Customer Association Process

Claiming Partner of Record (CPOR)

Introduction

In this training, we explore the customer association model supporting the FY20 OSU/OSA programs.

Microsoft

Objectives

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

- navigate the new customer association process.
- describe the new customer association process.

Contents

Customer Association Process

Microsoft

A new customer association incentive process

Why a new process?

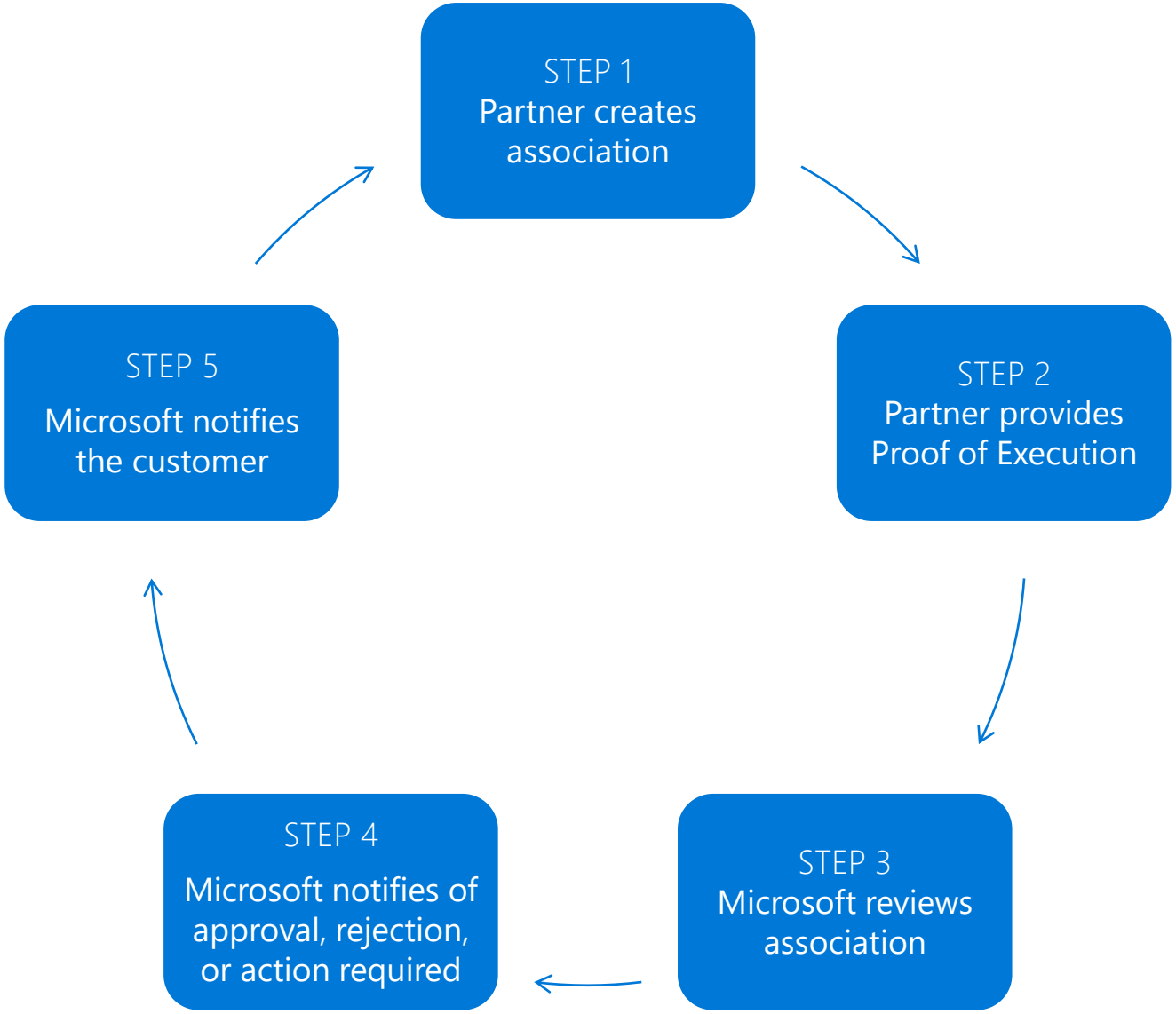
- In Microsoft's efforts to improve your incentives experience, we have replaced Digital Partner of Record (DPOR) with a new customer associations model; Claiming Partner of Record (CPOR).
- CPOR will put partners in control and lessen the dependency on customer actions.
- CPOR applies to OSU-Microsoft 365, Dynamics 365 under OSU-Business Applications, and OSA Sell. Partners who want to receive incentives for PowerBI will still need to become associated via DPOR.
- In the new CPOR model, you will be associated with the customer at a subscription or product/workload level. You will do this by submitting a customer association through the Partner Center Dashboard.
- This training will run through the creation, submission, and tracking of a customer association.

Customer association process

- CPOR is how partners associate with customers at product/workload or subscription level via claims.
- CPOR is how partners will get recognized for the engagement and impact they drive.
- Partners will create the association within Partner Center. Microsoft will verify the association request with the customer.
- A single customer can have multiple partners but only one partner per product/workload or subscription.

Customer association process

- After you create a new customer association, Microsoft will verify the details of the association and proof of execution provided to ensure its accuracy.
- If you and another partner claim for the same customer and product/workload, Microsoft will review each partner's proof of execution documentation to determine which partner to approve.
- Additional information might be requested from both partners which could cause delays in processing your association request.
- If your association is approved Microsoft will notify the customer



Creating a customer association (Business Applications)

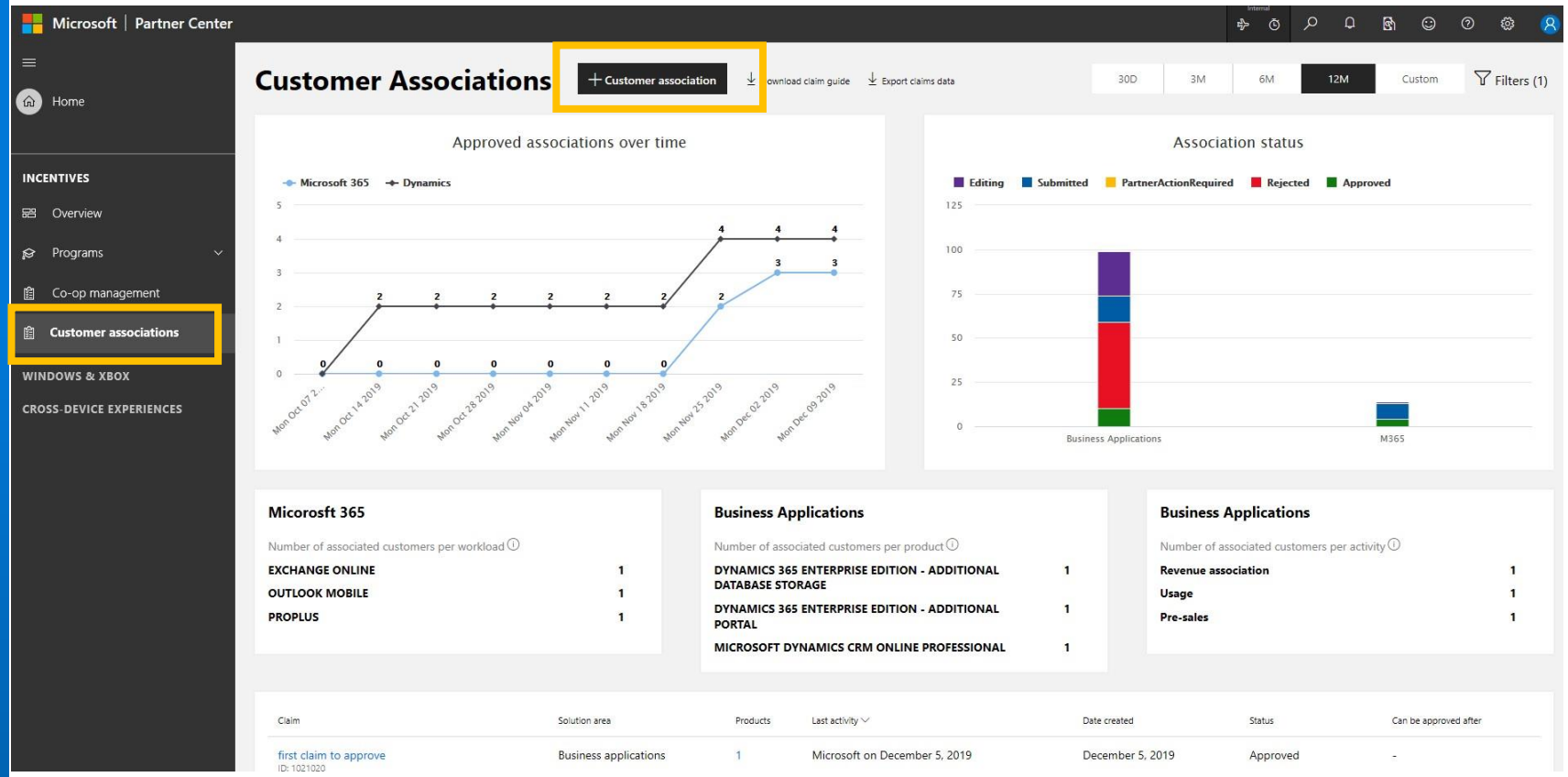
Creating an association
(Business Applications)

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

- Visit **Partner Center Dashboard**
- Under **Incentives**, select **Customer associations**.
- Select **+Customer association**

Note:

- A new window will open where you provide information about your association.
- Alternatively, you can select the relevant program under the **Program** dropdown menu. Then select Customer Association.
- Only the following users in Partner Center can view and create associations.
  - Incentive Admin
  - Incentive User



Creating an association
(Business Applications)

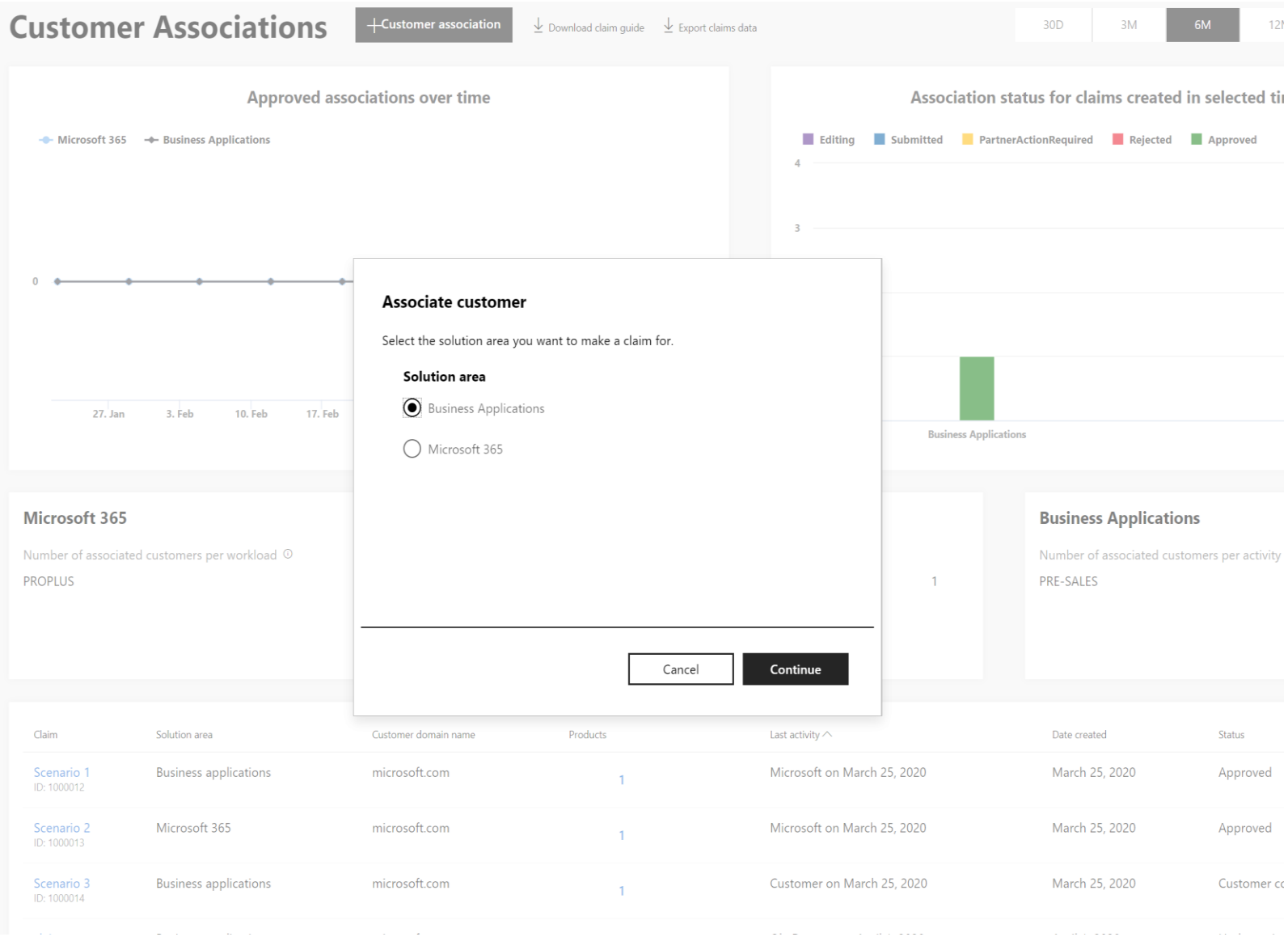
To create an association, you must follow the steps below:

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

- Select Solution area

Note:

- This is a dynamic screen where the options change based on your selection.
- The solution area and activity selected are applicable for certain incentive programs.

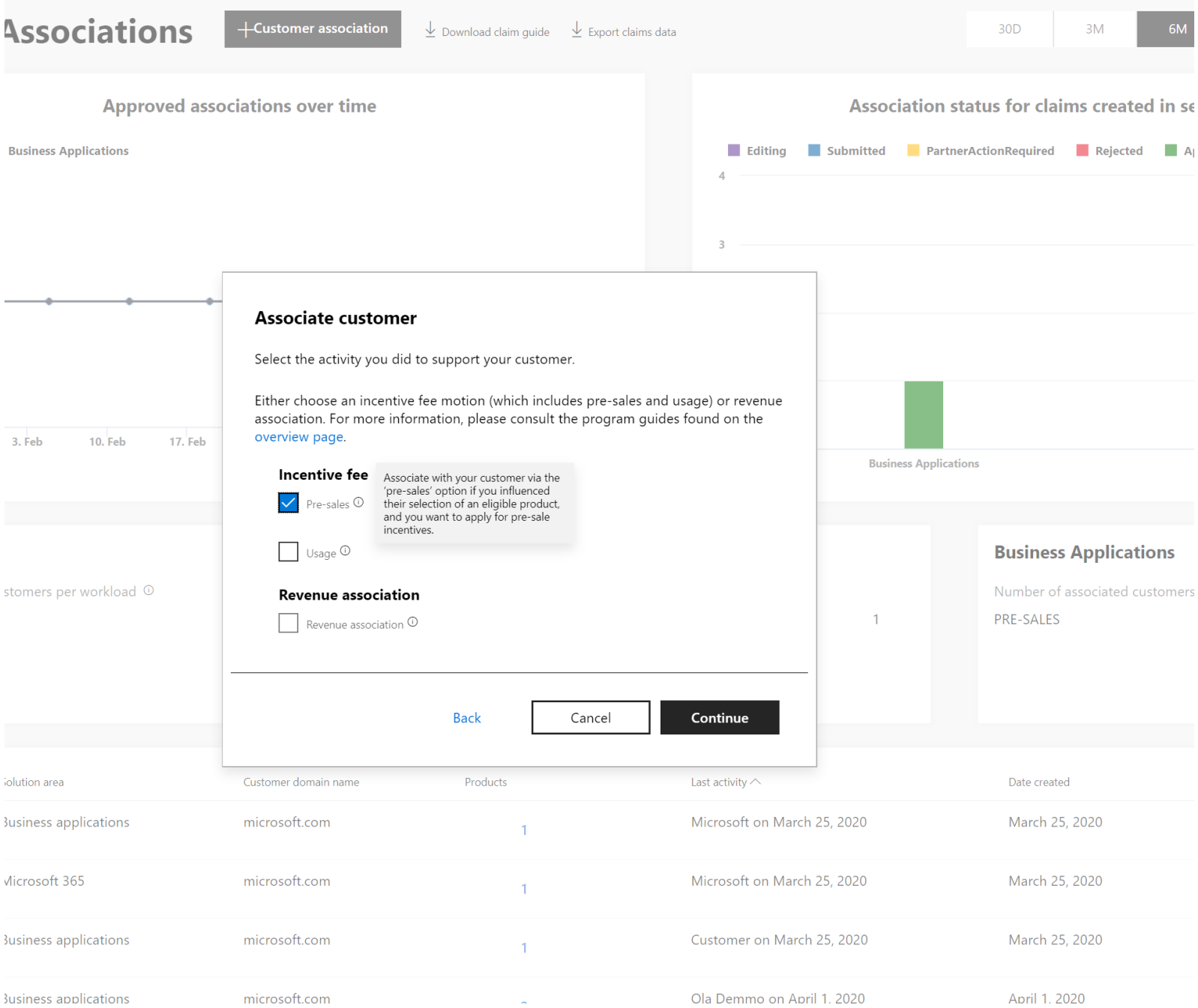


Creating an association
(Business Applications)

- Select the desired activity

Note: Do not select "Revenue association" if you also want to earn incentives for this customer association

The revenue association option is only applicable under the OSA Sell incentive program.

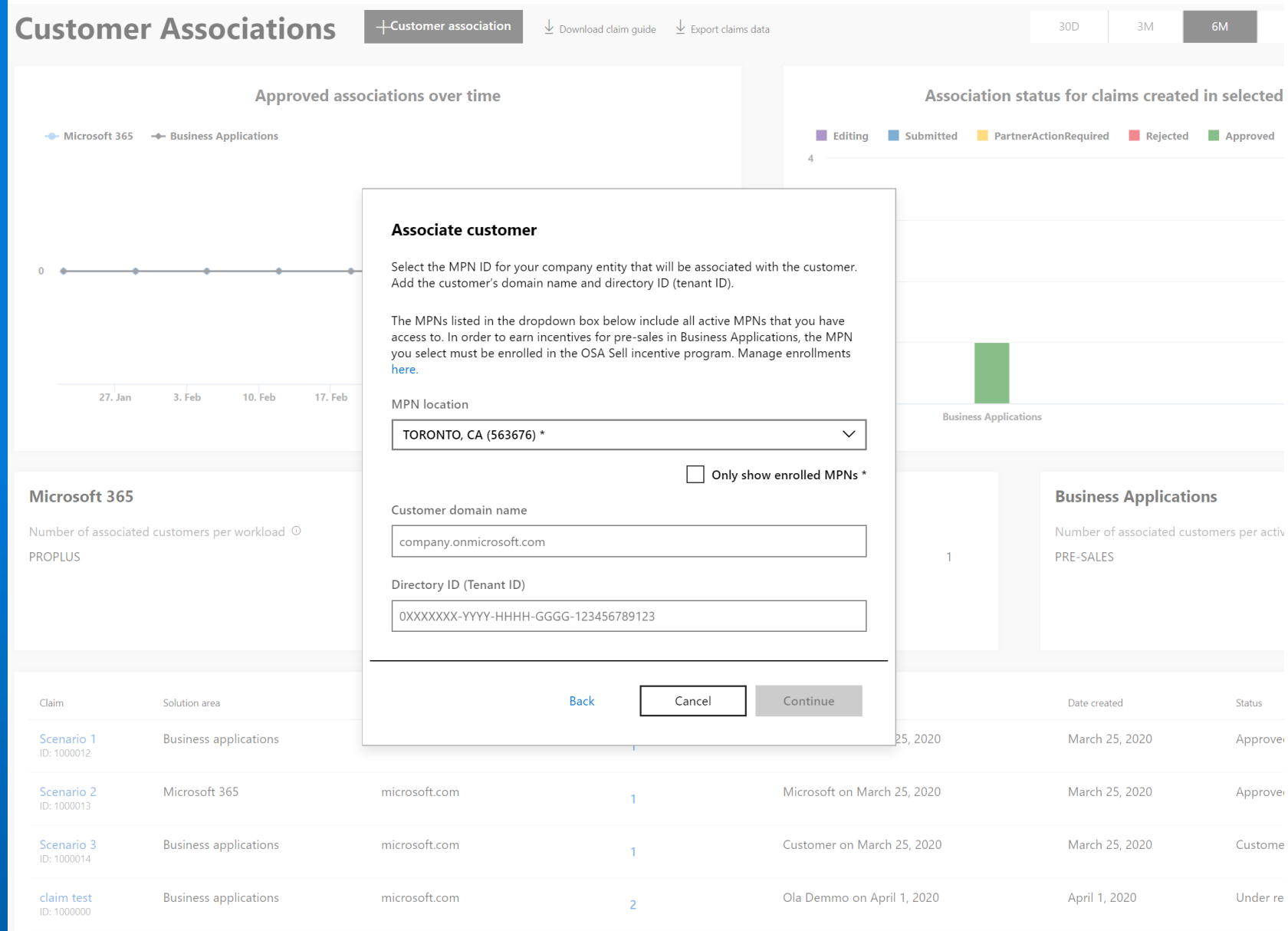


Creating an association
(Business Applications)

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

The next window appears where you select your location and customer for this association.

- Select MPN location
- Filter locations participating in incentives (if applicable)
- Enter Customer domain name
- Enter Directory ID (Tenant ID).
- Select **Continue**.



Creating an association
(Business Applications)

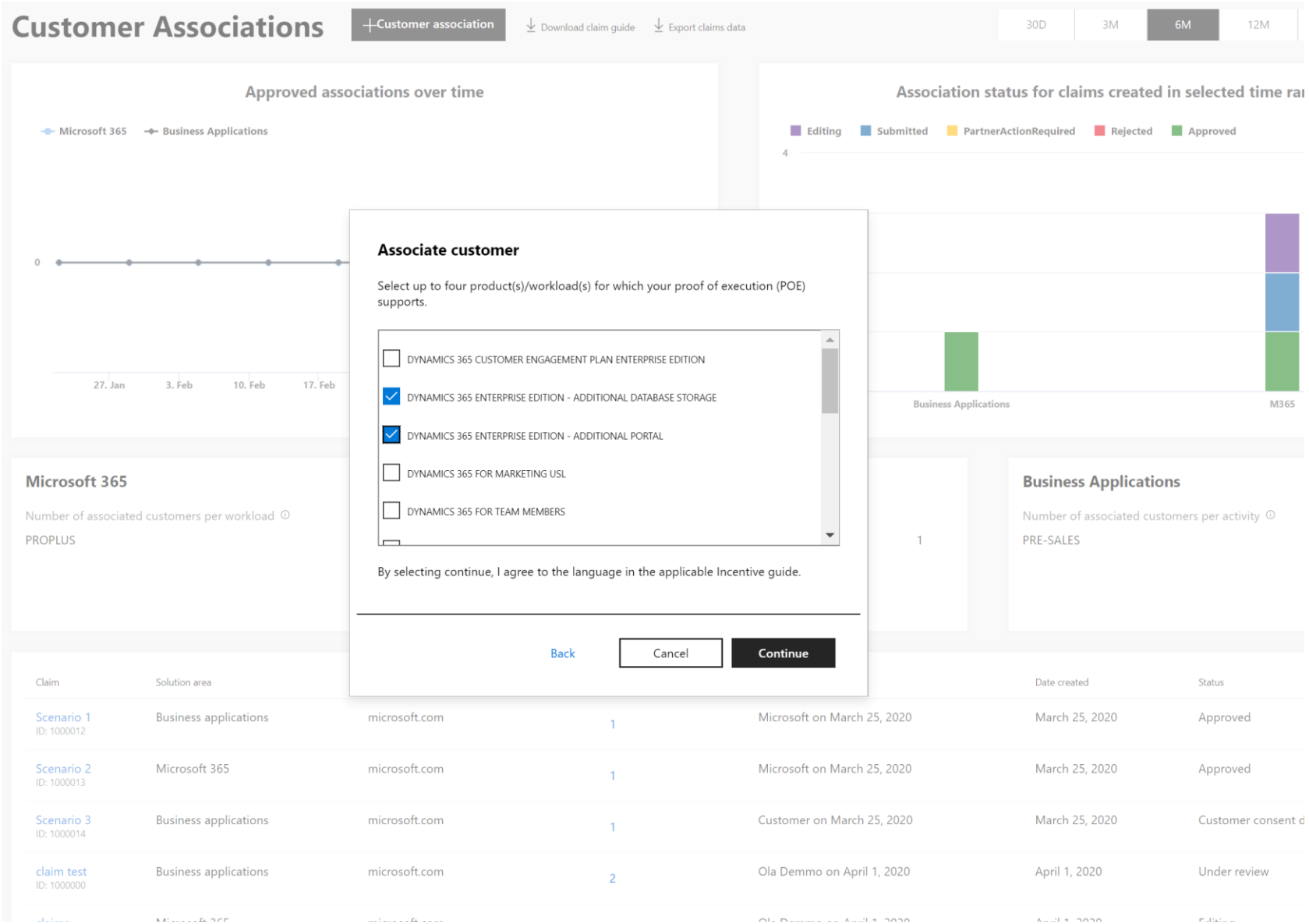
To create an association, you must follow the steps below:

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

- Select product(s)
- Select **Continue**.

Note:

- Products already associated with your organization, will be grayed out and unavailable for selection.
- Only select products you are actively engaged with the customer on. Otherwise your association may be rejected or delayed.
- Business Applications claims are associated at the Tenant/Product/Subscription level



Creating an association
(Business Applications)

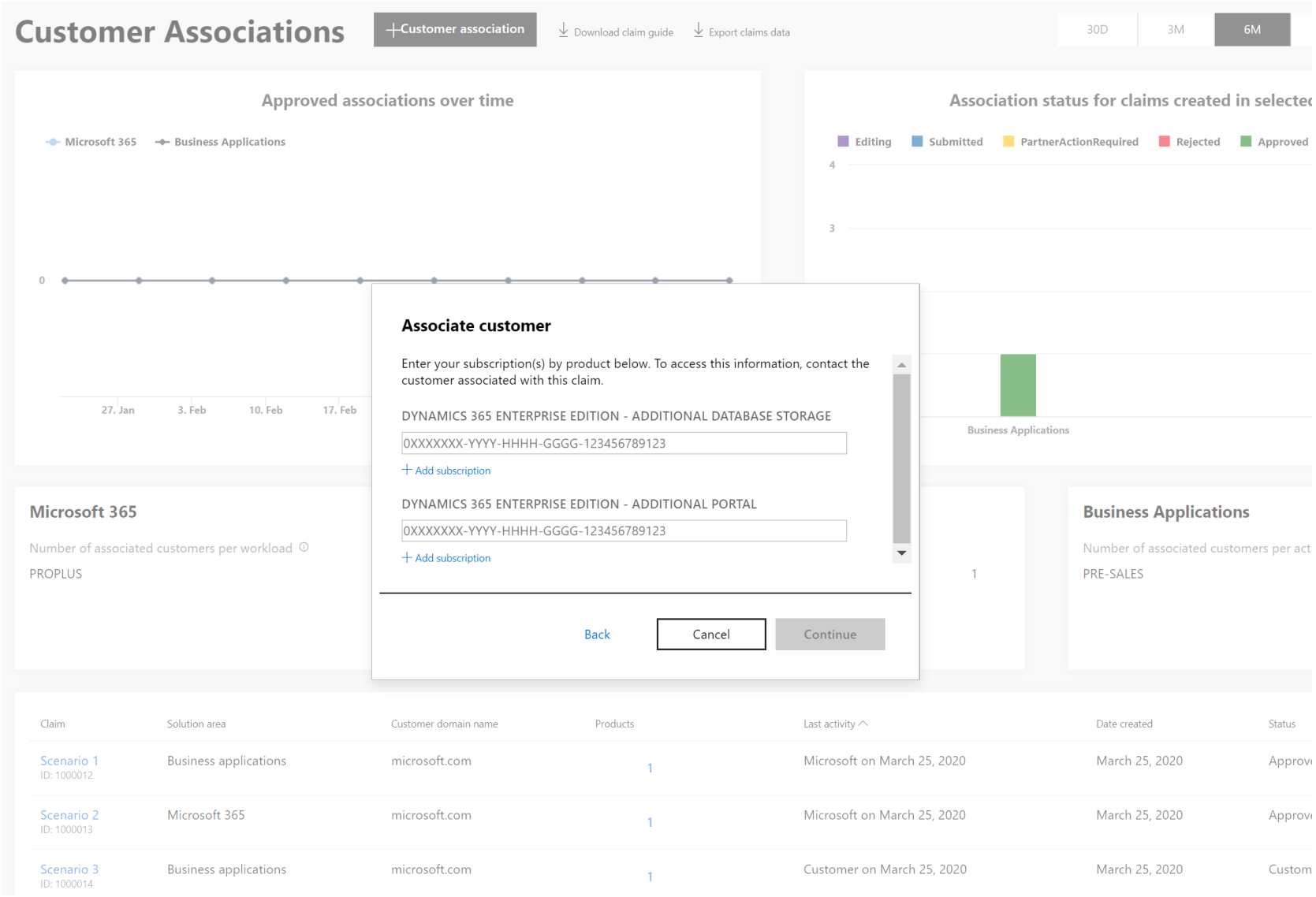
To create an association, you must follow the steps below:

For Business Applications, a new window may appear asking for the Subscription ID.

- Enter Subscription ID
- Select **Continue**
- The system will then validate the subscription provided

Note:

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

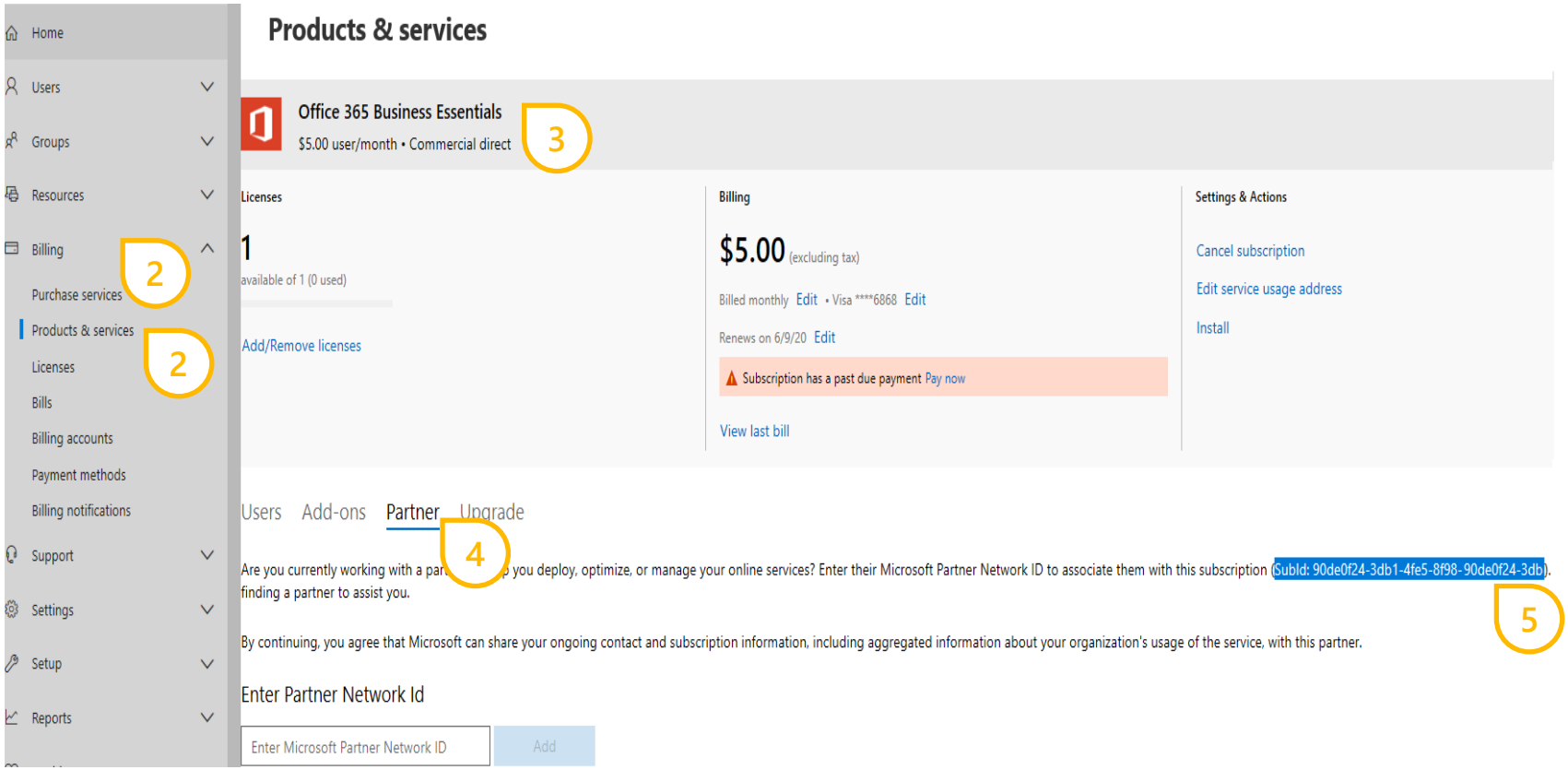


Creating an association
(Business Applications)

When selecting product(s) for Business Applications associations you may be required to provide the subscription.

Contact the customer associated with this claim for this information. Customers can find this information by

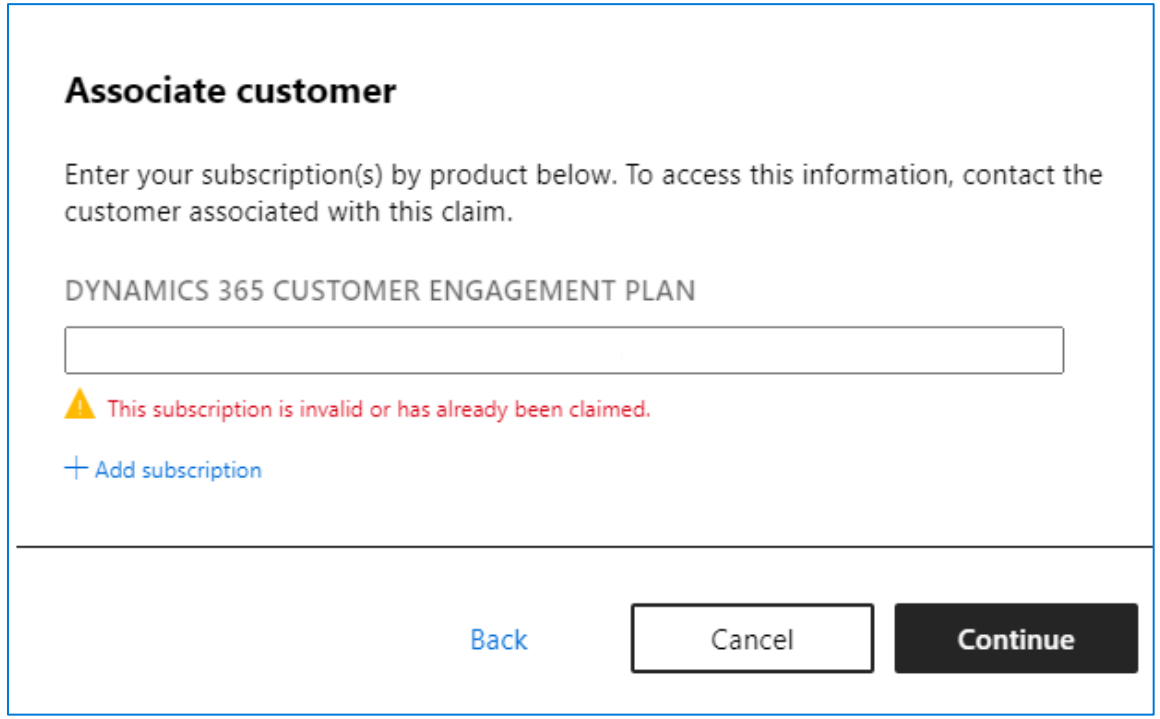
1. Logging into the O365 portal at: https://portal.office.com/
2. Selecting Billing > Products & Services.
3. Selecting the subscription name.
4. Selecting “Partner”.
5. The subscription ID will be visible in the middle of the page.



Creating an association
(Business Applications)

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

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



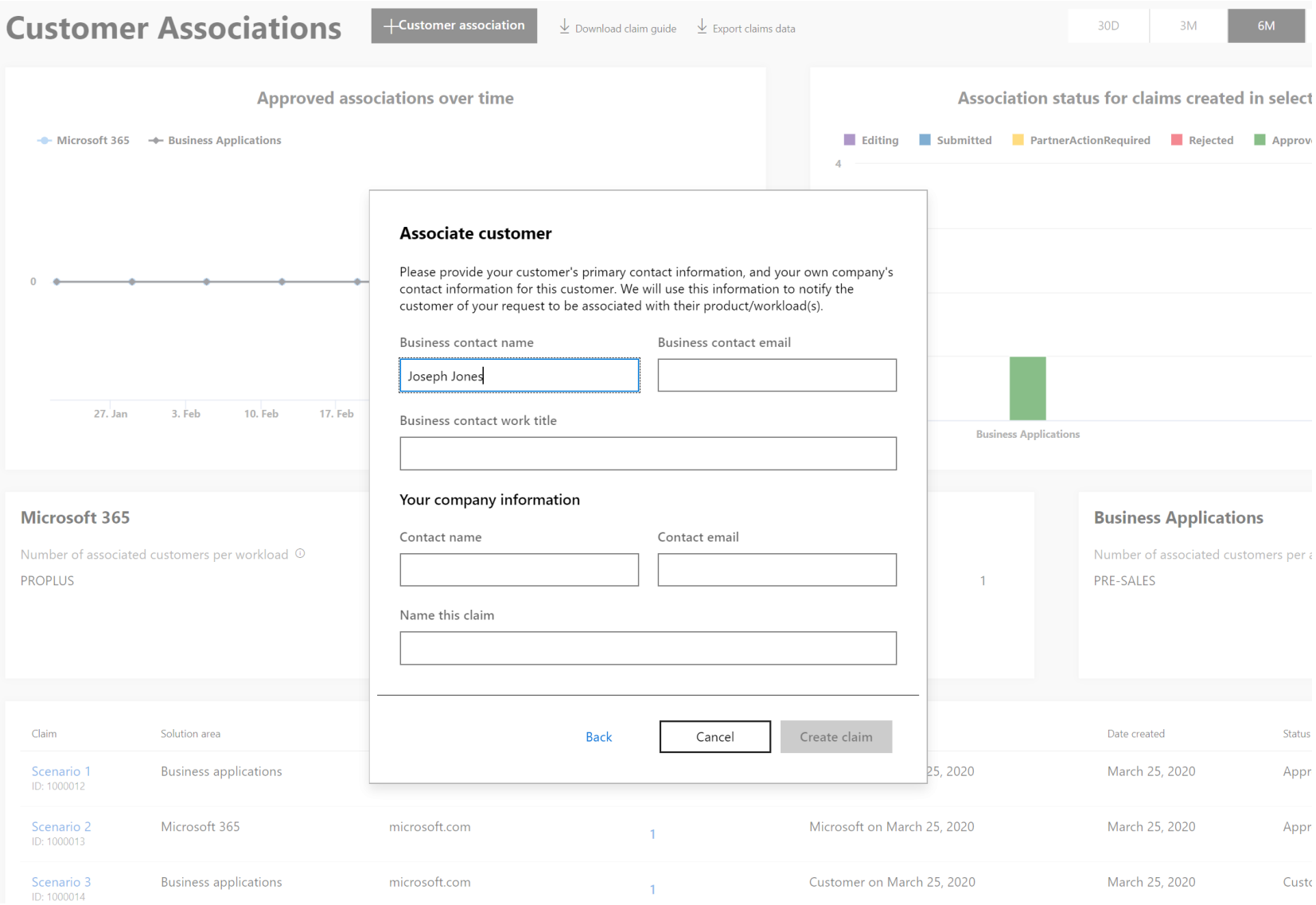
Creating an association
(Business Applications)

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

- Add your customer contact information. Microsoft will use these details to notify the customer of your request to be associated.
- Enter your organization's preferred contact. They should be familiar with the customer, as they will be included in the consent email.
- Name your claim. This will help you easily identify the claim later.
- Select **Create claim.**

Note:

For privacy reasons, Microsoft will notify the customer contact to give them the option of denying your access to their data. The customer's Office Portal administrator will also be copied in.



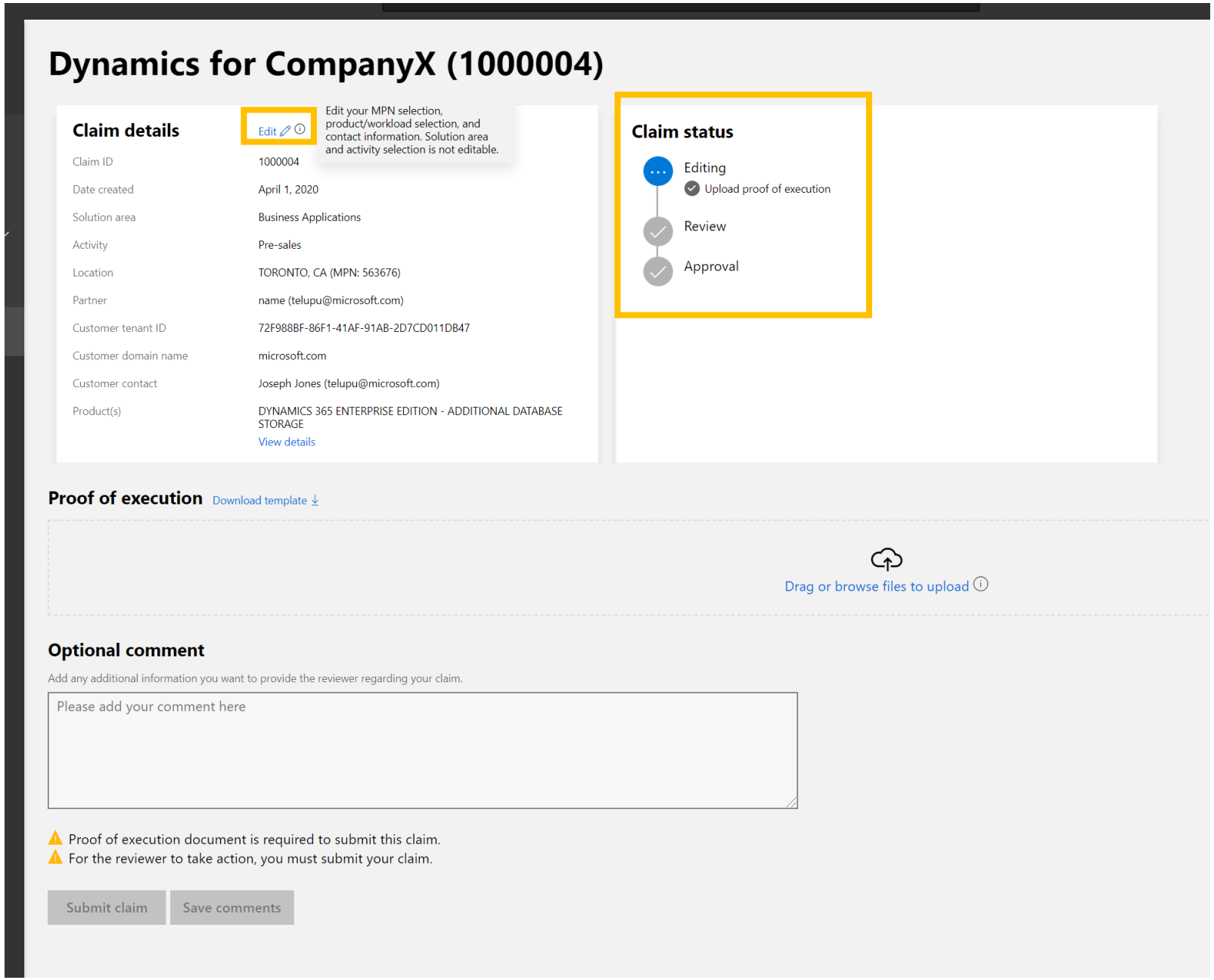
Creating an association
(Business Applications)

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

- The association page displays. You can see all the information have just entered related to the claim.

New claim editing functionality in Partner Center:

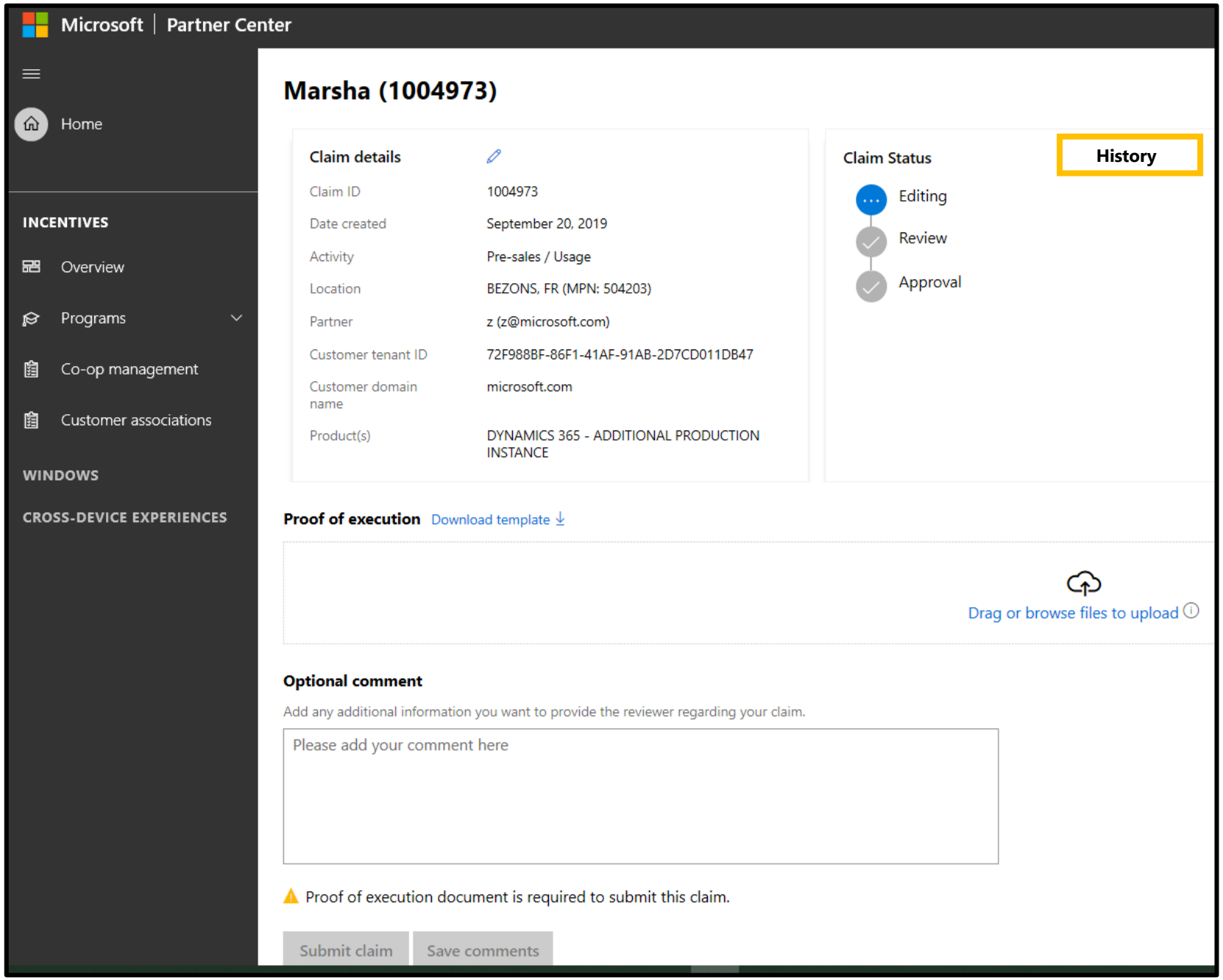
- If you select **Edit** you can change some details of your claim like:
  - MPN Selection
  - Product Selection
  - Subscription Selection
  - Contact Information
- The **Claim Status** diagram on the top right, tells you what stage your claim is at and if any action is needed.



Creating an association
(Business Applications)

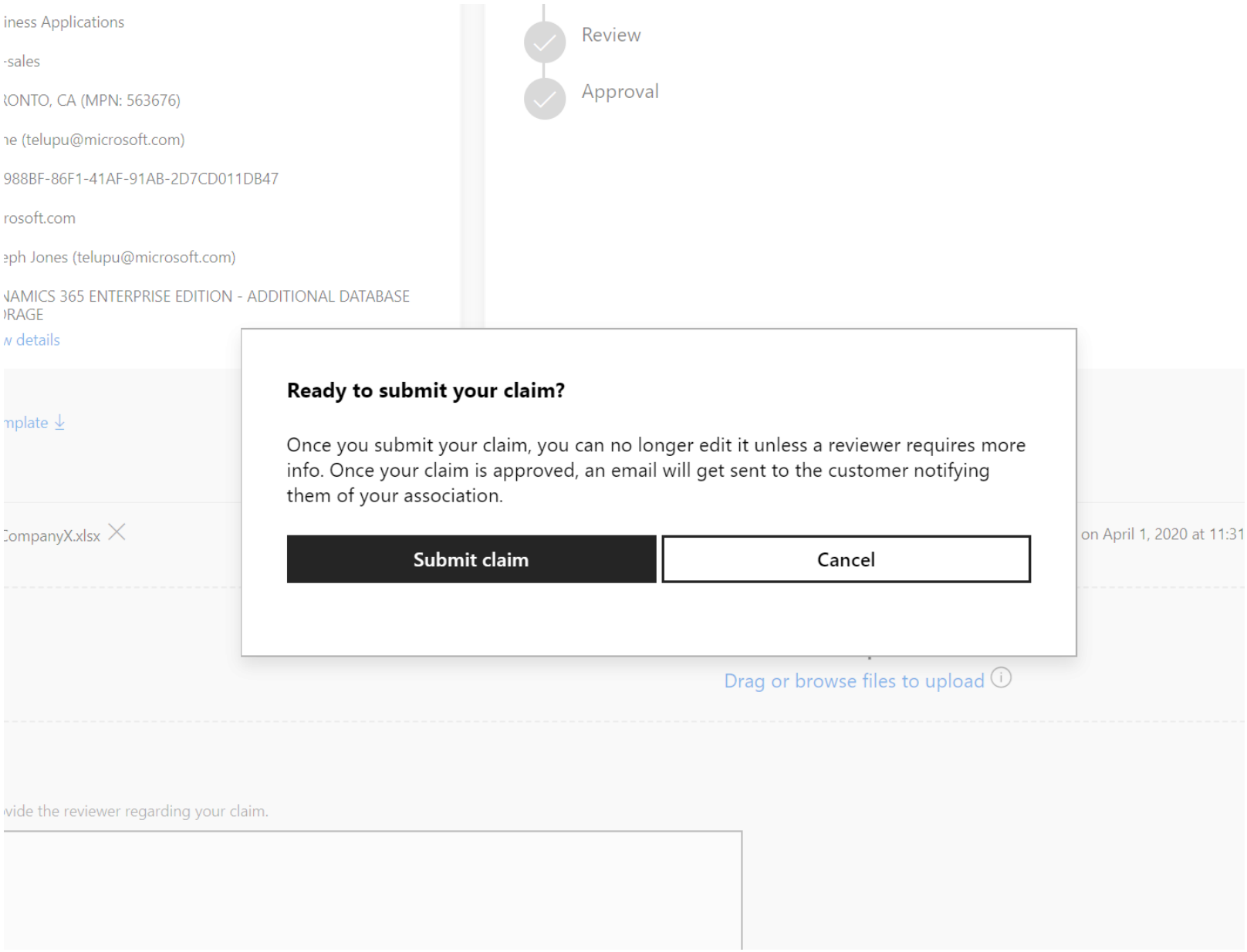
To create an association, you must follow the steps below:

- It is possible to see the history of all actions relating to this claim
- You can now upload the supporting documentation for the claim



Creating an association
(Business Applications)

- When finished, click “Submit claim”

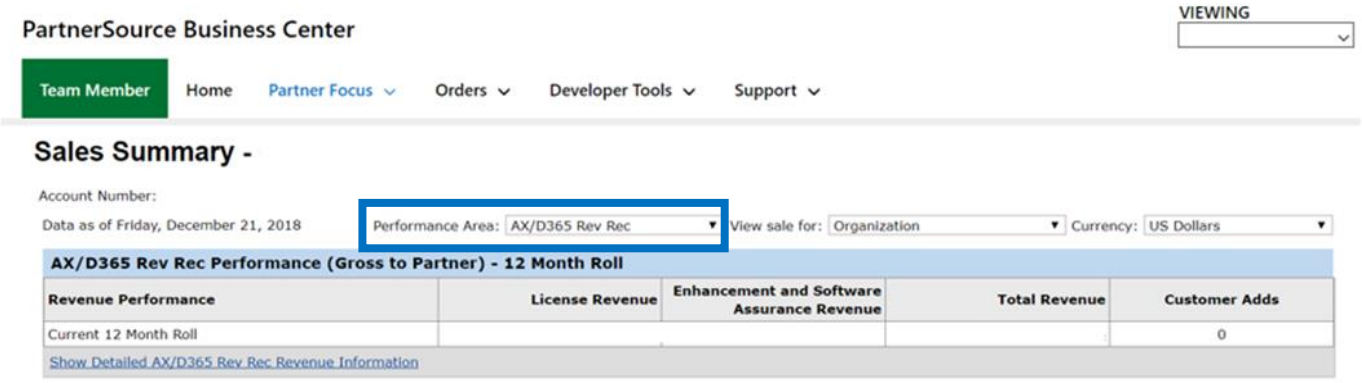


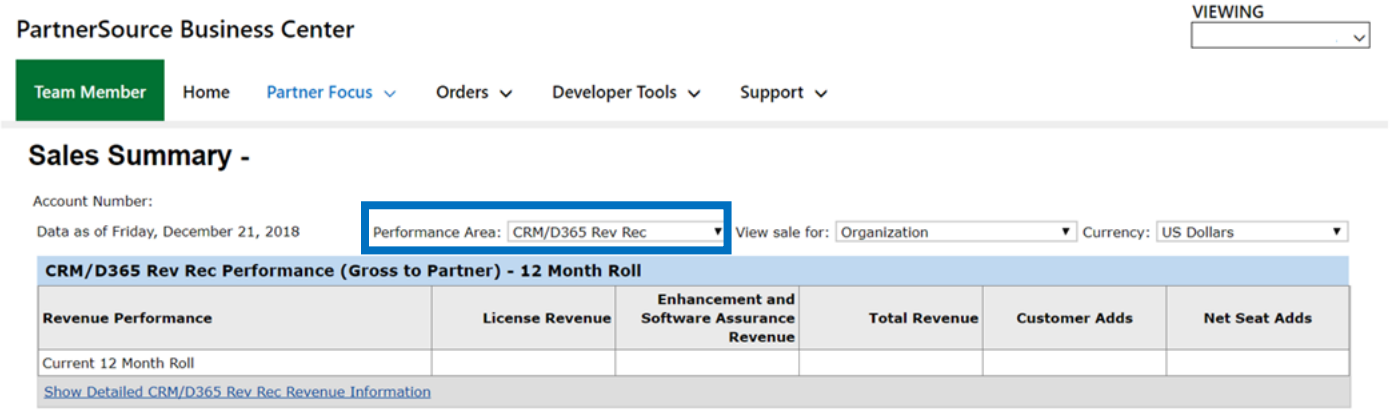
Revenue association

View Business Influencer-associated revenue within the "Partner focus– Sales summary" section of PartnerSource Business Center (PSBC).

- Select Performance Area "AX/D365 Rev Rec" for recognition of ERP revenue.
- Select Performance Area "CRM/D365 Rev Rec" for recognition of CRM revenue.

For more details on revenue association and the applicable requirements please review the OSA Sell incentive guide on aka.ms/partnerincentives





Create a customer association (Microsoft 365)

Creating an association
(Microsoft 365)

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

- Visit **Partner Center Dashboard**
- Under **Incentives**, select **Customer associations**.
- Select **+Customer association**

Note:

- A new window will open where you provide information about your association.
- Alternatively, you can select the relevant program under the **Program** dropdown menu. Then select Customer Association.
- Only the following users in Partner Center can view and create associations.
  - Incentive Admin
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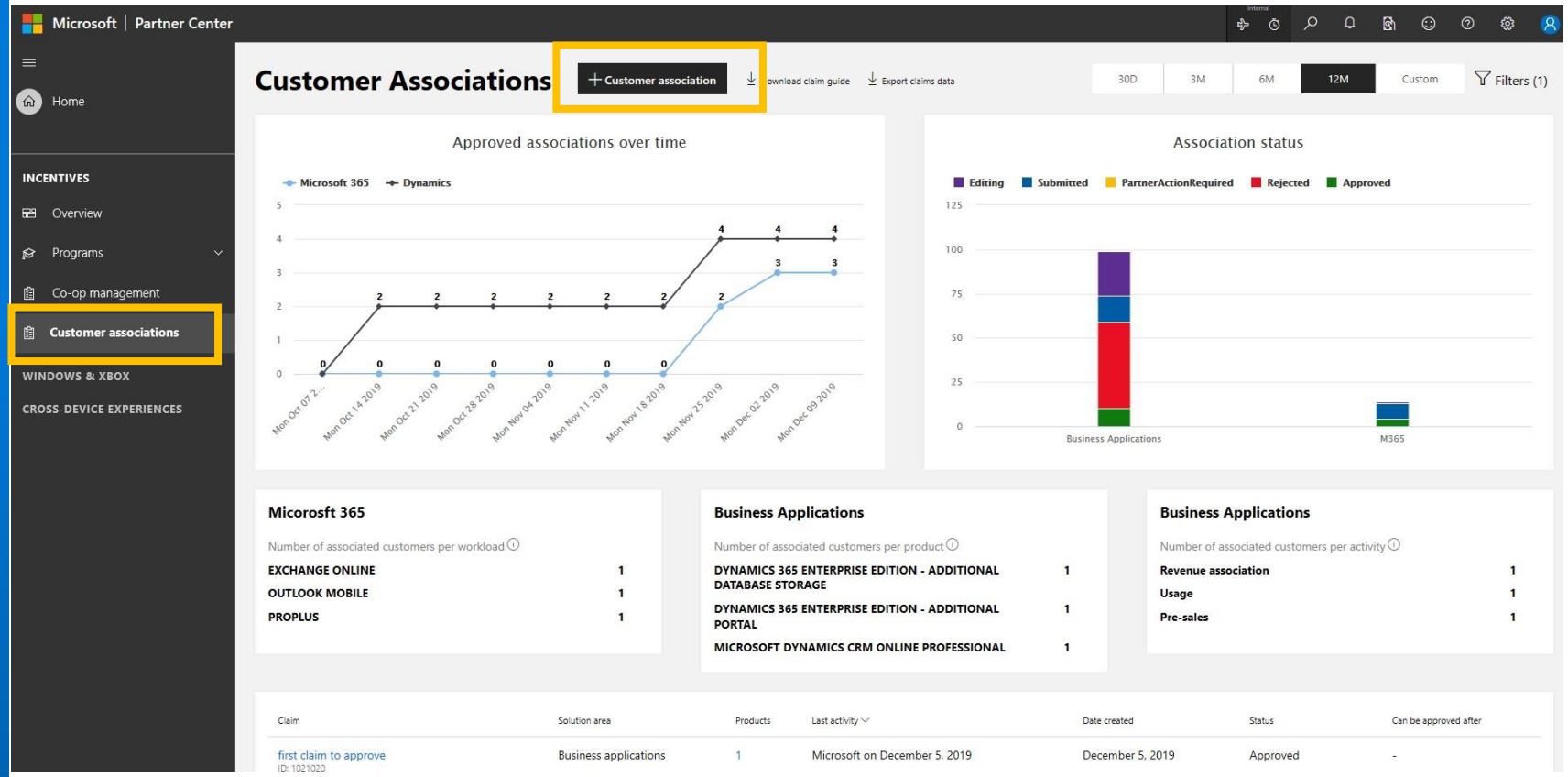

Creating an association
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To create an association, you must follow the steps below:

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

- Select Solution area

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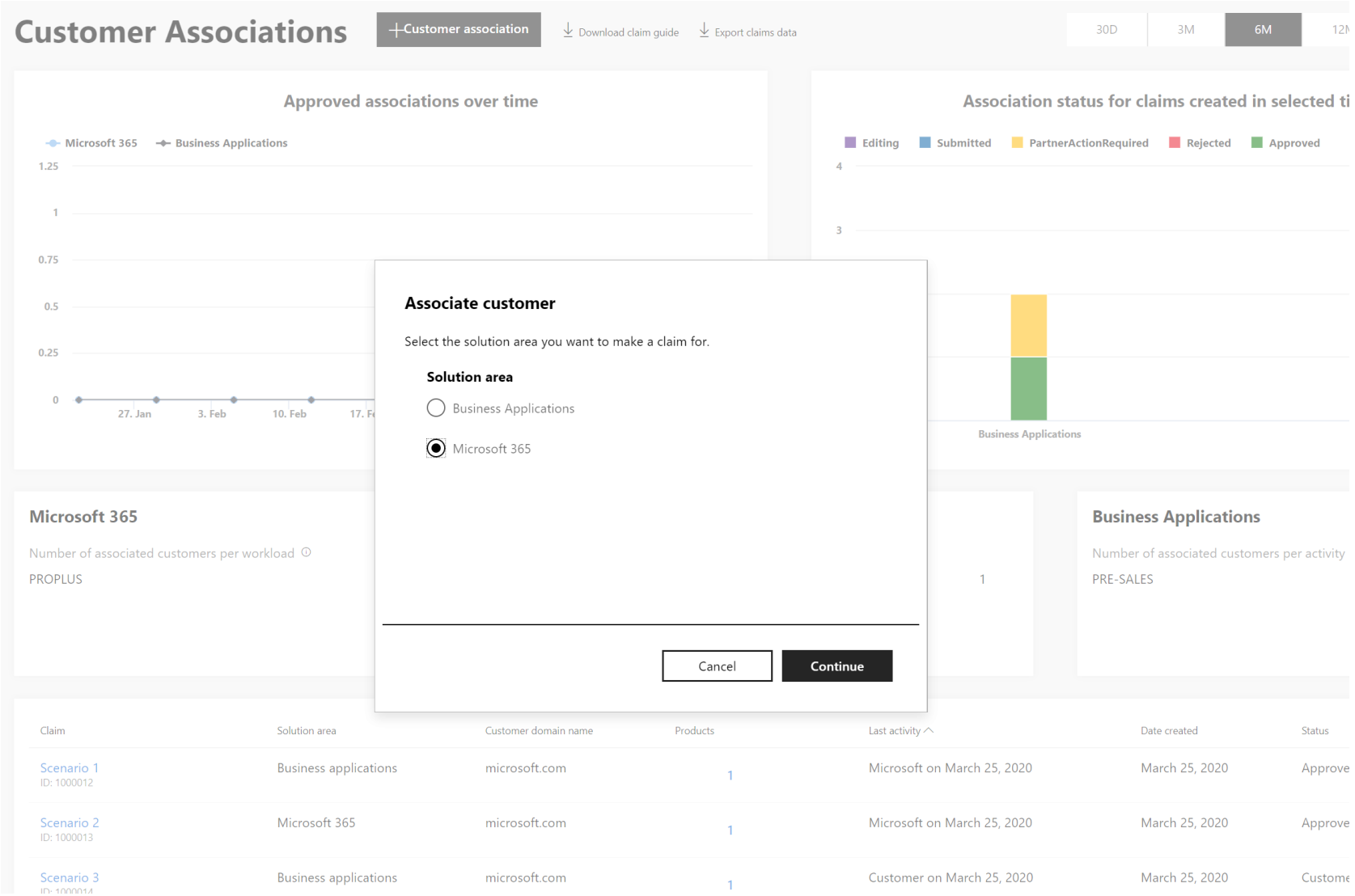
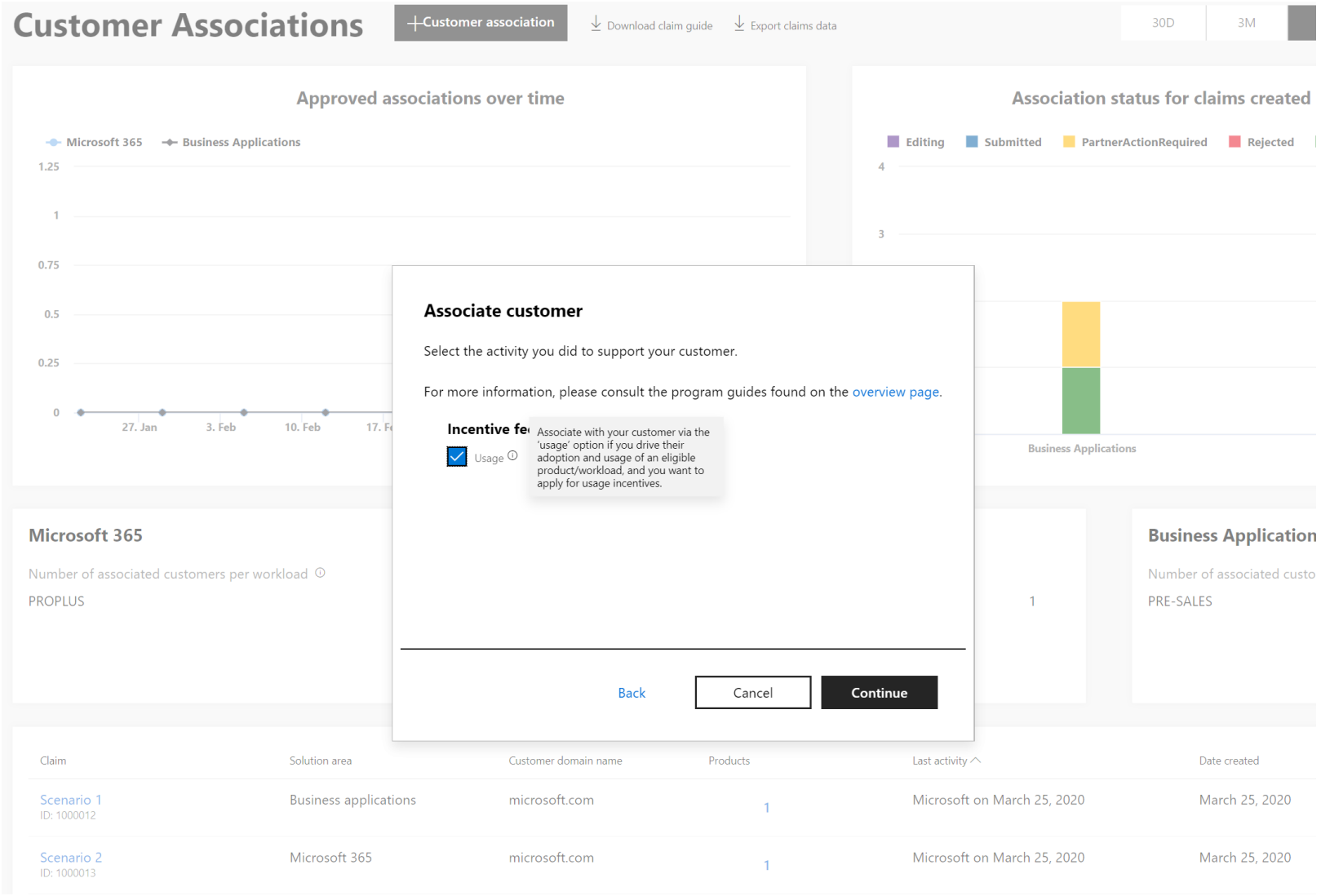


Creating an association
(Microsoft 365)

- Select the desired activity



Creating an association
(Microsoft 365)

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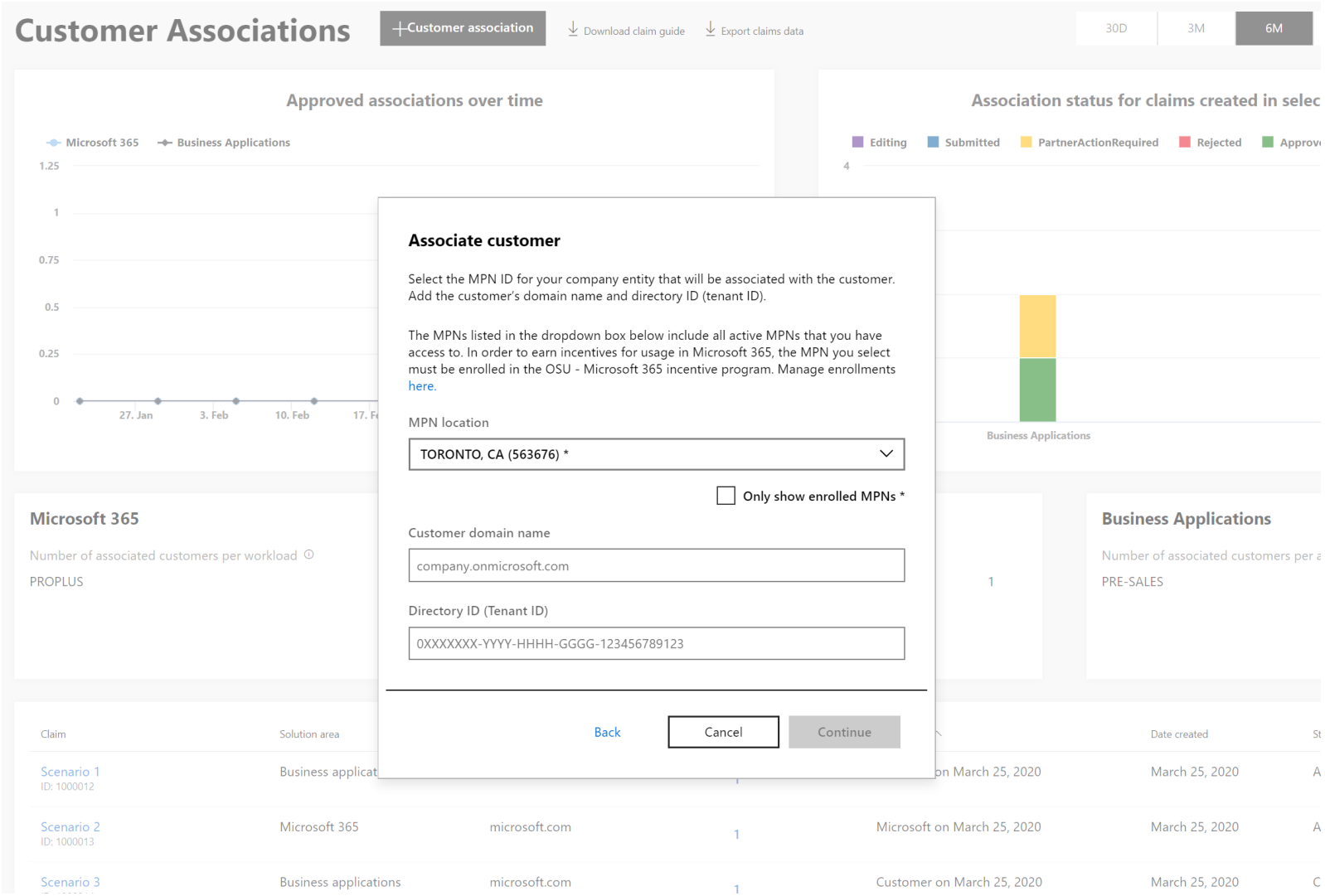
The next window appears where you select your location and customer for this association.

- Select MPN location
- Filter locations participating in incentives (if applicable)
- Enter Customer domain name
- Enter Directory ID (Tenant ID).
- Select **Continue**.



Creating an association
(Microsoft 365)

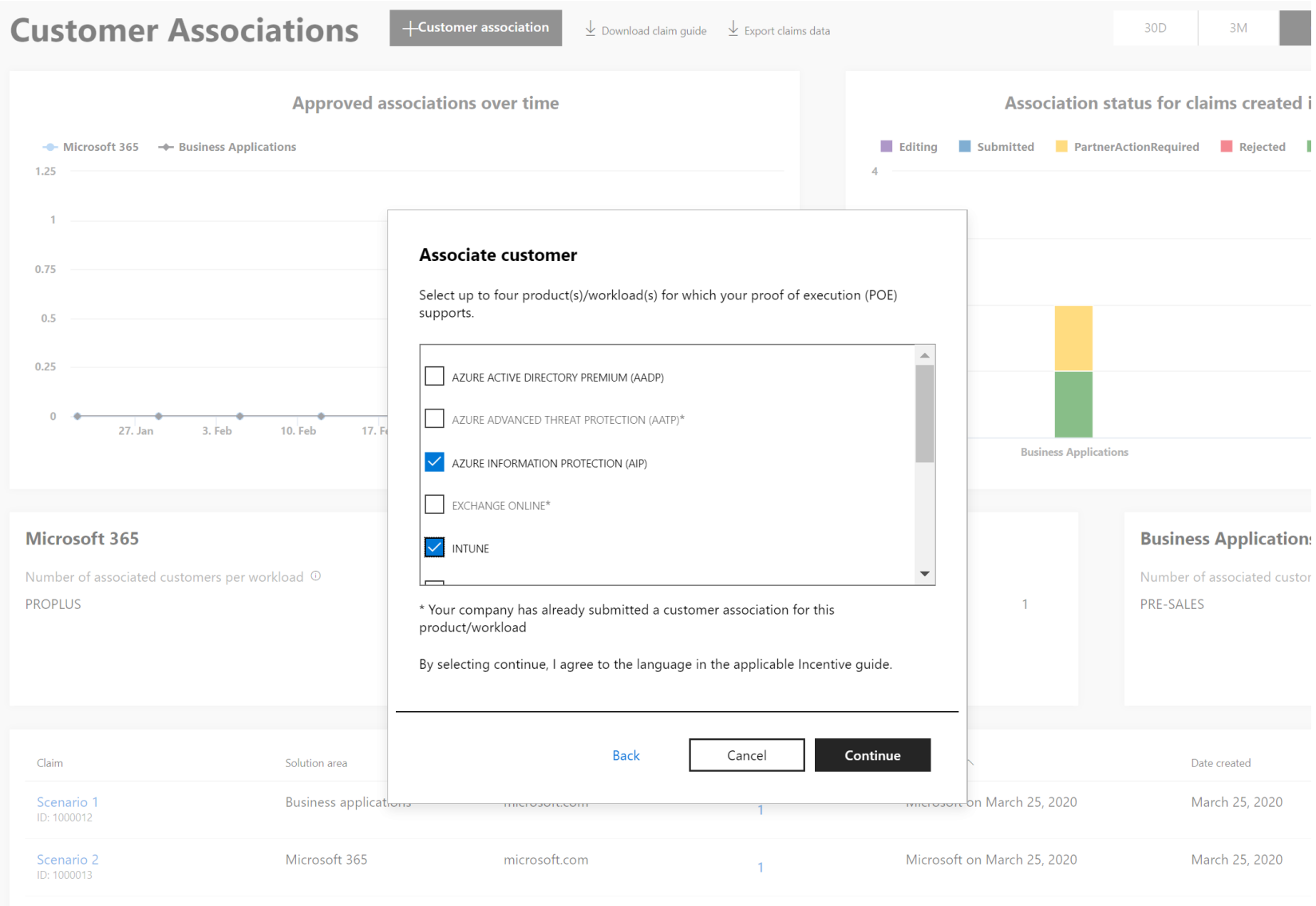
To create an association, you must follow the steps below:

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

- Select workload(s)
- Select **Continue**.

Note:

- Workloads already associated with your organization, will be grayed out and unavailable for selection.
- Only select workloads you are actively engaged with the customer on. Otherwise your association may be rejected or delayed.
- Microsoft 365 is associated at the Tenant/Workload level



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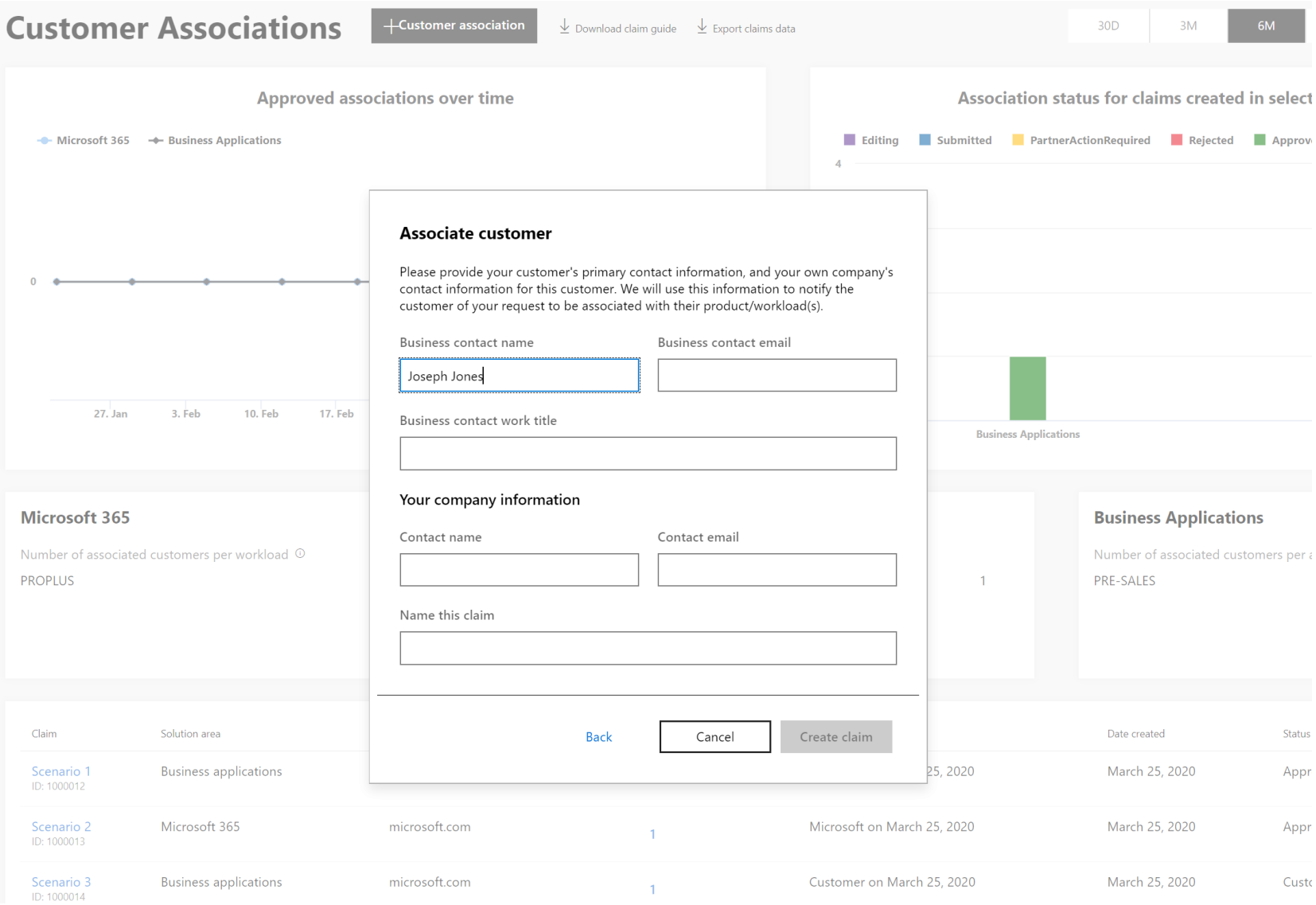

Creating an association
(Microsoft 365)

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- The association page displays. You can see all the information have just entered related to the claim.

New claim editing functionality in Partner Center:

- If you select **Edit** you can change some details of your claim like:
  - MPN Selection
  - Workload Selection
  - Subscription Selection
  - Contact Information
- The **Claim Status** diagram on the top right, tells you what stage your claim is at and if any action is needed.

M365 for CompanyX (1000005)

Claim details Edit

Edit your MPN selection, product/workload selection, and contact information. Solution area and activity selection is not editable.

Claim ID	1000005
Date created	April 1, 2020
Solution area	Microsoft 365
Activity	Usage
Location	TORONTO, CA (MPN: 563676)
Partner	My name
Customer tenant ID	72F988BF-86F1-41AF-91AB-2D7CD011DB47
Customer domain name	microsoft.com
Product(s)	AZURE INFORMATION PROTECTION (AIP), INTUNE

Claim status

- Ready to submit
- Review
- Approval

Proof of execution Download template

Document name	Comment	Last activity
Scanning document Proof of Execution with CompanyX.xlsx	Add note	Uploaded by **Ola Demmo** on April 1, 2020 at 12:23:45 PM

Drag or browse files to upload

Optional comment

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

Please add your comment here

OD **Ola Demmo** on April 1, 2020, 12:23 PM

I have a comment on this claim

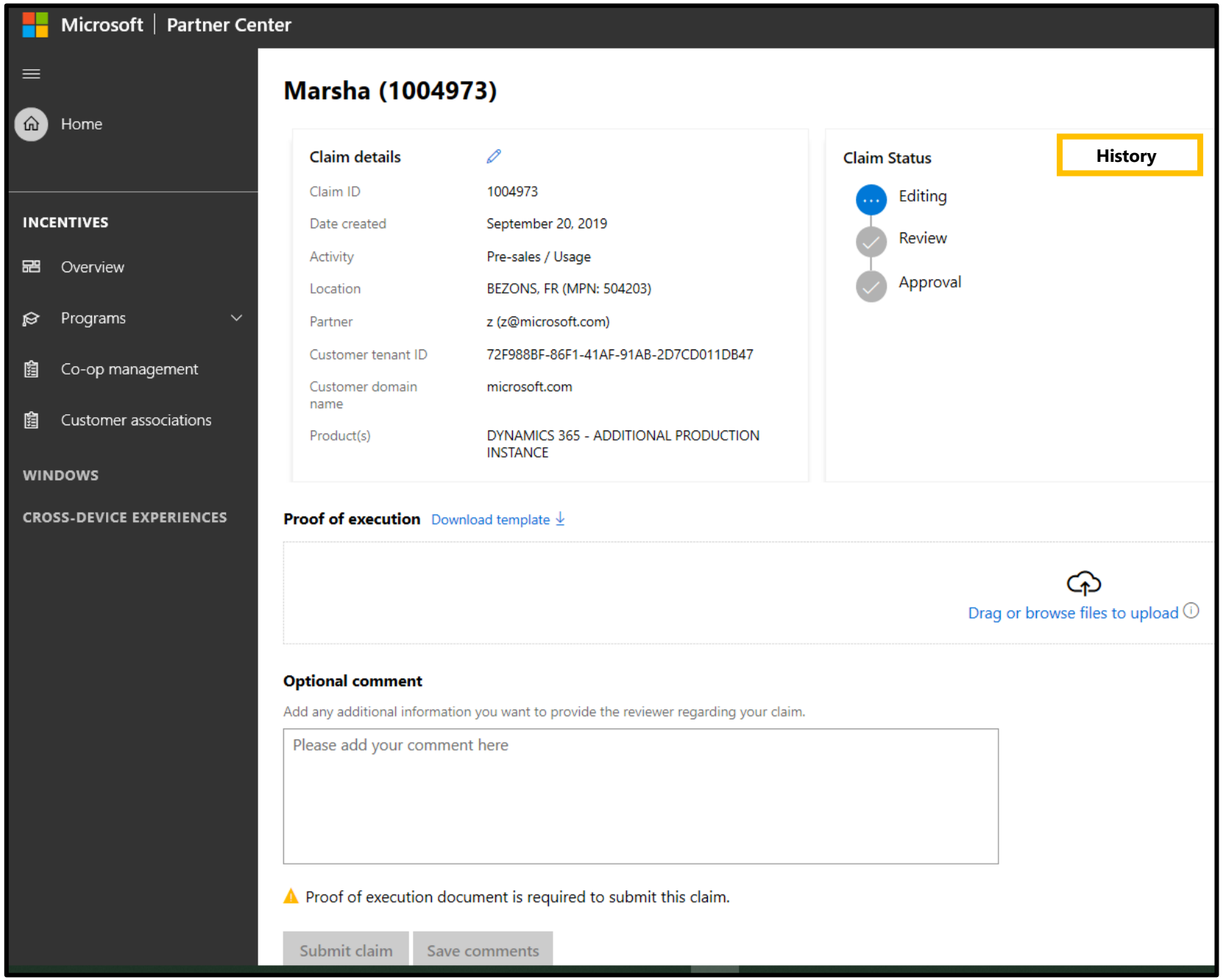
For the reviewer to take action, you must submit your claim.

Submit claim | Save comments

Creating an association
(Microsoft 365)

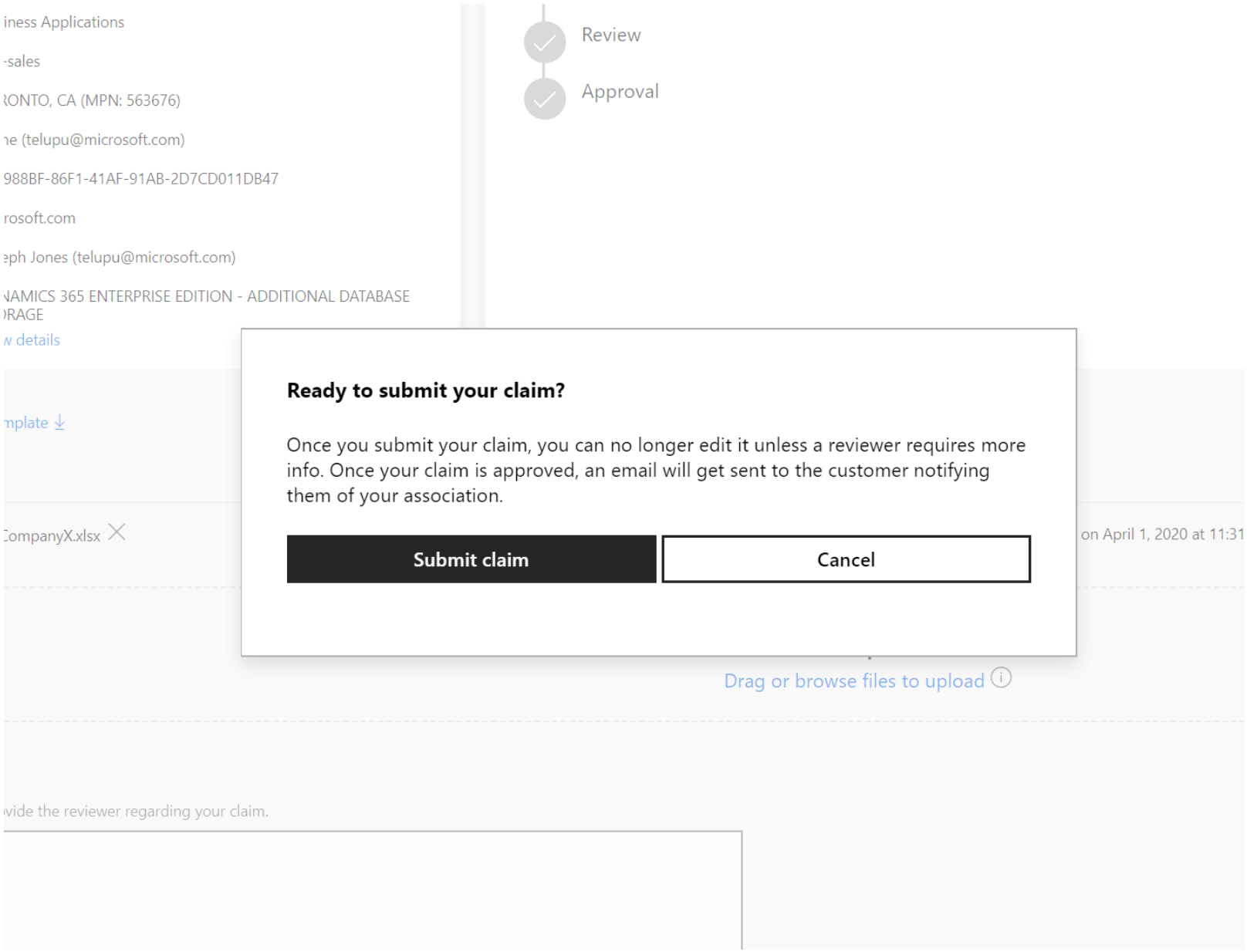
To create an association, you must follow the steps below:

- It is possible to see the history of all actions relating to this claim
- You can now upload the supporting documentation for the claim



Creating an association
(Microsoft 365)

- When finished, click “Submit claim”



Submitting Proof of Execution

Microsoft

Proof of Execution

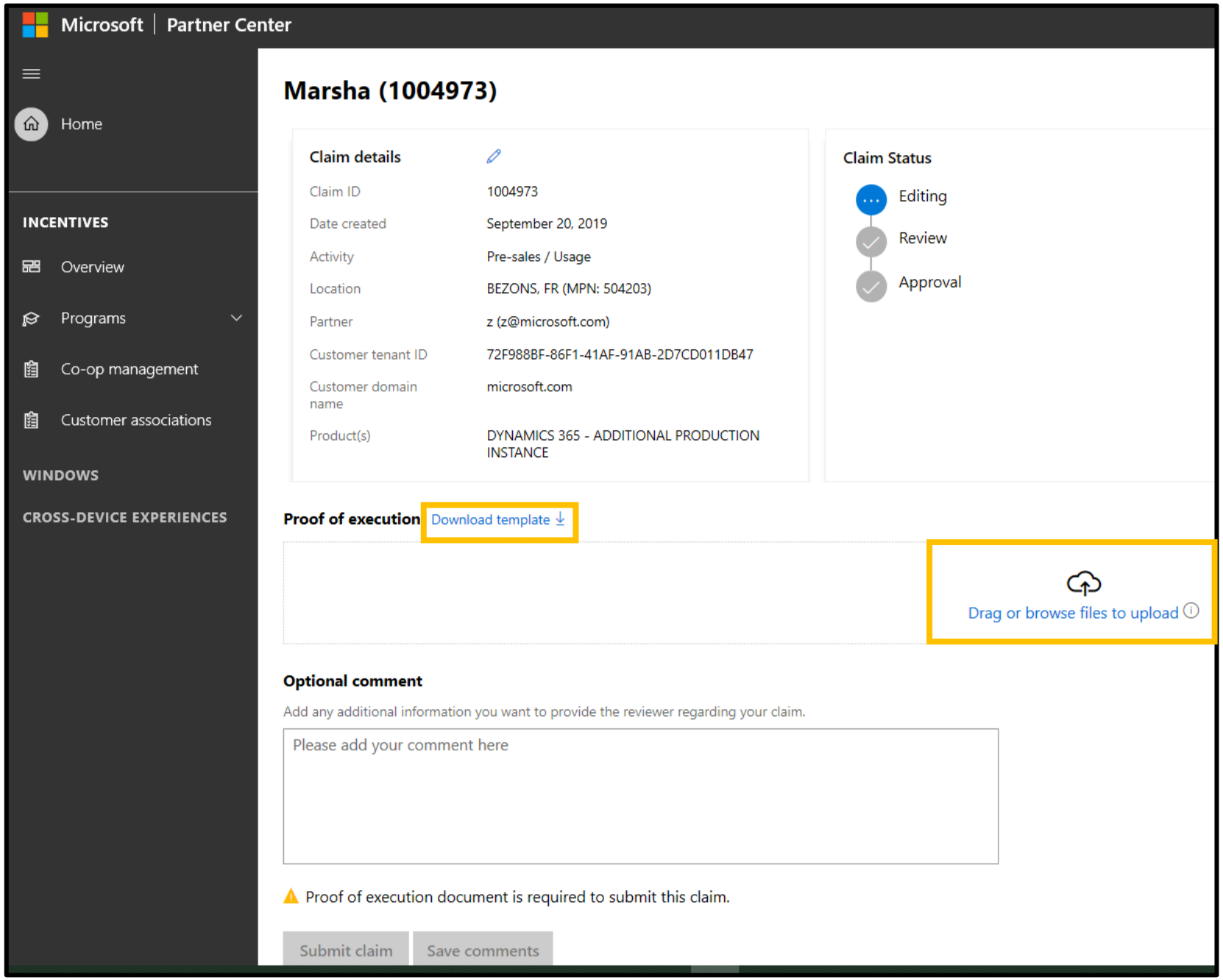
In between the creation and submission of your customer association, you will need to provide a proof of execution (POE) for each customer association.

POE must be included with all customer associations, for Microsoft to validate your involvement with the customer. Not applicable for revenue association.

For detailed guidance please review the POE Guidance document on **aka.ms/partnerincentives**.

Note:

- Partners can either use the POE template, or submit other supporting document (ex: SOW).
- To use the template, select **Download Template**.
- POE must be included with all claims in order to be submitted.

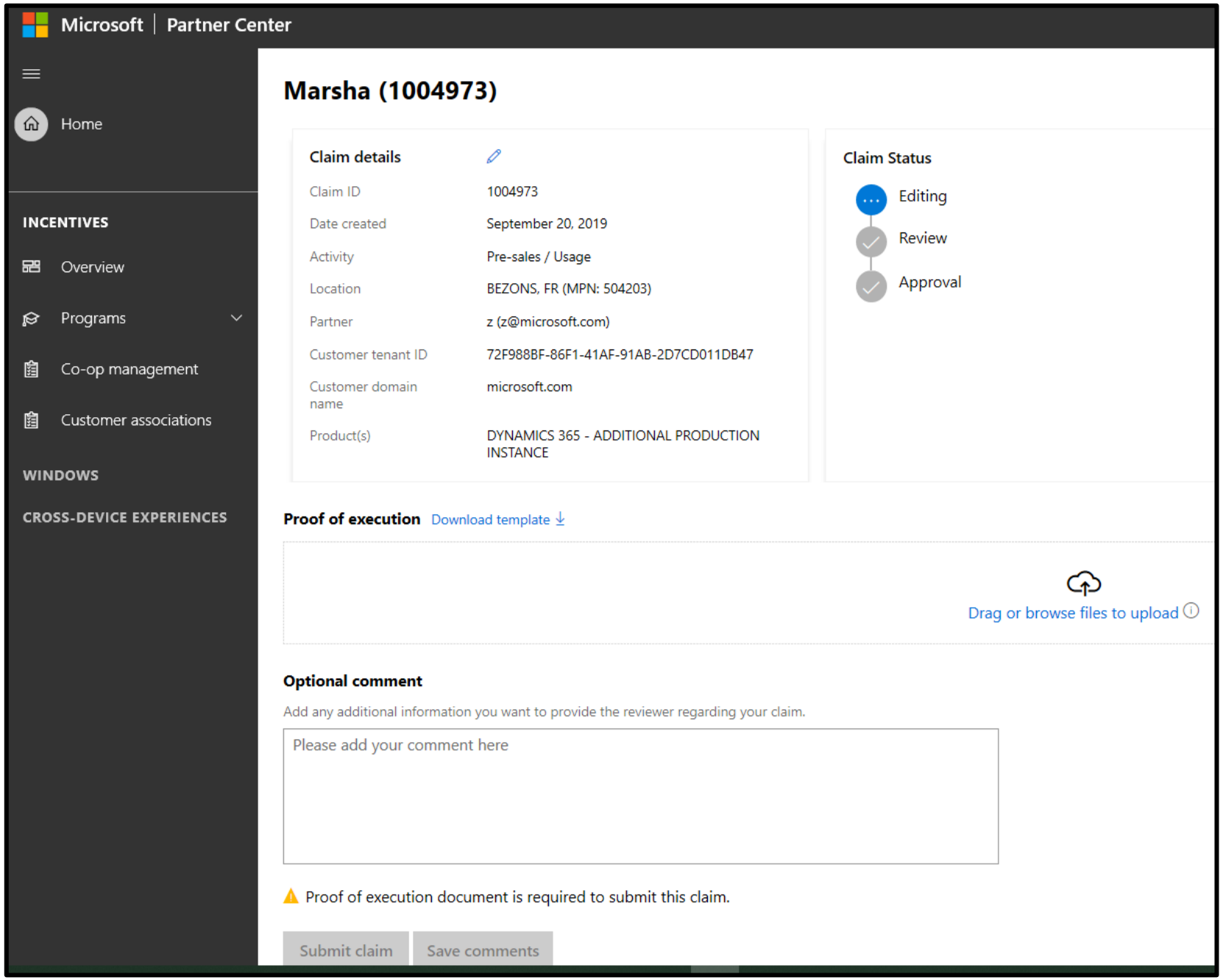


Proof of Execution

POE quality is the determining factor for a successful claim. We require submission of a Statement of Work, a Master Agreement or a Purchase order that contains:

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

1. Connection between products/workloads and a description of the intended/ongoing work.
2. Activities driving revenue and/or usage growth need to be explicitly stated.
3. The name of the claiming partner and the corresponding customer clearly visible
4. Dates shown clearly. Please ensure milestones and partner/customer signature dates are visible.



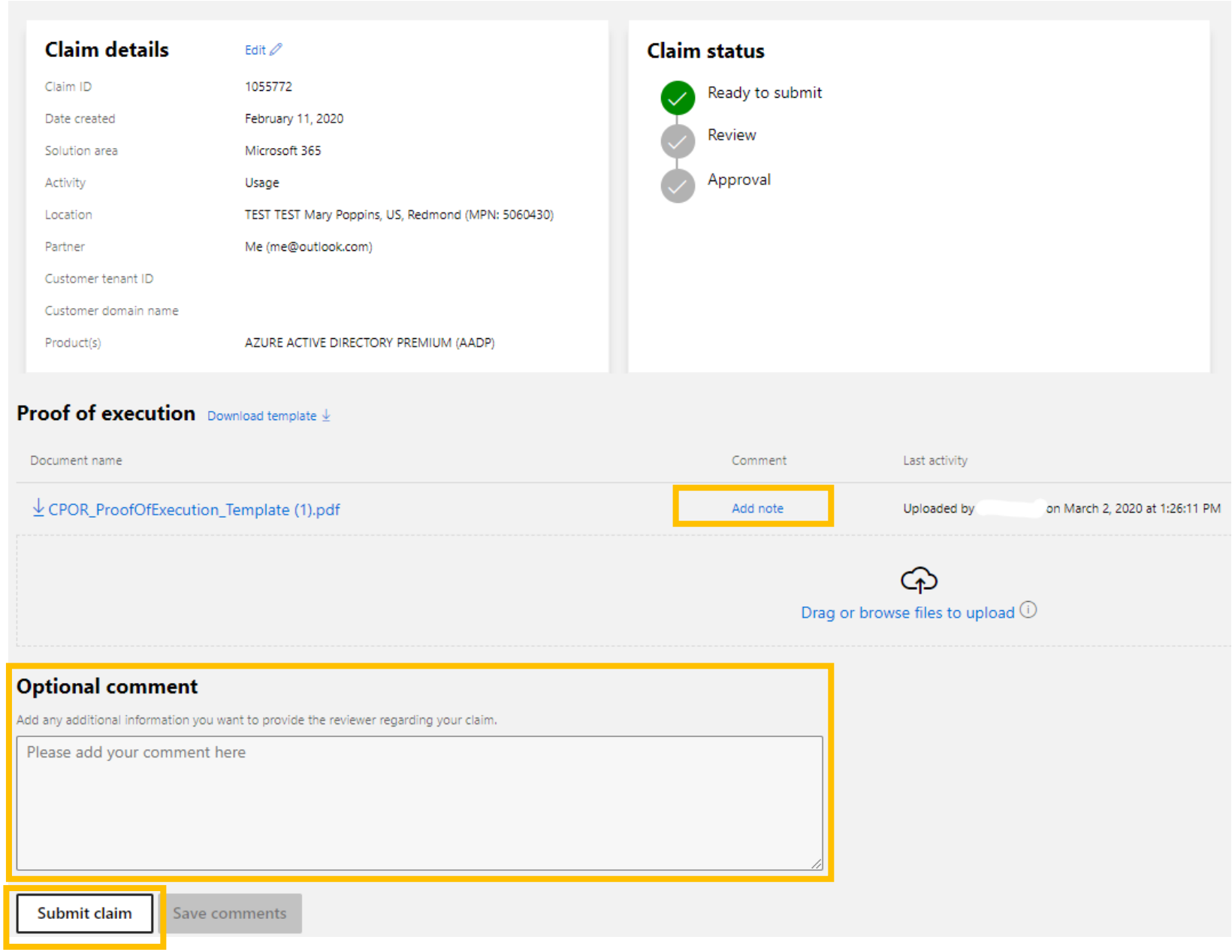
Submit an Association

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

- **Drag or browse files to upload** the proof of execution for your association.
- Select **Submit claim** when you are satisfied that you have added the relevant details.

Note:

- Add an optional comment to the document uploaded.
- Add an optional comment with details about your overall association.



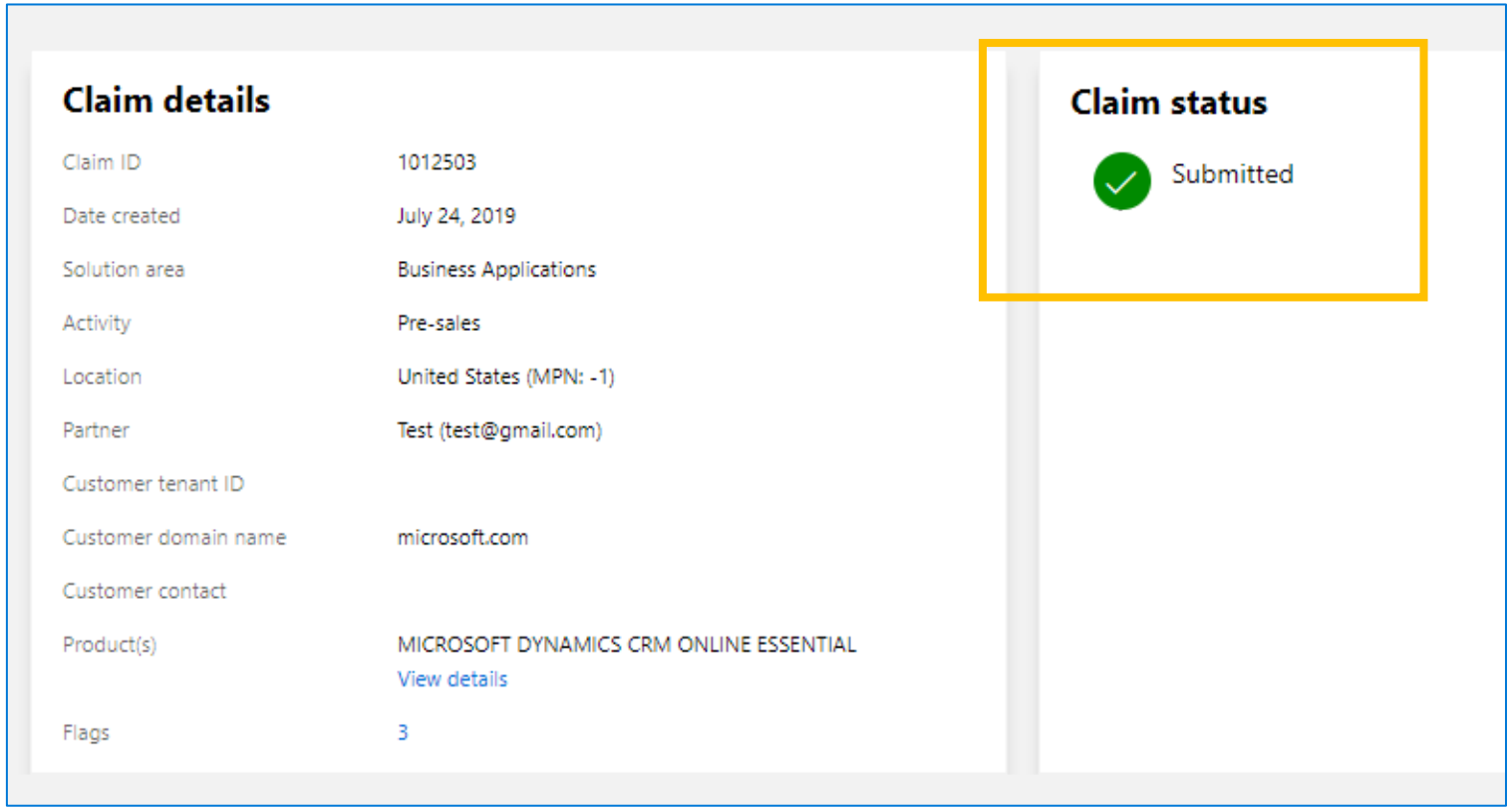
Status of a claim

Microsoft

Status of an Association:

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

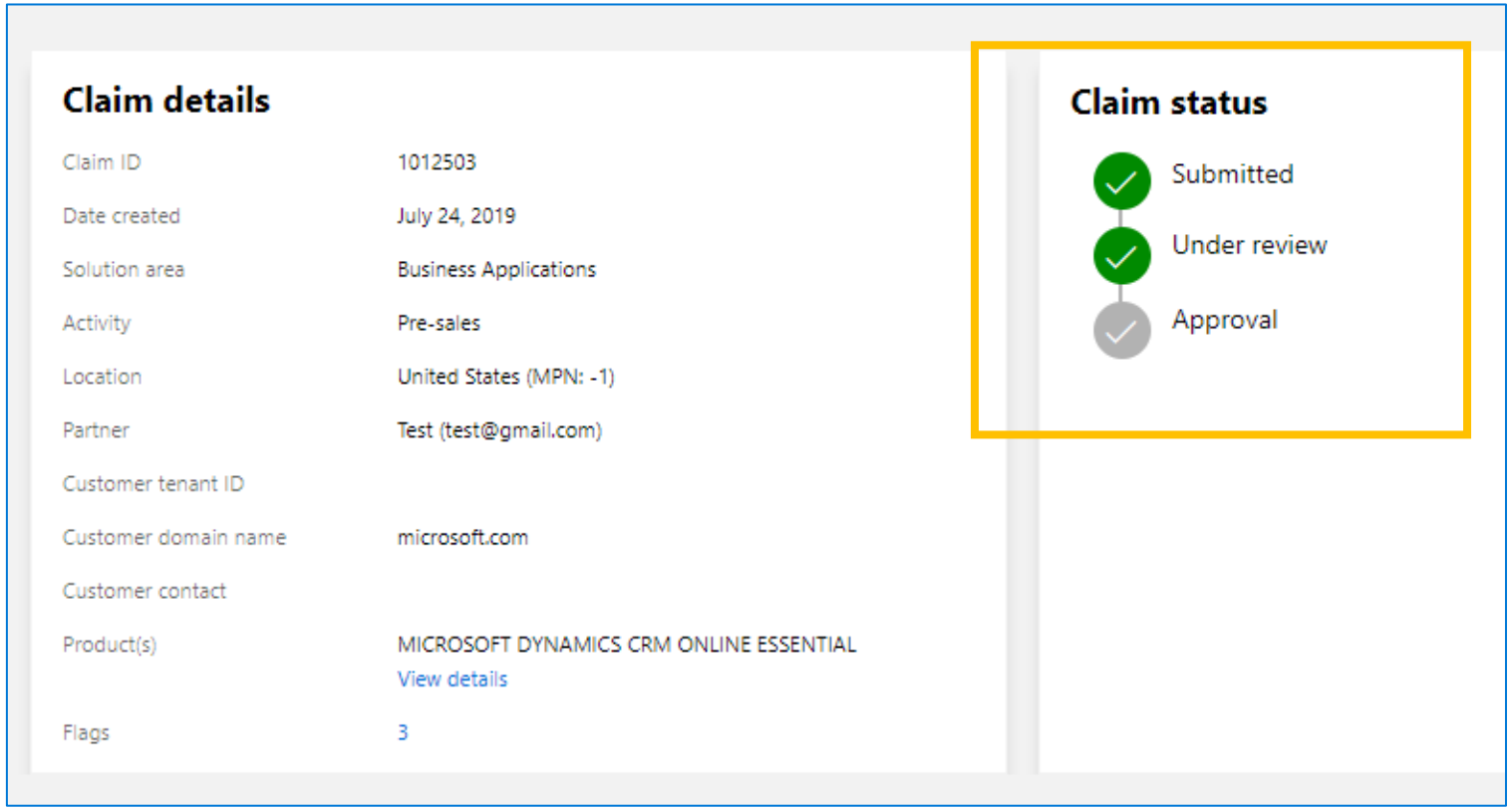
- Open your claim. The **Submitted** status is active in the status section.
- A claim will remain in submitted status while it awaits Microsoft review.



Status of an Association:

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

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



Status of an Association:

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

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

Note:

- Claims will not be processed unless any requested clarifications have been provided back to Microsoft.
- If you do not respond within 30 days your claim will be Rejected. This means that you have not provided proof documents on time and will need to create a new claim.

Dynamics for CompanyX (1000004)

Claim details

Edit

Edit your MPN selection, product/workload selection, and contact information. Solution area and activity selection is not editable.

Claim ID	1000004
Date created	April 1, 2020
Solution area	Business Applications
Activity	Pre-sales
Location	TORONTO, CA (MPN: 563676)
Partner	name (telupu@microsoft.com)
Customer tenant ID	72F988BF-86F1-41AF-91AB-2D7CD011DB47
Customer domain name	microsoft.com
Customer contact	Joseph Jones (telupu@microsoft.com)
Product(s)	DYNAMICS 365 ENTERPRISE EDITION - ADDITIONAL DATABASE STORAGE View details

Claim status

- Submitted
- Action required
  - The products/services purchased by the customer have not been specified.
- Approval

Proof of execution

Download template

Document name	Comment	Last activity
Scanning document Proof of Execution with CompanyX.xlsx	Add note	Uploaded by **Ola Demmo** on April 1, 2020 at 11:31:07 AM

Drag or browse files to upload

Optional comment

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

Please add your comment here

For the reviewer to take action, you must submit your claim.

Submit claim | Save comments

Status of an Association:

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

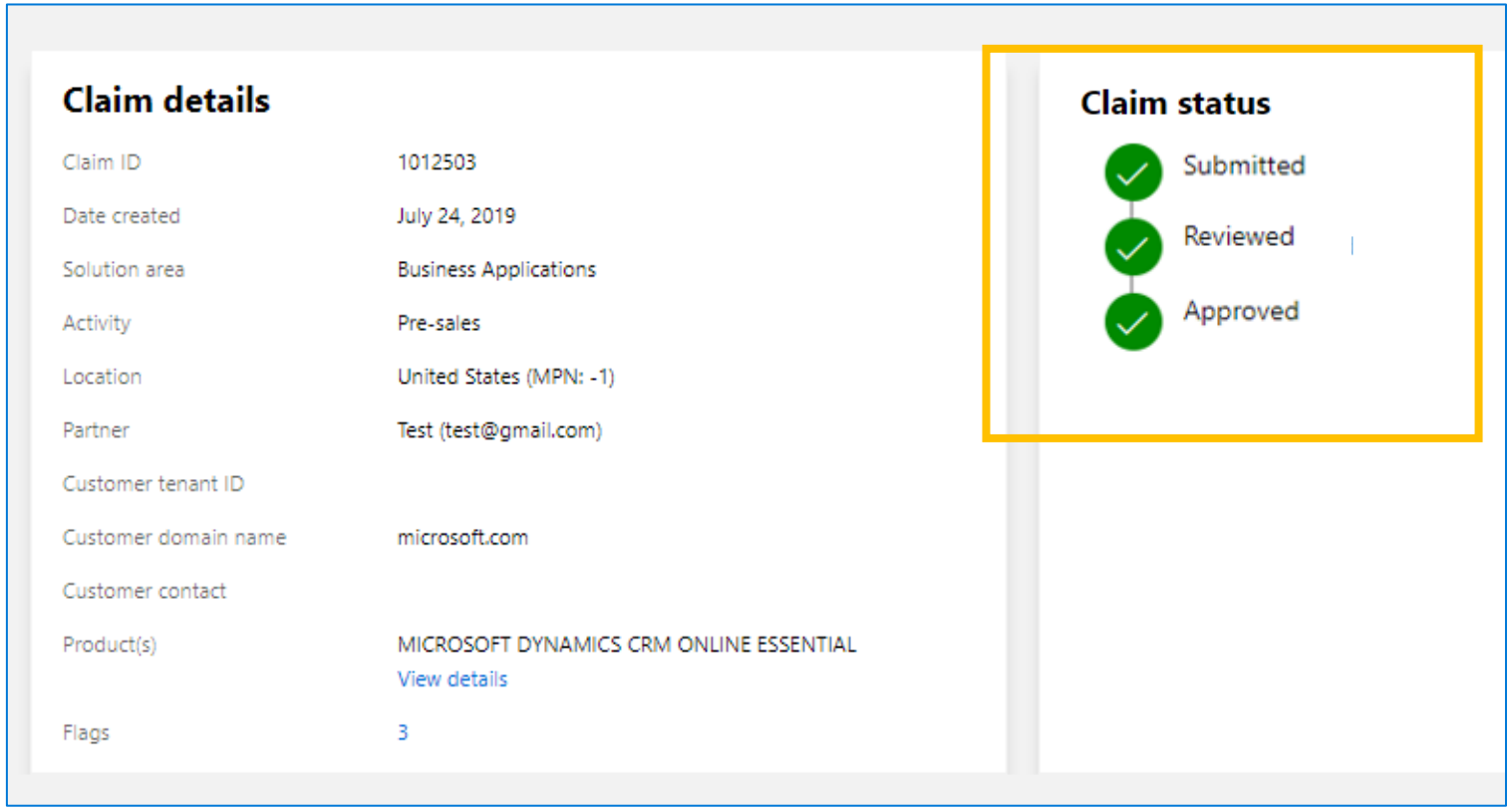
Once you re-submit your claim and provide all the relevant information, Microsoft will review it again.

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

After your association is approved a notification will be sent to the customer giving them the opportunity to deny your association. The customer will then have seven days to opt out after Microsoft approval.

Note:

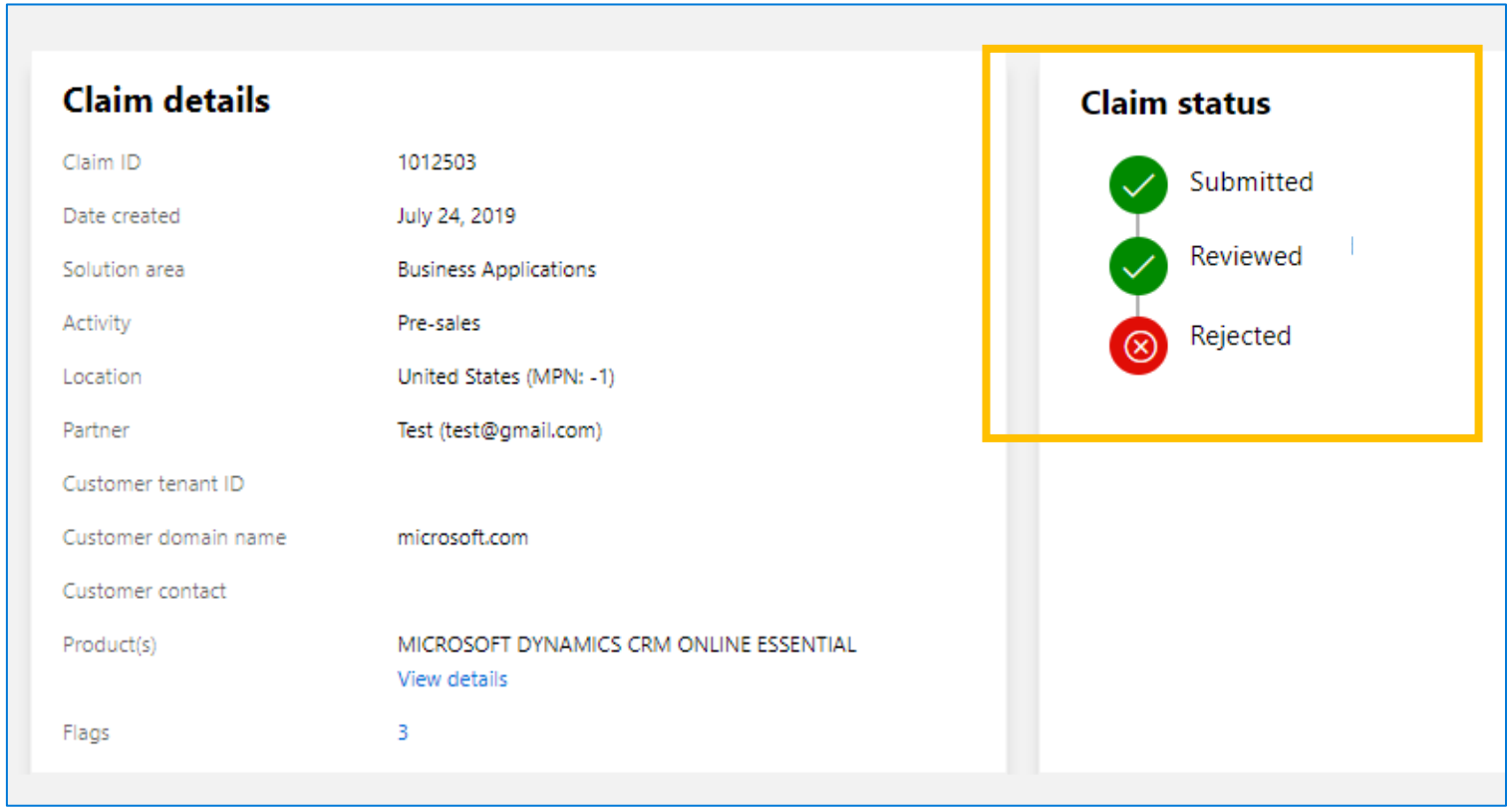
Approved indicates the status of the customer association, not the status of the payment.



Status of an Association:

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

If you have not provided all the required information, your claim will be **Rejected**.



Customer Notification

For privacy reasons, Microsoft will notify the customer contact to provide them with the option of denying your access to their subscription. The customer's Office Portal administrator will also be copied.

The customer will receive the consent email.

- If the customer consents to the association request, no action is required from them.
- Customers can deny or cancel the request at any time.
- If the customer denies consent, the status of your customer association will change from **Approved** to **Customer consent denied.**
- If customers have questions, they can reach out to the partner contact provided.

Note:

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

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

Microsoft 365

Notification of partner association request

Dear Customer,

Partner is requesting to be associated with your Microsoft 365 implementation. If associated, the partner will be able to access information regarding your implementation including and limited to the usage (active entitlements) and the sold seats (qualified entitlements) for the workload they are implementing at your organization.

If you wish to deny or cancel the above association request click here, otherwise there is no action for you.

If you have any questions, please contact the partner.

Customer name: teo lupu

Tenant/Directory ID: 72F988BF-86F1-41AF-91AB-2D7CD011DB47

Domain: microsoft.com

Product(s): [AZURE INFORMATION PROTECTION (AIP), AIP], [EXCHANGE ONLINE, EXO]

Partner organization name:

Partner contact name: organization contact personwoasd

Partner contact email: teo@hotmail.com

Thanks, Microsoft

Microsoft respects your privacy. To learn more please read our online Privacy Statement. Because you have an active account, you

Business Applications

Notification of partner association request

A Microsoft partner is requesting to be associated with your implementation of Dynamics 365. If associated, the partner will be able to access information regarding your implementation including and limited to the usage (active entitlements) and the sold seats (qualified entitlements) for the product they are implementing at your organization.

To provide feedback on the partner to help Microsoft improve your Dynamics 365 experience and get a $25 gift card, please take this ~1 minute survey here.

If you wish to deny or cancel the above association, please click here, otherwise there is no action for you.

If you have any questions, please contact the partner noted below.

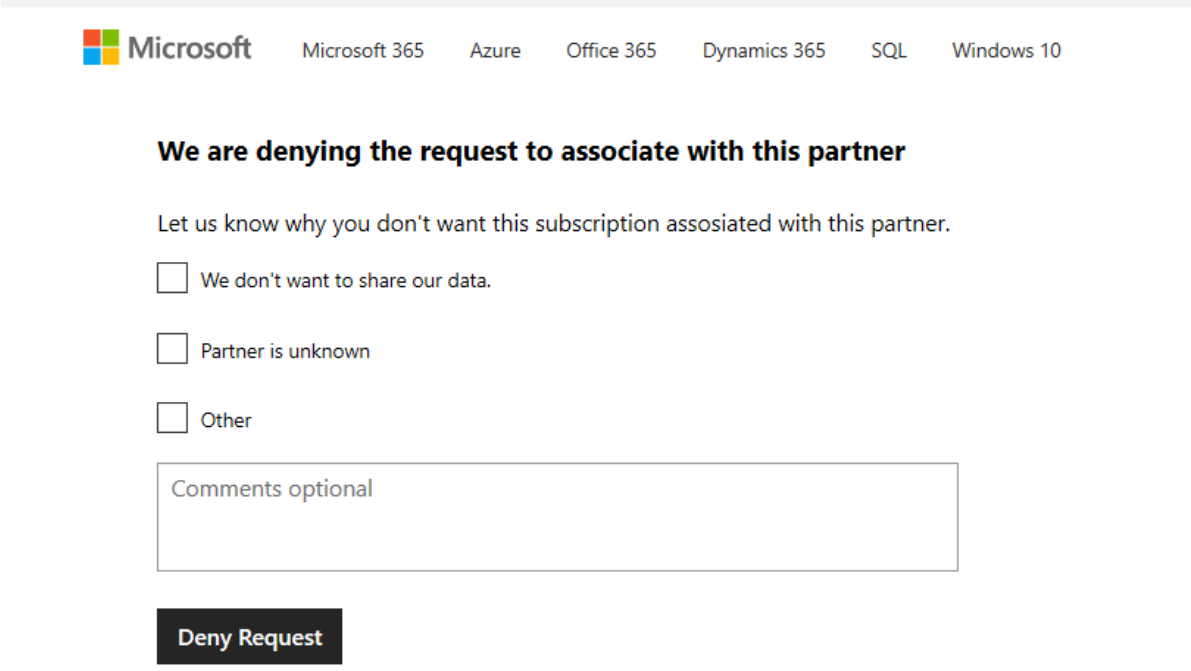
Customer name: teo lupu
Tenant/Directory ID: 72F988BF-86F1-41AF-91AB-2D7CD011DB47
Domain: microsoft.com
Subscription(s): [DYNAMICS 365 ENTERPRISE EDITION - ADDITIONAL PORTAL (QUALIFIED OFFER), D66656C2-F69B-4488-8035-287EB6711DDC, United States], [MICROSOFT DYNAMICS CRM ONLINE BASIC, EBDCD569-A643-46F4-94A0-194EF73B85A2, United States]
Partner organization name: FridayINC
Partner contact name: organization contact personwoasd
Partner contact email: telupu@microsoft.com

Thanks, Microsoft

Microsoft respects your privacy. To learn more please read our online Privacy Statement. Because you have an active account, you

Customer Notification

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



Resources

- Microsoft Partner Network: https://mspartner.microsoft.com
  - Program membership, products, licensing, training and event information
- Partner Incentives MPN Portal: https://partner.microsoft.com/membership/partner-incentives
- Partner Center: https://partnercenter.microsoft.com/partner/home
- Partner Incentives Reporting: https://partnerincentives.microsoft.com

Support channels: Support including self-help, live support agents, community support, and support tickets can be accessed through the Microsoft Partner Network on https://mspartner.microsoft.com. Under the "Support" tab, select "Contact Support." When the portal opens, select "Partner Incentives" as your Category. You are then able to choose your Topic and Issue.

Microsoft

Thank you.