

MCI Engagements

Partner Activities – Partner Center Claims Guide
Incentive Users and Administrators

Last Updated: January 1, 2025

Introduction	Navigating Engagements	Add New Customers	Claim Existing Customers	Request Consent	Submit POE	Review & Resolution	Referral Creation	Support and Resources
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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.



- 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.

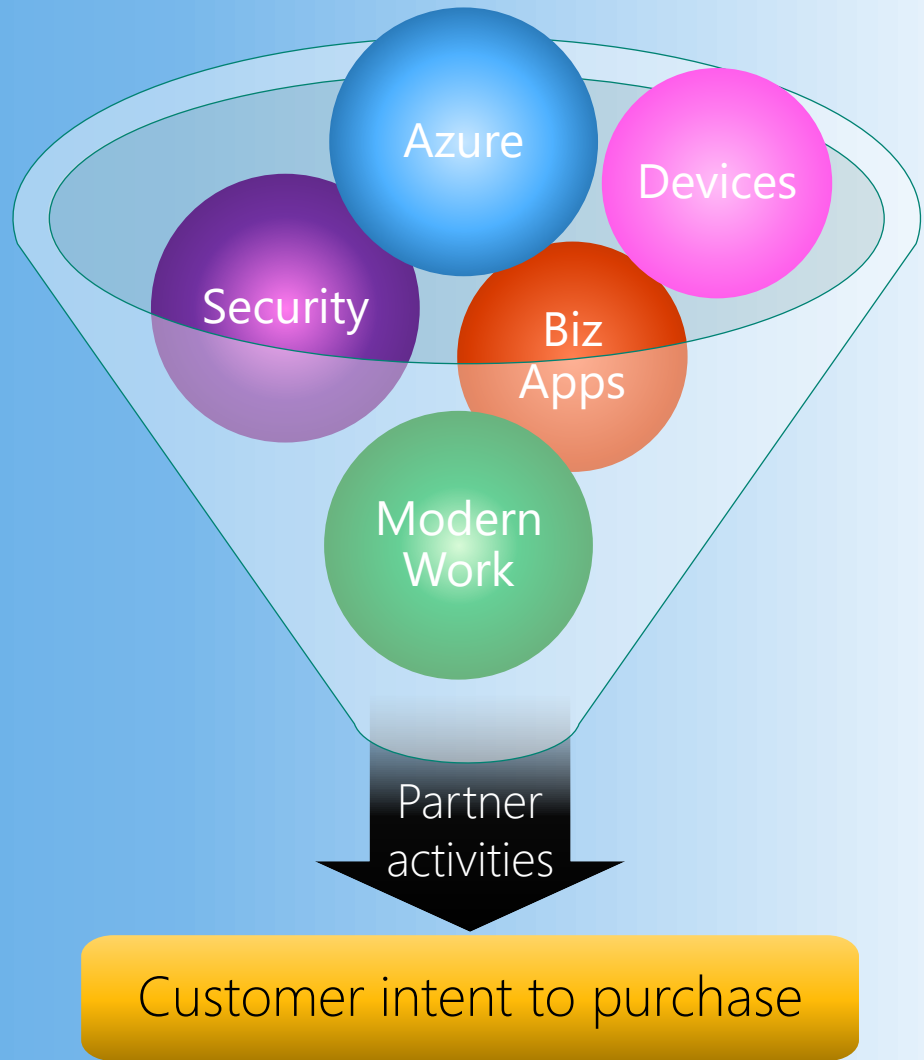
MCI Engagements – Partner Activities

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>.



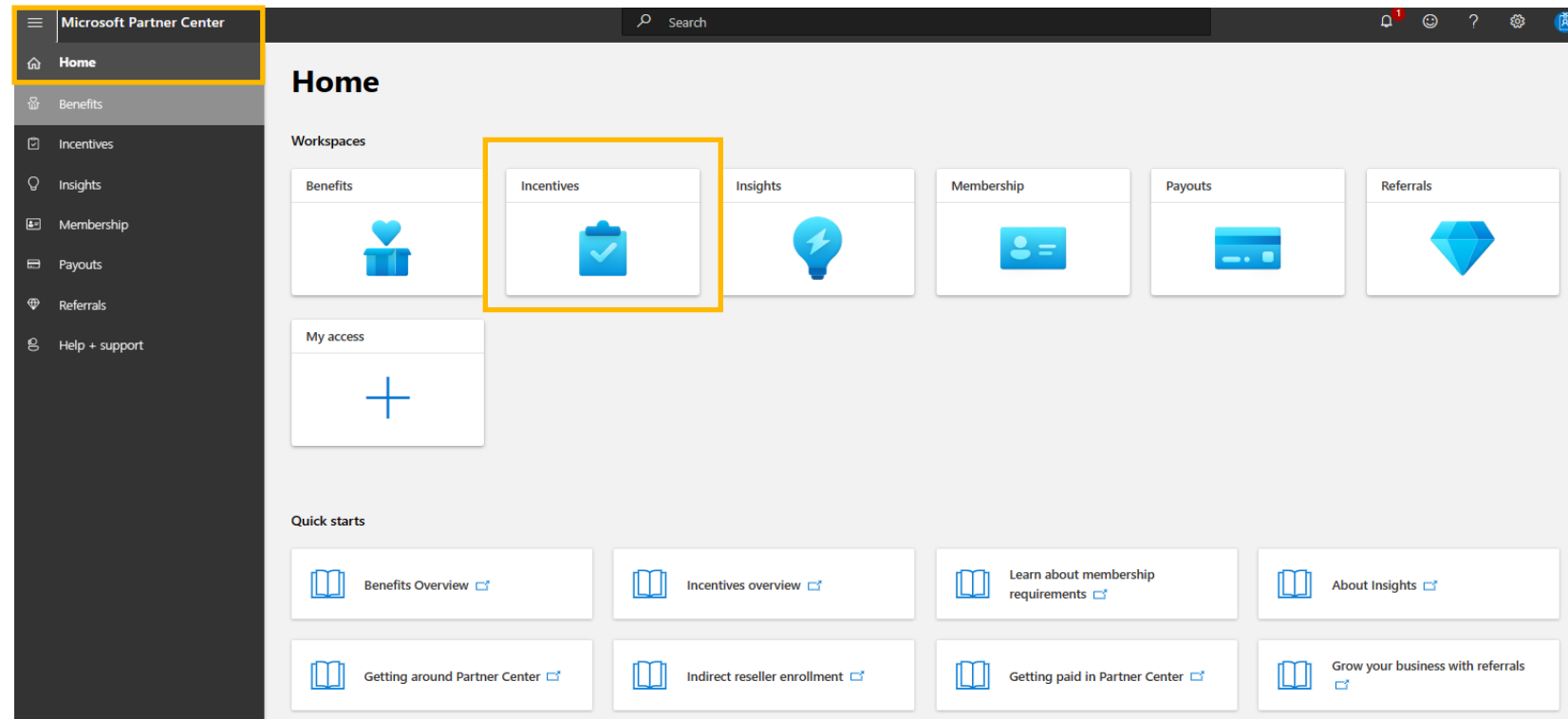
Partner Center Workspaces

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:

- Manage your Microsoft [account and users](#)
- See [earnings](#) and [payouts](#)
- [Engage with customers](#)
- Build relationships with [other partners](#)
- [Manage customer subscriptions](#)
- [Contact support](#)
- 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.

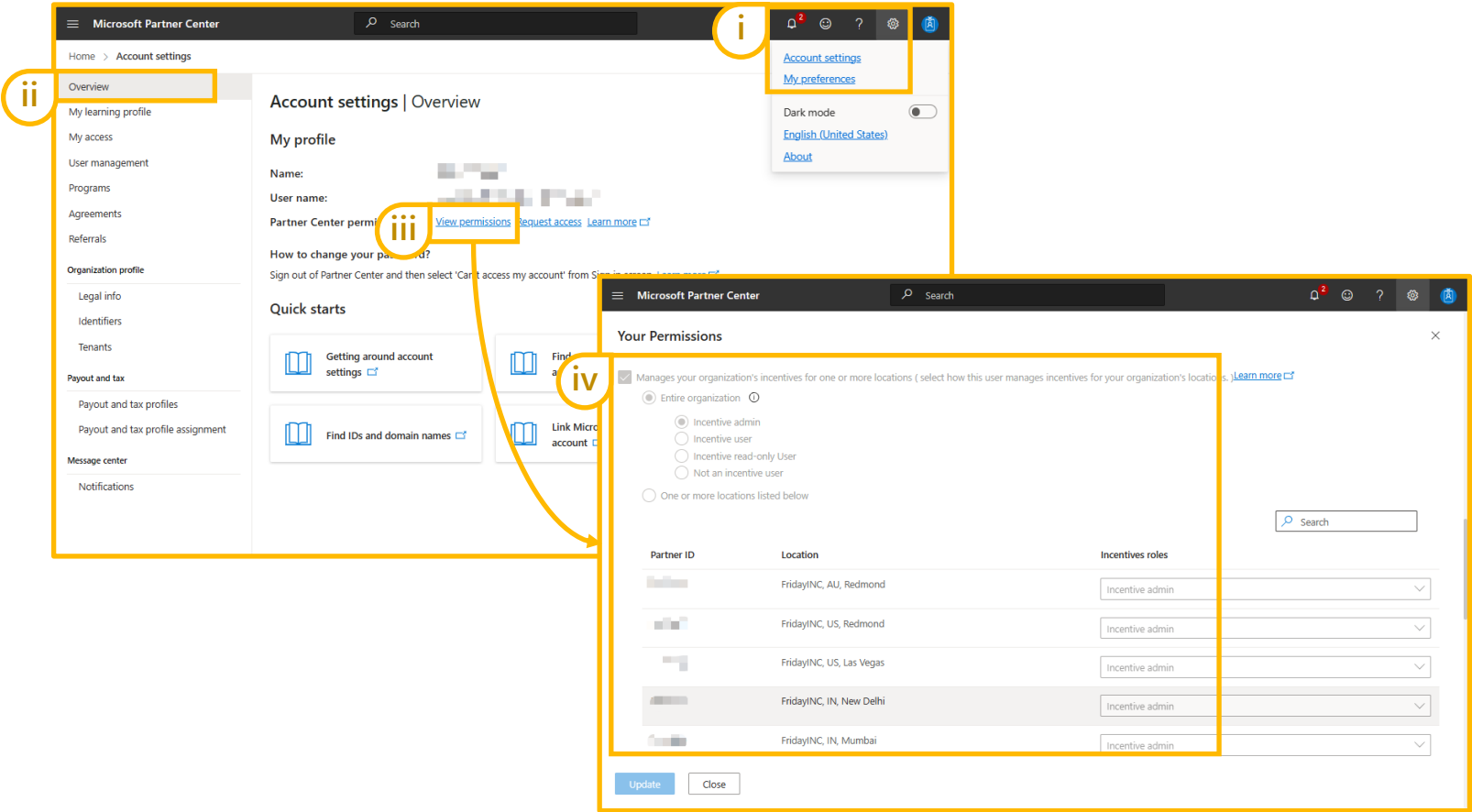
If you do not have Incentive Admin or User permissions for a location, you will not be able to access or manage incentive activity for that location, even if the location is enrolled in and eligible for an Incentive Program.

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](#)

The screenshot shows the Microsoft Partner Center interface. The top navigation bar includes 'Home > Incentives'. The left sidebar has 'Overview' highlighted (annotated with 'i'). The main content area is titled 'Incentives | Overview' and shows 'Total earned' and 'Total paid' as 0.00 USD. Below this is the 'Enrollments' section (annotated with 'ii'). A table lists various Microsoft Commerce Incentives programs. The first row is highlighted, and the 'Actions required' column shows an 'Enroll' button (annotated with 'iv'). A filter dropdown on the right (annotated with 'iii') shows 'Microsoft Commerce Incentives' selected. The table has columns for Program name, Partner ID, Country/Region, Earned, Paid, Status, Actions required, and Program resources.

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

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.

- Click to view **MCI Engagements**
- Click to navigate between engagement **Solution Areas**
- Click an engagement's **Name** to open that engagement's Summary page
- Click to navigate to **Attention Required**
- Filter and search **engagements**
- 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.

Microsoft Partner Center

Home > Incentives

Overview
Plans management
Co-op management

Microsoft Commerce Incentive

MCI engagements

Customer claims

Incentives | MCI engagements

MCI Opportunities is now MCI Engagements
The new Microsoft Commerce Incentive experience gives you a transparent view of current incentive earning opportunities, customer engagements, and eligibility status. [Learn more.](#)

Modern Work And Security Azure Business Applications Devices Attention required (0)

Filter Search

Name ↑	Partner role	Eligibility	Status
CSP M365 E3 Adoption Accelerator	Partner activities	8 of 67	Active
CSP M365 E5 Adoption Accelerator	Partner activities	8 of 67	Active
Collaborative Apps Workshop	Partner activities	8 of 67	Closed
Copilot for M365 Adoption Accelerator (Large)	Partner activities	8 of 67	Active
Copilot for M365 Adoption Accelerator (Medium)	Partner activities	8 of 67	Active

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.

Microsoft Partner Center

Search

Home > Incentives > MCI engagements > AMMP App/Data Modernization (Small)

i

Summary

Customers

Eligibility

ii

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

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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.

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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

Microsoft Partner Center

Search

1

Home > Incentives > MCI engagements > Enable Frontline Workshop

Summary

Customers

Eligibility

Customers | Enable Frontline Workshop

i

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.

ii

+ Add customer

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iv

Filter

Search by Customer name, Claim ID, PartnerID, Claim name

iii

Export

Custom 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	-	-

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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.

Microsoft Partner Center

Search

Home > Incentives > MCI engagements > Enable Frontline Workshop

Summary

Customers

Eligibility

Customers | Enable Frontline Workshop

i

Ineligible

Complete

A summary of all customers ineligible for the engagement.

+ Add customer

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Custom

Filter

Search by Customer name, Claim ID, PartnerID, Claim name

Customer name	Claim ID	PartnerID	Partner name	Last updated	Status	Action	Claims expiry
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Microsoft Partner Center

Search

Home > Incentives > MCI engagements > Enable Frontline Workshop

Summary

Customers

Eligibility

Customers | Enable Frontline Workshop

ii

Complete

A summary of all claims from customers for which the engagement has reached in a terminated state as either completed, expired or rejected final.

+ Add customer

↓ Export

1M

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6M

Custom

Filter

Search by Customer name, Claim ID, PartnerID, Claim name

Filter by:

×

Customer name	Claim ID	Claim name	PartnerID	Partner name	Last updated	Status	Action	Claims expiry
	3053273				5/30/2023	Approved	-	-
	3029852	-			3/23/2023	Cancelled	-	-
	3042516				5/30/2023	Cancelled	-	-

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.

Microsoft Partner Center

Search

1

Home > Incentives > MCI engagements > Usage–Defend Against Threats w/SIEM + XDR Workshop

Summary

Customers

Eligibility

Usage–Defend Against Threats w/SIEM + XDR Workshop | Eligibility

i

Filter

Search

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

Eligibility requirements

Co-sell Ready

Co-sell Ready

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

Search

Home > Incentives > Customer claims

Overview

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MCI engagements

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.

i

Modern Work And Security

Business Applications

Azure

Devices

ii

+ Add customer

Export

iii

1M

3M

6M

Customize

iv

Filter

v

Search by Customer name, Claim ID, PartnerID, Customer ID, Claim

Filter by:

vi

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

Apply

Reset

Filters Panel

Status

☐ Approved
 ☐ Under review

Engagement

☐ Surface - Customer Immersion Experience Workshop

Partner country

☐ Australia

Close

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

Microsoft Partner Center

Search

1

?

Home > Incentives > MCI engagements > Enable Frontline Workshop

Summary

Customers

Eligibility

Customers | Enable Frontline Workshop

EligibleIneligibleComplete

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.

i

+ Add customer

Export

1M3M6MCustom

Filter

Search by Customer name, Claim ID, PartnerID, Claim name

Customer name	Claim ID	PartnerID	Partner name	Last updated	Status	Action	Claims expiry
	1004521		FridayINC	10/21/2022	Submitted	-	-

Microsoft Partner Center

Search

5+

Home > Incentives > Customer claims

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Incentives | Customer claims

Modern Work And SecurityBusiness ApplicationsAzureDevices

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.

ii

+ Add customer

Export

Customize

Date Filter

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	A
3153705	GSI Copilot for Microsoft 365 Workshop						6/17/2024	-	Customer consent expired	-

Add new customer - Associate Customer (1/3)

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

- 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
- 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.

Microsoft Partner Center

Home > Incentives > MCI engagements > Pre-Sales Variable Envising Workshop

Customers | Pre-Sales Variable Envis

Summary
Customers
Eligibility

Customers | Pre-Sales Variable Envis

A summary of all customers eligible for the engagement or have been added to the engagement. **Important:** Customer consent emails are only sent once per day.

+ Add customer + Export

Filter by: X

Customer name	Claim ID
Emirates School Establishment	3000538
The Body Shop International PLC	3000551

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

Partner location*
Select option

- FridayINC, US, Las Vegas (5272302)
- FridayINC, HU, Budapest (5287170)
- FridayINC, IE, Dublin (5356509)
- FridayINC, MX, Mexico D.F. C.P. (5287169)
- FridayINC, AU, Redmond (5265117)
- FridayINC, US, Kirkland (5397472) - Your location ID is not eligible
- FridayINC, US, Redmond (5272301) - Your location ID is not eligible
- FridayINC, US, Olympia (5412674) - Your location ID is not eligible
- FridayINC, US, New York (5384778) - Your location ID is not eligible
- OMEX OSU Test, US, Redmond (6086834) - Your location ID is not eligible
- FridayINC, US, Houston (5384815) - Your location ID is not eligible
- FridayINC, US, Austin (6228201) - Your location ID is not eligible
- FridayINC, IN, Kota (6284395) - Your location ID is not eligible
- FridayINC, IN, New Delhi (5272981) - Your location ID is not eligible

Microsoft Partner Center

Home > Incentives > Customer claims

Incentives | Customer claims

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Incentives | Customer claims

A summary of all customer associations (claims) across all engagements.

Click [here](#) to ensure that you are claiming for the right customer.
Click [here](#) to learn more about claiming intent - part 1.

Modern Work And Security Business Applications Azure

+ Add customer + Export

Filter by: X

Claim ID	Engagement	Claim name
3000552	Modern Work and Security Usage	ms test1
3000550	Modern Work and Security Usage	ms test 2
3000541	Modern Work and Security Usage	Test New M360 Workloads

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

Partner location*
Select option

- FridayINC, US, Las Vegas (5272302)
- FridayINC, HU, Budapest (5287170)
- FridayINC, US, Kirkland (5397535)
- FridayINC, IE, Dublin (5356509)
- FridayINC, MX, Mexico D.F. C.P. (5287169)
- FridayINC2, US, Bellevue (5384802)
- Test Russia Company, RU, Moscow (6032972)
- FridayINC, US, Kirkland (5397478)
- FridayINC, US, Kirkland (5397536)

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.

The screenshot shows the 'Add customer | Associate customer' form. On the left is a progress indicator with four steps: 'Associate customer' (selected), 'Associate engagement', 'Contact Information', and 'Review and complete'. The form fields are as follows:

- Claim name ***: A text input field containing 'Contoso - Enable Frontline'. An annotation 'i' points to this field.
- Partner location ***: A dropdown menu showing 'FridayINC, US, Las Vegas (5272302)'. An annotation 'ii' points to this field.
- Customer ID type ***: A dropdown menu showing 'Domain name'. An annotation 'ii' points to this field, and an arrow points from this dropdown to a separate list of options.
- Customer ID ***: A text input field containing 'contoso.com'. An annotation 'iii' points to this field.
- Next**: A blue button at the bottom right. An annotation 'iv' points to this button.

Below the 'Customer ID type' dropdown, a separate list shows the available options:

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

At the top of the form, there is explanatory text: '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](#) C#'

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.

i

Associate customer

Associate engagement

Contact Information

Review and complete

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)

Previous

ii

Associate customer

Associate engagement

Contact Information

Review and complete

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

☒ Pre-Sales Variable Envisioning Workshop

Requested hours*

Provide the number of hours needed to complete the engagement with the customer. The number of hours cannot be edited once the customer add steps are completed.

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 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.

✓ Associate customer

● Associate engagement

○ Contact Information

○ Review and complete

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**

☐ Envisioning - Variable Payout Pilot - Invalid customer ID type

☐ Needs Assessment Workshop — D365 Sales - Your location ID is not eligible

☐ Needs Assessment Workshop — D365 Business Central - Your location ID is not eligible

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 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]

[Edit Associate engagement](#)

Engagements: Pre-Sales Variable Envisioning Workshop

Requested hours: 10

Proposed payout (USD): 1630

Microsoft Partner Center

Home > Incentives > MCI engagements >

Summary

Customers

Eligibility

Add customer

✓ Associate customer

✓ Associate engagement

✓ Contact Information

✓ Review and complete

Customer successfully claimed

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

[Done](#)

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.

Microsoft Partner Center

Home > Incentives > MCI engagement

SummaryCustomersEligibility

Enable Frontline Workshop

Customers | Enable Frontline Workshop

EligibleIneligibleComplete

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 customerExport

1M3M6MCustomFilter

Search by Customer name, Claim ID, PartnerID, Claim name

Customer name	Claim ID	PartnerID	Partner name	Last updated	Status	Action	Claims expiry
						<div>ivClaim customer</div>	
	3001583		FridayINC	2/10/2023	Customer consent received	Submit claim	2/22/2023
	3015123		FridayINC	2/10/2023	Cancelled		
	3003931		FridayINC	2/9/2023	Cancelled		
						Claim customer	
	3000008		FridayINC	2/11/2023	Not submitted claim expired		
						Claim customer	
	3015125		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.

Associate customer

Associate engagement

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. 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

TestClaim1

i Partner location *

FridayINC, US, Kirkland

Customer ID type *

Tenant ID

ii Customer ID *

Enter the tenant ID

Next

Close

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.

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

i

☒ Associate customer

☒ Associate engagement

☐ Contact Information

☐ Review and complete

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.

✓ Associate customer

● Associate engagement

○ Contact Information

○ Review and complete

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

☐ Envisioning - Variable Payout Pilot - Invalid customer ID type
 ☐ Needs Assessment Workshop — D365 Sales - Your location ID is not eligible
 ☐ Needs Assessment Workshop — D365 Business Central - Your location ID is not eligible

Previous

Next

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.

✓ 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

✓ Associate engagement

✓ Contact Information

○ Review and complete

Add customer

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

26

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.

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

Associate customer

Associate engagement

Contact Information

Review and complete

Customer successfully claimed

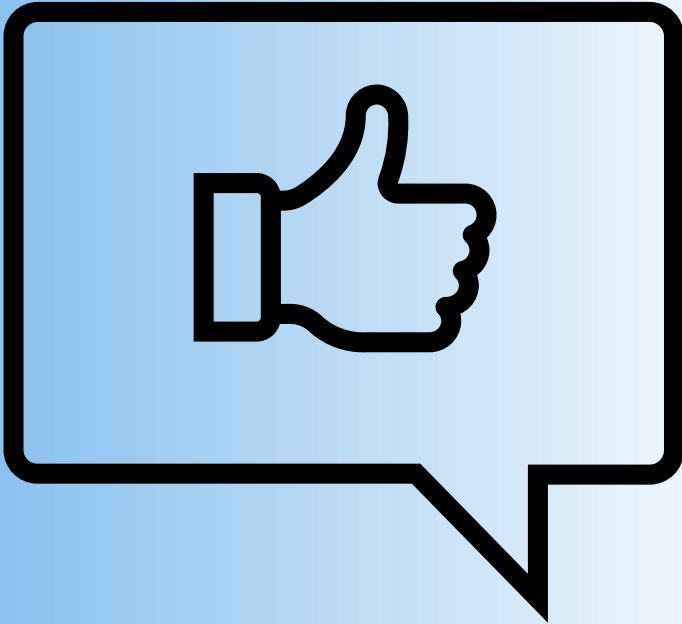
Done

Introduction	Navigating Engagements	Add New Customers	Claim Existing Customers	Request Consent	Submit POE	Review & Resolution	Referral Creation	Support and Resources
Customer Consent Policies	Preparing Your Customer to Consent	Request Consent	Managing Consent Requests	Customer Experience – Consent Response	Claim Expirations			

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.**



Introduction	Navigating Engagements	Add New Customers	Claim Existing Customers	Request Consent	Submit POE	Review & Resolution	Referral Creation	Support and Resources
Customer Consent Policies	Preparing Your Customer to Consent		Request Consent	Managing Consent Requests	Customer Experience – Consent Response		Claim Expirations	

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**.

Microsoft Partner Center

Home > Incentives > MCI engagements > AMMP Virtual Desktop Infrastructure (Large)

Summary

Customers

Eligibility

Customers | AMMP Virtual Desktop Infrastructure (Large)

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

↓ Export

1M

3M

6M

Custom

Filter

Search by Customer name, Claim ID, PartnerID, Claim name

Customer name	Claim ID	PartnerID	Partne name	Last updated	Status	Action	Claims expiry
	3015827		FridayINC	2/10/2023	Customer claimed	Send email for customer consent	3/13/2023

Microsoft Partner Center

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 and action required. [Learn More](#)

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

+ Add customer

↓ Export

1M

3M

6M

Custom

Customize

Filter

Search by Customer name, Claim ID, PartnerID, Tenant ID, TPID, Cla

Claim ID	Engagement	Claim name	Customer name	Tenant ID/TPID	PartnerID	Partner name	Last updated	Claims expiry	Status	Action
3015949	Enable Frontline Workshop					FridayINC	2/12/2023	3/15/2023	Pending customer consent	Re-send customer consent email
3015948	Microsoft 365 Digital Workforce Workshop					FridayINC	2/11/2023	3/15/2023	Customer claimed	Send email for customer consent

Request consent – Provide contact details (2/4)

- 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.
- Click **Next**.

The screenshot shows a 'Customer consent' form with a yellow border. It is divided into two main sections: 'Customer contact information' and 'Your company information'. The 'Customer contact information' section includes fields for 'Customer contact name *' (Fred Martinez), 'Customer contact email *' (f.martinez@contoso.com), and 'Customer contact work title' (IT Systems Administrator). The 'Your company information' section includes fields for 'Partner contact name *' (Priya Kaur) and 'Partner contact email *' (pkaur@fridayinc.com). A yellow arrow points from the 'Customer contact email *' field to a separate box on the right. This box contains the text 'Customer contact email *' (susie@contoso.com) and a red-bordered field for 'Reason for different email domain: *' with the placeholder text 'Enter reason for different email domain'. Below this field is a red error message: 'Domain email address is different. We need a reason for this change.' A yellow arrow points from this error message to another box at the bottom right. This box contains the text 'Reason for different email domain: *' and a text area with the message 'Customer's primary email domain is not associated with eligible tenant'. At the bottom of the main form, there is a 'Next' button and a yellow circle with the Roman numeral 'ii'.

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.

Customer consent | Review and complete

Review

[Edit Contact details](#)

Customer contact name: [redacted]

Customer contact email: [redacted]

Customer contact work title: [redacted]

Partner contact name: [redacted]

Partner contact email: [redacted]

[Edit Deal information](#)

Deal size: 1000

☒ By checking this box, I confirm, on behalf of myself and my company, that I have obtained sufficient consent to:

- Provide the customer's contact information to Microsoft.
- Provide my company's employee information to Microsoft.
- Grant Microsoft the right to use such information to contact the customer or partner employee for the purposes of fulfilling Microsoft obligations to partners and customers.

Previous **Send for consent** Close

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.

Microsoft Partner Center

Search

Home > Incentives > MCI engagements > Enable Frontline Workshop

Summary

Customers

Eligibility

Customers | Enable Frontline Workshop

i

Consent email successfully sent to customer

×

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.

1M

3M

6M

Custom

Filter

Search by Customer name, Claim ID, PartnerID, Claim

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

Customer consent

iii

Edit

Review

Contact details

Partner location

FridayINC, AU, Redmond (MPN)

Customer contact name

Susie Jones

Customer contact email

s.jones@contoso.net

Customer contact work title

IT Manager

Partner contact name

Priya Kaur

Partner contact email

pkaur@fridayinc.com

When you select Send for consent, we'll automatically send this customer an email requesting consent for the engagement.

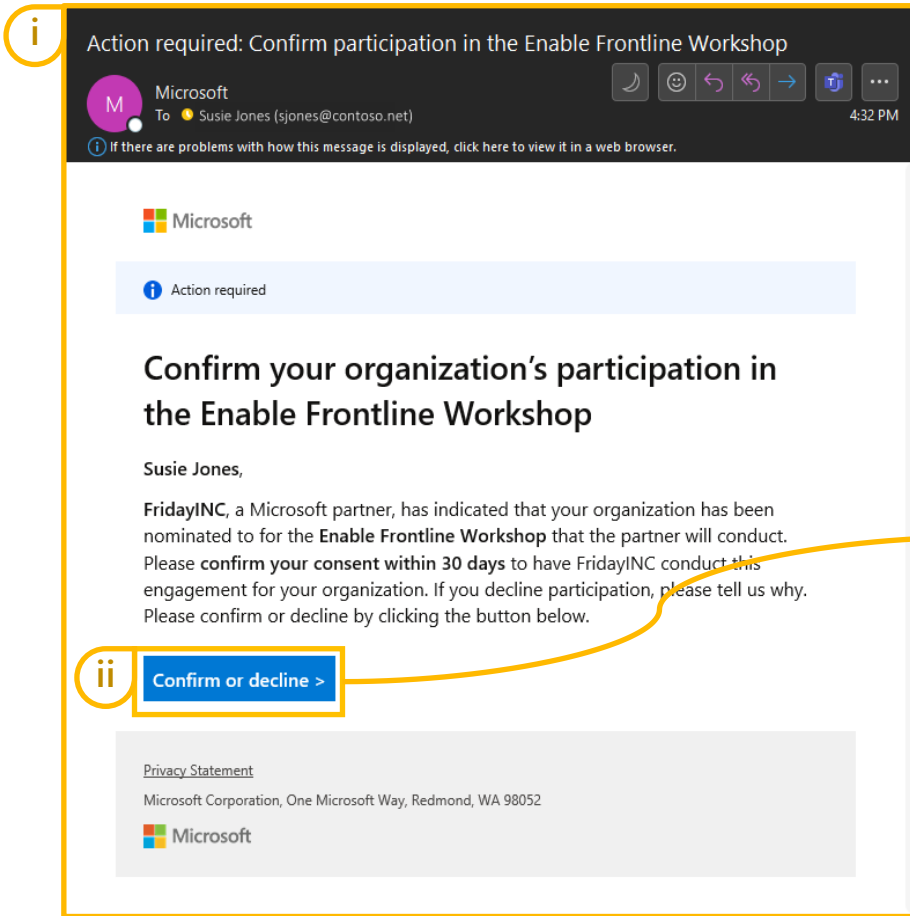
iv

Send for consent

34

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.**



Microsoft Microsoft Security Azure Dynamics 365 More

Customer consent

Please fill all required questions.

iii Do you give your consent to work with partner 'FridayINC' to complete 'Enable Frontline Workshop'? *

☐ Yes

☒ No

Please let us know why you did not give consent: *

☐ Partner is unknown

☐ Don't wish to work with partner

☐ Don't wish to do the engagement

☒ Other

Please provide a reason.

Please provide a reason.

Submit

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.

i

Action required: Confirm participation in the Enable Frontline Workshop

Microsoft
To: Susie Jones (sjones@contoso.net) 4:32 PM

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

Microsoft

ii

Action required

Confirm your organization's participation in the Enable Frontline Workshop

Susie Jones,

FridayINC, a Microsoft partner, has indicated that your organization has been nominated to for the **Enable Frontline Workshop** that the partner will conduct. Please **confirm your consent within 30 days** to have FridayINC conduct this engagement for your organization. If you decline participation, please tell us why. Please confirm or decline by clicking the button below.

iii

Confirm or decline >

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

Microsoft

Microsoft Microsoft Security Azure Dynamics 365 More

Customer consent

Please fill all required questions.

iii

Do you give your consent to work with partner 'FridayINC' to complete 'Enable Frontline Workshop'? *

☐ Yes

☒ No

Please let us know why you did not give consent: *

☐ Partner is unknown

☐ Don't wish to work with partner

☐ Don't wish to do the engagement

☒ Other

Please provide a reason.

Please provide a reason.

Submit

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.*

Introduction	Navigating Engagements	Add New Customers	Claim Existing Customers	Request Consent	Submit POE	Review & Resolution	Referral Creation	Support and Resources
Claim Actions	Proof of Execution (POE) Components	Anatomy of a claim	Invoice requirements	POE document requirements	Customer Survey	Partner Survey	Add Comments & Submit	

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	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	-

* 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.

Introduction	Navigating Engagements	Add New Customers	Claim Existing Customers	Request Consent	Submit POE	Review & Resolution	Referral Creation	Support and Resources
Claim Actions	Proof of Execution (POE) Components	Anatomy of a claim	Invoice requirements	POE document requirements	Customer Survey	Partner Survey	Add Comments & Submit	

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.

The screenshot displays the Microsoft Partner Center interface for a specific claim. The breadcrumb navigation at the top shows the path: Home > Incentives > MCI engagements > GSI Copilot for Microsoft 365 Workshop > Customers > [Redacted].

The main header for the claim is "Claim 3042516 | F [Redacted]". It includes "Edit" and "Submit claim" buttons. A summary note states: "Summary of your engagement claim. You must submit your claim with all of the required information before Microsoft can review it. [Learn More](#)".

The "Engagement Details" section is divided into three parts:

- Customer information**: Includes fields for Customer name, Customer consent date (June 7, 2024), Customer contact name, Customer contact email, Customer contact title, and TPID. The contact information fields are highlighted with a yellow box and labeled with a circled "iii".
- Partner information**: Includes fields for Partner location (AUS, Redmond, (Partner ID: [Redacted])), Partner name, Partner contact name, and Partner contact email. The contact information fields are highlighted with a yellow box.
- Deal information**: Includes fields for Referral ID (f528cfae-dad6-46ae-a944-f2cd4341925a) and Deal size (5000). The Referral ID field is highlighted with a yellow box and labeled with a circled "iv".

The "Claim status" section shows a progress indicator with stages: Editing (active), Submitted, Under review, and Approved. The "Editing" stage is expanded, showing tasks: Upload Invoice, Upload findings & recommendations report, Partner survey complete, and Customer survey complete. The "Submitted" stage is also visible.

The "History" sidebar on the right shows 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. 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.

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
	pdf	Updated by [blurred] 2023
	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

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

ii

Upload proof of execution

iii

move

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

MCI Engagements – Claim Invoice Template & Guidelines

FRIDAY INC

Fridav Inc

New Delhi, IN

Phone +1-111-555-1234

Contact E-mail pkaur@fridayinc.com

Microsoft Partner Incentives

MCI Engagements

CLAIM INVOICE

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

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Introduction	Navigating Engagements	Add New Customers	Claim Existing Customers	Request Consent	Submit POE	Review & Resolution	Referral Creation	Support and Resources
Claim Actions	Proof of Execution (POE) Components	Anatomy of a claim	Invoice requirements	POE document requirements	Customer Survey	Partner Survey	Add Comments & Submit	

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.

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 > [Customer Name]

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

[Redacted]

Customer consent date

December 13, 2022

Customer contact name

[Redacted]

Customer contact email

[Redacted]

Customer contact title

IT Program Manager

Customer domain name

[Redacted]

Customer TPID/Tenant ID

[Redacted]

Tenant domain name mismatch reason

[Redacted]

Partner

[Redacted]

Claim status

Editing

Upload In

Upload fin

Partner su

Customer

Submitted

Under review

Approved

Customer information

You may only edit the fields below for this claim.

Customer contact name*

[Redacted]

Customer contact email*

[Redacted]

Customer contact title

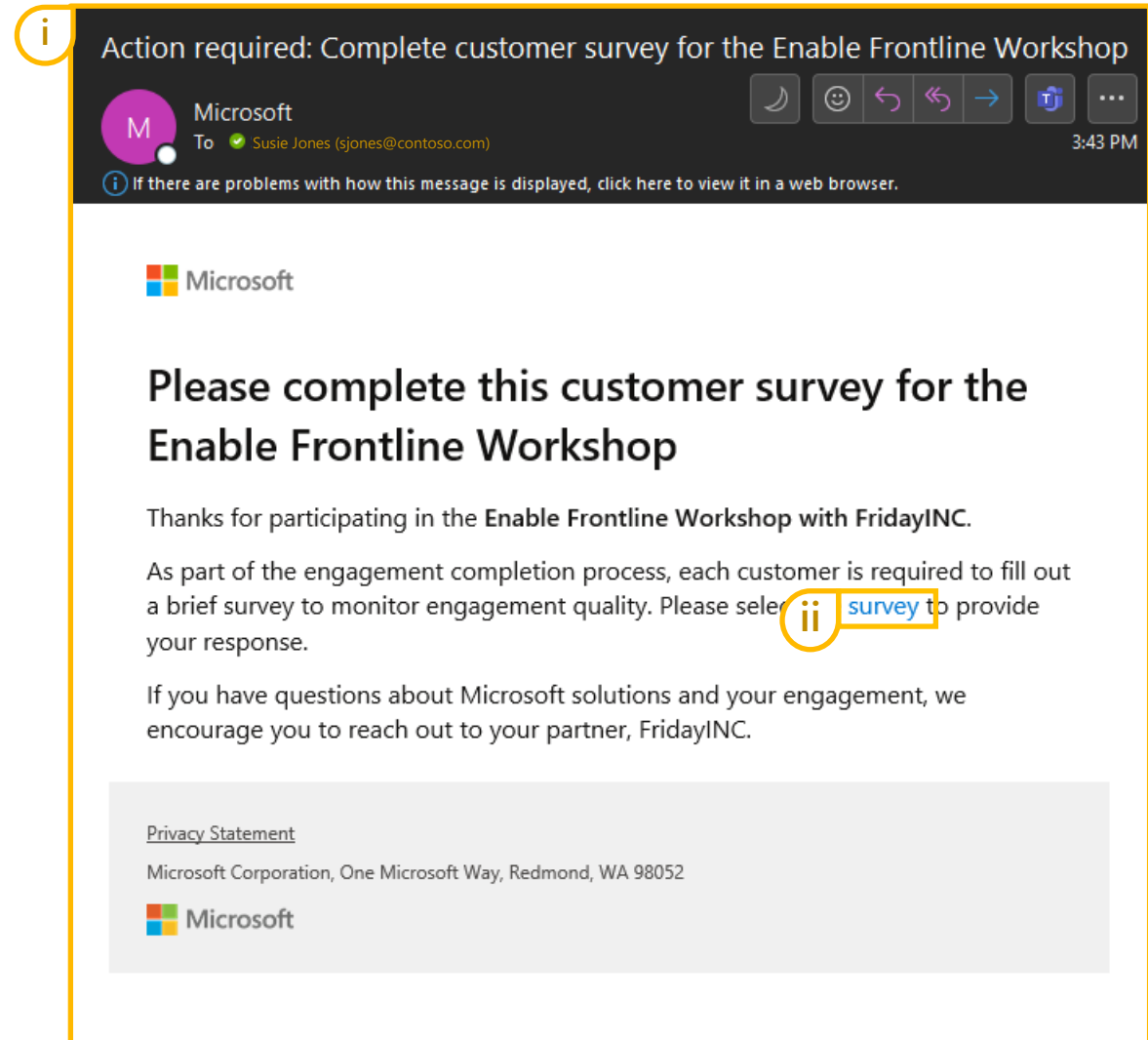
IT Program Manager

Save changes

Introduction	Navigating Engagements	Add New Customers	Claim Existing Customers	Request Consent	Submit POE	Review & Resolution	Referral Creation	Support and Resources
Claim Actions	Proof of Execution (POE) Components	Anatomy of a claim	Invoice requirements	POE document requirements	Customer Survey	Partner Survey	Add Comments & Submit	

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.

The image displays two screenshots of a web browser showing a Microsoft Cloud Accelerator Survey. The top screenshot, marked with a circled 'i', shows an error message: "An error occurred, could not find survey. Please contact support." The URL in the address bar is highlighted with a red box and a red 'X' icon. The bottom screenshot, marked with a circled 'ii', shows the survey title "Customer Satisfaction Survey: Enable Frontline Workshop" and a signature prompt: "17. By signing this form electronically, the customer confirms that the Partner has delivered a Enable Frontline Workshop and has invested ~24hrs conducting this workshop. Please type your Full Name, Company Name, and Title in the space below." The URL in the address bar is highlighted with a green box and a green checkmark icon. A "Submit" button is visible below the signature prompt.

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.

Surveys

Customer Survey:

Not Initiated

➤ Send Customer Survey

Partner Survey:

i Not Initiated

ii ➤ Send Partner Survey

iii Go to survey

Microsoft Partner Center

Search

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

Customer contact name

[redacted]

Submitted

Customer contact email

[redacted]

Under review

Customer contact title

IT Program Manager

Approved

Customer domain name

[redacted]

Customer TPID/Tenant ID

[redacted]

Tenant domain name mismatch reason

[redacted]

Partner information

iv Edit

Partner location

AUS, Redmond, (MPN: [redacted])

Partner name

FridayINC

Partner contact name

[redacted]

Partner contact email

[redacted]

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*

[redacted]

Partner contact email*

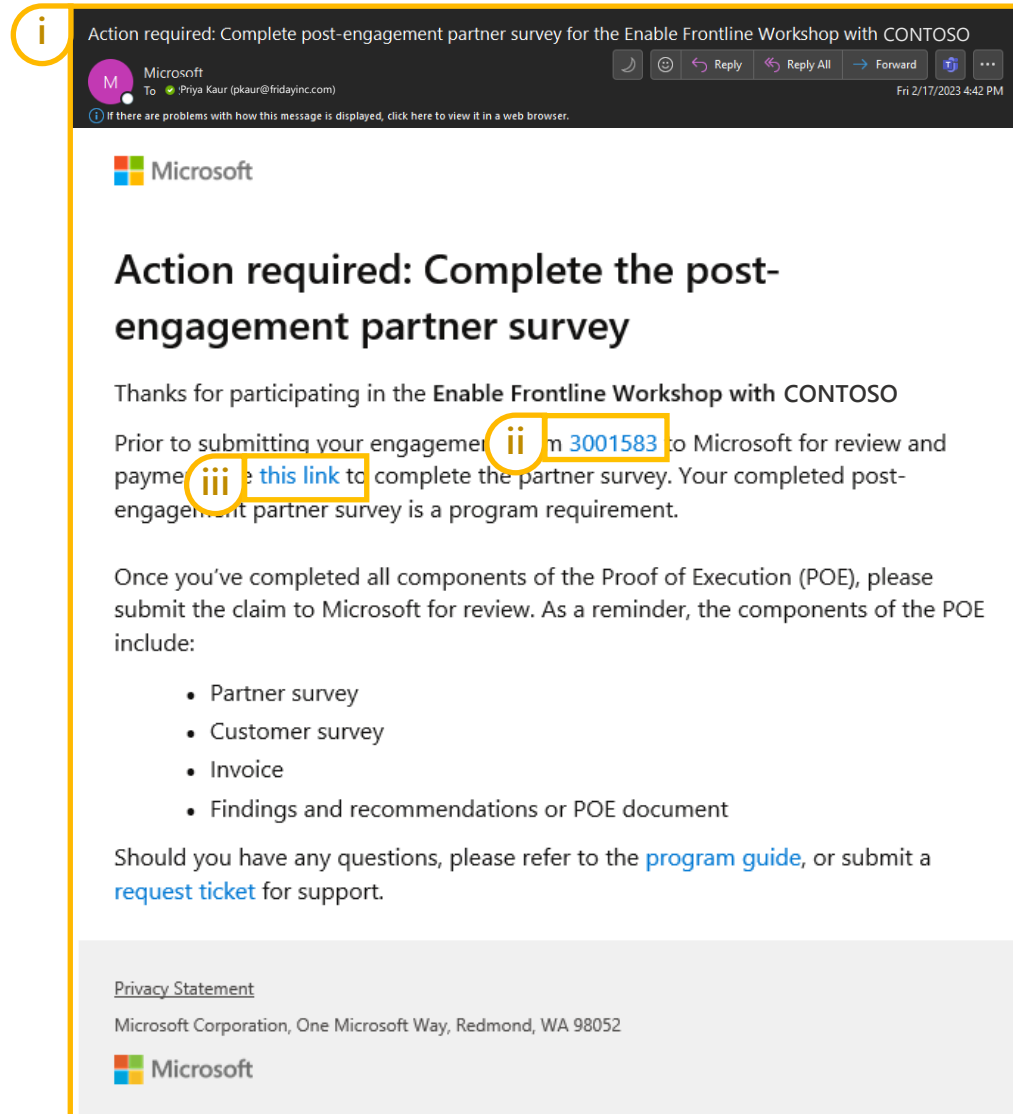
[redacted]

Save changes

Introduction	Navigating Engagements	Add New Customers	Claim Existing Customers	Request Consent	Submit POE	Review & Resolution	Referral Creation	Support and Resources
Claim Actions	Proof of Execution (POE) Components	Anatomy of a claim	Invoice requirements	POE document requirements	Customer Survey	Partner Survey	Add Comments & Submit	

Partner Survey (2/3) – Partner respondent experience

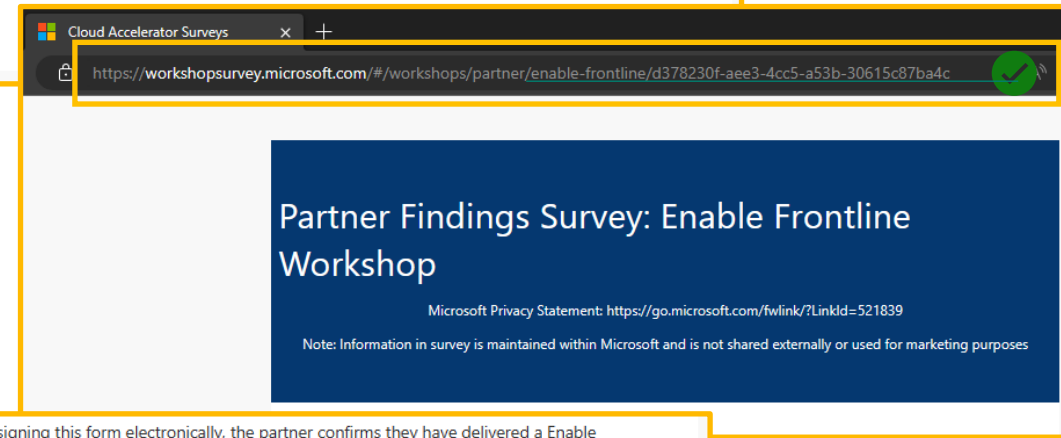
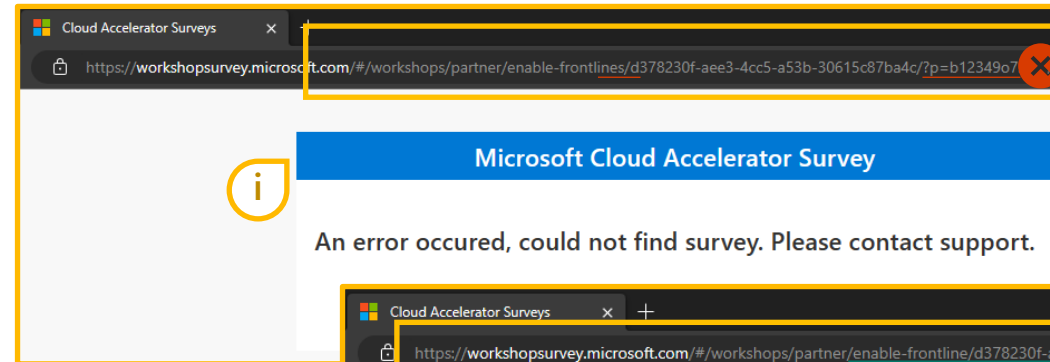
- i. If you click **Send Partner Survey** link in the claim, the partner contact specified in the claim will receive an email with the following details:
 - ✓ Subject line: "Action required: Complete post-engagement partner survey for the [Engagement Name] with [Customer name]"
 - ✓ From: microsoft-noreply@microsoft.com
 - ✓ 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.



Introduction	Navigating Engagements	Add New Customers	Claim Existing Customers	Request Consent	Submit POE	Review & Resolution	Referral Creation	Support and Resources
Claim Actions	Proof of Execution (POE) Components	Anatomy of a claim	Invoice requirements	POE document requirements	Customer Survey	Partner Survey	Add Comments & Submit	

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.



ii

19. By signing this form electronically, the partner confirms they have delivered a Enable Frontline Workshop and has invested ~24hrs conducting this workshop. Please type your Full Name, Company Name, and Title in the space below.*

Please type your Full Name, Company Name, and Title in the space below.

Submit

This content is created by the owner of the form. The data you submit will be sent to the form owner. Microsoft is not responsible for the privacy or security practices of its customers, including those of this form owner. Never give out your password.

Privacy and cookies | Terms of use

Take Survey?

This survey has already been submitted. Would you like to resubmit the survey?

Continue Cancel

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**.

The screenshot shows a web interface for managing a claim. It includes a header with the company name 'idayINC' and a 'Submit claim' button at the top right. Below the header is a 'Workshop claim status' section with a list of actions: 'Editing' (with a blue clock icon), 'Upload Invoice', 'Upload findings & recommendations report', 'Partner survey complete', and 'Customer survey complete'. Below this is a 'Comment' section with a text input field and a 'Save comments' button. At the bottom, there is a 'Comment history' section and a row of buttons: 'Submit claim', 'Dispute claim', and 'Cancel claim'. Four numbered callouts (i-iv) are overlaid on the interface: i points to the 'Comment' input field; ii points to the 'Save comments' button; iii points to the 'Editing' status item in the 'Workshop claim status' list; and iv points to the 'Submit claim' button at the top right.

Introduction	Navigating Engagements	Add New Customers	Claim Existing Customers	Request Consent	Submit POE	Review & Resolution	Referral Creation	Support and Resources
Claim Review Policies	Notification emails	Action required	Approval	Rejection	Disputes			

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.

Introduction	Navigating Engagements	Add New Customers	Claim Existing Customers	Request Consent	Submit POE	Review & Resolution	Referral Creation	Support and Resources
Claim Review Policies	Notification emails	Action required	Approval	Rejection	Disputes			

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**

i

Subject: Additional proof of execution details needed for Microsoft Teams

Preheader: Please provide the additional POE details.



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
4. Add additional comments (optional).
5. Resubmit your claim (the status will t

As a reminder, we can't take action on y
tus. Claim review can resume once you'
tus changes to Under Review. If your cl
the review timeline that's defined in th

For details about the program, refer to
[ticket for support](#).

[Privacy Statement](#)


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 wa




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



iii

Subject: Claim for Microsoft Teams workshop engagement was rejected

Preheader: Notice: Engagement claim not approved.



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.

[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:

- 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.
- Review the **Comment history** to determine what elements were found to be missing by the reviewer.
 - ✓ Click **Show More** to expand.
- 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.
- 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](#)

i

Claim status

- ✓ Editing
- ✓ Submitted
November 14, 2022
- ✓ Under review
November 15, 2022
- 🕒 **Action required**
- Approved

Comment history

M Microsoft
September 20, 2021 06:19 PM

Dear Partner,

ii At this time the Workshops POE review process does not support documentation review ...
[Show More](#)

Comment history

M 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

iii [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]

Partner information [Edit](#)

Partner location
Partner name
Partner contact name
Partner contact email

Claim status

✓ Editing
✓ Submitted May 17, 2022
✓ Under review May 18, 2022
✓ **Approved** May 18, 2022

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](#)

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.**

Microsoft Partner Center

Search

Home

>

Incentives

>

MCI engagements

>

Microsoft Syntax Workshop

>

Customers

>

Claim 3008309

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

Customer name

Customer consent date

Customer contact name

Customer contact email

Customer contact title

Customer domain name

Customer TPID/Tenant ID

Tenant domain name mismatch reason

Edit

Partner information

Partner location

Partner name

Partner contact name

Partner contact email

Edit

AUS, Redmond, (MPN:)

FridayINC

Claim status

Editing

Submitted

Under review

Rejected

July 25, 2022

July 27, 2022

August 18, 2022

Comment history

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,

Workshops - POE Validation Team

Show Less

Disputing a rejection

- 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.
- Open claim and scroll to the bottom. Click **Dispute** claim to initiate dispute process.
- Review the dispute resubmittal deadline and click **Dispute** to proceed or **Close** to abandon the dispute action.
- 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.
- 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.

Microsoft Partner Center

Home > Incentives > MCI engagements > Threat P

Dear Partner,

We are writing to inform you that a decision has b
Pro...
[Show More](#)

[Submit claim](#) **i** **Dispute claim**

Do you want to dispute the rejected claim?

Important: 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.

ii **Dispute** **Close**

Microsoft Partner Center

Home > Incentives > MCI engagements > Hybrid Cloud Security Workshops > Customers >

iii

- 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.

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>

Best regards,

MCI Engagements - Workshops POE Review Team

[Show Less](#)

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

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.

- Navigate to Referrals > Co-sell opportunities to review your deals.
- Deals that were created by the Partner Activities claims system will appear in the Outbound tab.

The screenshot displays the Microsoft Partner Center interface for the Referrals workspace. The top navigation bar includes the Microsoft Partner Center logo, a search bar, and icons for notifications, help, settings, and user profile. The left sidebar shows the navigation menu with options: Business profile, Leads, Co-sell opportunities (selected), ISV Connect deals, ISV Connect invoices, and Analyze. The main content area is titled 'Referrals | Co-sell opportunities' and includes a description: 'Co-sell opportunities are deals where collaborative selling is done by multiple parties to meet a customer need. [Learn more](#)'. Below this, there are tabs for Inbound, Outbound (selected), and Favorites. A summary text states: 'All deals that are created by your company and sent to Microsoft sellers and partners.' A toolbar at the top of the table provides actions: '+ New deal', 'Upload', 'Download', 'Columns', 'Filters', and a search bar. The table lists co-sell opportunities with columns: Deal name, Customer name, Type, Status, Microsoft status, MACC eligibility, Value, Close date, Country, and a star icon. One deal is visible: 'Fc...' with a customer 'Fc...', type 'Co-sell', status 'Created', Microsoft status 'Received', MACC eligibility 'No', value '\$5,000.00', close date '11/1/2024', and country 'United Arab Emirates'. The bottom of the page shows pagination controls: '< Previous', '1' (selected), 'Next >', and a dropdown for '10' deals per page.

Microsoft Partner Center

Home > Referrals

Business profile

Leads

Co-sell opportunities

ISV Connect deals

ISV Connect invoices

Analyze

Summary

Leads

Co-sell opportunities

Partner cohort

Referrals | Co-sell opportunities

Co-sell opportunities are deals where collaborative selling is done by multiple parties to meet a customer need. [Learn more](#)

Inbound **Outbound** Favorites

All deals that are created by your company and sent to Microsoft sellers and partners.

+ New deal Upload Download Columns Filters Type 3 letters to start searching

Deal name	Customer name	Type	Status	Microsoft status	MACC eligibility	Value	Close date	Country	
Fc...	Fc...	Co-sell	Created	Received	No	\$5,000.00	11/1/2024	United Arab Emirates	☆

< Previous 1 Next >

10 Deals per page

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".

Microsoft Partner Center

Home > Referrals > Co-sell opportunities > F [redacted] > Deal Details

Deal details

Solutions

Help from Microsoft

Partner collaboration

F [redacted] | Deal Details [Take a tour](#)

Collaborate with other partners to co-sell solutions. [Learn more](#)

\$5,000.00
Estimated deal value

OUTBOUND CO-SELL

Your company's deal progress [View history](#)

Created Won/lost (Pending) Closed

Qualify | MCEM Listen & Consult

Mark as qualified

Develop | MCEM Inspire & Design

Propose | MCEM Empower & Achieve

Negotiate | MCEM Empower & Achieve

Customer

Customer name: F [redacted] [Insights](#)

Location: DUBAI, United Arab Emirates

Contacts: TC [redacted]

MACC eligibility: No

Solution area: Digital and Application Innovation

Solution play: Migrate Enterprise Apps

Details [Edit](#)

Deal name: F [redacted]

Deal type: Co-sell

Partner Role: Proof of concept

Referral ID: f528cfae-dad6-46ae-a944-f2cd4341925a [Link](#)

Location: Partner ID (formerly MPN ID): [redacted]

Created date: Jun 7, 2024

Estimated close date: Nov 1, 2024

Estimated value: \$5,000.00

Currency: USD

Notes: This referral was automatically created by Partner Center based on a partners incentive claim with the associated customer: Engagement Name: [redacted]

Won Lost

[Close as error](#)

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' page, illustrating the steps to submit an inquiry. The interface includes a navigation bar at the top with icons for notifications, help, settings, and user profile. The main content area is titled 'Help + support' and lists 'Related documentation' links. The form fields are as follows:

- Problem summary *:** A text input field containing 'Customer not eligible'.
- Workspace *:** A dropdown menu with 'Incentives' selected.
- Problem type *:** A dropdown menu with 'Engagements' selected.
- All Incentives topics:** A list of subtopics under 'Engagements', including 'Add customer', 'Claim customer', and 'Claim status and submission deadlines'.
- Browse topics / Review solutions:** Two buttons at the bottom of the form.

Yellow callout boxes with Roman numerals (i through vi) highlight the specific steps described in the instructions: (i) clicking the question mark icon, (ii) clicking 'Contact Support', (iii) entering the problem summary, (iv) selecting the workspace, (v) selecting the problem type, and (vi) clicking 'Browse topics' or 'Review solutions'.

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**](#)



Thank you.