# Partner Membership Center Guide v3



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#### Intro to MPN

#### **Network Membership**

Receive a set of no-cost introductory benefits to help you save time and money. Use our resources to help build your business as a new partner and discover your next step.

- Make sure the right people in your organization get the right information. Review and update your organization's profile to help us know you better.
- Demonstrate your capabilities to customers in a customized environment. You can create custom trials and subscriptions, and track prospects while managing your cloud customers.
- You can access technical support from Microsoft and other partners on our online support forum.
- Build training plans for the latest Microsoft technologies, products, and competencies to share across your team.
- Take advantage of readily available Microsoft sales and marketing resources and keep your customers up-to-date with the latest product information.
- Experience the power of partnership and find new opportunities by linking directly to other partners. Join the conversation by participating in Microsoft's diverse partner communities.

#### **Action Pack (MAPS)**

This affordable yearly subscription is for businesses looking to begin, build, and grow their Microsoft practice in the cloud-first, mobile-first world through a wide range of software and benefits. Action Pack includes all the benefits of a Network membership, in addition to:

- Free software to run your business. Test your great ideas first, get comfortable with the solutions and platforms, and make the jump to cloud on your schedule. For \$475.00 a year, you get Windows 10 Enterprise, Office 365 E3, Enterprise Mobility Suite, a monthly credit for Microsoft Azure, Microsoft Dynamics CRM Online Professional licenses 1, and more.
- Access to world-class developer tools like Visual Studio Professional, which you can use to build apps for iOS, Android, Linux, and Windows. Plus, you can get a powerful end-to-end solution when you create a free Visual Studio Team Services account which offers teams with version control, agile planning tools, continuous integration, and much more—all for use with any app, in any language.
- Receive training on core Microsoft technologies. Pre-sales support2 helps you design the right offer for customers. Post-sales technical support ensures you can fully serve your customers' needs.
- Acquire new customers and increase profitability through digital marketing guidance and enablement from the Partner Marketing Center.
- Connect and network with other partners, round out solution offerings, and get practical advice from your peers in the MPN community.

#### **Competencies**

Demonstrate your proven expertise in delivering quality solutions in a specialized area of business. Microsoft competencies are designed to meet your customers' needs and be recognizable to prospective ones. Join the elite tier of Microsoft Partners and stand out from your peers. To help make the most of your MPN membership, we've grouped competencies into <u>six Centers of Excellence</u> that align to your business needs.

- App Development and ISV: Application Development, Application Integration, and Application Lifecycle Management
- Cloud Platform and Infrastructure: Cloud Platform and Datacenter
- Data Management and Analytics: Data Analytics and Data Platform
- Business Applications: Cloud Customer Relationship Management and Enterprise Resource Planning
- Mobility: Enterprise Mobility Management and Windows & Devices
- Productivity: Cloud Productivity, Small and Midmarket Cloud Solutions, Collaboration and Content,
   Communications, Messaging, and Project and Portfolio Management

#### Why would I use Partner Membership Center?

Partner Membership Center provides you access to a wealth of benefits and resources available to Microsoft Partner Network members of all levels. In this guide we cover some of the most important features of the Partner Membership Center:

- Manage your organization hierarchy, create new locations, and identify your HQ
- Associate individuals and Microsoft Certified Professionals with your organization
- Create and manage customer references needed for meeting competency requirements
- Redeem your internal use rights software, order additional software benefits, and order your official
   Microsoft Competency plaques
- Check competency renewal dates, manage your competencies, and pay your fees
- Access support options, the MPN legal agreements, and the Partner Dashboard

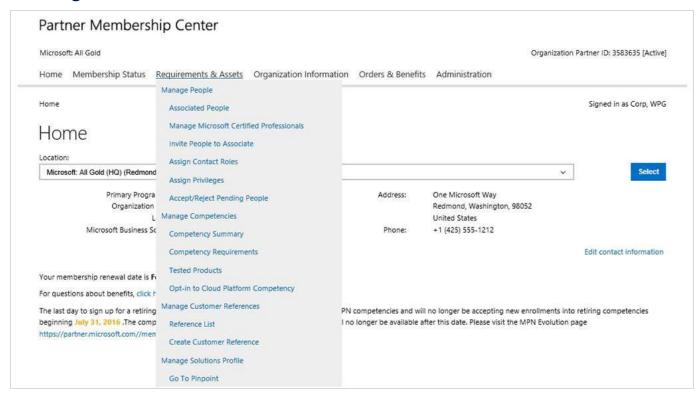
#### **Customer References**

#### Why do I need customer references?

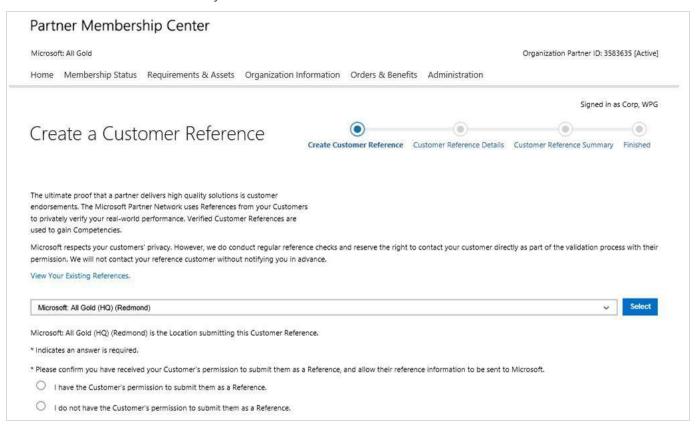
The ultimate proof that a partner delivers high quality solutions is customer endorsements. The Microsoft Partner Network uses References from your Customers to privately verify your real-world performance. Verified Customer References are required to gain Competencies. Depending on which competencies you are trying to attain you will need to check customer evidence requirements and collect references.

For an example of the email that is generated when you request a customer reference, please check here this link: <a href="https://partner.microsoft.com/en-US/membership/customer-reference-sample-email">https://partner.microsoft.com/en-US/membership/customer-reference-sample-email</a>.

#### Creating a new customer reference

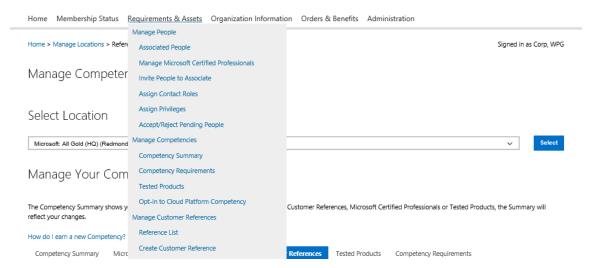


From the Partner Membership home, click "Create Customer Reference" in the Requirements & Assets dropdown. The steps that follow will have you fill out information about the customer before a request is sent to them to confirm the entry.



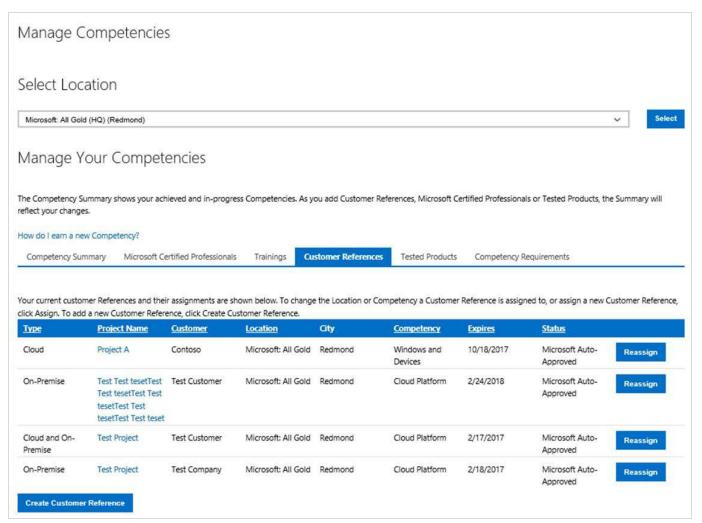
While customers do not need to fill out the reference information for you, they will need to confirm the reference information you provide.

#### Managing customer references





Select "Manage Customer References" or "Reference List" from the Requirements & Assets dropdown menu.



Your current customer References and their assignments are shown on this page. Note that they are associated with a location and list an **expiration date**<sup>2</sup>. To change the Location or Competency a Customer Reference is assigned to, or assign a new Customer Reference, click Assign. To add a new Customer Reference, click Create Customer Reference.

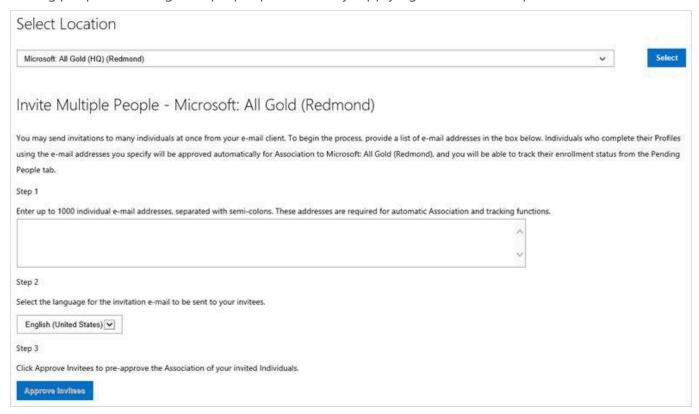
<sup>&</sup>lt;sup>1</sup>The customer references list is a section under Manage Your Competencies because customer references are part of your competency requirements.

<sup>&</sup>lt;sup>2</sup>Customer references are good for two years once approved!

# Managing individuals and MCPs

#### Inviting new individuals

From the main screen navigate to the "Manage People" page from the Requirements & Assets. Use the "Invite Multiple People" tab, even if you're only inviting one **person**<sup>3</sup>.. You have the option of individually adding people or adding multiple people at once by supplying a semi-colon separated list of **emails**<sup>4</sup>.

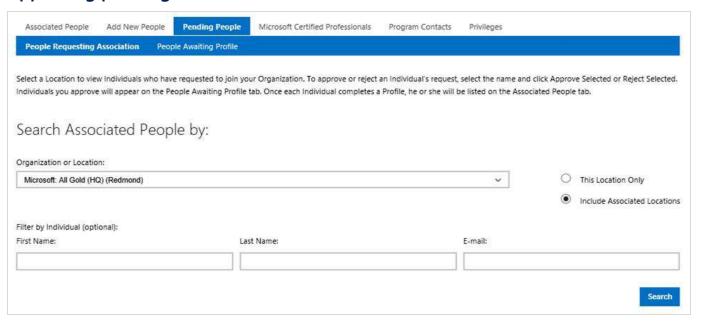


<sup>&</sup>lt;sup>4</sup>Individuals can also request association as well as be invited. People who are invited to associate rather than request association are pre-approved and automatically are added to the People Awaiting Profile list.

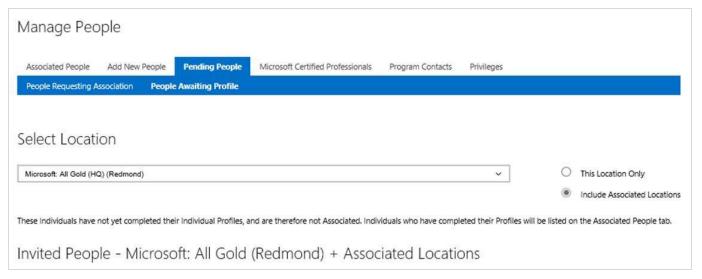


<sup>&</sup>lt;sup>3</sup>Single invitations require you as admin to add the details, then the individual to wait for the invitation, then an approval process. Multiple invitation just requires you to add an email and the person you are inviting can add their own details before being automatically associated with your organization.

#### Approving pending individuals



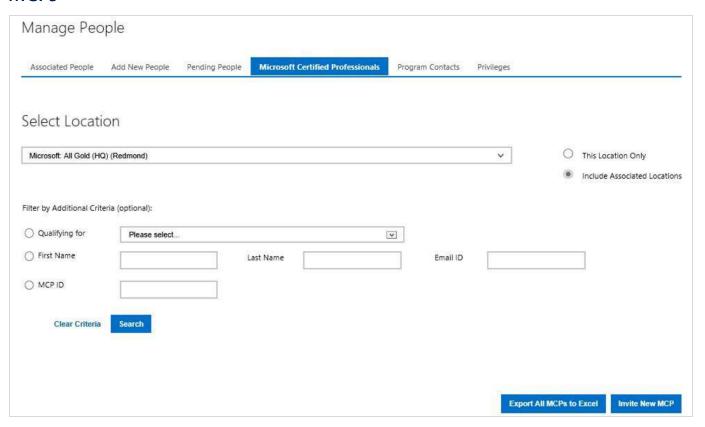
Once an individual has requested association, you can approve them from the People Requesting Association page. A list will appear that can be filtered by first name, last name, or email.



After individuals are approved (whether by being pre-approved through an invite or requesting association) they will appear in the People Awaiting Profile list alongside their location, date of invitation, and invite method. From here you have the option to resend invites or delete a selected **party**<sup>5</sup>.

<sup>&</sup>lt;sup>5</sup>If you delete someone from this list, they can still re-request association or be invited again.

#### **MCPs**



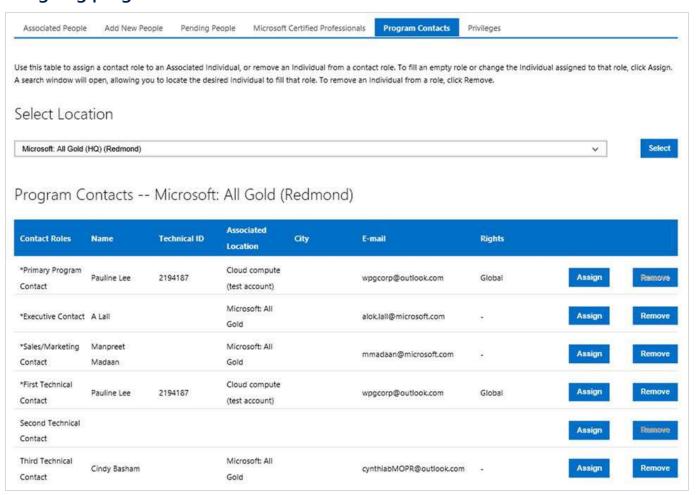
MCPs<sup>6</sup> that are associated with your organization show up here. They can be filtered and identified by location, which certifications they qualify for, name, or MCP ID. A list of your MCPs can be exported from this page as well. If you need to invite an MCP to associate with you, there is a link to do so here as well<sup>7</sup>.

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vindow).

<sup>&</sup>lt;sup>6</sup>For information on available certifications and planning, check the MCP home page here: <a href="https://www.microsoft.com/en-us/learning/microsoft-certified-professional.aspx">https://www.microsoft.com/en-us/learning/microsoft-certified-professional.aspx</a>

<sup>&</sup>lt;sup>7</sup>Note that if you do not invite the MCP to the correct location you can change their association later or reorganize your location hierarchy.

#### **Assigning program contacts**

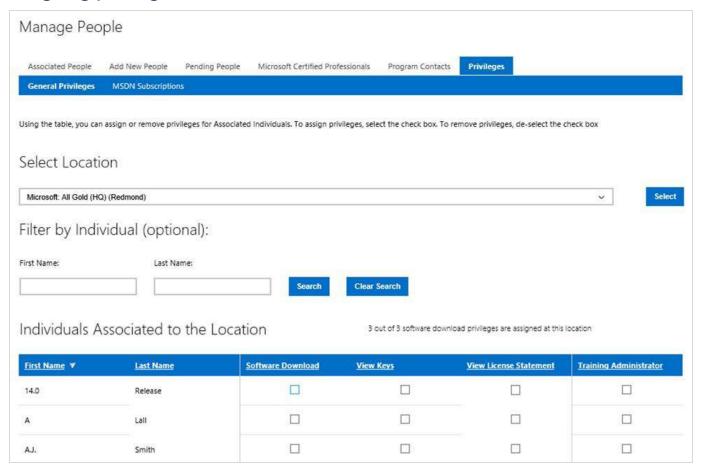


Assigning program contacts ensures that Microsoft knows how to communicate with you best. From the Program Contacts page, you can assign, change, or remove contacts by clicking the buttons and selecting associated individuals from a **list**<sup>8</sup>.

<sup>&</sup>lt;sup>8</sup>Note that you cannot assign non-affiliated people to a contact role, so each person involved in your usage of MPN must associate.



# **Assigning privileges**



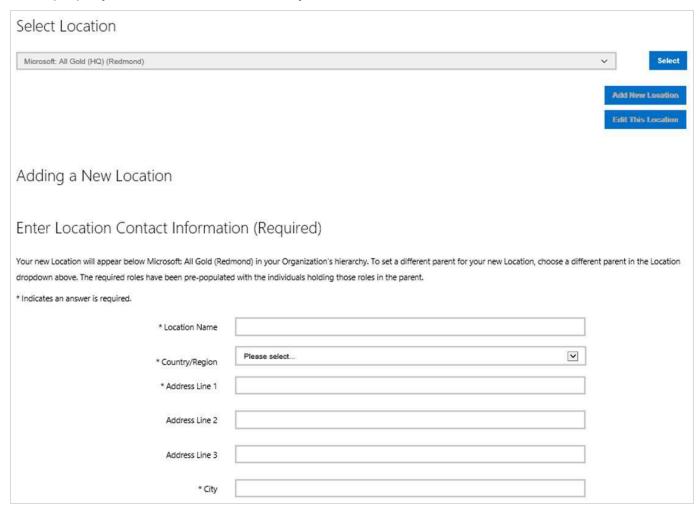
For each associated individual to a given location, you can assign software download, key, license statement, and training administrator privileges. The page will notify you of how many remaining software download privileges you have<sup>9</sup>.

<sup>&</sup>lt;sup>9</sup>If you remove privileges from one individual, you may reassign them to another individual.

# Managing organization hierarchy

#### **Creating new locations**

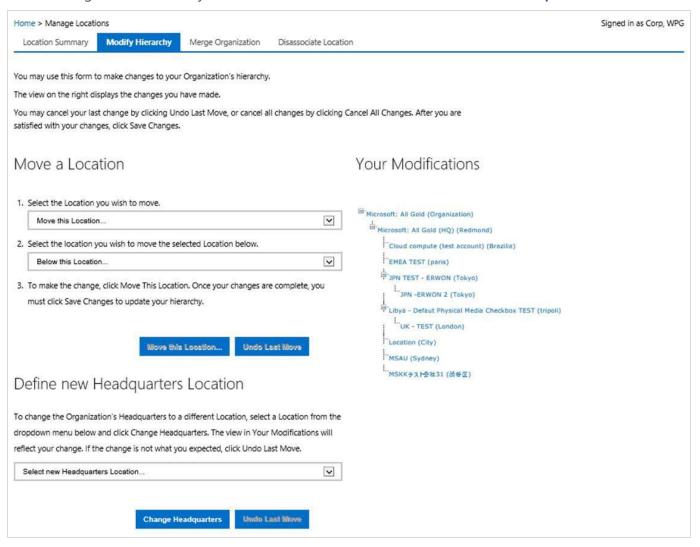
In order to properly manage your associated individuals and receive benefits, you must create locations for each part of your organization including the headquarters. Otherwise, you will not be able to assign MCPs, properly associate contacts, or access your benefits.



When a new Location is created, the Contact Roles are filled by the individuals who hold those roles at the next highest Location in your Organization's hierarchy. You must manually reassign contact roles if you do not want these individuals to automatically be designated as the contact role.

#### Managing location hierarchy

In the Manage Locations tab, you can move locations around or select a new headquarters<sup>10</sup>.

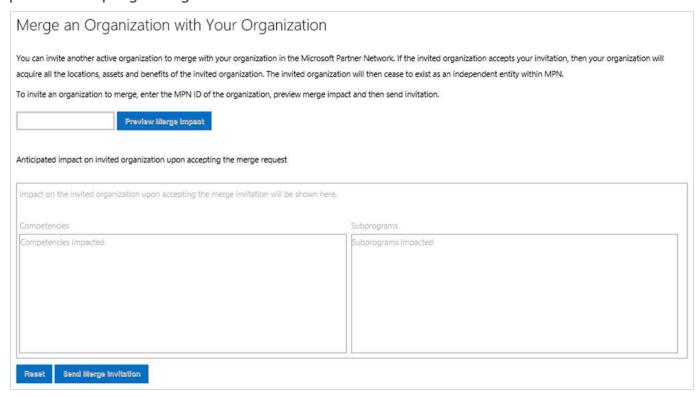


<sup>&</sup>lt;sup>10</sup>Moving locations around will not affect other locations unless they are subordinate to the location being moved. Selecting a new headquarters will make all other locations a child location of the new HQ, with their own sub-hierarchies intact.



#### Merging organizations

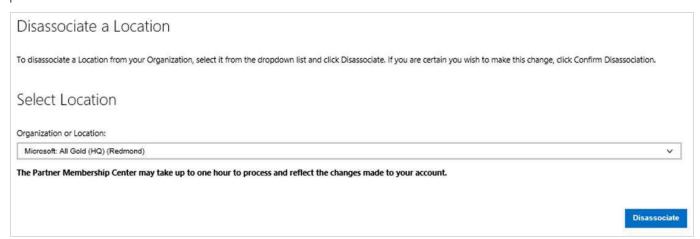
WARNING: Merging organizations is a complex process that may result in loss of benefits or other issues if completed incorrectly. Please contact your Regional Service Center and get their assistance prior to attempting a merge.



From the Manage Locations tab, you can merge your organization with another organization. This pane will show you the anticipated impact to competencies for both organizations.

#### **Dissociating locations**

Dissociating a location is effectively deleting it. If your company is closing a particular location, then you must dissociate it. This may affect benefits, competency eligibility, or cause other issues. If you are sure you want to dissociate, please consult with your Regional Service Center to ensure the correct action is performed.



Once a location is dissociated, you can re-add it if necessary but this may not reverse the damage of an accidental dissociation.

# Ordering Additional Benefit Toolkits and Competency Plaques

#### What are ABTKs?

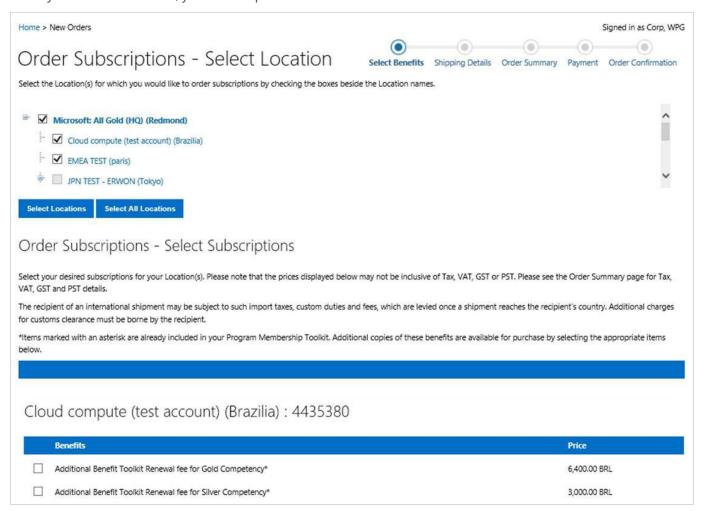
Additional Benefit Toolkits are extra silver or gold competency benefits including IUR licenses, MSDN subscriptions, and Technical Presales and Advisory Services. For example, if you have the Silver Cloud Productivity Competency you could order an ABTK that would include 25 additional O365 IUR licenses and 5 additional Visual Studio 2015 with MSDN subscriptions.

#### What conditions are ABTKs subject to?

- Partners may purchase an Additional Benefit Toolkit for any qualifying location linked to the organization's headquarters. Additional Benefit Toolkits are available to locations that attain at least one competency (specific to that location)
- Each qualifying location can obtain only one set of core benefits and receive IUR licenses related to
  the specific competency it has earned. These additional IUR and MSDN licenses are bound to the
  maximum country or worldwide license grants listed on the <u>Microsoft Competency License table</u>.
  Demonstration and training licenses are not bound to maximum grants
- The headquarters location is not eligible to purchase an Additional Benefit Toolkit; only associated, qualified locations can purchase Additional Benefit Toolkits

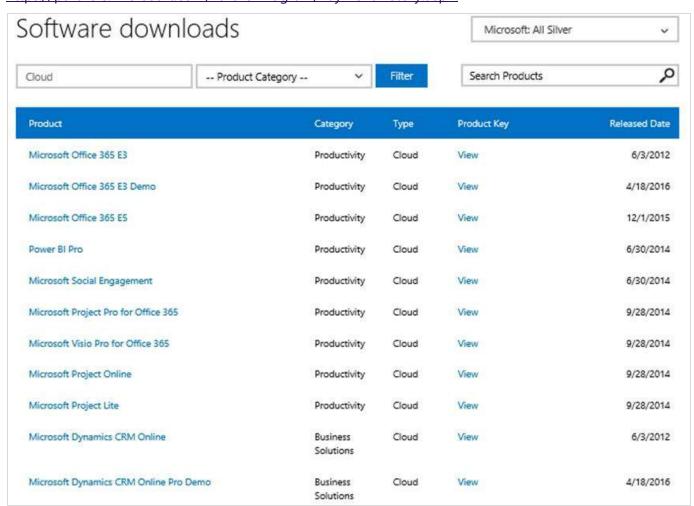
#### **Ordering ABTK**

You can create a new order for benefits from the New Order page on the Orders & Benefits dropdown. Once you select locations, you will be presented with the available orders for each **location**<sup>11</sup>.



<sup>&</sup>lt;sup>11</sup>Price is shown in converted currency for each location. Prices may not include tax, VAT, GST, or PST detail.

From there, it's simply a matter of competing the information required at each stage of the new order creation process. You can view your program purchases here for outstanding invoices: <a href="https://partners.microsoft.com/PartnerProgram/PaymentHistory.aspx">https://partners.microsoft.com/PartnerProgram/PaymentHistory.aspx</a>.



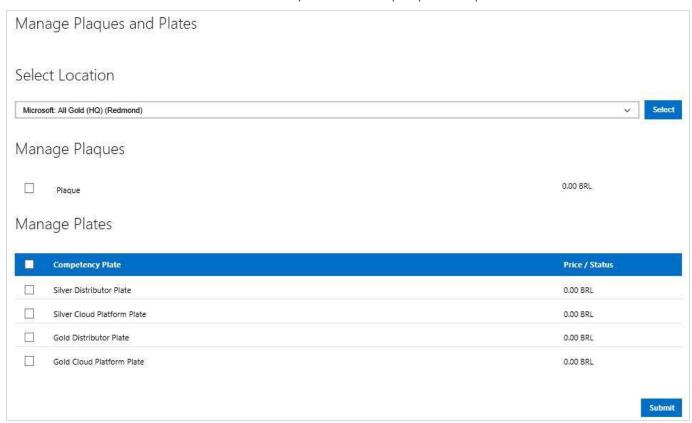
See the ABTK appendix in this guide for additional information and restrictions on ordering ABTKs.

#### What are competency plaques and plates?

Competency plaques and plates display your expertise, experience, and relationship with Microsoft You can order a plate to denote your membership in the Microsoft Partner Network, or order plaques for each of your competencies that you have achieved.

#### Ordering competency plaques

At the bottom of the Orders and Benefits dropdown, select plaques and plates

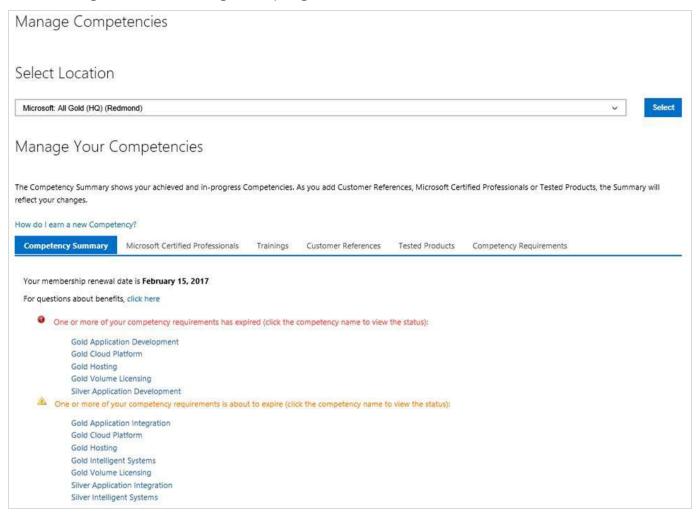


On this page, you can see which plaques and plates your organization is eligible to receive, as well as place orders. The prices are shown according to your IP's location.

# Managing and viewing competency assets

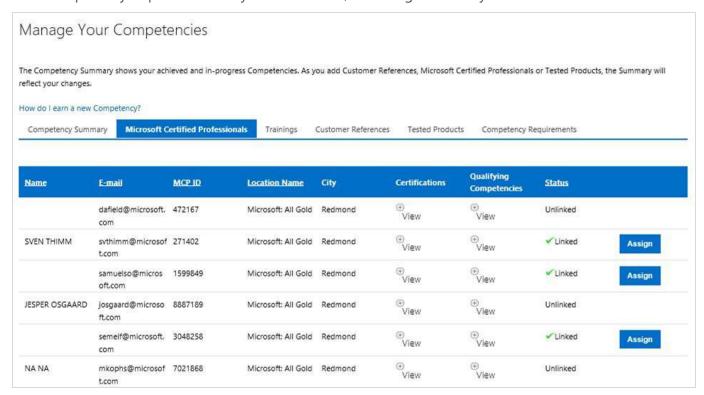
#### Viewing competency summary

The manage competencies page allows you to view competency, MCP, training, customer reference, and requirement information by location or for all your locations. It will also identify competencies that are in need of being renewed or in danger of lapsing.



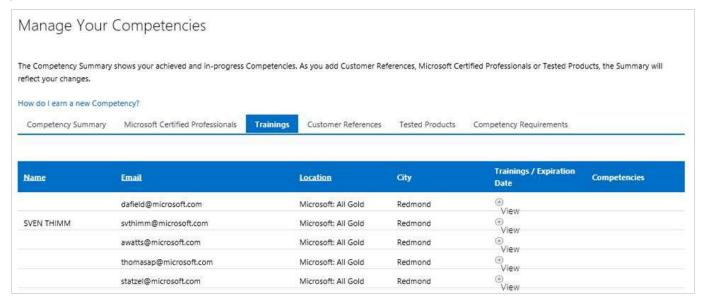
#### Managing associated MCPs

Once MCPs have been successfully associated with your organization, you can view their certifications, what competency requirements they count towards, and assign them to your locations.



#### **Managing MCP trainings**

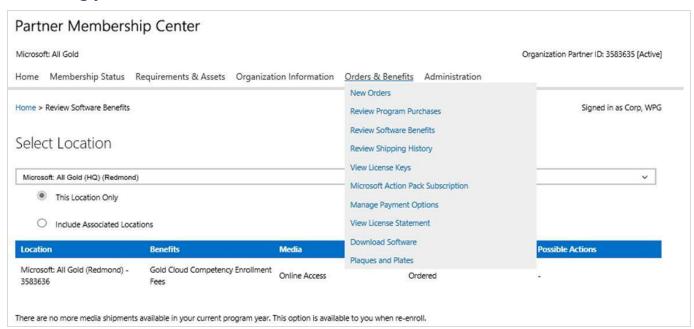
Trainings that your associated MCPs have completed are viewable on the Trainings tab. This will help you plan when to re-certify and check your current MCPs certifications against competency requirements that you would like to meet.



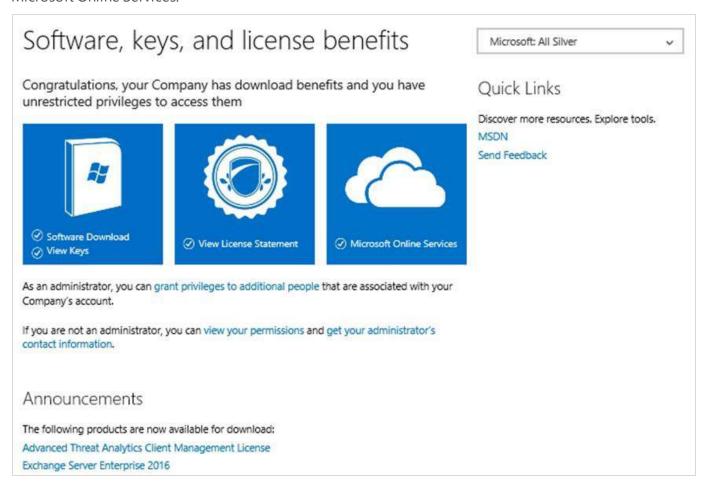


# **Activating IUR**

#### Accessing your software



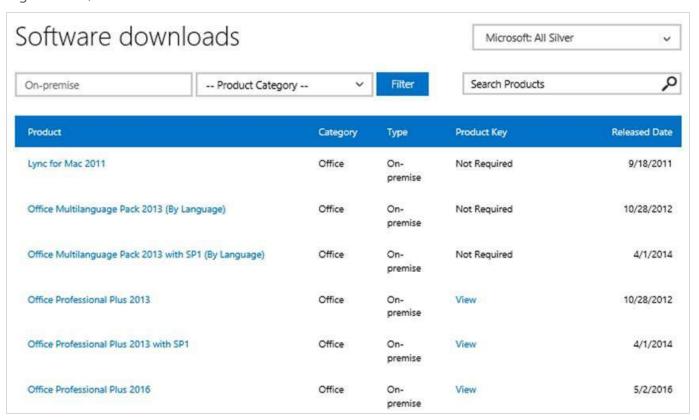
From the partner membership center, click on View License Keys in the dropdown. On this page, you can view and download software (if you have permissions), view license statements, and view or use Microsoft Online Services.





#### Downloading your software

Click on the Software Download and View Keys box. You can filter by product, category, and organization/location<sup>12</sup>.

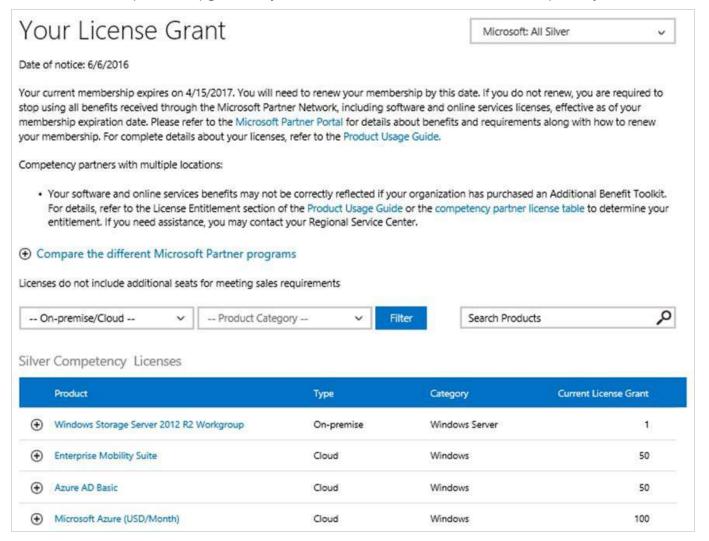


You can also view the product keys for each piece of software you are eligible to download that requires one. Once you select pieces of software to download, you will be given language and operating system download options as well as any a list of system requirements based on the OS and any additional special instructions.

<sup>&</sup>lt;sup>12</sup>Note that this software download section is for on-premise solutions only. Cloud software is found on the Microsoft Online Services page

#### View license statement

When you view your license statement, you'll be given information about when your membership expires, how to renew, and links to additional license **details**<sup>13</sup>. This page also provides a tool for comparing current benefits to possible upgrades in your benefits or the addition of a new competency.



<sup>&</sup>lt;sup>13</sup>It is important to know that if you have purchased ABTK this page may not reflect all of your benefits.



# **Support**

# Support options at a glance

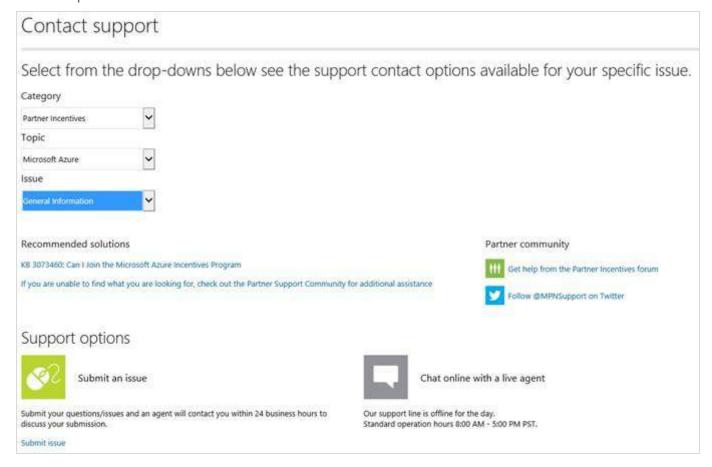
	Self Help	Community	Live Chat	RSC	RTC	Concierge
Network Member	•	•				
MAPS	•	•	•	•	•	
Silver	•	•	•	•	•	
Gold – on Premises	•	•	•	•	•	
Gold – Cloud	•	•	•	•		•
Coverage	<ul> <li>Top Partner Questions</li> <li>Self help guides</li> </ul>	Medium Priority     Search Partner     questions     Communicate with     the RSC in either     Public or Private     thread     Partner to Partner     questions	High priority, low complexity, high convenience	High priority, high complexity questions.	Named contact for MPN questions, benefits, campaigns and lite touch sales focus	Named contact works with PSE to resolve all MPN programmatic questions including benefit guidance

# **Support links**

- MPN Self help
- Contact support

#### How to raise a ticket

From the "Contact Support" page (linked above), you will have a number of dropdowns to select a Category, Topic, and Issue. This will provide you with self-serve support pages, forums, a live chat option, and the option to submit a ticket.



# **Appendix**

#### **ABTK terms and conditions**

Please contact Partner Support (RSC) for guidance and clarification on the purchase of ABTKs

Each location ordering an ABTK must have at least one silver or gold competency in Active-Earned or Active-Pre-approved status at their location.

- 1. Either silver or gold level ABTKs may be purchased. The fee, benefits, and requirements vary by the silver or gold level<sup>14</sup>.
- 2. ABTKs cannot be ordered by a headquarters location.
- 3. Only one ABTK may be purchased for each qualifying location (regardless of the number of competencies earned.)
- 4. A location that has qualifying silver competency may only purchase only silver ABTK (even if the organization has a gold competency active at another location.)
- 5. A location that has a qualifying gold competency has the option to purchase either a silver ABTK or gold ABTK
- 6. An ABTK or ABTK Upgrade Toolkit cannot be ordered within a partner's re-enrollment window of their program year. (The re-enrollment window is the 90-day period that precedes the partner's next anniversary date.)
- 7. Partners will have the ability to order an ABTK after re-enrollment however the associated benefits will be valid only for the remainder of partner's enrollment year. (The fee will not be discounted or prorated.)
- 8. A Global Administrator may order ABTKs for any location within their membership. A Location Administrator may only order for the location(s) that they manage.
- 9. ABTK orders or upgrades will not reset program anniversary date.
- 10. All benefits of ABTKs will expire on the anniversary date of the organization's MPN membership.

  The partner must qualify for, and order a new ABTK each new program year to receive the associated benefits.
- 11. In the event that an organization's anniversary date is extended, the benefits of the ABTKs will be valid through the new anniversary date.
- 12. A silver ABTK can be upgraded to a gold ABTK if the location qualifies for gold at location level and pays the ABTK upgrade fee. (The upgrade fee is the difference in price between a silver and gold ABTK.)
- 13. Only a partner upgrading from paid silver ABTK to paid gold ABTK will be shipped an upgrade kit. (A location that upgrades to a gold competency will not automatically be upgraded to gold ABTK.)
- 14. If a location has paid for an ABTK and subsequently earns additional competencies at that location, they are entitled to the competency-specific benefits of the new competency. The PMC should automatically generate those benefits to the partner as part of the update kits.
- 15. If a location purchases an additional toolkit, the Partner will receive a Welcome Kit for the additional toolkit as well as all competency kits for all competencies that are active-earned or active pre-approved at that location. (The Welcome Kit is not a full media set. It will consist only of the items that cannot be downloaded, e.g., Terminal Server license codes.)

<sup>&</sup>lt;sup>14</sup>The Yearly fee for each silver and gold ABTK is equivalent to the standard annual competency fee for a silver or gold partner respectively.

#### **Building Logos**

You can find the Logo Builder tool here: <a href="http://logobuilder.mspartner.microsoft.com/">http://logobuilder.mspartner.microsoft.com/</a>

You can find the Logo Builder User Guide here:

https://logobuilder.mspartner.microsoft.com/Home/ DownloadResource?resourceld=1

You can find the MPN brand Logo Guidelines here:

https://logobuilder.mspartner.microsoft.com/Home/ DownloadResource?resourceld=3

#### MPN Portal differentiation

Through the MPN portal at partner.microsoft.com, you can access many more tools and resources relating to your MPN membership. The Portal is also your primary source of information and important updates relating to MPN – please familiarize yourself with the structure in order to have the portal's tools and resources easily available when you need them.

Here are a few examples of what you will find in the MPN Portal:

- Contact Support either your Regional Service Center or the Partner Support Community
- Answers to frequently asked questions about MPN
- Official MPN blogs and a "What's New" section, to keep you up to date with the latest changes and improvements
- Your Cloud Services Dashboard
- Guidance on Digital Partner of Record and Partner Association
- Information and activation tools for your Internal Use Rights
- Information and access to your support benefits, including Advisory hours and Signature Cloud Support

This guide is not concerned with the MPN portal. Instead, it focuses on the possible actions one can take through the Partner Membership Center at partners.microsoft.com/partnerprogram

#### **Useful links**

- Competency webpages
- MAPs URL
- MSDN
- O365
- IUR
- DPOR overview and FAOs
- <u>Technical presales and deployment services</u>