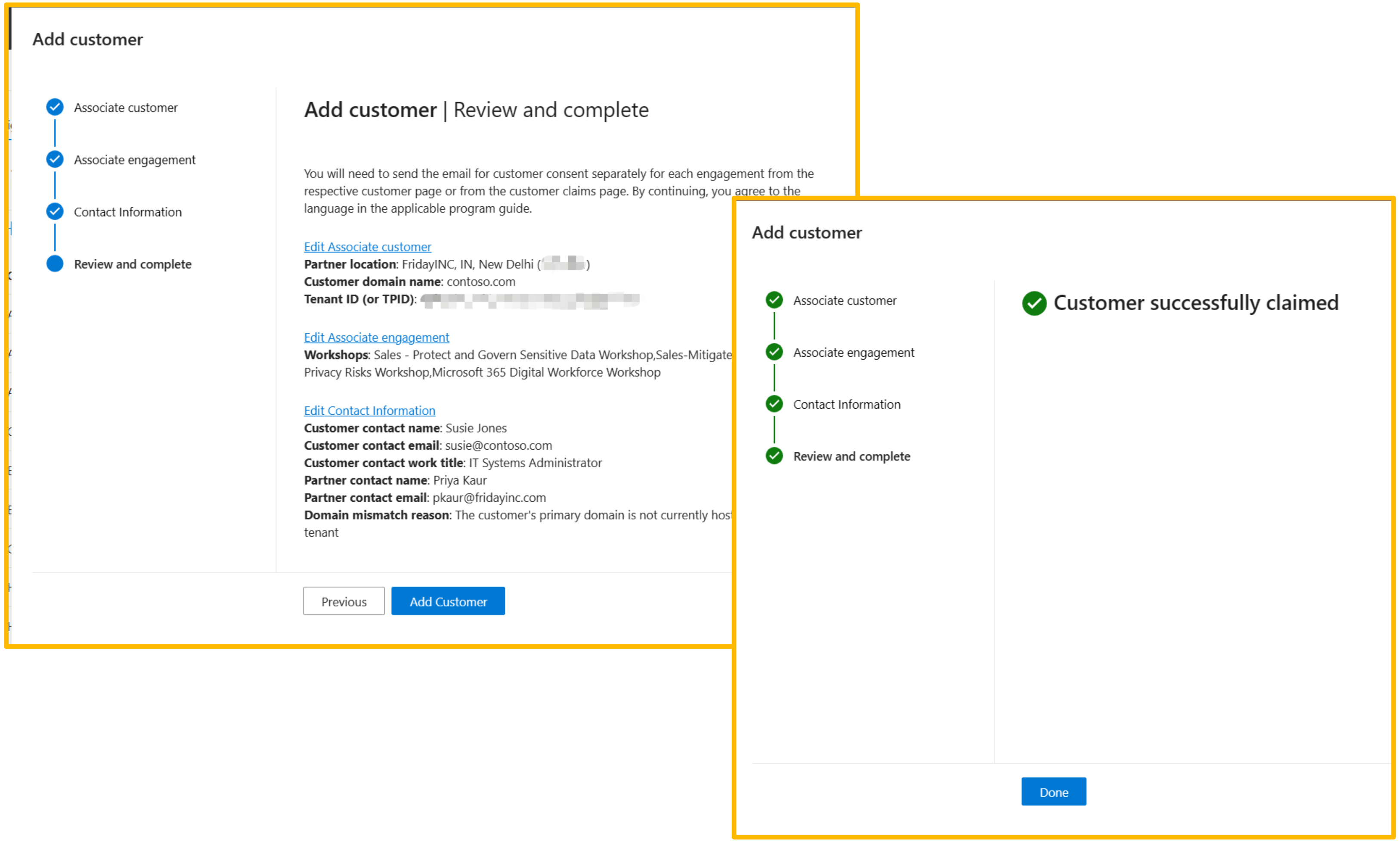
Review and confirm the claim details. You can click the Edit links or use the Previous button to navigate back through each stage to modify as needed.

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.

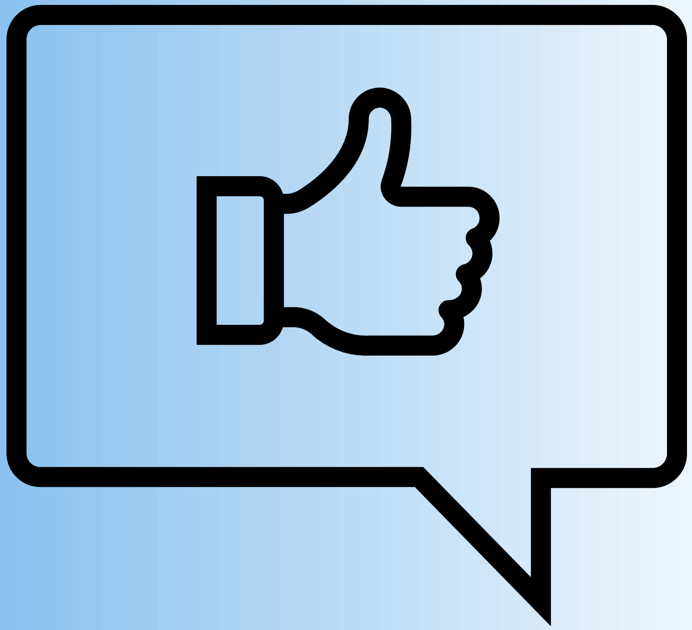
Next, you must **request customer consent**. If you do not obtain consent from your customer within 30 days of creating this claim, the claim will **expire** and cannot be reactivated.



# 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.**



# 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**:

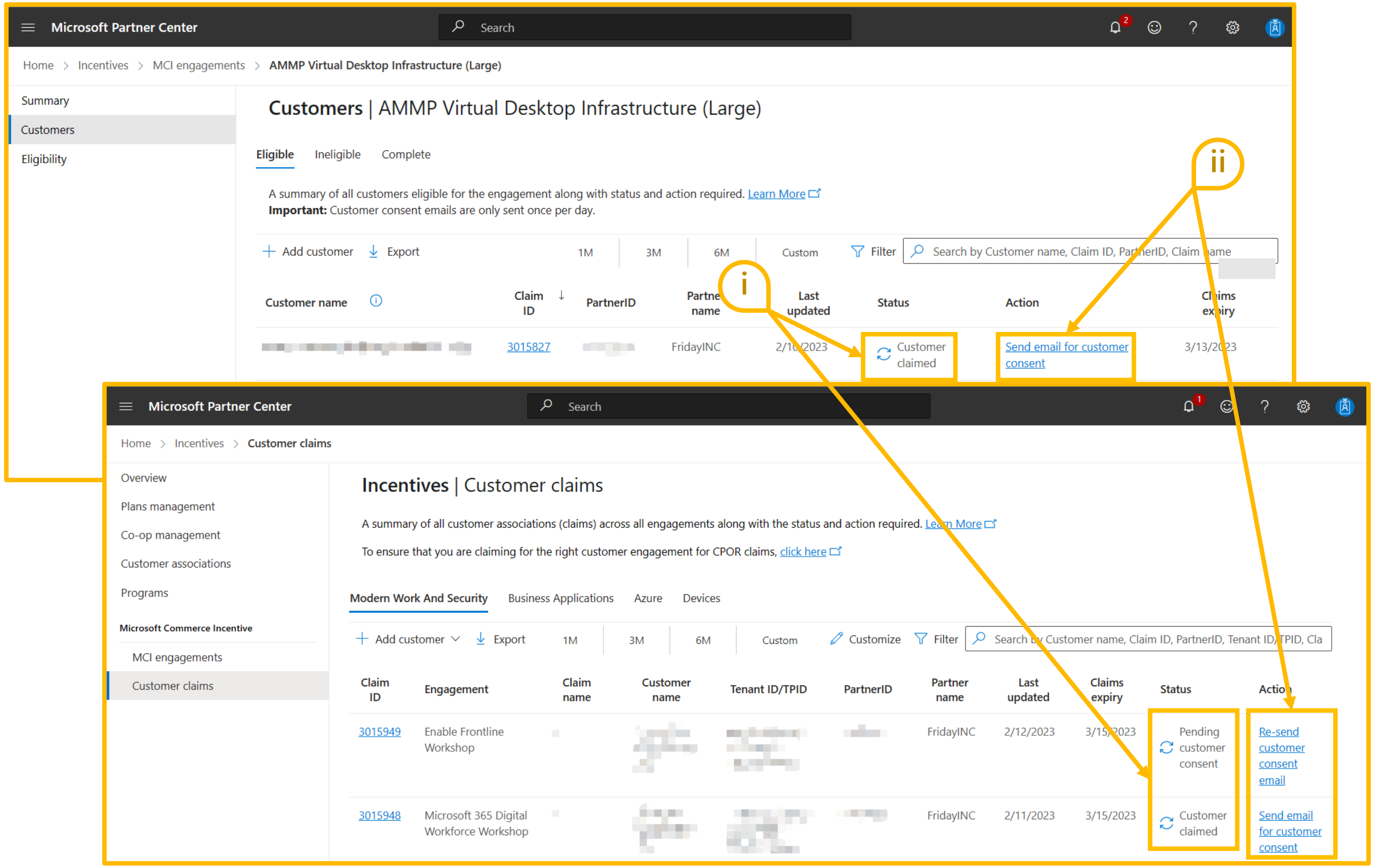
- ✓ The customer contact listed in the claim will receive automated emails from Microsoft, containing links to the consent response form and post-engagement survey form. These links are unique, one-time-use URLs that lead to browser-based forms. **We recommend that customers add microsoft-noreply@microsoft.com 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.**

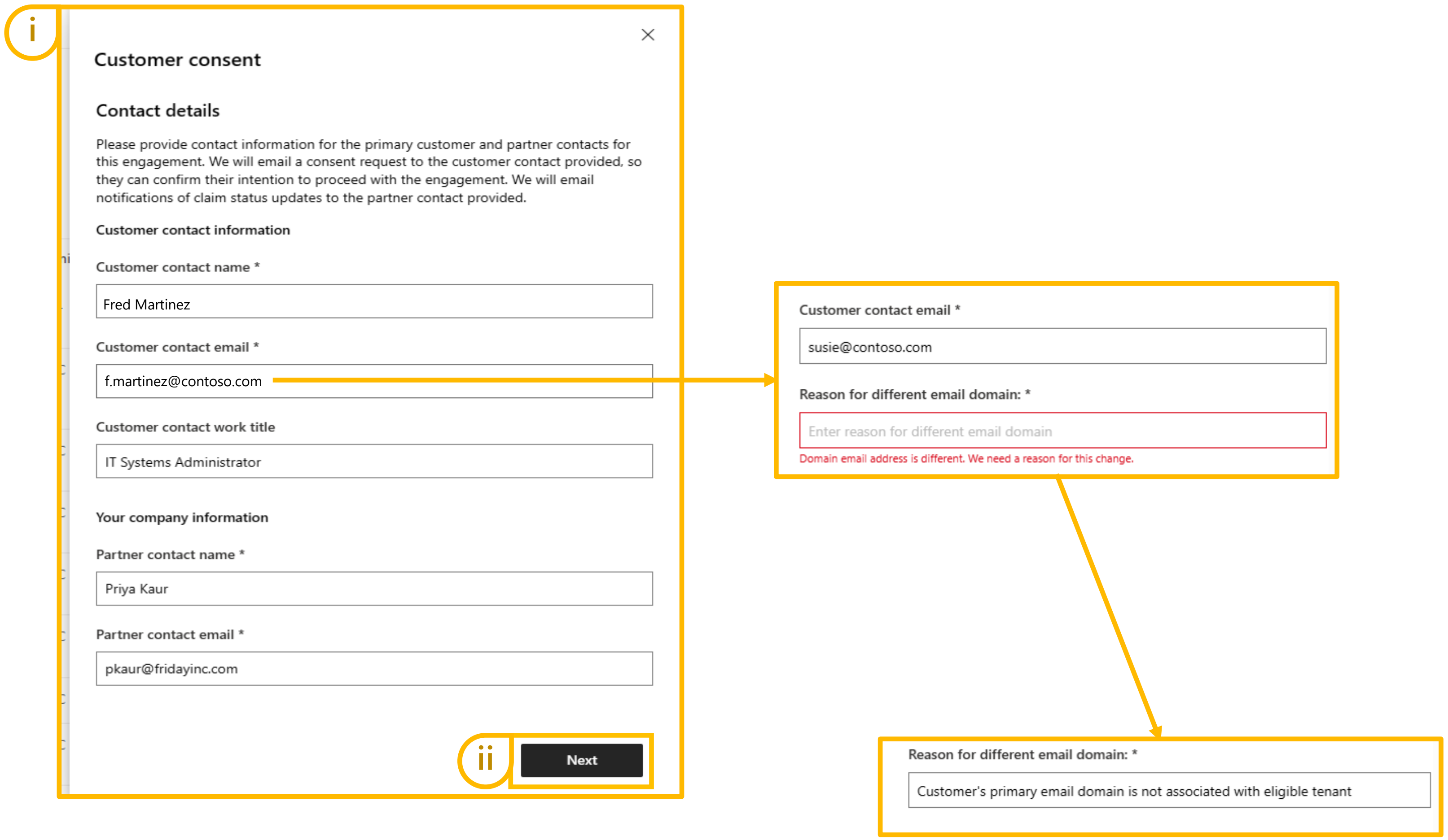


# Request consent – Provide contact details (2/4)

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.**

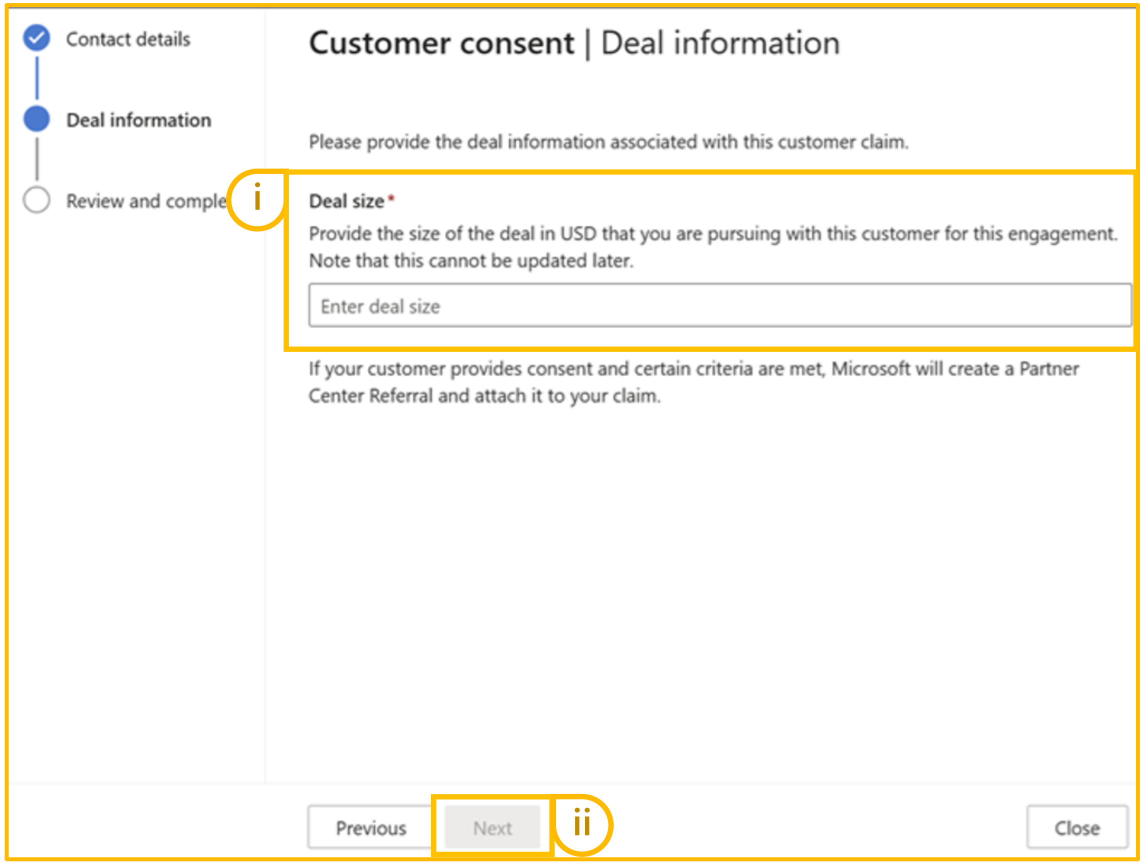


# Request consent – Provide deal information (3/4)

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.**



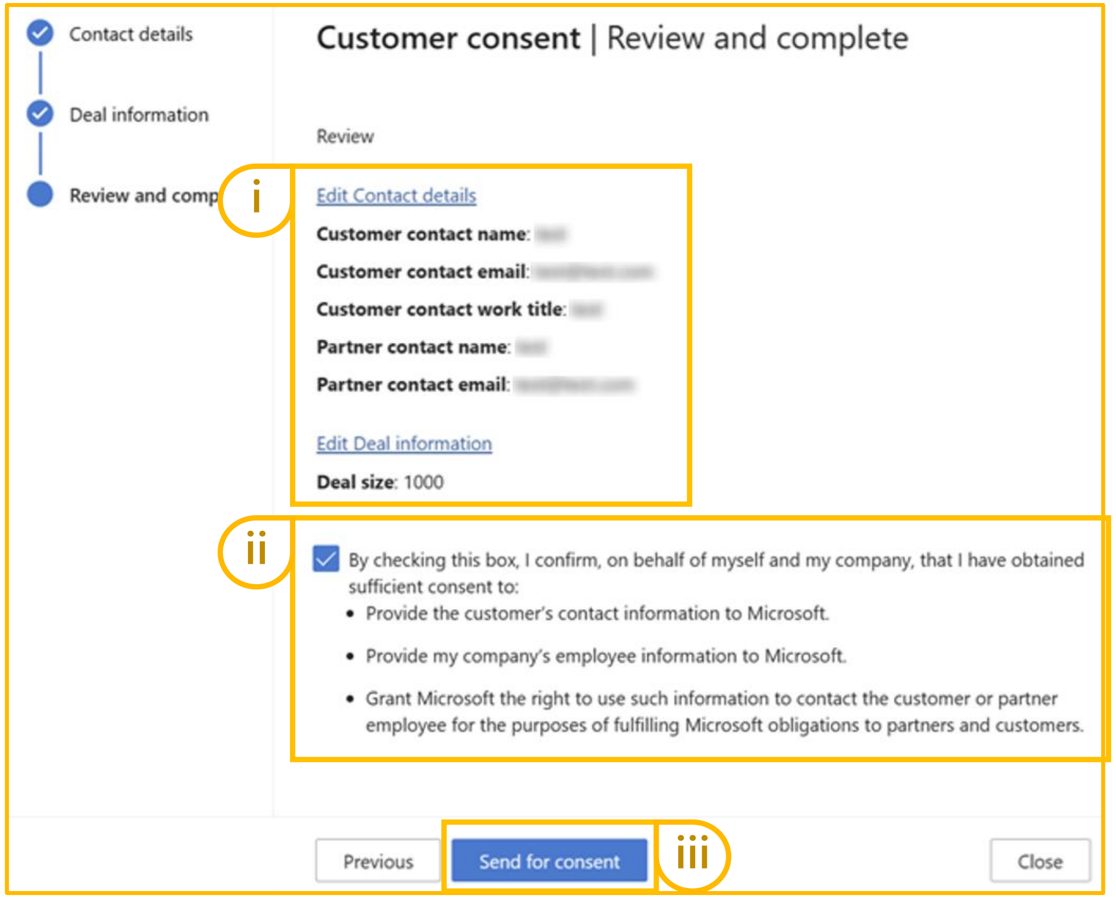
# Request consent – Review and complete (4/4)

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.

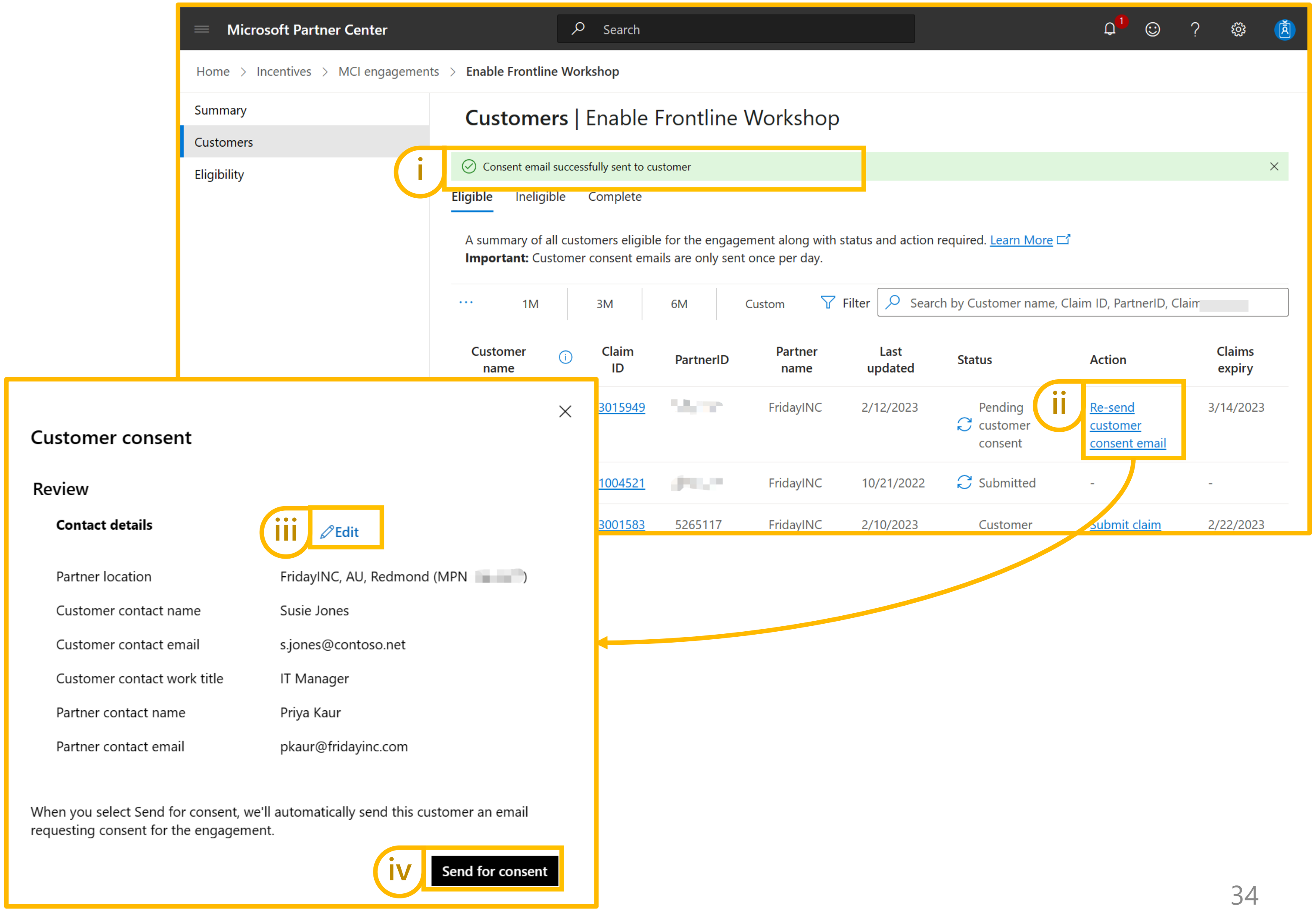
ii. If your customer did not receive the consent email or you need to change the customer contact, click **Re-send customer consent email.**

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.



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

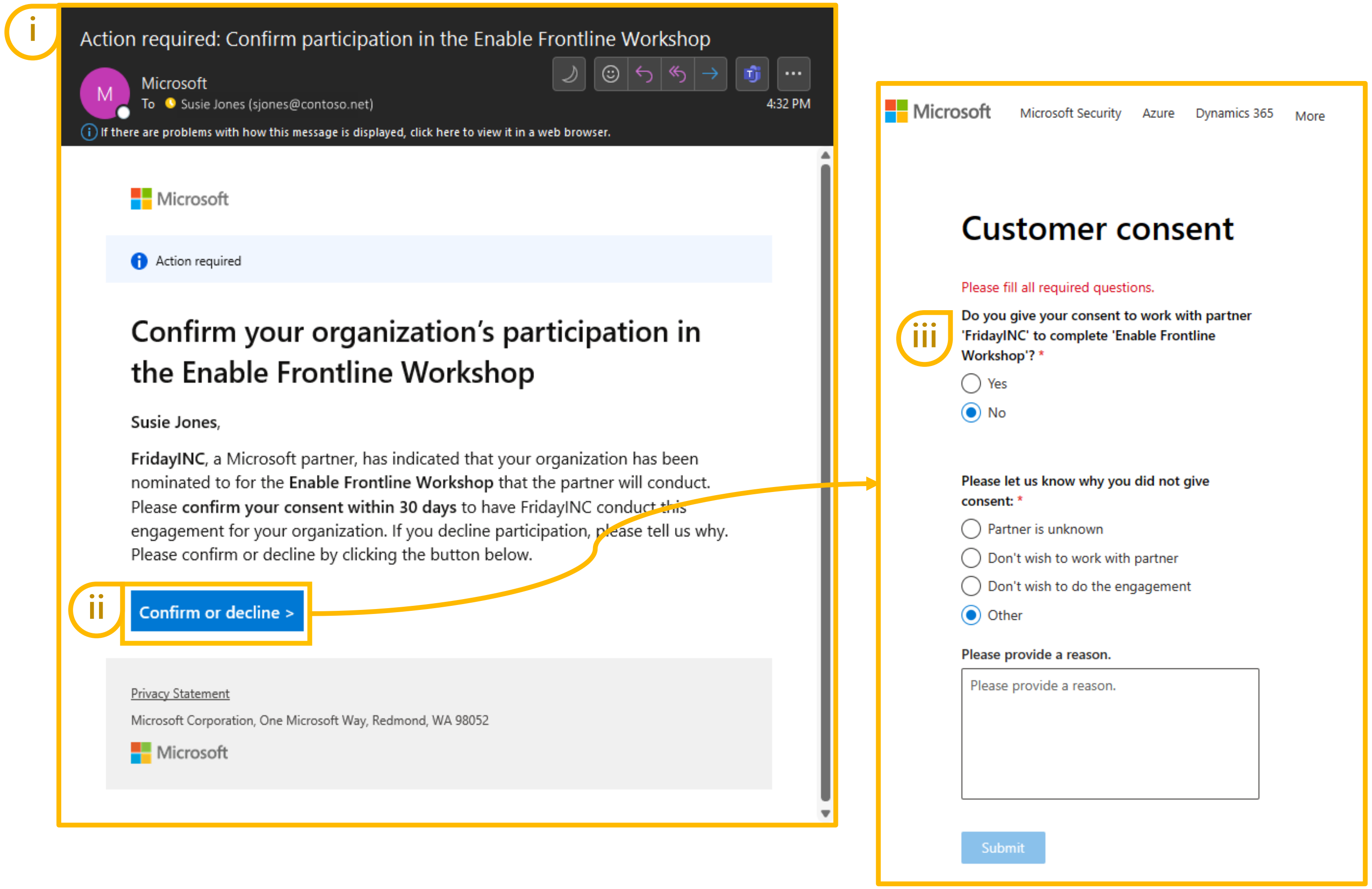
i. The customer contact specified in the claim will receive an email with the following details:

- ✓ **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.**

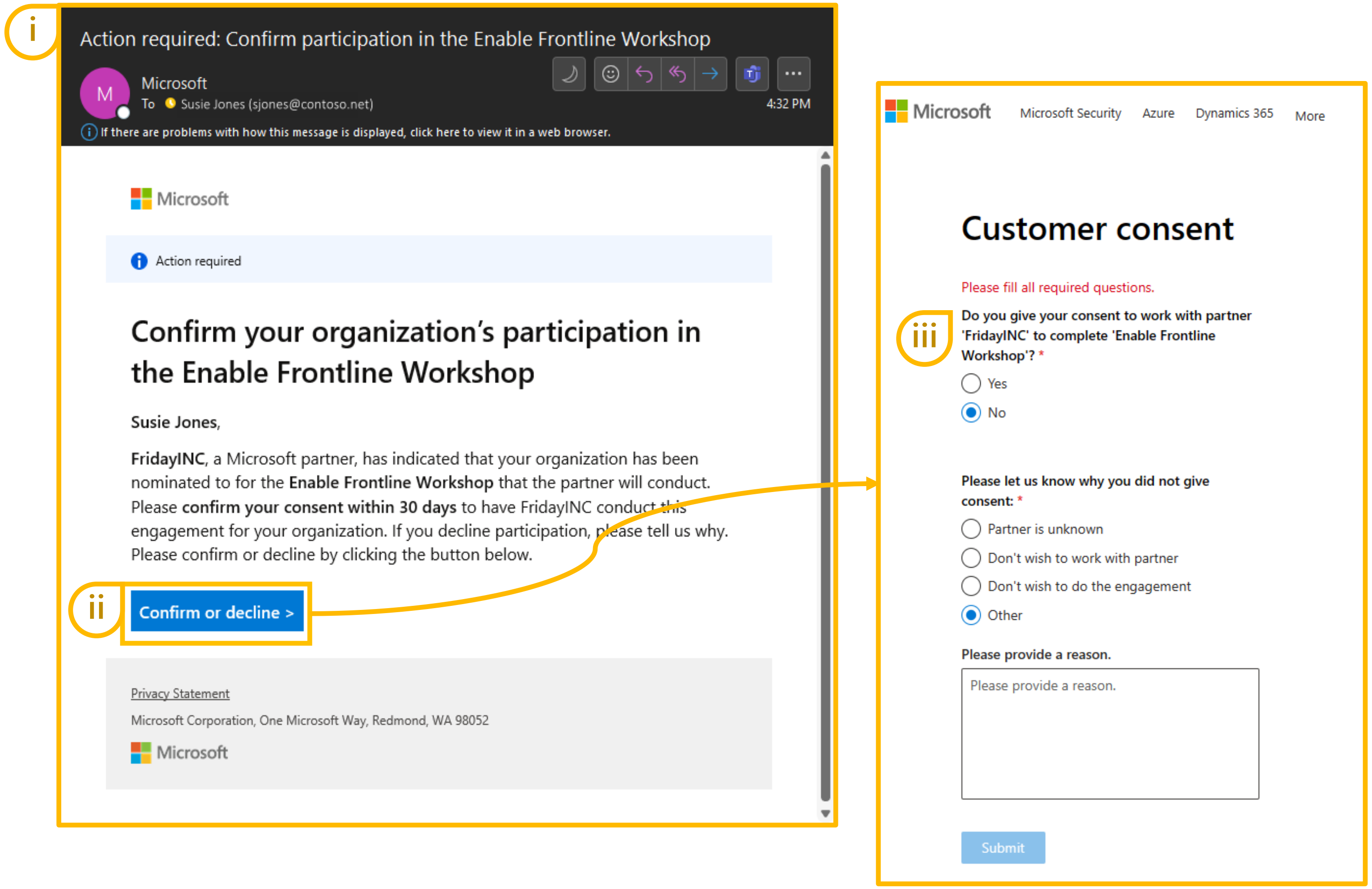


# Customer experience (2/2) – Policies and troubleshooting

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:<br>• **Cancelled**<br>• **Customer consent declined**<br>• **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.*

# Allowed claim actions by user type and claim status

Customers, Partners, and Microsoft POE reviewers all have different permissions for allowed actions when interacting with Partner Activities claims, consent response forms, and survey response forms. These permissions activate or deactivate when the claim's status changes.

Review the table below to see what actions are allowed for each type of user at each stage of the claim process.

| Allowed Actions / Claim Status | 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 |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| **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 | - |

** Microsoft's POE review team is only actively monitoring the comments and POE documentation on claims that are in **Submitted** or **Under Review** status. If you require assistance with a claim that is **not** currently in **Submitted** or **Under Review** status, please contact the Engagements support team via [Partner Center Support]() and provide the claim details and issue description. The Engagements support team will ensure that the POE review team is notified to check your claim details as needed.*

# Proof of Execution (POE) Components

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 Survey

ii. Customer Survey*

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 customer survey. 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

# 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

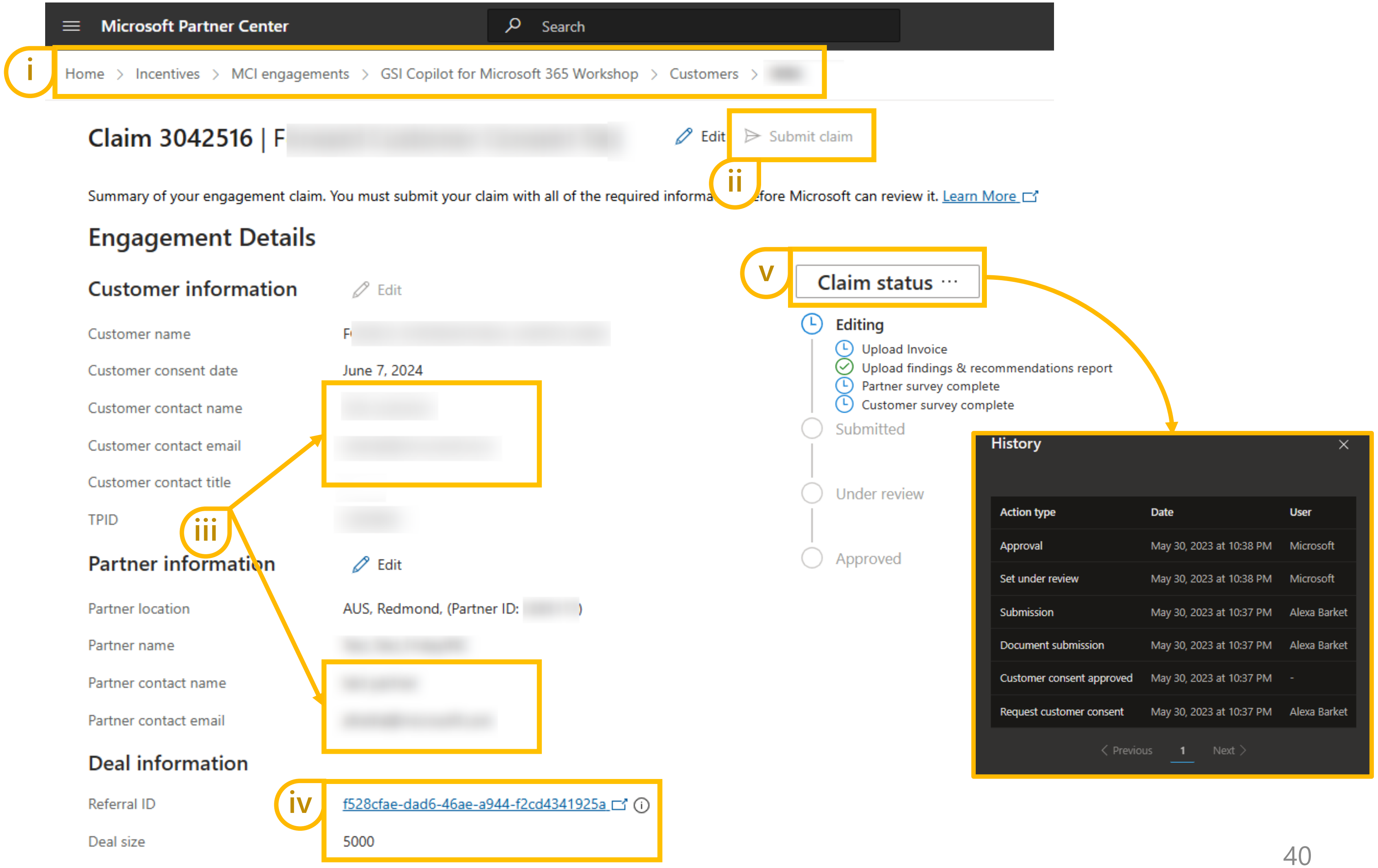
- ✓ Customer name will auto-populate based on the organization name defined by your customer for their ID. If the customer wishes to change this name, we recommend that they review **this guidance**.

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.



# 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.

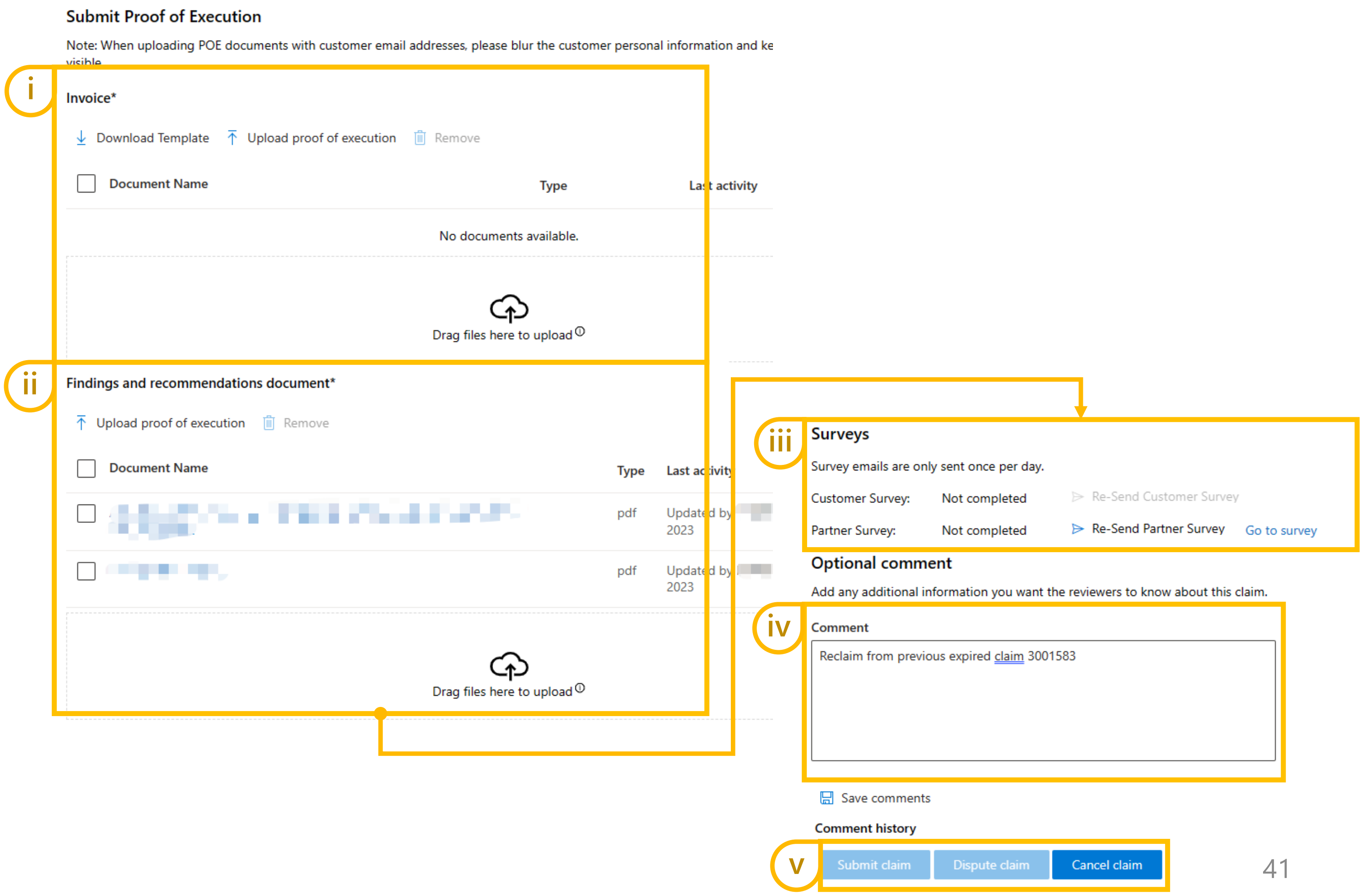
iii. Surveys

- ✓ 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.



# 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.

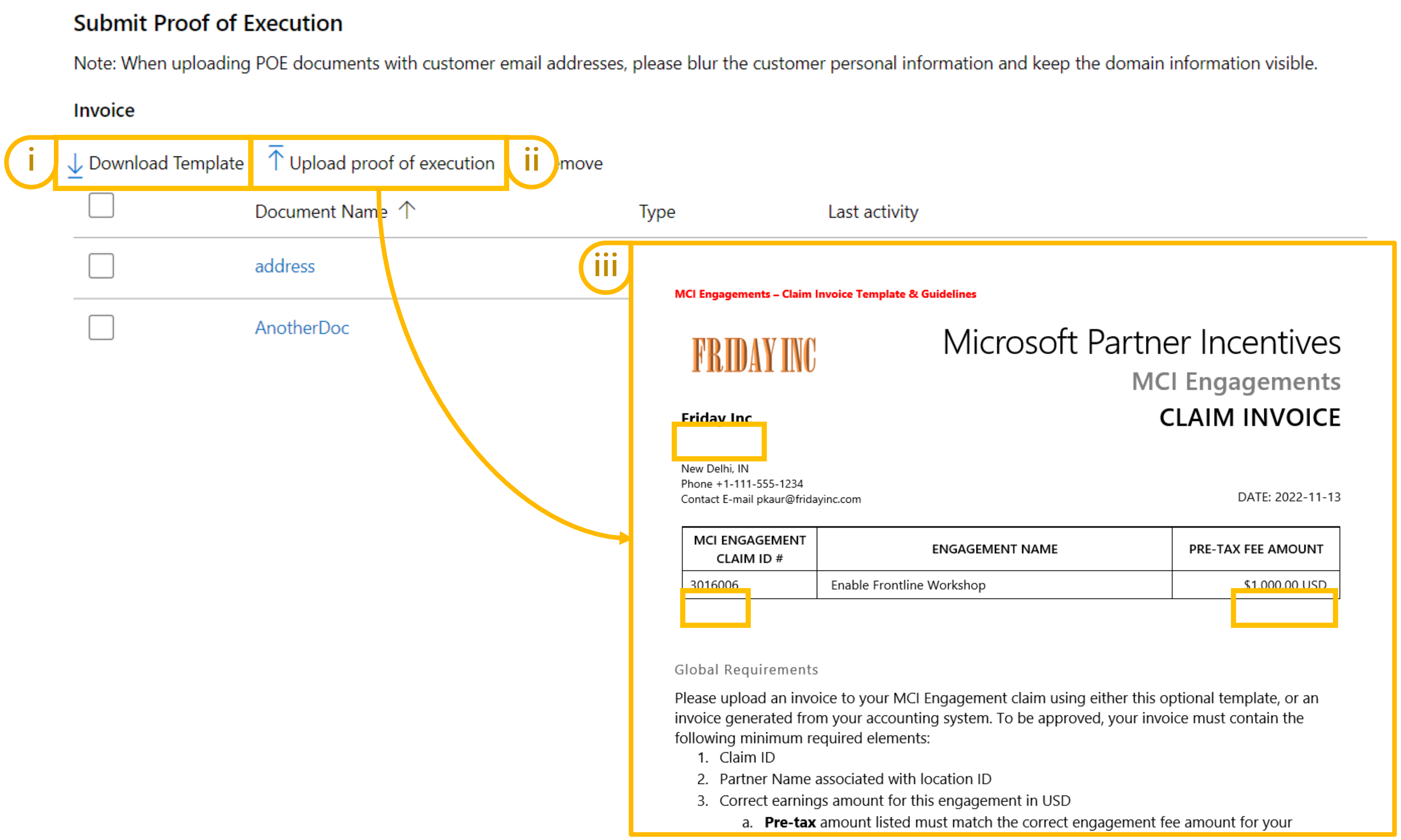
iii. Each claim must have a separate, unique invoice with the following minimum required elements

- ✓ 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.



# POE documentation requirements

- POE documentation requirements are different for every engagement, and current published templates must be always used.
  - ✓ Partners are responsible for monitoring changes to engagement-specific POE requirements. Claims submitted for review with outdated POE may not be approved.
- You can download the most recent updated POE templates and other supporting engagement execution materials by clicking the links provided in each Engagement's **Summary** page.
- Your POE must show:
  - ✓ Unique, customer-specific details. Duplicative POE submittals or POE details identical to template examples are not permitted
  - ✓ All required slides, exports, and sections present and completed
- Acceptable filetypes: .pdf, .ppt, .pptx, .doc, .docx, .msg, .xls, .xlsx
- POE review is currently supported in English, French, and Japanese.
- Public Sector Disclosure (PSD) - PSD is required when customer is a public sector entity located in India, Puerto Rico, or USA. Claims for commercial entities and public sector customers in other countries do not require PSD.
  - ✓ Recommended PSD template: **https://aka.ms/MCIEngagementsPSD**
- All documentation required for POE review and claim approval must be uploaded by the partner directly to the relevant claim in Partner Center.
- MCI Partner Activities Engagement POE documents are not accepted for review via any other means of submittal (email, share link, etc). Microsoft cannot upload documents to a claim on a partner's behalf.
- It is not possible to transfer documents uploaded to one claim to any other claim.

# Customer Survey (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**

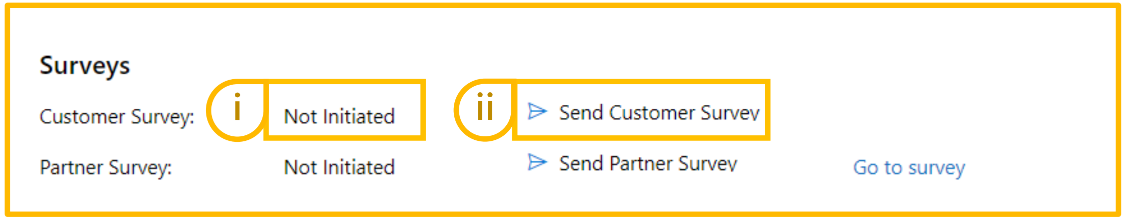
ii. Click to **Send or re-send** unique, one-time-use Customer survey link email

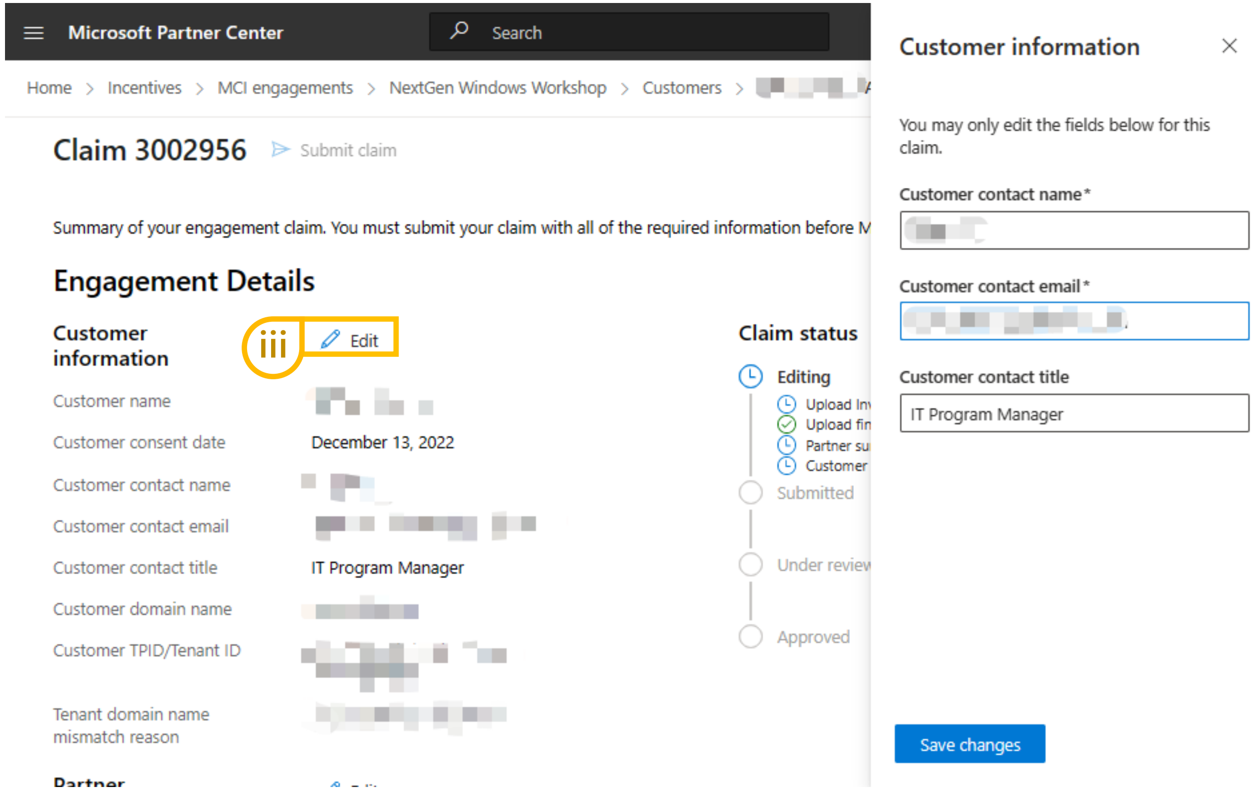
   ✓ Each claim has a maximum limit of 1 customer survey email send actions per day. If you have already attempted to send the survey email today, please wait 24 hours before your next attempt.

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.



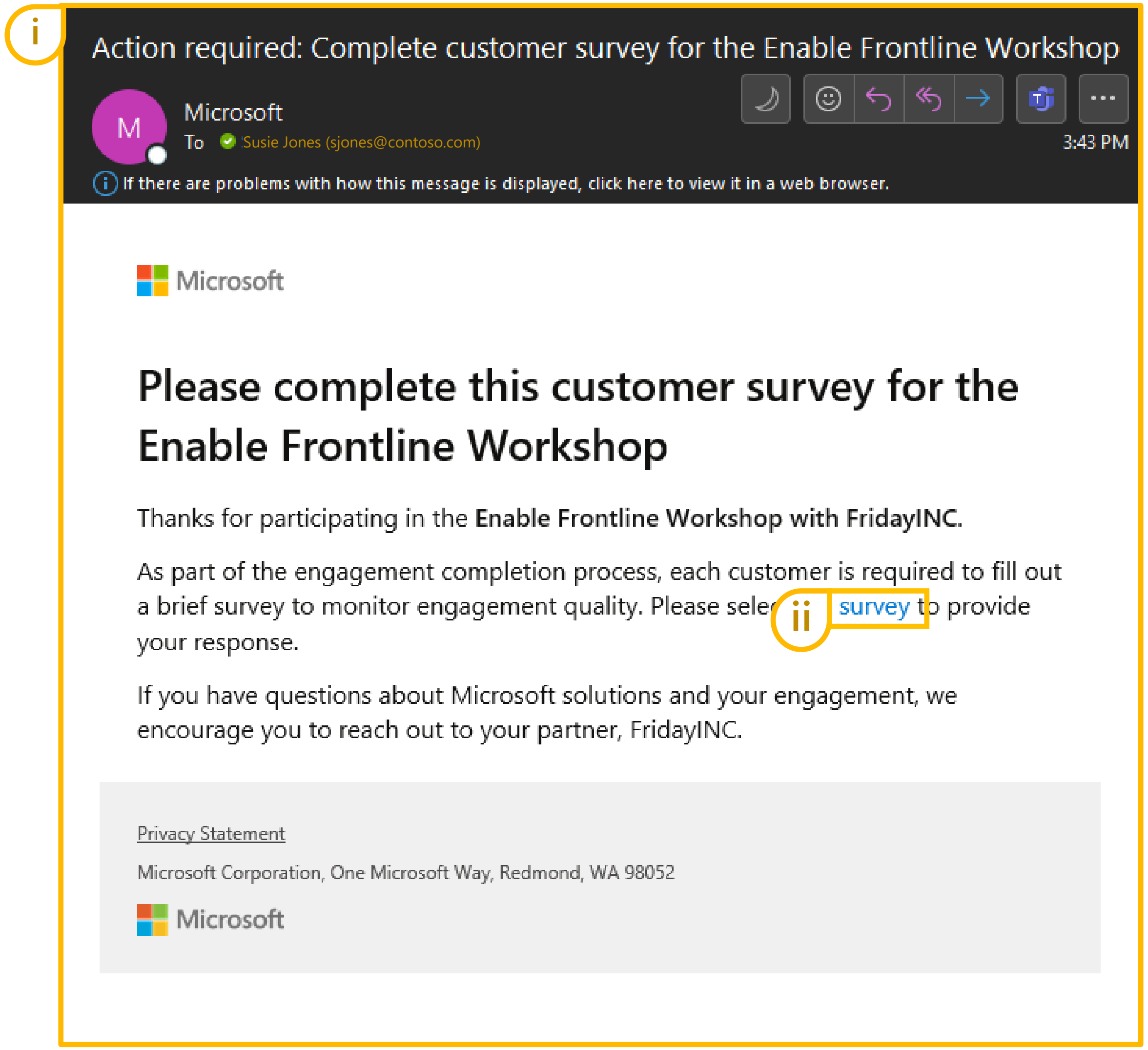
# Customer Survey (2/3) – Customer respondent experience

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.



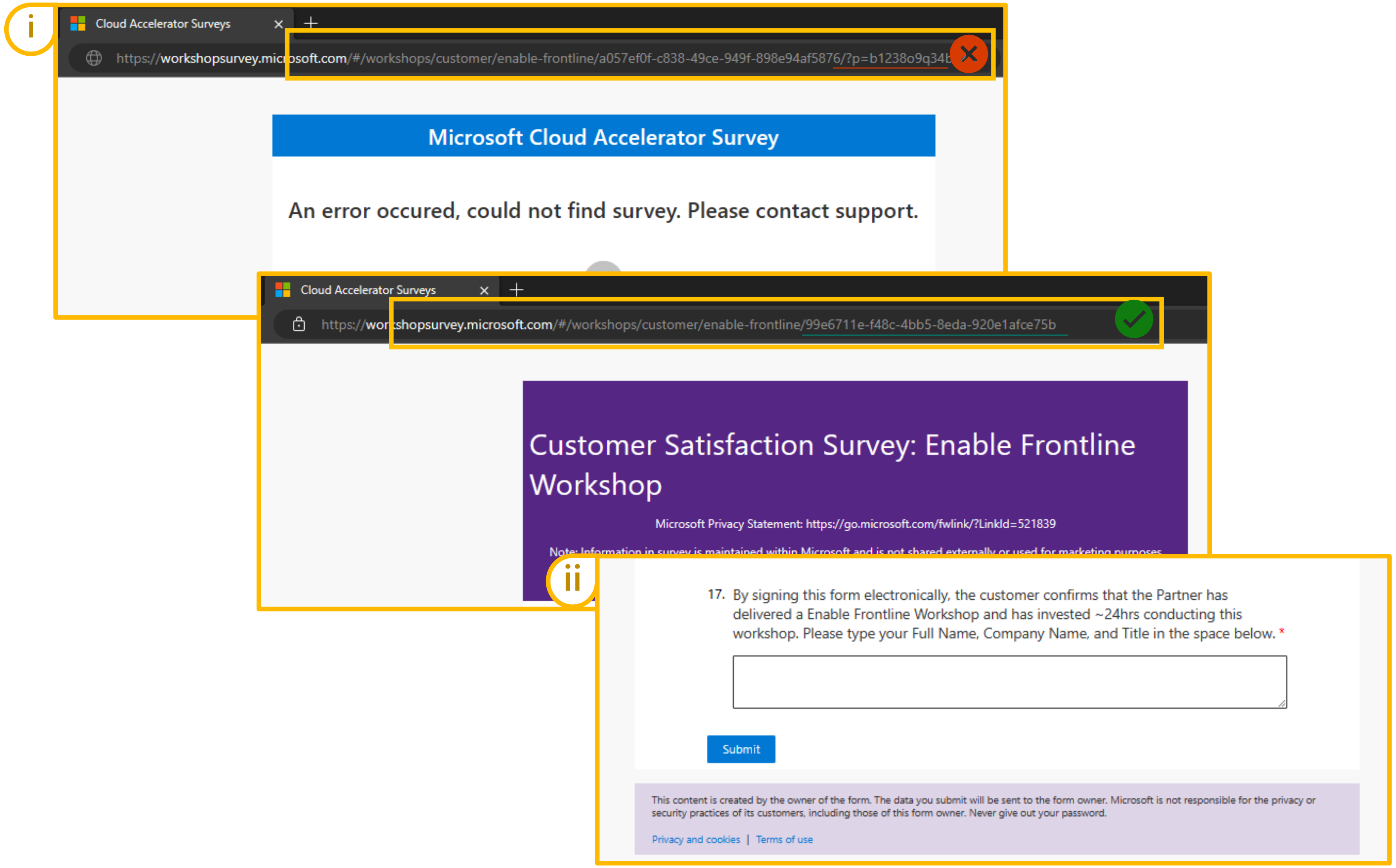
# Customer Survey (3/3) – Customer respondent experience

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 Survey will vary with each engagement, the final question on all Customer Surveys 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 Survey signature is not valid with all required elements per this prompt's instructions, the claim may be rejected.



# Partner Survey (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**

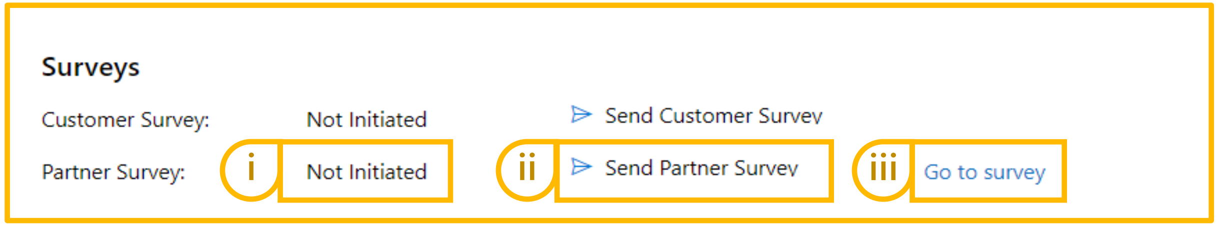
ii. Send or re-send **Partner Survey email**

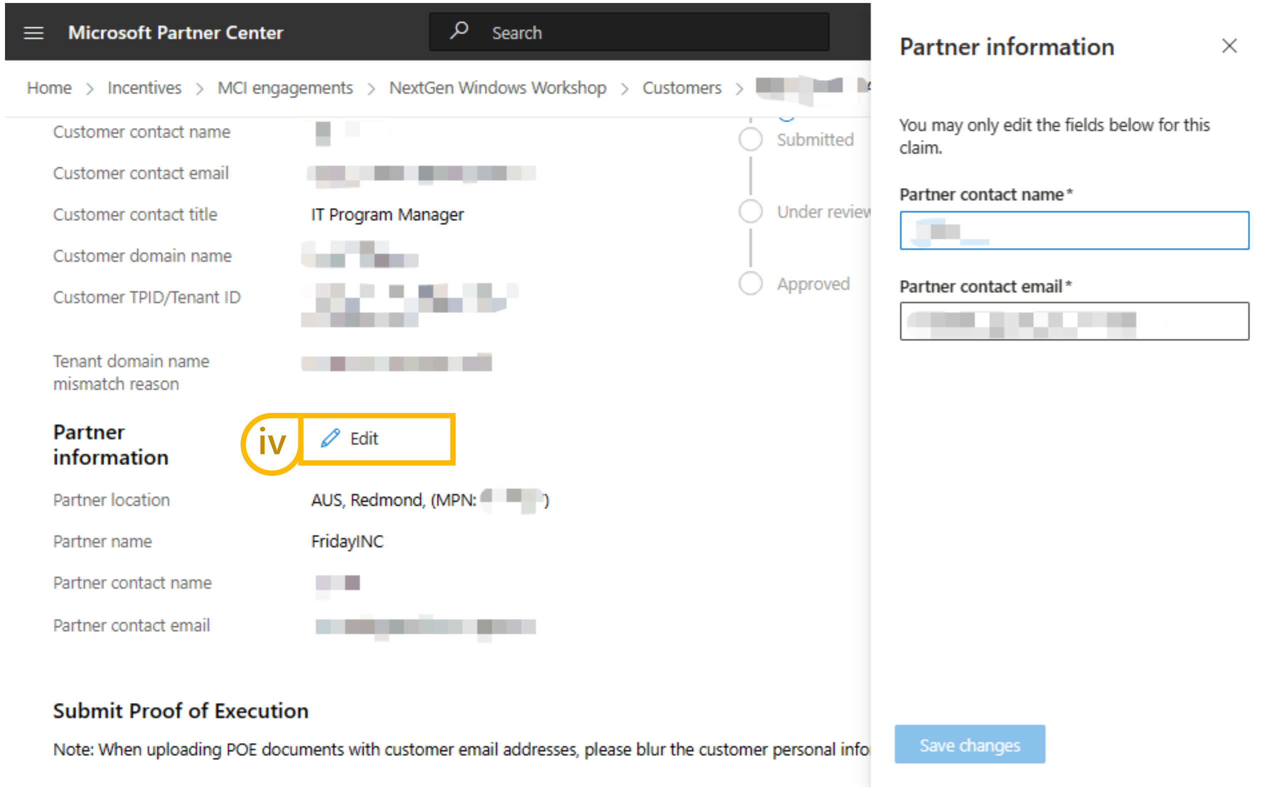
- ✓ Each claim has a maximum limit of 1 partner survey email send action per day. If you have already attempted to send the survey email today, please wait 24 hours before your next attempt, or access the survey form directly using Go to survey link

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.



# Partner Survey (2/3) – Partner respondent experience

i. If you click **Send Partner Survey** link in the claim, the partner contact specified in the claim will receive an email with the following details:

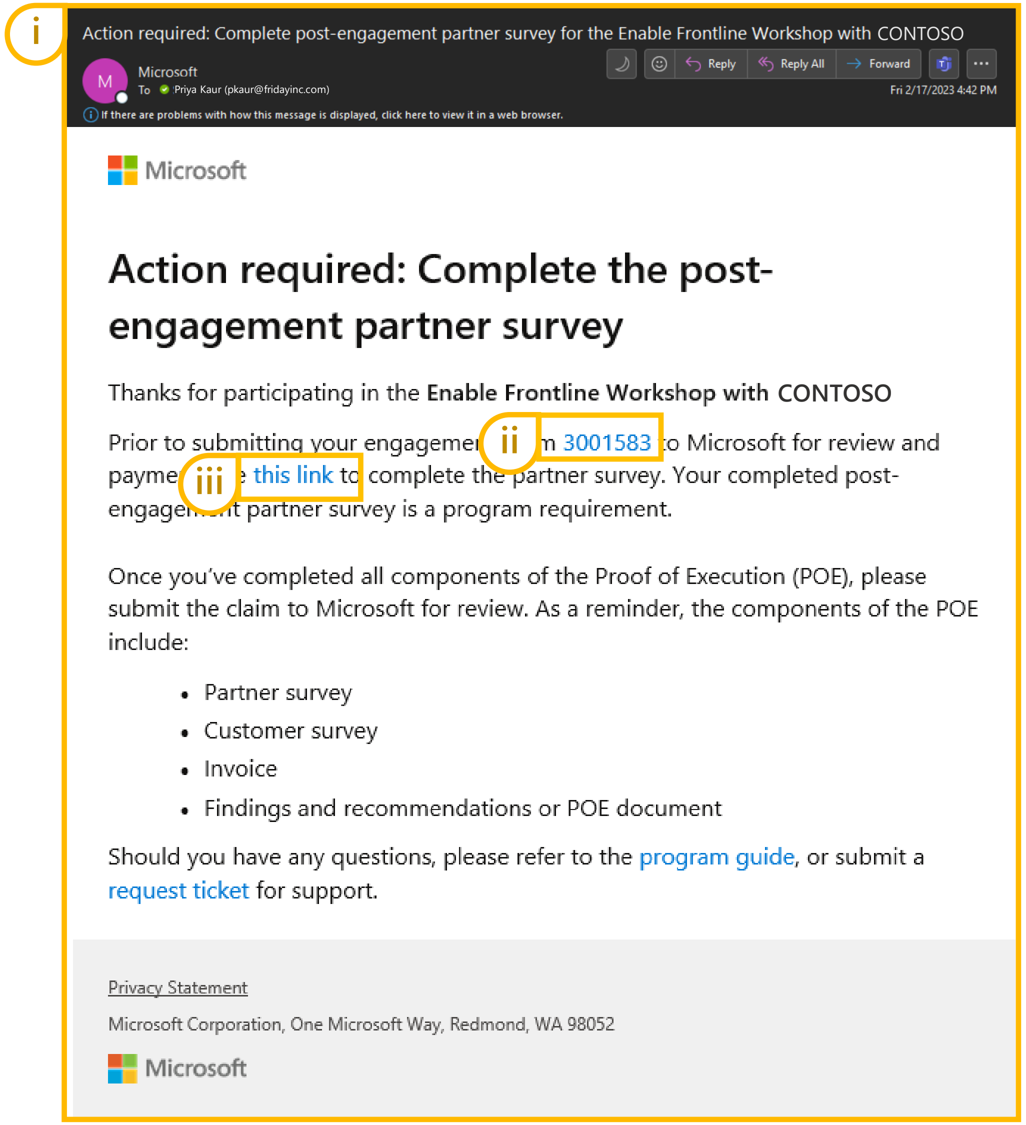
- ✓ Subject line: "Action required: Complete post-engagement partner survey for the [Engagement Name] with [Customer name]"
- ✓ From: microsoft-noreply@microsoft.com
- ✓ Body: See example

ii. Click to access **claim** – Sign into Partner Center with location-based Incentive role permissions required to view claim.

- ✓ Survey 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. Survey form link is unique for each claim.

- ✓ Survey 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.



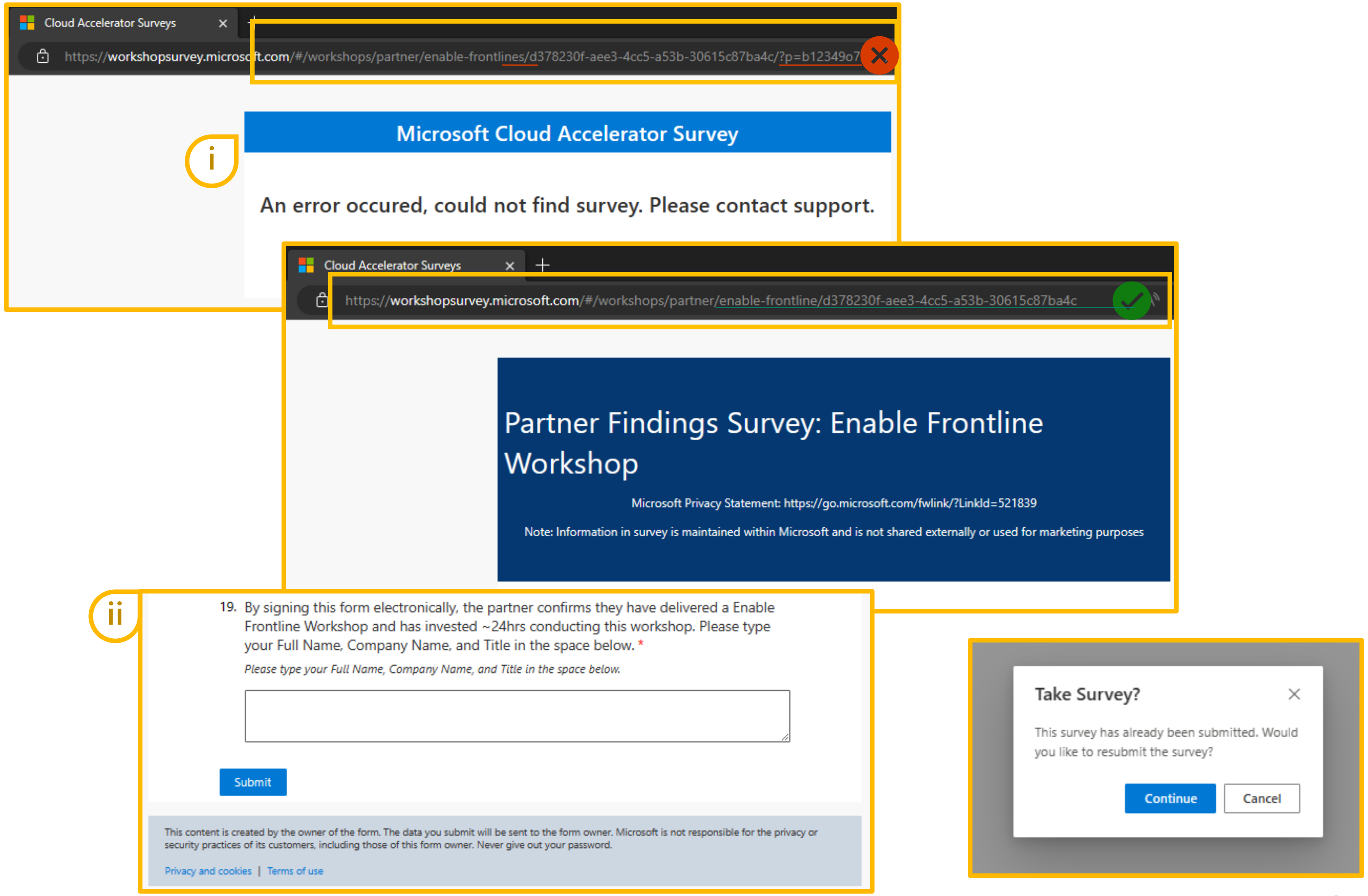
# Partner Survey (3/3) – Partner respondent experience

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 Survey will vary with each engagement, the final question on all Partner Surveys 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 Survey 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.

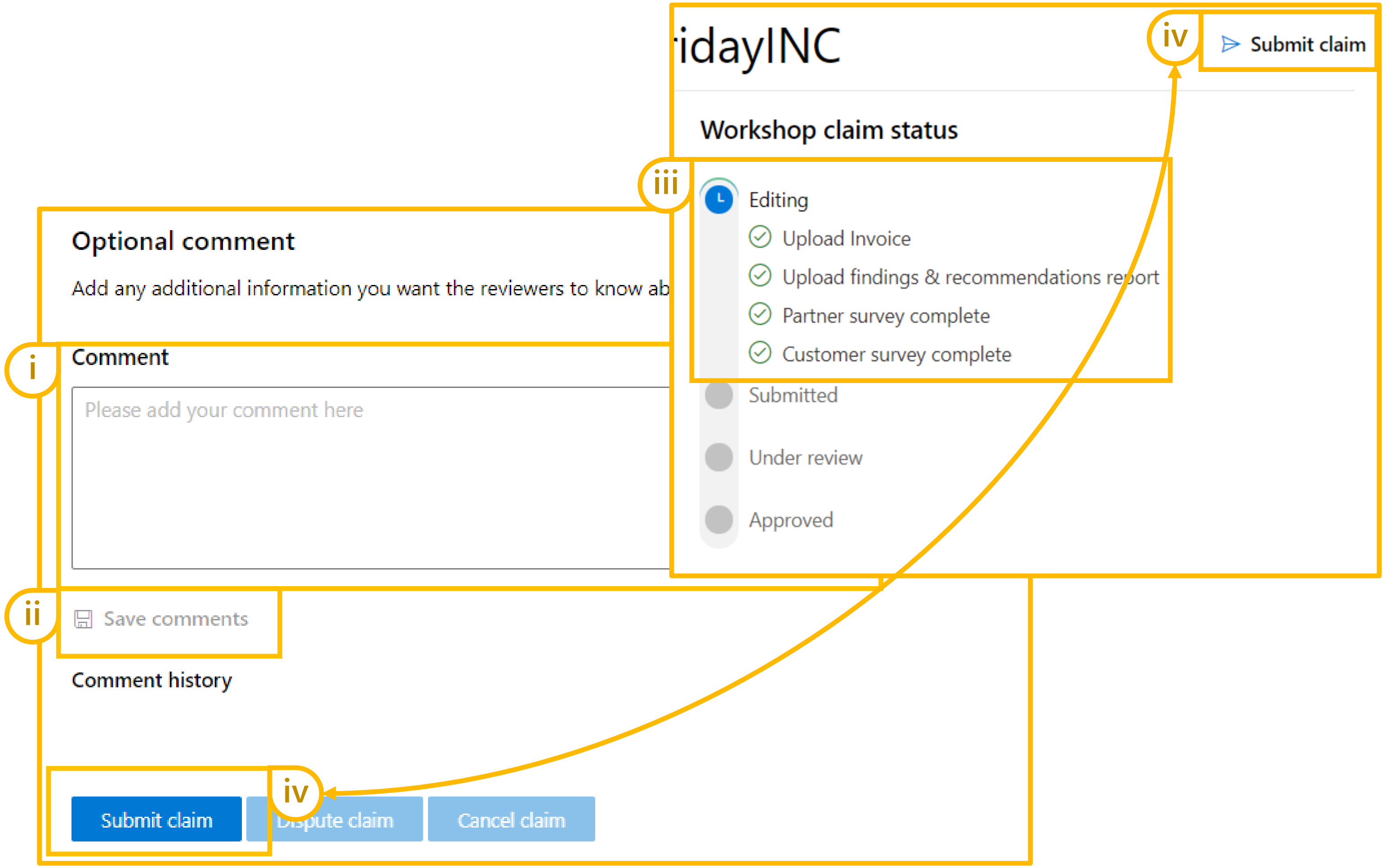
ii. Click to **save comments**.

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 Review Policies

Please note that Microsoft's Partner Activities POE review team is not actively monitoring comments or file uploads to claims that have not been **Submitted** to the review queue. If you require assistance with a claim that is not currently in **Submitted** or **Under Review** status, or are encountering technical difficulties with creating, managing and submitting your claims, please contact **Partner Center Support.**

Once the claim has been submitted and reviewed, Microsoft may revert with additional questions or request additional documentation from you by changing the claim status to **Action required**. You will be sent an email notification to alert you to the status change, and the specific details that prevented the reviewer from approving the claim will be communicated via the **Comments History** thread in the claim.

If the reviewer is unable to approve based on your initial submittal, up to 30 days may be added to the expiry deadline to allow for your response to reviewer inquiries, and any additional review. See **Claim Expiration Timelines** for more detail.

The POE content review criteria is specific to each engagement and is determined by that engagement's business program leaders and solution play teams.

- ✓ If you wish to withdraw your claim after you have clicked **Submit**, inform your POE reviewer via the claim comments and they will reject the claim at your request.
- ✓ If your claim is **Approved**, Microsoft will send a claim status notification email, and you will receive payment via wire transfer to your location's payment profile as per the next standard payment cycle of the MCI program.
- ✓ If your claim is **Rejected**, Microsoft will send a claim status notification email. You will have 30 days to initiate and then **submit** a **dispute** on the claim. The specific details that led the reviewer to reject the claim will be communicated via the **Comments History** thread in the claim.
- ✓ If your claim **expires**, it cannot be reactivated. You will need to submit a new claim in order to proceed.

# Claim status change notification emails

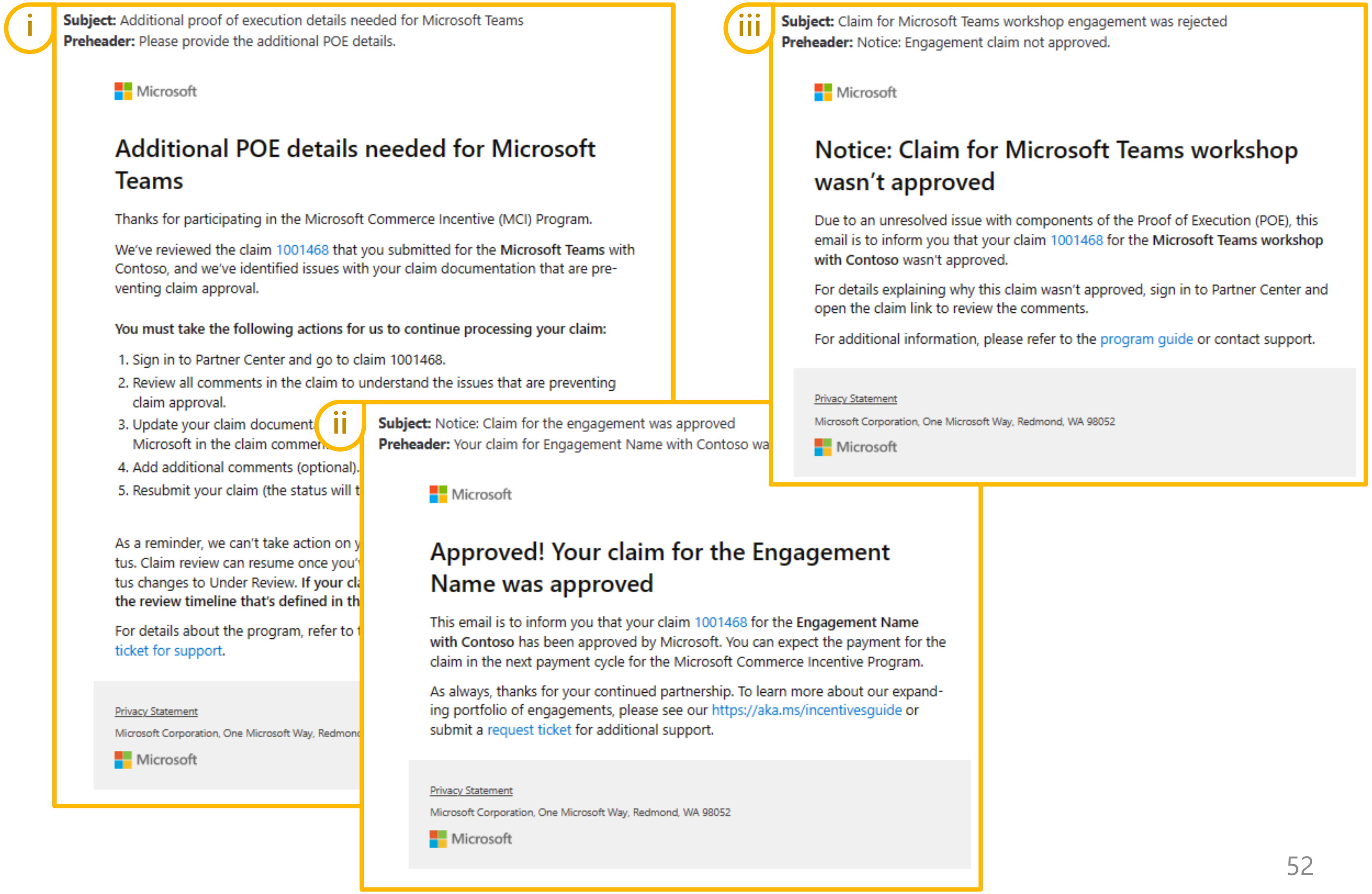
When Microsoft changes the status of your claim to Action required, Approved, or Rejected, microsoft-noreply@microsoft.com will send an email notification alerting you to the status change.

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**



# Action required: Responding to reviewer

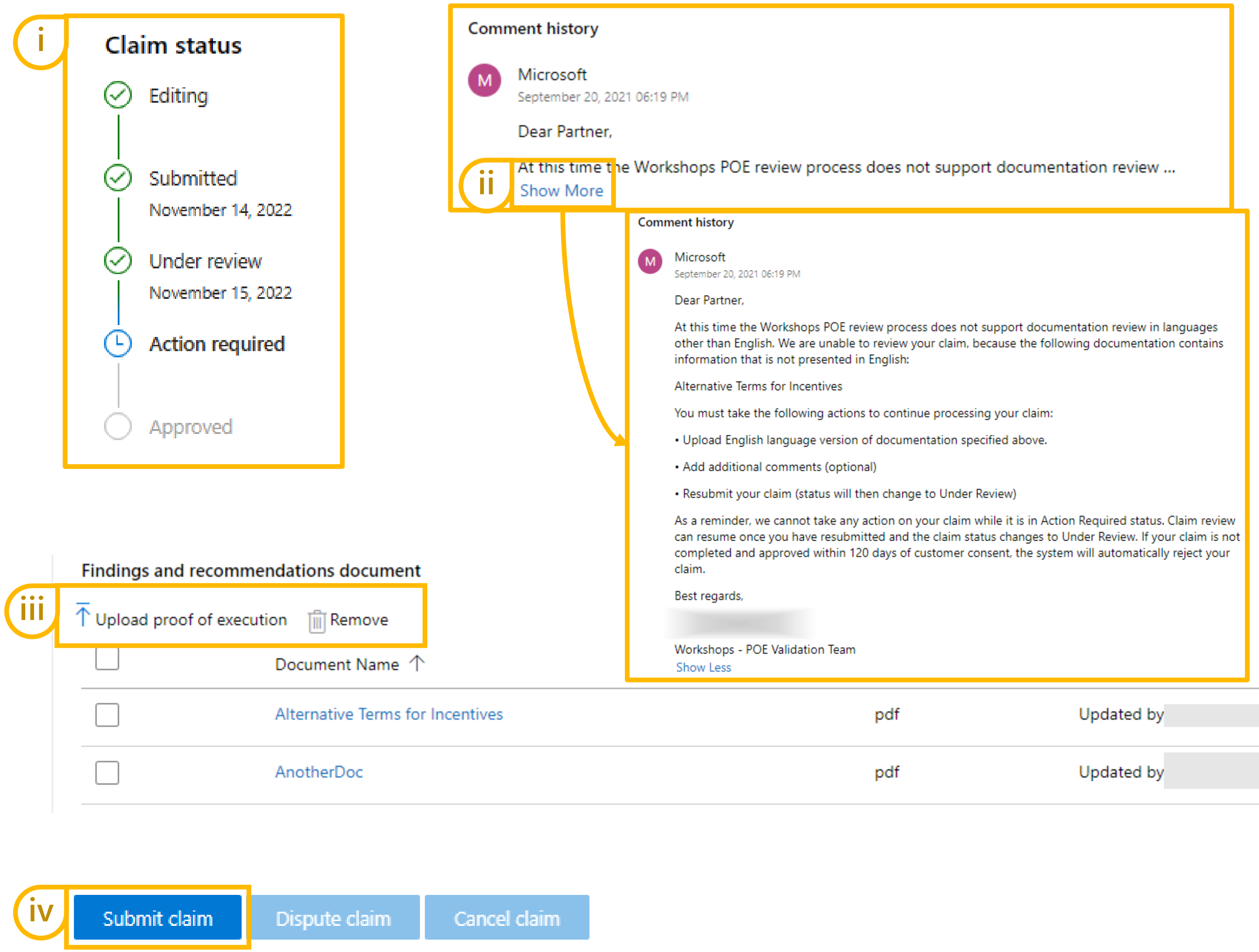
If the POE reviewer is unable to approve based on your initial submittal, the following will occur:

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.

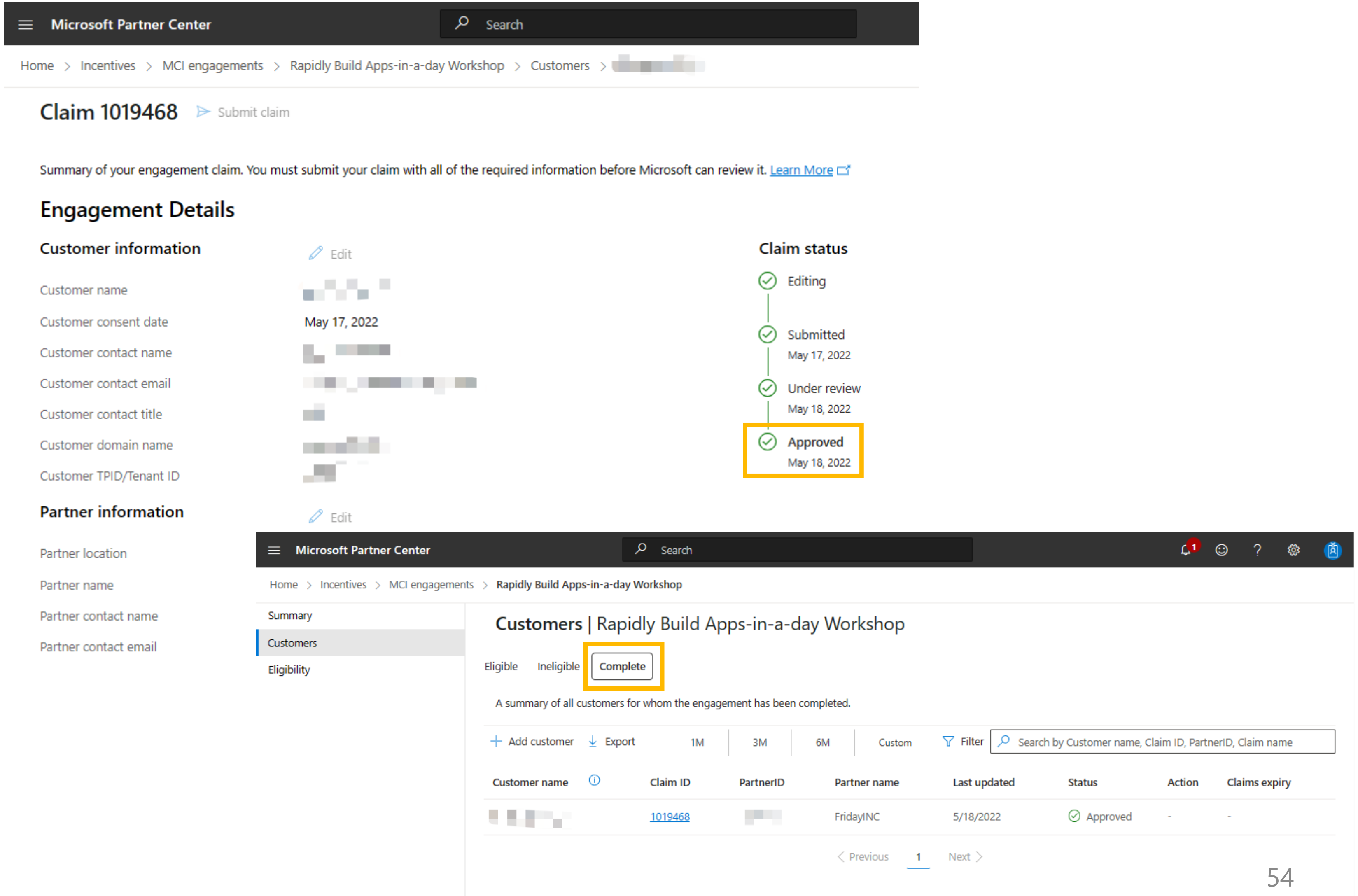
iv. Click **Submit**. If you do not click Submit, the claim will remain in Action Required status and any changes will not be reviewed.
   - ✓ NOTE: If a claim is still in Action Required status on the next expiry date, it will expire and cannot be reactivated. See **Claim Expiration Timelines**



# Claim approval

If your claim is approved, the following will occur:

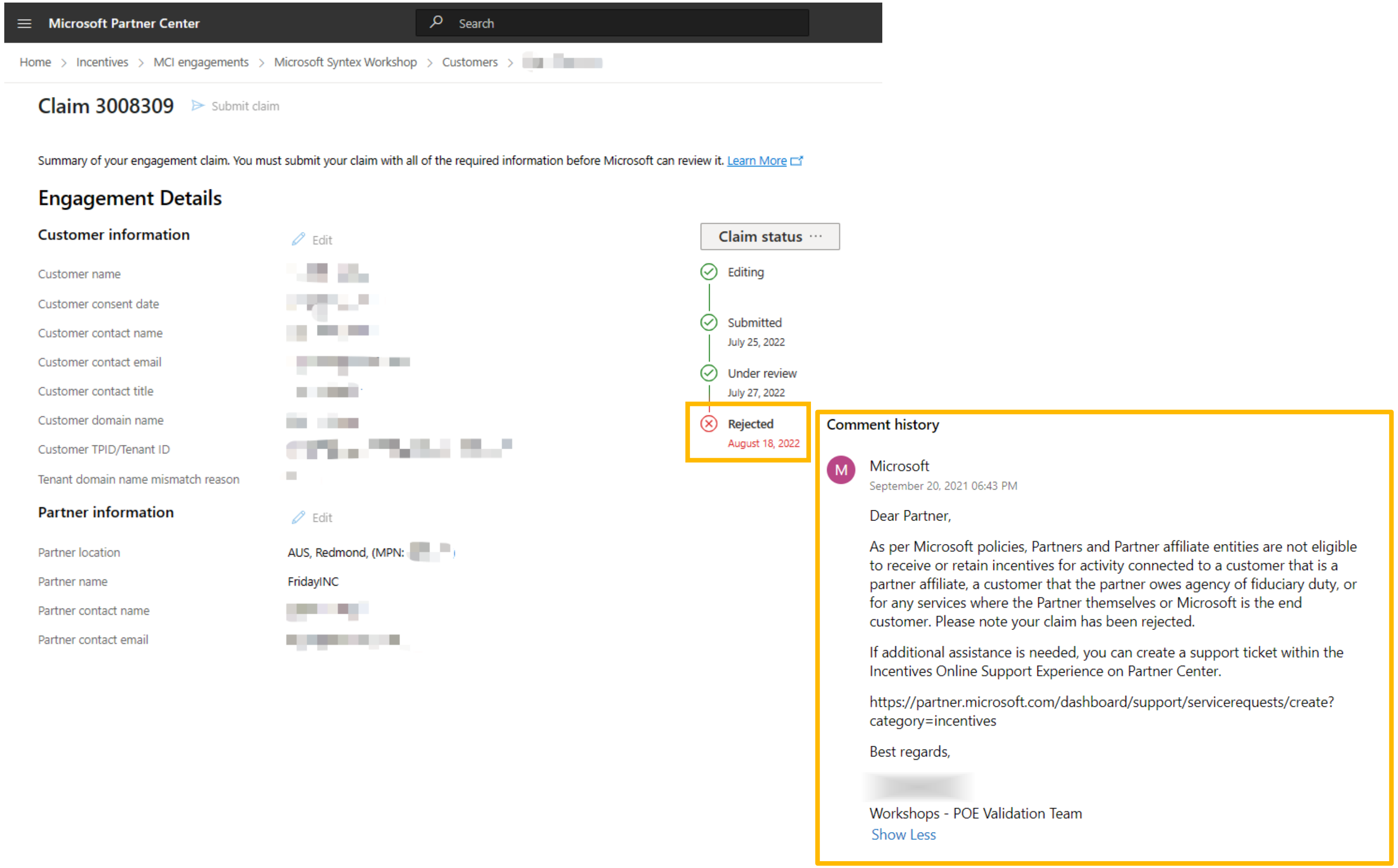
- ✓ The claim status will change to **Approved** in Partner Center.
- ✓ Claim status emails will be sent to the partner contact provided for this claim, along with the user who added/claimed this customer.
- ✓ Approved claims will appear in the **Complete** list of the respective Engagement's Customers 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 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.**



# 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.

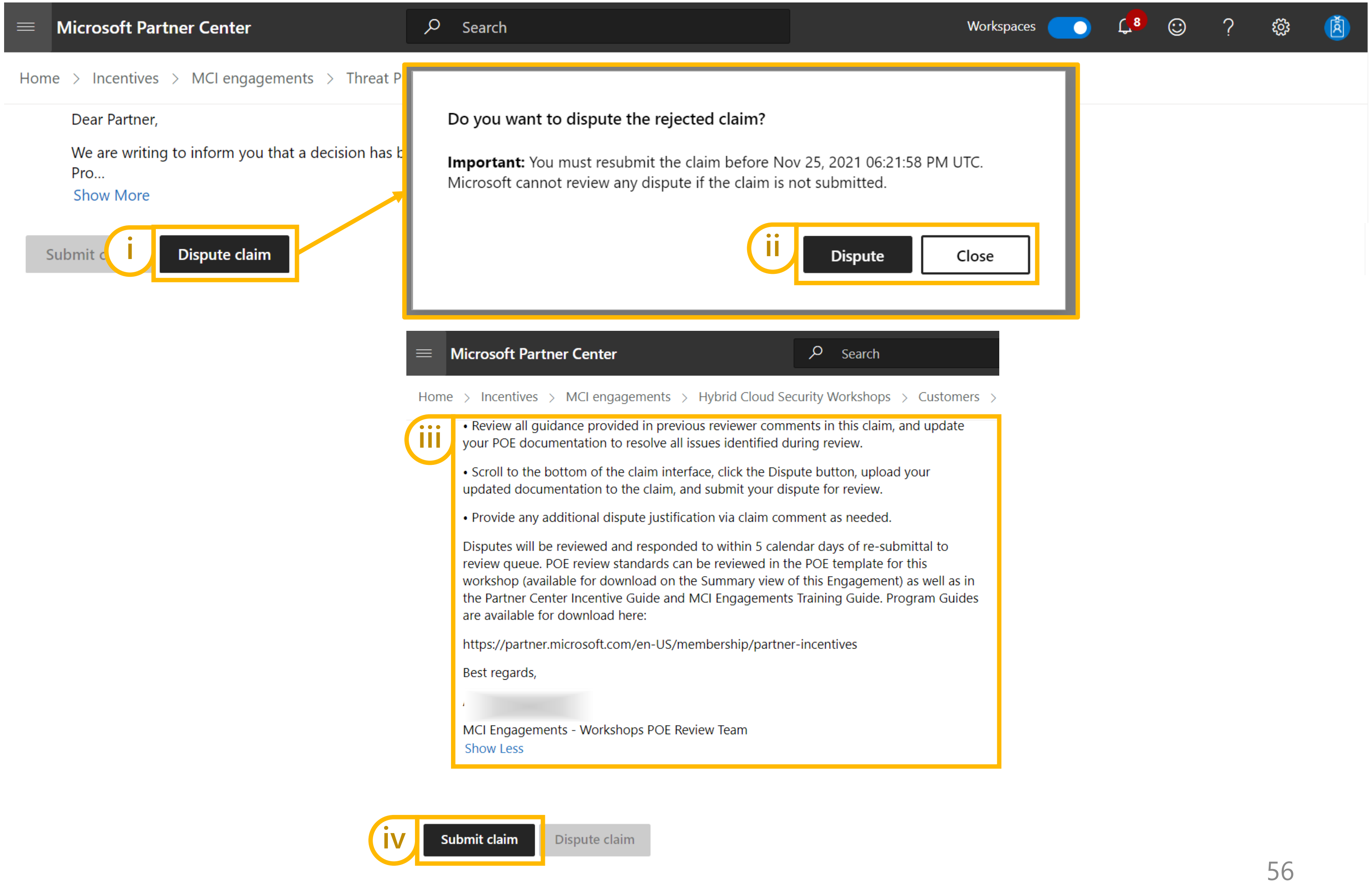
ii. Open claim and scroll to the bottom. Click **Dispute** claim to initiate dispute process.

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.



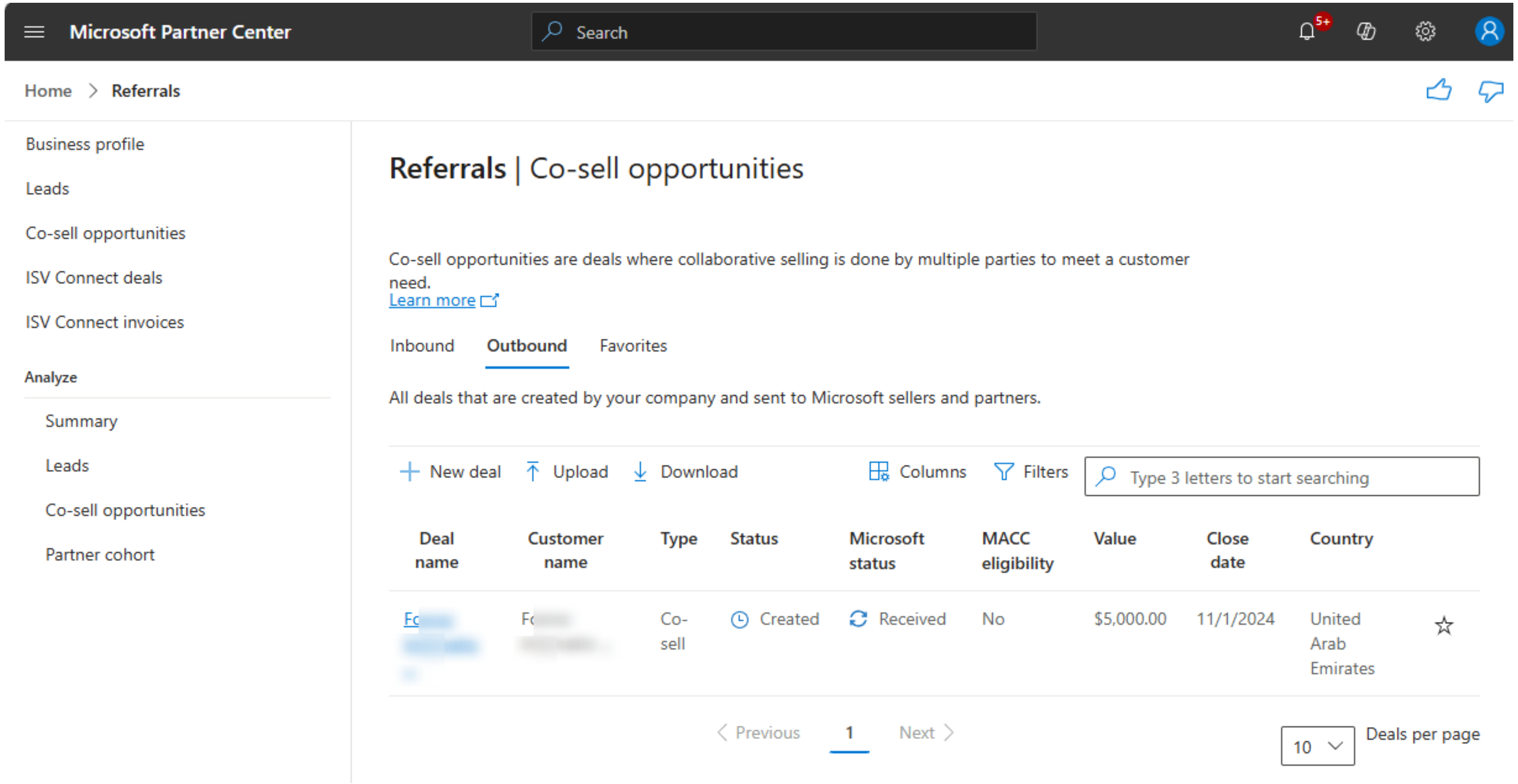
# Referrals Workspace

If the deal size and customer subsegment associated to your claim meet the internal referrals criteria established by Microsoft, an outbound co-sell opportunity deal will be automatically created in the **Referrals workspace** and associated to your claim. If this occurs, the referral link will appear in your claim in the **Deal Information** section.

You must have **Referrals admin** permissions to access this workspace. These permissions are separate from Incentives user or admin permissions. See **Find your workspaces, roles, and admins in Partner Center | Microsoft Learn** for more information on user roles.

i. Navigate to Referrals > Co-sell opportunities to review your deals.

ii. Deals that were created by the Partner Activities claims system will appear in the Outbound tab.

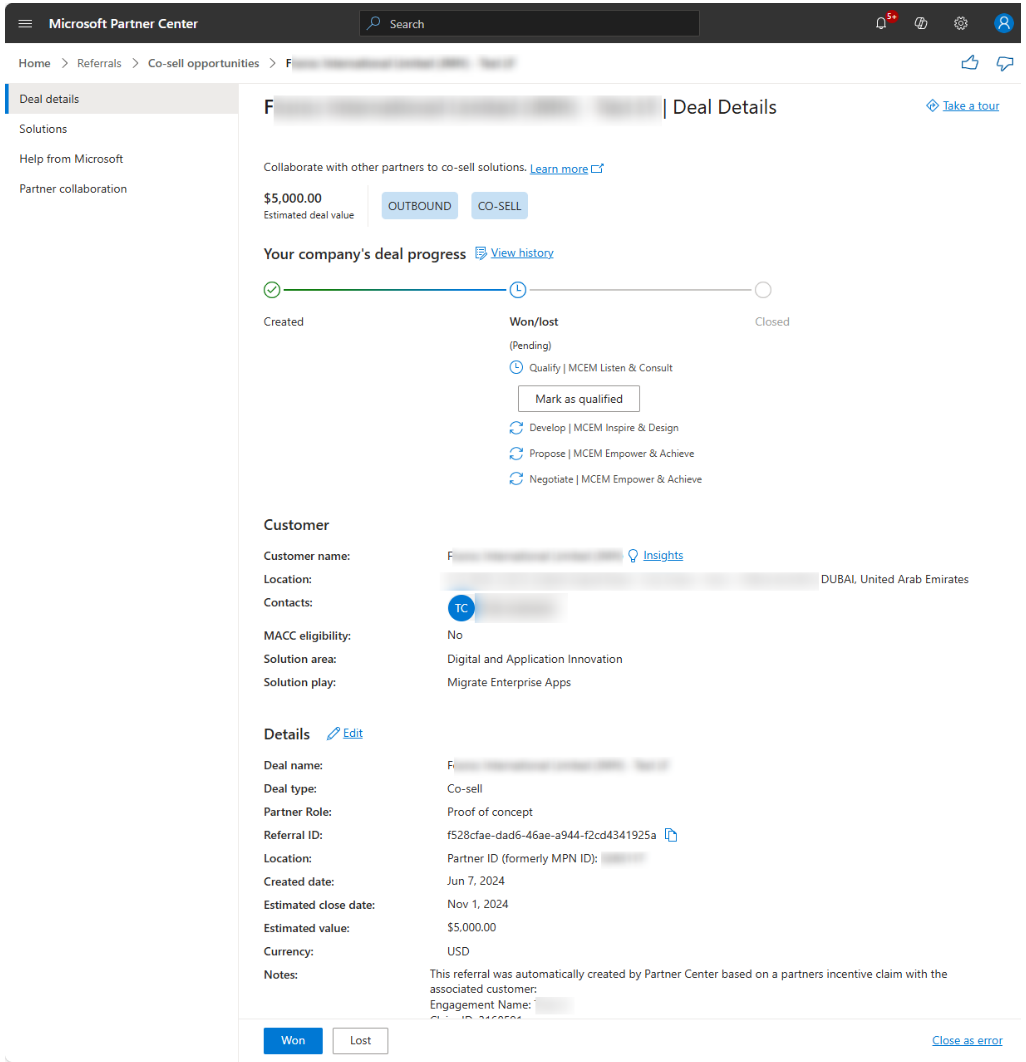


# Deal Details

The details of your referral co-sell opportunity will be automatically populated based on the details in the originating Partner Activities Claim and the internal deal parameters determined by Microsoft for the relevant engagement.

If the originating Partner Activities claim is approved, the status of the associated deal will change to “Won”.

If the originating Partner Activities claim is cancelled, expired or final rejected, the status of the associated deal will change to “Lost”.



# Submitting an inquiry to Partner Center Support

i. Click the **question mark icon** in the navigation bar

ii. Click **Contact Support**

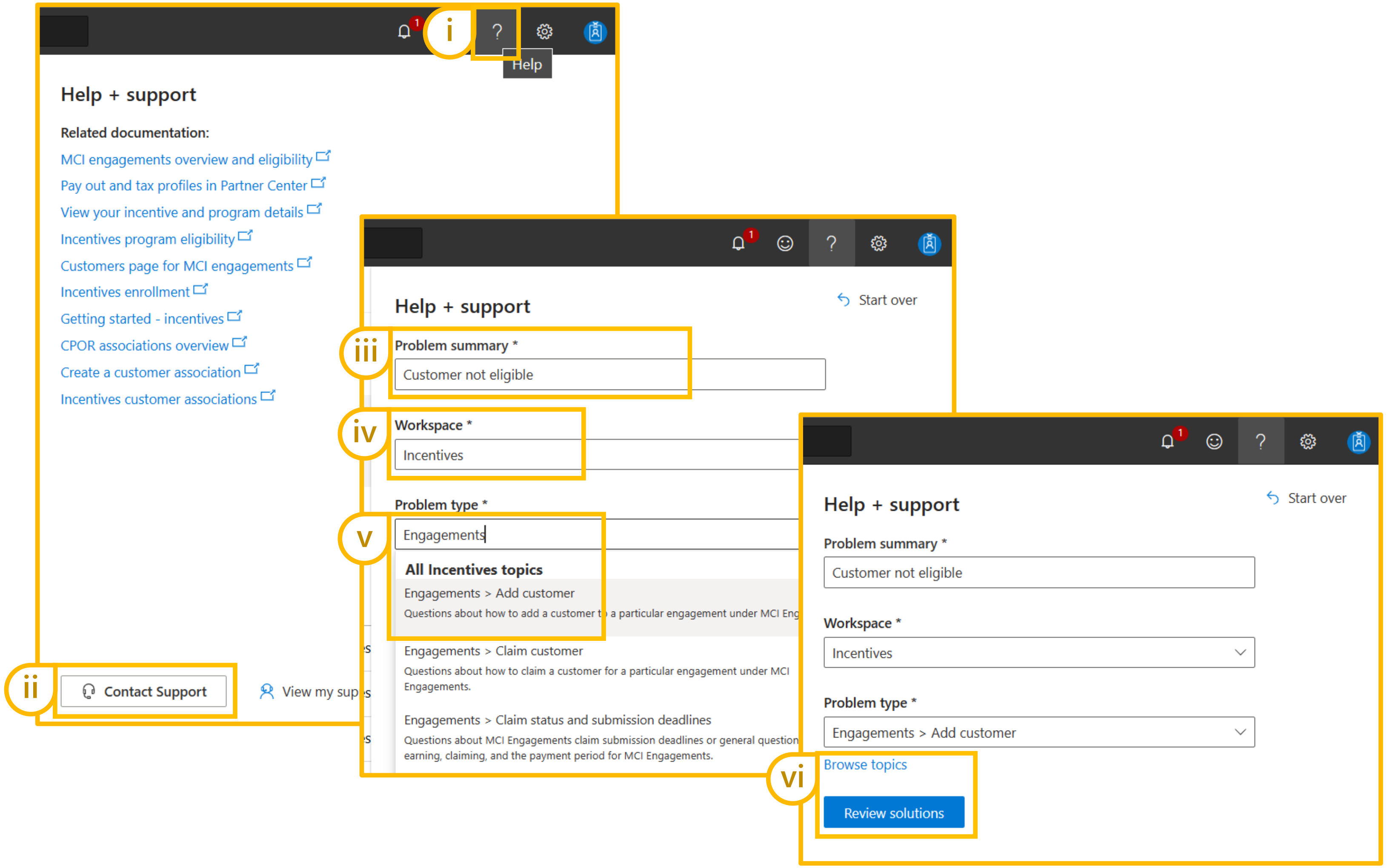
**iii. Problem Summary**: Type brief explanation of issue

**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



# Summary and Resource Links

You should now be able to:

- ✓ Access Incentives workspace in Partner Center
- ✓ Navigate MCI Engagements and Customer Claims
- ✓ Add new customers
- ✓ Claim and manage customers in Engagements
- ✓ Submit **Partner Activities** claims and respond to POE review action prompts
- ✓ Access help and support for Engagements claims

Links:

- **Microsoft Commerce Incentives Resources**
- **Partner Center Incentives Resources**
- **Learn > Partner Center Docs**
- **Partner Center**
- **Microsoft Partner Network**
- **Partner Center Support**

Microsoft

Thank you.