Introduction

In this training we will show you how to use the Partner Center for your incentive programs.
By the end of this training, you will be able to:

- Create Incentive Administrator(s) and Users.
- Navigate through the incentives pages on the Partner Center.
- Access help and support.

**Content**

1. A new incentive experience.
2. User management.
3. Navigating the incentives pages:
   - Overview tab.
   - Programs tab.
   - Co-op management (claims) tab.
   - Transaction history and Payments pages.
4. Support
A new incentive experience

Why a new incentive experience?

In Microsoft’s efforts to make your incentives experience easier, we are moving all incentive programs to a single platform called the Partner Center.

This will be a centralized location where you can:

• Enroll in incentives programs.
• View program details
• View all your incentives earnings and payments.
• Manage your claims (where applicable).
User management
User management

To access the incentives section within Partner Center Dashboard, the Global Administrator or Account Administrator needs to set up your company users. They must assign an Incentive Administrator(s) and grant Incentive User permissions. 

**Please note** that only the Incentive Administrator(s) and User(s) can access the incentives section.

User management is fully integrated into the Partner Center Dashboard. This allows for the:

- Addition of both the Incentive Administrator and user roles.
- Editing of permissions.
- Deletion of user profiles.

For more details on partner accounts, roles, and permissions – see the "Learn more" articles.

The Global Administrator can also set up your company users through the Azure Active Directory (AAD).
Once your organization is eligible for incentives, the following users will receive an incentive enrollment invite:

- Global Administrator
- Account Administrator
- Incentive Administrator

The Incentive Administrator is the only user who can enroll in incentive programs. If there is no Incentive Administrator for your particular location, the Global Administrator and Account Administrator must assign one. The Incentive Administrator must be assigned for the location MPN IDs.

The Global Administrator or Account Administrator can also be assigned as the Incentive Administrator.

We will run through the process for assigning an Incentive Administrator in the next slides.
User management

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

1. Navigate to the **User management** page.
   - Here, the Global Administrator can either:
     i. Add a new user or
     ii. Edit the roles and permissions of existing users by selecting a hyperlinked name.

   a. The **User management** screen can be accessed at any time by selecting the cog wheel icon at the top right of the screen, selecting **Account settings** and then **User management**.

**Note**

Only users with the permissions of an "Incentive Administrator" can enroll in an incentive program. The Global Administrator must assign these permissions to either existing or new users.
User management

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

2. To add a new user – enter the name and email address. The domain is prepopulated.
   • Once the users details are entered, their incentive permissions can then be defined.

3. To do this the Global Administrator selects Manage your organization’s incentives for one or more locations.

Note
If the checkbox to Manage your organization’s incentives for one or more locations does not appear, please refresh the page.
User management

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

The screen expands allowing the incentive permissions to be applied.

4. A user can be given either Incentive Administrator or Incentive User permissions at:
   - An entire organization level.
   - At a location level.
   - At a program level.

To apply a permission level, the Global Administrator selects the radio button next to the applicable option.

Note
For more information on the various user permissions visit the “Learn More” articles.
User management

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

5. The functionality to offer permissions for one or more locations is also supported.
   - To apply a permission level select the radio button next to **One or more locations listed below**.

6. Then select the relevant role next to each location.
User management

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

7. Further customization of how your incentives are configured at a program level is also available from the Manage your organization’s incentives for one or more offers.

Note
Locations need to be saved before you can update the program details.
User management

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

8. This functionality allows the Global Administrator to restrict the incentive programs within the locations that the Incentive Administrator or User should access.

Note
Locations need to be saved before you can update the program details.
User management

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

9. Select **Update** to save the changes.
   - If these changes are being applied to an existing user – there is no further action required and within a few minutes the changes will be applied.

Note

In the above screen, if a new user is being added – “Update” will be replaced with the word “Add”.
User management

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

If a new user is added, an additional screen is shown.

10. This screen will detail confirmation of the user being added and a temporary password. This will need to be copied and sent to the user.
   - The new user would use this temporary password when logging in to Partner Center Dashboard for the first time. They will then be prompted to create a new password.

Note

After you leave this page, the temporary password cannot be viewed again.
User management

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

11. You can search for a user by their permission type. Use the dropdown arrow to select and view the **Global admin** for your organization.
Navigating incentives information in Partner Center
Navigating the incentives pages

There are four main locations for incentives related information in Partner Center:

1. Overview tab
2. Programs tab
3. Co-op management tab (if applicable)
4. Transaction history and Payments pages

The following slides provide a high-level overview of each location and point you towards more detailed information.
Overview tab

In the overview tab, you can see all the incentive programs you have enrolled in and the latest status of each program.

1. The status will show if there are any actions required or if you have a pending invite.
2. Navigate to the bank and tax profile page to make any updates to your payment profile.

If you have a pending invite, you can enroll in that incentive program by selecting “Enroll” which will appear.

For a detailed walk-through of the enrollment process, see the incentive enrollment in Partner Center guide.

Within the **Programs** tab is a program page for each incentive program you are currently enrolled in.

Here you can view information specific to the program you have selected. For detailed instructions see the **Incentive Programs within Partner Center guide**.

Co-op management tab

From the Co-op management claims tab, you can:

• Create a claim
• Provide proof of execution
• Submit a claim
• Manage a claim

For detailed instructions on the actions above, please see the incentive co-op claiming experience guide.

You can access incentive reporting information within the **Transaction history** and **Payments** pages. Navigate to these pages by selecting the money icon on the top navigation bar within Partner Center.

To explore the reporting functionality available in these pages, please see the incentive reporting guide.

Support
Support in Partner Center

1. To access Support, select the “?” at the top right of the screen.
Thank you.