

Managing and claiming Microsoft Co-op incentives

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This QuickStart guide explains how to **manage and receive co-op incentives from Microsoft**. Beginning January 1, 2020, Microsoft has introduced co-op as a component of the CSP Direct Bill Partner and CSP Indirect Reseller incentive programs.

When you participate in one of the Microsoft Incentives programs you can claim reimbursements of earned funds for activities you have done that support Microsoft product awareness. You submit a claim directly from the [Partner Center](#). Please read this QuickStart to get you started on managing and claiming co-op incentives.

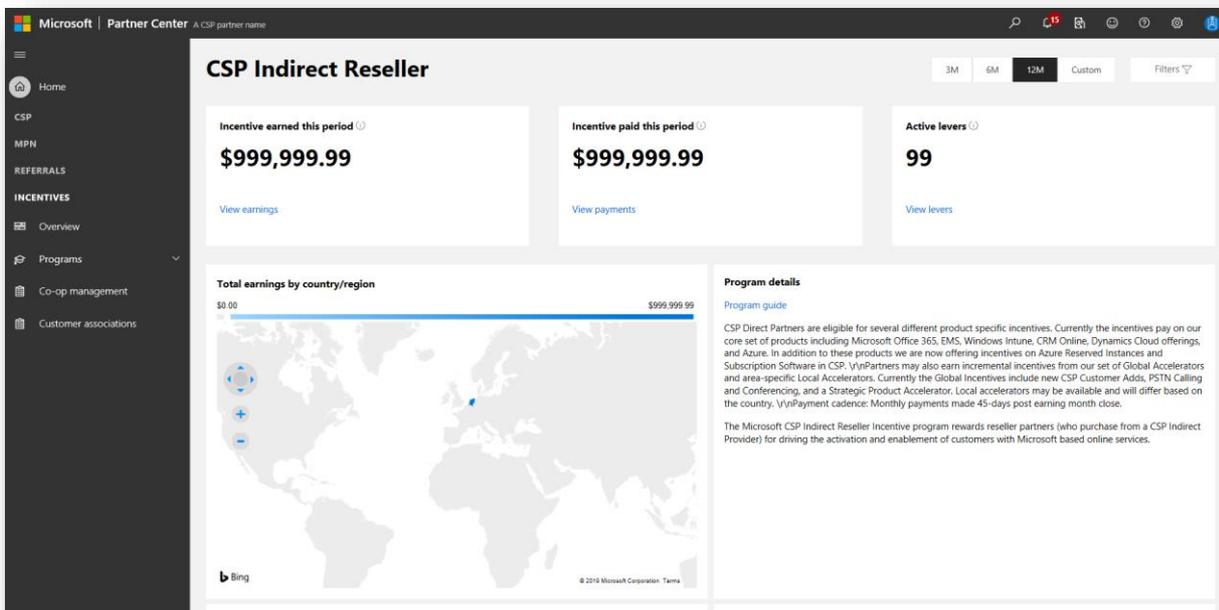


Figure 1 Incentives in the Microsoft Partner Center

What are co-op incentives?

Co-op funds enable partners to conduct marketing activities that can increase brand awareness and drive sales pipeline growth. A partner may invest co-op funds in activities to facilitate readiness, develop specializations, or attain Microsoft certifications – activities that foster focused solution practices and Centers of Excellence.

Co-op funds offer important benefits to our partners' organizations:

- **Extend existing budgets:** ensuring adequate levels of Microsoft-focused marketing and readiness activities by the partner
- **Increased profitability:** because earnings are reinvested into the business rather than being shared with customers as part of a discounting strategy
- **Drive business growth:** rather than being included in the company's general account, incentive earnings are allocated to increase sales pipeline and build focused business practices

How co-op incentives work

CSP partners can earn co-op incentives during each 6-month **earning period**. For instance, January – June 2019 (Fiscal Year 2020 H2 or FY20H2 for Microsoft) is such an earning period.

A 6-months **usage period** follows directly after each 6-months earning period. For instance, the July – December 2019 (FY21H1 for Microsoft) usage period follows after the earning period mentioned above. A **usage period** is the period where you can use the incentives build up during the previous earning period. Or in other words, spent money that you can then claim. You can claim co-op incentives during the entire usage period + another 45 days after the usage period.

For example, your organization builds up \$ 5,000 co-op incentives during January – June 2019. Your organization then runs a marketing campaign, with a media buy of \$ 5,000, between July 01 and August 31. Your organization can then claim the full \$ 5,000 any time between July 01, 2019 and February 14, 2020 (December 31 + 45 days).

Basically, you earn in one 6-month period, then spent during the next 6 month and can claim what you spent anywhere during that next 6-month period, plus 45 days after the second 6-month period has ended. The extra 45 days is to make sure you have enough time to create your claims.

How much co-op incentives you can get

Microsoft will calculate monthly incentive earnings using a split of 60% rebate and 40% co-op. The 40% co-op incentives will build up during a 6-month earning period.

- If your organizations' build up co-op after any 6-month earning period **does not exceed \$ 4,000** you will receive the withheld co-op funds as part of your rebate payment in the following payment cycle.
- If your organizations' build up co-op after any 6-month earning period **exceeds \$ 4,000** you will have to claim this co-op. These incentives will not be automatically paid to you!

Finding your co-op incentives

Finding your co-op incentives is easy:

1. [log in to the Microsoft Partner Center](#) with a user that has an [global admin role](#).
2. Either choose **Incentives** on the Partner Center dashboard or use the menu on the right side of the Partner Center to choose the **Incentives** option.

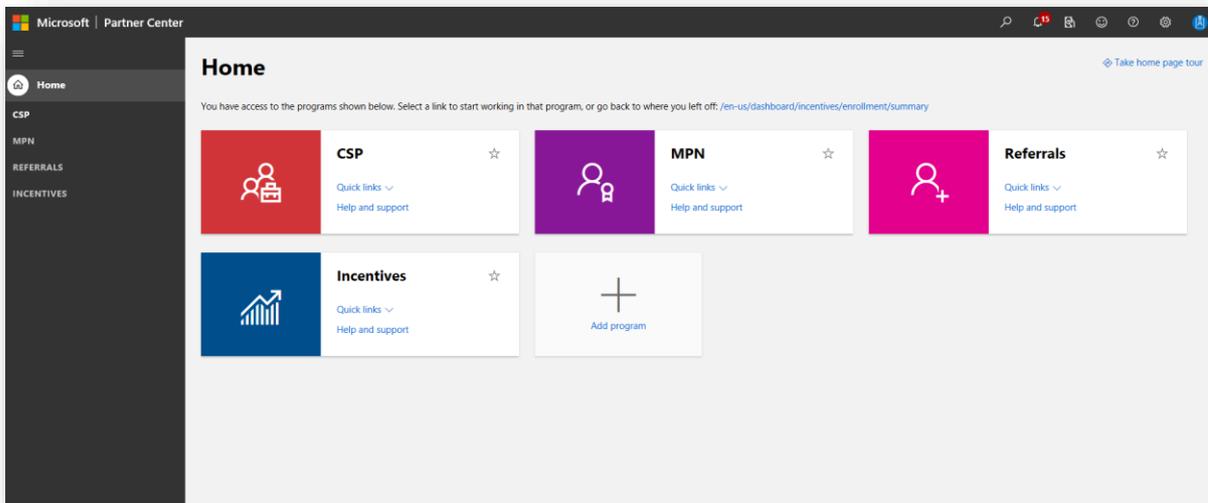


Figure 2 finding co-op incentives in the Partner Center

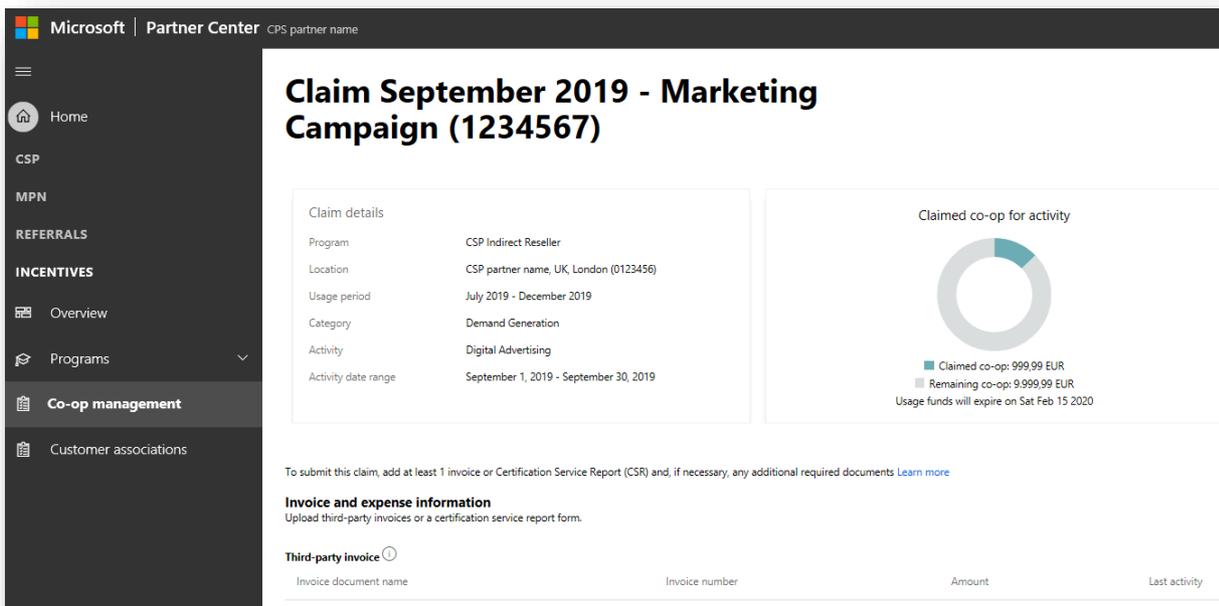
3. Click on the Programs option to view the incentives dashboards (depending on your partner status you may get more than one program to choose from, for instance CSP Direct Bill Partner and CSP Indirect Reseller).
4. Choose the data range in the upper right corner (the default option is the last 12 months).
5. Scroll down to find the Program **Earnings by type** graph. This shows you the amount of rebate and co-op incentives as well as any amount of co-op incentives claimed.
6. Optionally you can use the **Recent Claims** table on the same dashboard to view the status of co-op claims.

Claiming your co-op incentives

Once you have built up more than \$ 4,000 co-op incentives during any earning period you will have a 6-month usage period to spend the co-op incentives. During or after spending the incentive amount you can claim the co-op incentives:

1. From Incentives on the Partner Center dashboard, select **Claims**.
2. If you already have a claim in process, the Claims overview page shows information on the status of existing claims and funds approved, claimed, and totals.

3. To create a new claim, select **Create a claim** on the upper left corner.
4. Choose the program (for instance CSP Direct Bill Partner or CSP Indirect Reseller), your location (usually just one choice) and the usage period (the current 6-month period, for instance July – December 2019).
5. Select the activity you have undertaken for which you wish to claim co-op incentives. You can choose from **Demand Generation** (create demand/leads for your products and solutions), **Market Development** (create awareness for your brand, product and solutions) and **Partner Readiness** (raising the level of knowledge and competence within your organization) activities.
6. Select the start and end date of the activity (for instance, if your online advertisement campaign ran from July 01 till August 31, 2019, those are your start and end date). These dates need to be within the usage period you have selected during step 4.
7. Choose the currency (usually the same as the currency on the invoice of the activity undertaken) and give your claim a name.
8. When you have filled out the initial form and selected Create Claim, you will be taken to the Claim detail page where you will be able to add invoices, CSR's, proof documents, and metrics. This overview will also show you how much co-op incentives you have claimed and how much co-op incentives can still be claimed. You can also add additional information and comments if needed.



Claim September 2019 - Marketing Campaign (1234567)

Claim details	
Program	CSP Indirect Reseller
Location	CSP partner name, UK, London (0123456)
Usage period	July 2019 - December 2019
Category	Demand Generation
Activity	Digital Advertising
Activity date range	September 1, 2019 - September 30, 2019

Claimed co-op for activity

Usage funds will expire on Sat Feb 15 2020

- Claimed co-op: 999.99 EUR
- Remaining co-op: 9.999.99 EUR

To submit this claim, add at least 1 invoice or Certification Service Report (CSR) and, if necessary, any additional required documents [Learn more](#)

Invoice and expense information
Upload third-party invoices or a certification service report form.

Third-party invoice

Invoice document name	Invoice number	Amount	Last activity

Figure 3 claim overview

Next, claiming your co-op incentives requires you to provide:

1. **Invoice and expense information:** A third-party invoice (if you used a third party for the activities) or an certification service report (if you undertook the activities yourself and incurred the cost yourself. So basically, the money spend on the employee undertaking the activities).
2. **Proof-of-execution (PoE) documents:** documents, screenshots and / or other files that proof you completed the activity for which you are claiming the co-op incentives. For instance, you might be required to upload communication materials, such as online advertisement banners and screenshots showing the URL of the landing page (on your website) used plus screenshots of the amount of impressions and clicks on your banners and the number of visitors on the landing page.

After you have provided all required details, uploaded all required documents and added any optional comments you can submit your claim for review. After submission your claim will be reviewed by Microsoft. This process might take a couple business days but can happen within 24 hours. You will have to manually check whether your claims has been reviewed and approved.

Usually the first couple of times you are required to provide some additional details or clear up some things via the comments section of a claim. Once you have provided the details you need to resubmit the claim and restart the review process. Once Microsoft is happy with the invoice and expense information and PoE documents provided your claim will be approved. That starts the payment process, which might take several weeks to be completed.

Finally, for a very detailed co-op incentives guide please [download the guide](#) provided by Microsoft.