

Microsoft Cloud Partner Program Solutions Partner Designations

Partner Associations Playbook

► **More as a Service™**



Overview



Associations are the sole mechanism by which customer success, performance, and skilling category points are acknowledged and calculated towards achieving solutions partner designation(s).



Without these associations in place, partner capability score points are not recognized.



Eligible Partner Associations by Solutions Partner Designation



Solutions Partner Designation | Partner Association Eligibility



Partner association type	Solutions Partner designation			
	Modern Work	Business Applications*	Security	<ul style="list-style-type: none"> • Data & AI • Infrastructure • Digital & App Innovation (Azure)
Claiming Partner of Record (CPOR)	X (Enterprise & SMB)	x	x	
<i>Eligible subcategories</i>	Net customer adds, Usage growth, Deployments	Net customer adds, Usage growth, Deployments	Net customer adds, Usage growth, Deployments	
Digital Partner of Record (DPOR)	X (Enterprise only)	x		x
<i>Eligible subcategories</i>	Net customer adds, Usage growth, Deployments	Net customer adds, Usage growth, Deployments		Net customer adds, Usage growth, Deployments
Partner Admin Link (PAL)**	\$13,000.00	x	x	x
<i>Eligible subcategories</i>	\$13,000.00	Usage growth, Deployments	Net customer adds, Usage growth, Deployments	Net customer adds, Usage growth, Deployments
Cloud Solution Provider (CSP)	X (SMB only)	x		x
<i>Eligible subcategories</i>	Net customer adds, Usage growth, Deployments	Net customer adds, Usage growth, Deployments		Net customer adds, Usage growth, Deployments

*Different workloads within the Business Applications designation have different partner association eligibility. Please go here to learn more about eligibility by workload. **This association type is not available in China or Government clouds.

Partner Capability Score: Alignment Across the Microsoft Cloud



70+ points With >0 points for each metric meets requirements for Solutions partner	Solutions Partner for Business Applications	Solutions Partner for Modern Work	Solutions Partner for Security	Solutions Partner for Infrastructure, Data & AI, and Digital & App Innovation (Azure)
Performance	Net customer adds > 15 pts	Net customer adds > 15 pts	Net customer adds > 20 pts	Net customer adds > 30 pts
Skilling	Intermediate Certs > 20 pts	Intermediate Certs > 10 pts	Intermediate Certs > 40 pts	Intermediate Certs > 20 pts
	Advanced Certs > 15 pts	Advanced Certs > 15 pts	No Advanced Certs currently	Advanced Certs > 20 pts
Customer Success	Usage Growth > 30 pts	Usage Growth > 30 pts	Usage Growth > 20 pts	Usage Growth > 20 pts
	Deployments > 20 pts	Deployments > 25 pts	Deployments > 20 pts	Deployments > 10 pts

Playbook Contents



Claiming Partner of Record (CPOR)



Digital Partner of Record (DPOR)



Partner Admin Link (PAL)



Cloud Solution Provider (CSP)



Certified professional associations

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Claiming Partner of Record (CPOR) Partner Association

How does CPOR work and what are the benefits?



What is CPOR?

Claiming Partner of Record (CPOR) allows a partner to be recognized for servicing a customer's Microsoft cloud environment.

CPOR allows only one partner of record per workload or product. However, multiple partners can be associated to the same customer for different subscriptions or workloads.

Counts toward partner capability scores for Modern Work, Business Applications and Security net customer adds, deployments and usage growth.

What is it used for?

Some types of CPOR are used to allocate incentives, while other types of CPOR are used to recognize partner associated or influenced revenue or usage but are not eligible for incentives.

Associate with your customer via the "usage" option if you drive their adoption and usage of an eligible product / workload.

Associate with your customer via the "pre-sales" option if you influenced their selection of an eligible product.

Associate with your customer via the "revenue association" option if you influenced their selection of an eligible product as a Business Influencer.

Process

Partners initiate the claim process and submit a claim within the Incentives workspace in Partner Center.

Make CPOR claim associations at the subscription or workload level.

Provide required Proof of Execution (POE) for each incentive claim (if required by type of CPOR).

Your claim will be validated by both Microsoft and customer.

Types of CPOR

Online Services Usage M365

Allows incentive associations, and usage associations (non compensable) per workload and is licensing agnostic.

Online Services Advisor (OSA Sell)

Allows incentive associations and revenue associations per subscription (non compensable) under Enterprise Agreement, CASA/EES, and Web Direct (MOSA).

Online Services Usage Business Applications

Allows incentive associations only per subscription under Enterprise Agreement and CASA/EES licensing.

RevRec

Allows revenue associations per subscription (non compensable) under Enterprise Agreement, CASA/EES, and Web Direct (MOSA).

Why claim revenue association?

Revenue association available for Business Applications partners is the primary way in which partners achieve revenue recognition and contribute to demonstrating impact with their customers.

Revenue recognition for non-incentivized workloads gets recognized automatically and you will not have to submit Proof of Execution (POE). Available under Enterprise Agreement, legacy CSP, CASA/EES, and Web Direct (MOSA) licensing models only. Please note POE is not required for revenue association at this time.

Why claim for usage recognition?

Usage recognition available under M365 (Modern Work & Security) and Biz Apps allows you to claim for the work that you are driving with your customer and be recognized as their partner of record by Microsoft. Please note some usage associations may earn incentives.

Usage recognition for non-incentivized workloads get recognized automatically and you will not have to submit Proof of Execution (POE).



CPOR Association Types

The CPOR claiming platform allows for CPOR association claims related to Business Applications and Microsoft 365 solution areas as well as recognition outside of these programs (see non compensable associations below). Select the correct activity based on the descriptions to avoid having to reclaim in the future. Claiming with an incorrect activity may result in missed eligibility, Solutions Partner attainment, and incentive earnings.

Solution area	Activity / Program	Applies to Partner Capability Score?	When to select?	Licensing	Requirements to submit a claim
Business applications	Incentive association Presales – OSA	Business Applications: • Deployments • Usage growth	Select if you influenced the purchase of an eligible product and want to apply for pre-sale incentives or revenue- association. Revenue association is automatically completed once you associate to OSA (note one-month lag for this to reflect in Microsoft scorecards).	Enterprise Agreement, CASA/EES, and Web Direct (MOSA). Please note legacy ^[SEP] CSP is revenue association only.	<ul style="list-style-type: none"> • Active and in-grace^[SEP] status of the subscription. ^[SEP] • Subscription purchased through applicable licensing program. ^[SEP] • Excludes^[SEP] MPSA licensing and CSP.
	Revenue association only – (RevRec) Program agnostic (non-compensable)	Business Applications: • Net customer adds			
	Incentive association – OSU Business Applications (Usage)	Business Applications: • Deployments • Usage growth	Select if you drive the adoption and usage of an eligible product and want to apply for usage incentives. This option is only applicable if the customer purchased these products via Enterprise agreement, and CASA/EES.	Enterprise Agreement and CASA/EES.	
Microsoft 365	Incentive association – OSU M365 (Usage)	Modern Work and Security: • Net customer adds • Deployments • Usage growth	Select if you drive the adoption and usage of an eligible workload, for a customer and want to apply for usage incentives, or usage association.	N/A	<ul style="list-style-type: none"> • Tenant must at least have one active subscription under the claimed workload. ^[SEP] • Excludes MPSA
	Usage association only – Program agnostic (non-compensable)	Modern Work and Security M365: • Net customer adds • Deployments ^[SEP] • Usage growth	The usage association only workloads: Teams, Yammer, Outlook Mobile, and Microsoft Defender for Office (MDO) formerly Office Advanced Threat Protection (OATP).		

How to Complete a Claiming Partner of Record (CPOR) Association

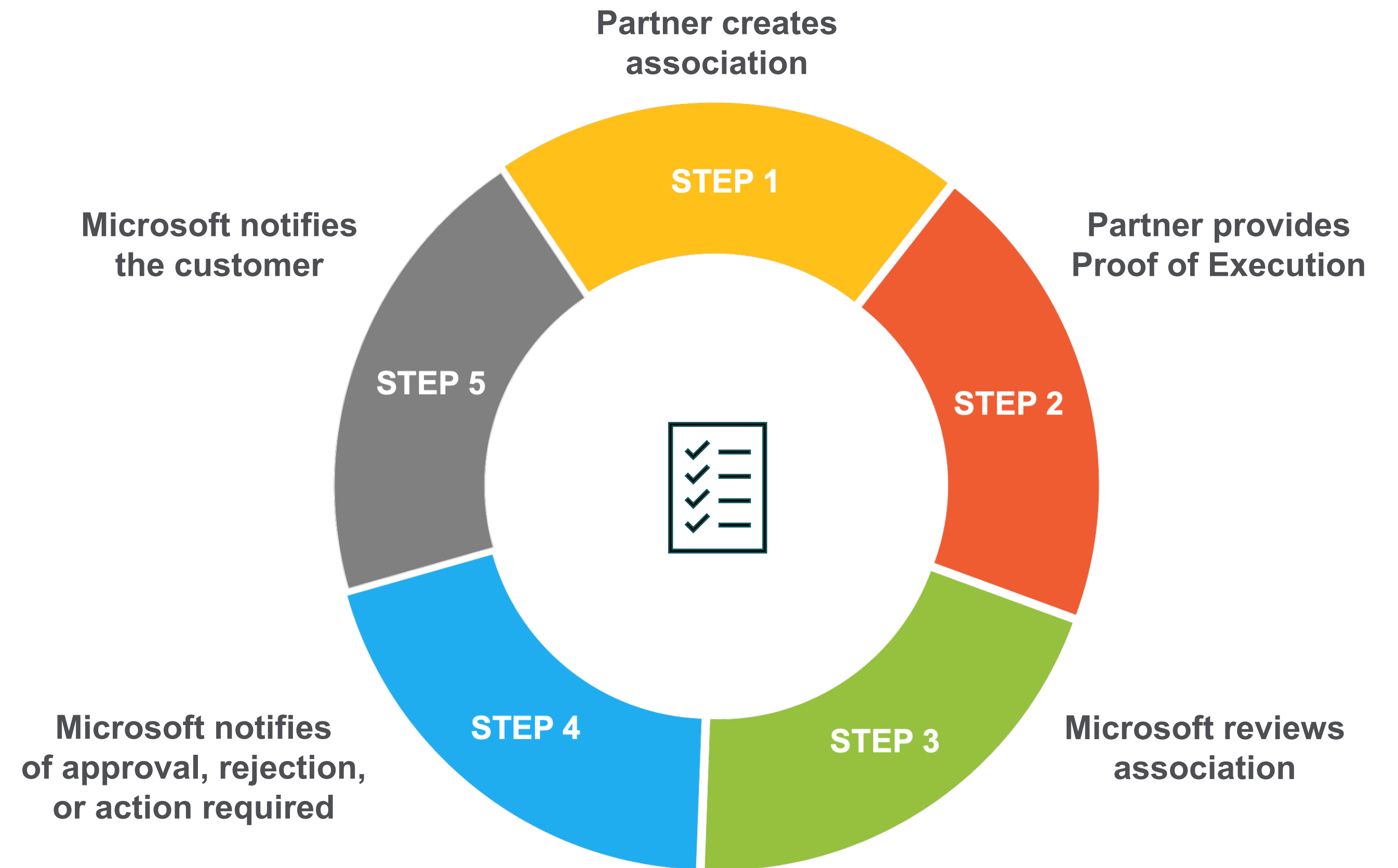


After you create a new customer association, Microsoft will verify the details of the association and proof of execution provided to ensure its accuracy.

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.

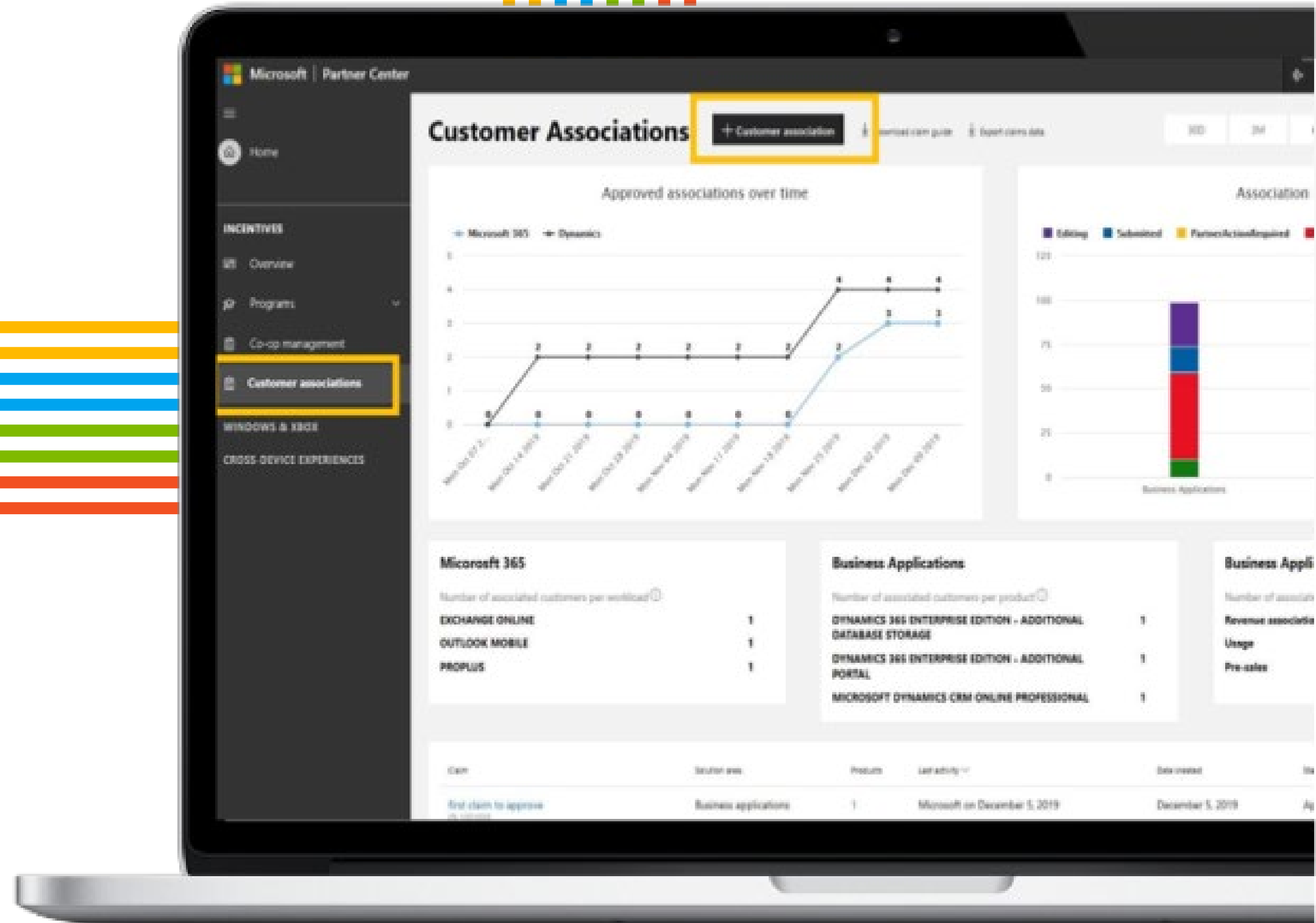
If your association is approved Microsoft will notify the customer.



Creating an Association

To create an association, start with the steps below

- Visit Partner Center
- Under Incentives, select Customer associations
- Select +Customer association
- Follow the steps in the claim guide
- Only the following users in Partner Center can view and create associations:
- IncentiveAdmin
- IncentiveUser



[Download CPOR Claim Guide](#)

Claiming Partner of Record (CPOR)

Partner / Customer FAQ



Partner / Customer CPOR FAQ

How do I explain CPOR to a customer?

CPOR enables Microsoft to identify and recognize those partners who are helping customers achieve business objectives and realize value in the cloud. Once an advisory partner associates to a workload or subscription they will only obtain access to the usage and/or sold seats data for the products/workloads they have claimed. This enables partners to monitor active usage and utilization while providing customers with recommendations of how to maximize usage. Partners will only have access to the daily usage and seats/sold feed for workload/products they are associated to in the period in which they are attached as partner of record. Partners will not have access to any other transactional or usage data.

Additionally, this association helps Microsoft understand the ecosystem of our service providers and to refine the tools and programs needed to best support our common customers.

There is no action required for the customer, we allow customers the opportunity to opt out. Customers will receive a notification informing them of the association request for partners. If a customer denies association to a partner, they will not be able to be recognized as the partner of record. When you engage with your customer, Please ensure that the customers tenant administrator (this is the person receiving the notification) is aware of the engagement so that they do not decline the consent request.

Can more than one partner have CPOR for the same workload?

CPOR allows only one partner of record per workload or product. However, multiple partners can be associated to the same customer for different subscriptions or workloads.

I was disassociated, why? How do I fix this? I was expecting incentives, how do I escalate?

If you were disassociated, it is due to another partner claiming for the same subscription/workload. If you believe you are the right POR, we ask you to re-claim via CPOR providing updated POE that proves you are the partner driving the most influence to the customer's environment.

We have many MPN IDs. Which one should we use for OSUM365? I claimed for the wrong MPN ID, how do I fix it?

You should claim with your partner location ID only, and one rolls up to the partner global account (PGA) you want to get the partner capability score credit for the association. If you have claimed with the wrong MPN ID, you will need to submit a new claim.

At what point is our eligibility determined, upon submission of the claim or the approved date of the claim?

Our systems look at the claim submission date for incentive eligibility. Incentives are however not earned until a milestone has been reached.

What happens if there is an existing partner of record on a claim that I've submitted?

Partners should claim and provide detailed proof of execution documentation as called out in the incentives guide. Microsoft will then review the documentation and determine which partner exerted the greatest influence in driving usage of the customer's workloads.

I'm being asked for more POE, why? It should be sufficient?

If you're being required to submit POE it is due to another partner claiming for the same subscription/workload. Microsoft assesses partner of record adjudications based on the quality of POE. We recommend that you follow the POE guidelines outlined in this deck and in the Incentive Policy Guide for guidance on how to submit quality POE.

Claiming Partner of Record (CPOR)

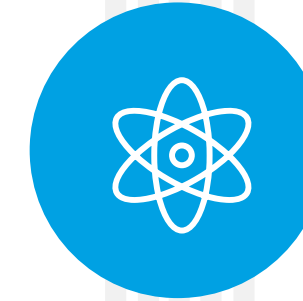
Partner resources



Resources



CPOR claim guide



Partner Center



Video: Partner Associations: Online Services Usage (OSU) Program



Partner docs: Understand CPOR Associations



Incentives page on the partner website:
aka.ms/partnerincentives



Partner Center incentives resources
asset collection on the partner website

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Digital Partner of Record (DPOR) Partner Association

How does DPOR Work and What are the Benefits?



What is DPOR?

Digital Partner of Record (DPOR) associates servicing partners to a Microsoft cloud subscription. It is an online capability to attach a partner to a customer's Microsoft online subscription.

Allows only one partner of record per customer.

Counts toward partner capability scores for Data & AI (Azure), Digital & App Innovation (Azure), Infrastructure (Azure), Modern Work, and Business Applications net customer adds, deployments and usage growth.

What is it used for?

DPOR is intended to associate a consulting (Systems Integrator) or management (Managed Service Provider) partner with a customer's relevant Azure footprint for the time while the partner is engaged with the customer.

DPOR is attached at subscription level for each cloud product. Active usage is also calculated at subscription level, except Office 365, which is at customer tenant level. Partners must be added as the DPOR each time a new subscription is established, regardless of whether their customer is new or existing.

Process

Only a customer can designate a DPOR for their subscriptions. To recognize the partner for that work, the customer adds the partner ID to the subscription via the customer's service portal.

Who is a Digital Partner of Record (DPOR)?

The Digital Partner of Record for Office 365, Microsoft Dynamics CRM Online, Windows Intune, Enterprise Mobility Suite, and Microsoft Azure subscriptions is the partner who is helping the customer design, build, deploy or manage a solution that they've built on the service. It is not the partner who sold the subscription.

When should customers add their DPOR?

Encourage your customers to attach a Digital Partner of Record to their subscriptions immediately to make sure you have access to business-critical reporting and support capabilities, and to enable you to qualify for incentives. DPOR is also one way to ensure that you receive credit toward Solutions Partner designations.

Digital Partner of Record (DPOR)

automates how partners are attached as the Partner of Record for the subscriptions you are actively managing for customers for Microsoft Office 365, Microsoft Dynamics CRM Online, Microsoft Intune, Enterprise Mobility Suite (EMS), and Microsoft Azure.

DPOR Registration

We have enabled online capability to automate how partners are attached as the Partner of Record for Microsoft Office 365, Microsoft Dynamics CRM Online, Microsoft Intune, Enterprise Mobility Suite (EMS), and Azure subscriptions. Customers can designate you as their Partner of Record for subscriptions you are helping them deploy, or for solutions you are helping them design, build or manage.

DPOR improves the partner and customer experience, reduces your cost of doing business with us, and enables automated tracking of cloud performance levels. For Solutions partners, DPOR is one of the ways to register your role in cloud subscriptions to earn points for customer related partner capability score metrics.

Benefits

Partners benefit because it allows them to qualify for solutions partner designations and enables reporting that provides a single view into the revenue, usage, and consumption driven by you. This insight can also be leveraged for cross-sell/upsell opportunities and allows partners to proactively engage customers at risk for non-renewal.

When a partner is registered as the DPOR, it signals to Microsoft's Fast Track services to defer to the DPOR for customer assistance to ensure partner attach.

Customers benefit because it provides their partner with access to performance and usage data so you can provide better service and support to them and help optimize their usage for the desired business outcome.

How to Complete a Digital Partner of Record (DPOR) Association for:

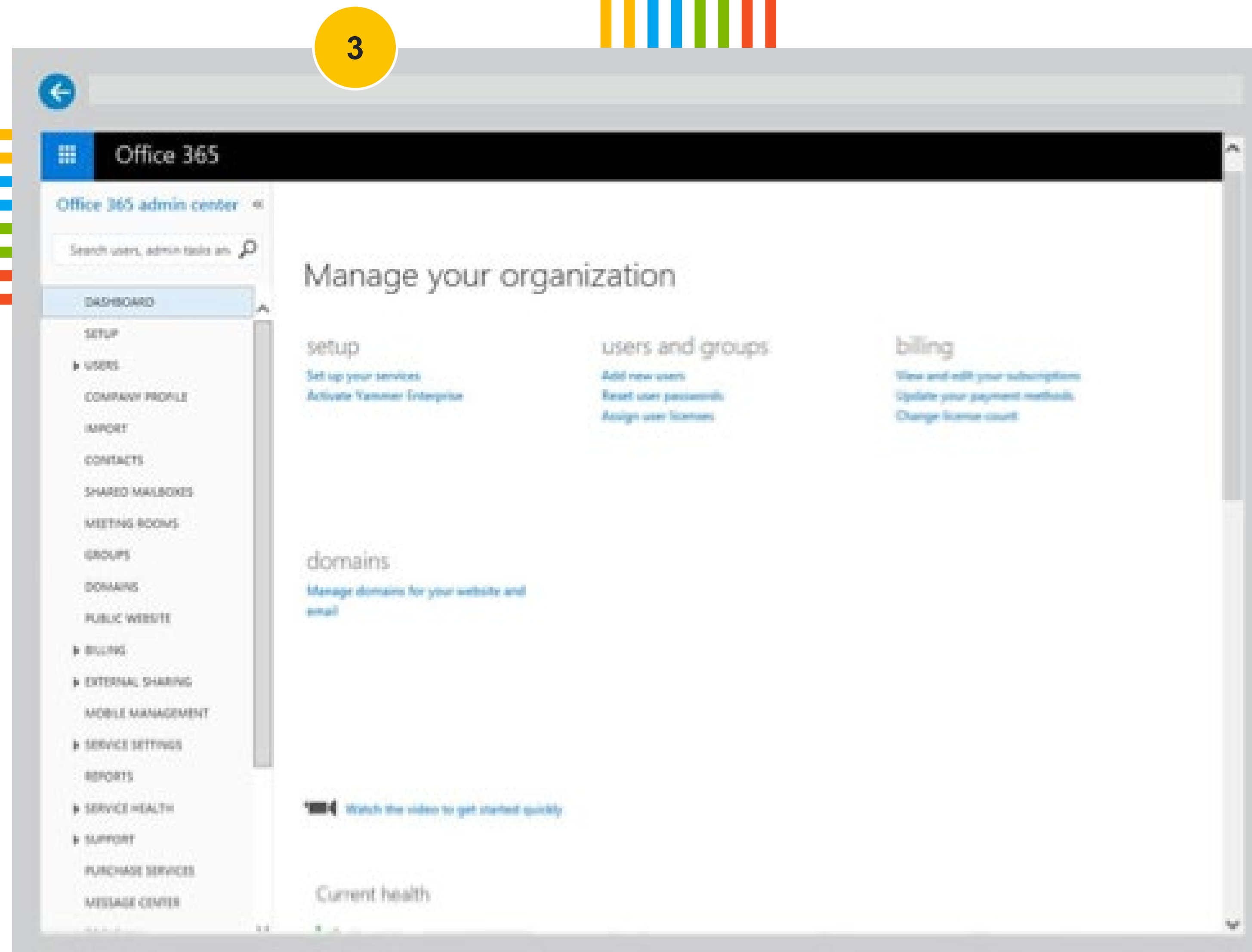
Office 365 | Intune | EMS | PowerBI
Dynamics 365 | CRM On-Line and AX7



Attaching a DPOR for Office 365, Intune, EMS, Powerbi, Dynamics 365, CRM Online and AX7

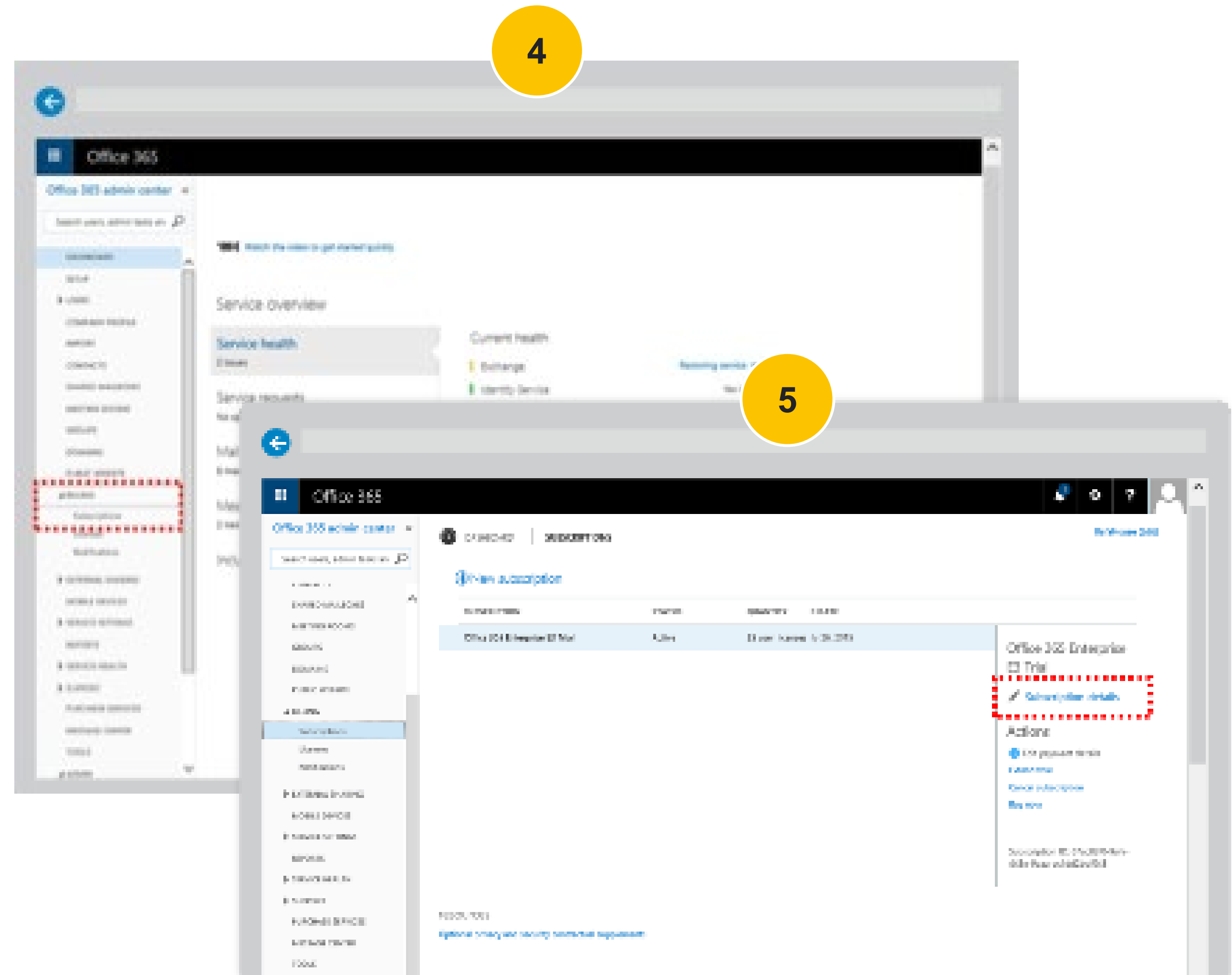
Customers should complete the steps in this and following slide to create the DPOR association

- 1 Go to the Office Customer Portal at <https://portal.office.com/>.
- 2 Log into your account using your user name and password.
- 3 You will enter the Office 365 admin center.



Attaching a DPOR for Office 365, Intune, EMS, PowerBI, Dynamics 365, CRM Online and AX7

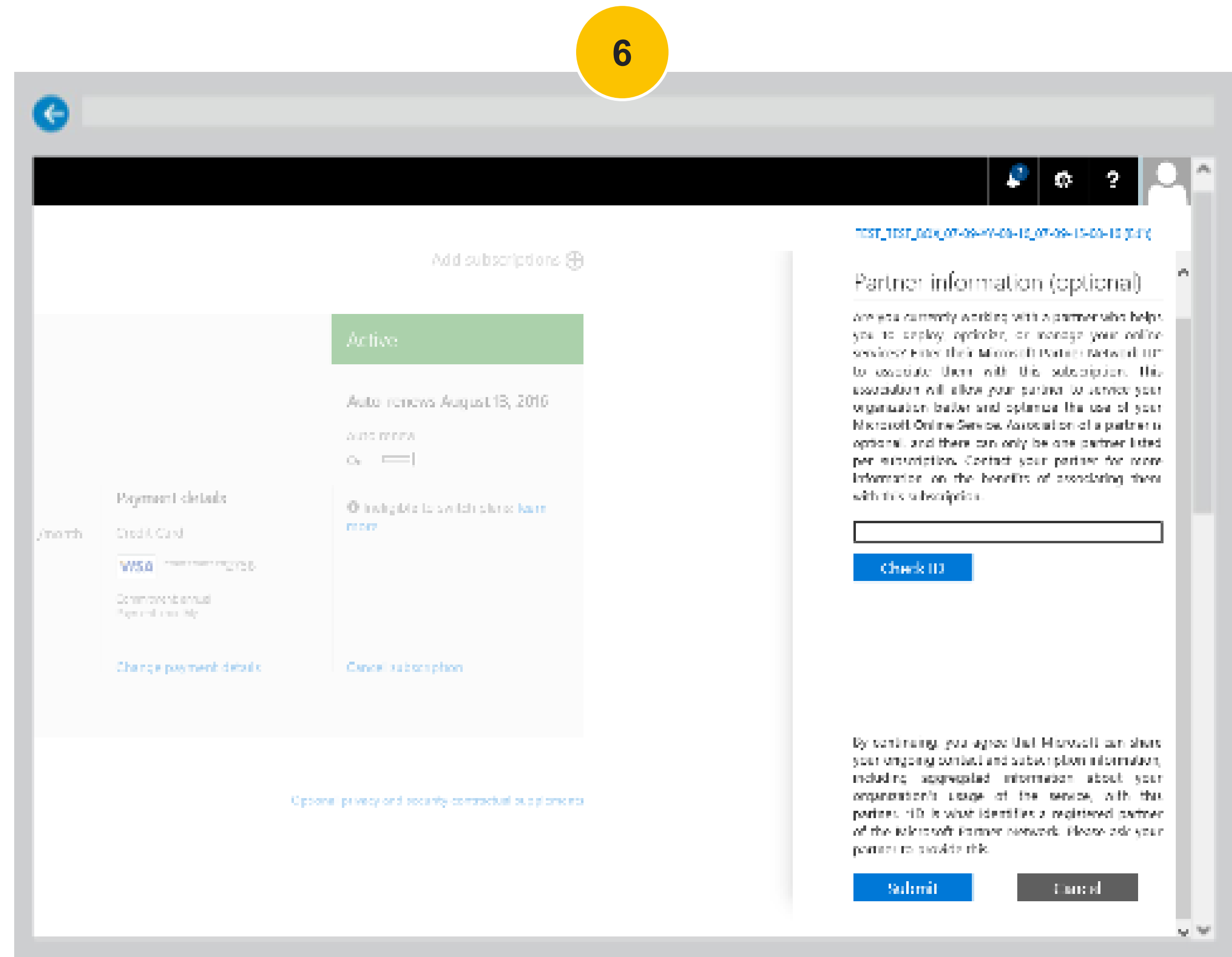
- 4** In the admin center, click on Billing, then Subscriptions.
- 5** Select your subscription and click on More actions in the upper left corner under the price per user/ month.



Attaching a DPOR for Office 365, Intune, EMS, PowerBI, Dynamics 365, CRM Online and AX7



- 6 Input your partner's Partner ID. If you do not know the Partner ID of your partner, please contact your partner to get that information.



Attaching a DPOR for Office 365, Intune, EMS, PowerBI, Dynamics 365, CRM Online and AX7



- 7 Click Check ID to see the name of the partner. Verify you have selected the correct partner.
- 8 Click Submit to complete assigning your Partner of Record.

The screenshot displays the Microsoft subscription management interface. On the left, there are sections for 'Payment details' (showing a VISA credit card) and 'Auto-renew' (set to August 13, 2016). The main area on the right is titled 'Partner information (optional)' and contains a text box for entering a partner ID. A red dashed box highlights the 'Check ID' button, with a yellow circle containing the number '7' next to it. Below this, another red dashed box highlights the 'Submit' button, with a yellow circle containing the number '8' next to it. A 'Cancel' button is also visible. At the bottom of the page, there is a link for 'Optional privacy and security contractual supplements'.

Attaching a DPOR for Office 365, Intune, EMS, PowerBI, Dynamics 365, CRM Online and AX7

- 9 After you assign a Partner of Record, the partner will receive an email notification that lets them know that you have assigned, changed or removed your Partner of Record.

Microsoft BafaHouse has added you as their subscription advisor

We're pleased to inform you that BafaHouse has added you as a subscription advisor on their Office 365 Enterprise E3 Trial subscription. Please contact BafaHouse to help them get started with their services.

Contact Details:

Organization Name: BafaHouse
Service: Office 365 Enterprise E3 Trial
Subscription Start Date: 2015-05-27
Subscription End Date: 2015-07-26

Address:

UNITED STATES

2068986757

Sincerely,
The Microsoft Online Services Team

This is a mandatory service communication. To set your contact preferences for other communications, [click here](#).

This message was sent from an unmonitored email address.
Please do not reply to this message. [Privacy](#) | [Legal](#)

Microsoft Corporation | One Microsoft Way,
Redmond, WA 98052-6399

Microsoft

To Change or Remove Your Partner of Record

Customers should complete the steps in this and following slide to create the DPOR association:

- 1 Following the steps outlined above, log into the Office 365 admin center at <https://portal.office.com/>.
- 2 On the Partner information local pane, the Partner of Record ID assigned to your subscription will be shown. Click the “X” inside of the field to remove it.
- 3 Click Submit. You have now removed the Partner of Record for this account and your subscription no longer has a Partner of Record.
- 4 If you wish, you may then add a new Partner of Record by entering the Partner ID in the field and clicking Check ID.

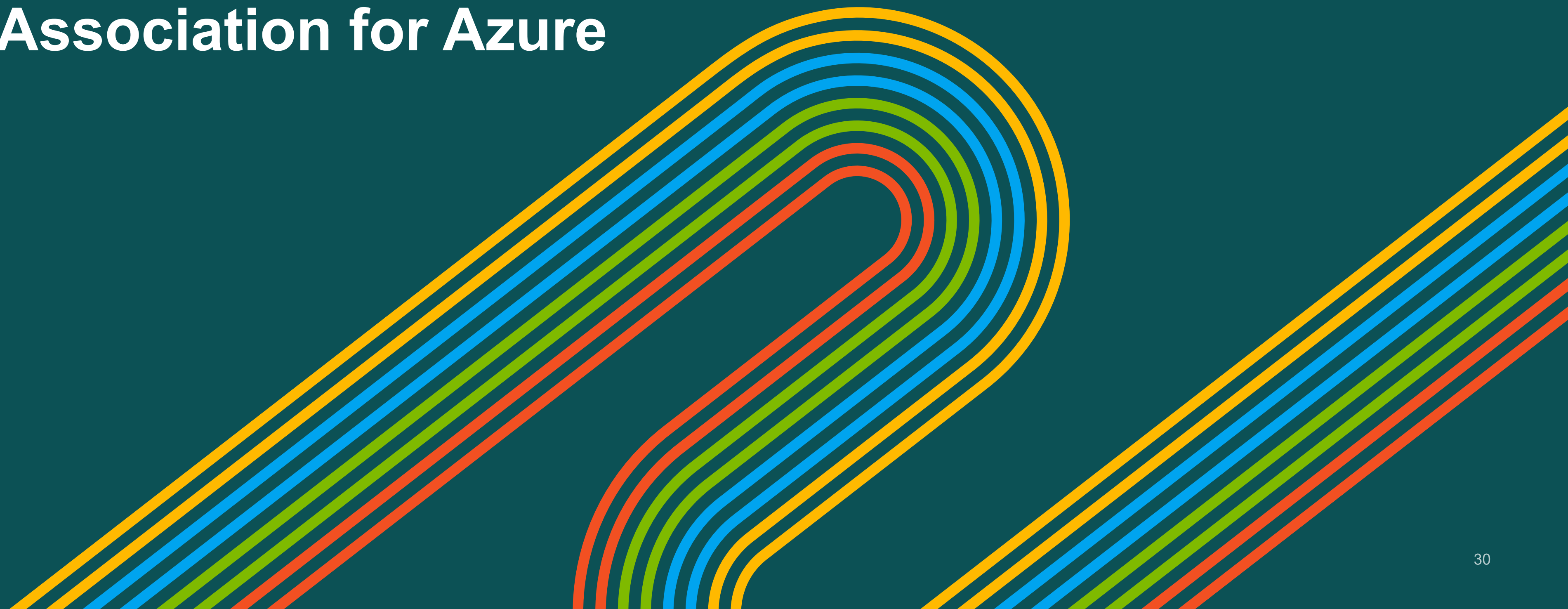
The screenshot displays the Microsoft Office 365 admin center interface. At the top, there is a navigation bar with a back arrow, a search bar, and icons for notifications, settings, help, and user profile. The main content area is titled "Add subscriptions" and shows a subscription status of "Active" with a green bar. Below this, it indicates "Auto-renews August 13, 2016" and "Auto renew On" with a toggle switch. The "Payment details" section shows a credit card (VISA) with the last four digits "2758" and a commitment of "annual" with a "monthly" payment option. A note states "Ineligible to switch plans: learn more". There are links for "Change payment details" and "Cancel subscription". On the right side, the "Partner information (optional)" section asks if the user is working with a partner and provides a text input field containing "3013173" with a red "X" icon to the right. A yellow circle with the number "2" is overlaid on this field. Below the input field is a "Check ID" button. At the bottom of the partner information section, there is a "Submit" button and a "Cancel" button. A footer note states: "By continuing, you agree that Microsoft can share your ongoing contact and subscription information, including aggregated information about your organization's usage of the service, with this partner. *ID is what identifies a registered partner of the Microsoft Partner Network. Please ask your partner to provide this."

Additional Support

If your customers have any problems or questions about this process and the ability to assign, maintain, and change and remove their Partner of Record, they can click the Support link on the left navigation pane of the admin portal screen to get access to Technical and Billing support and to find support options and recommendations.



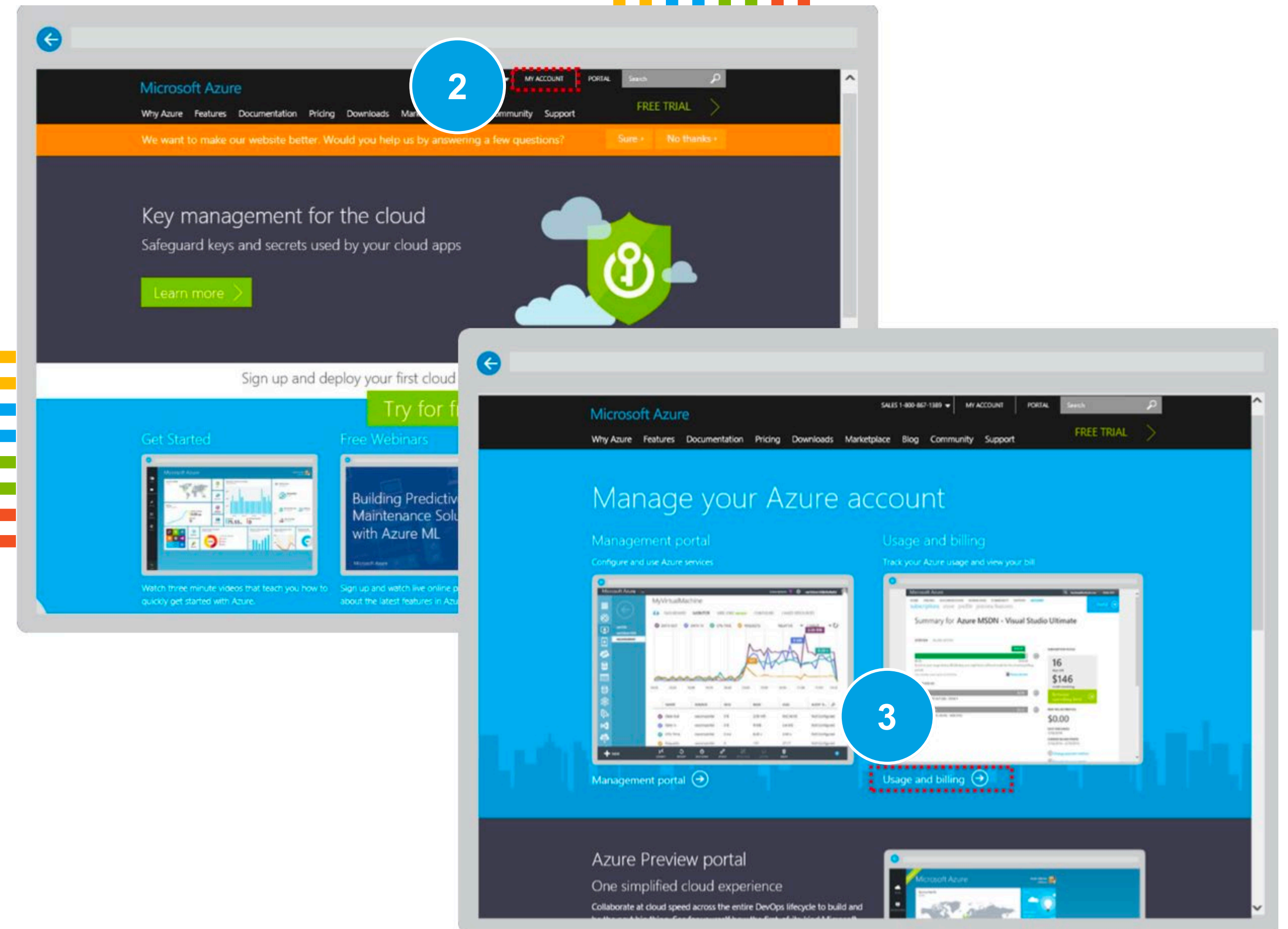
How to Complete a Digital Partner of Record (DPOR) Association for Azure



Attaching a DPOR for Azure

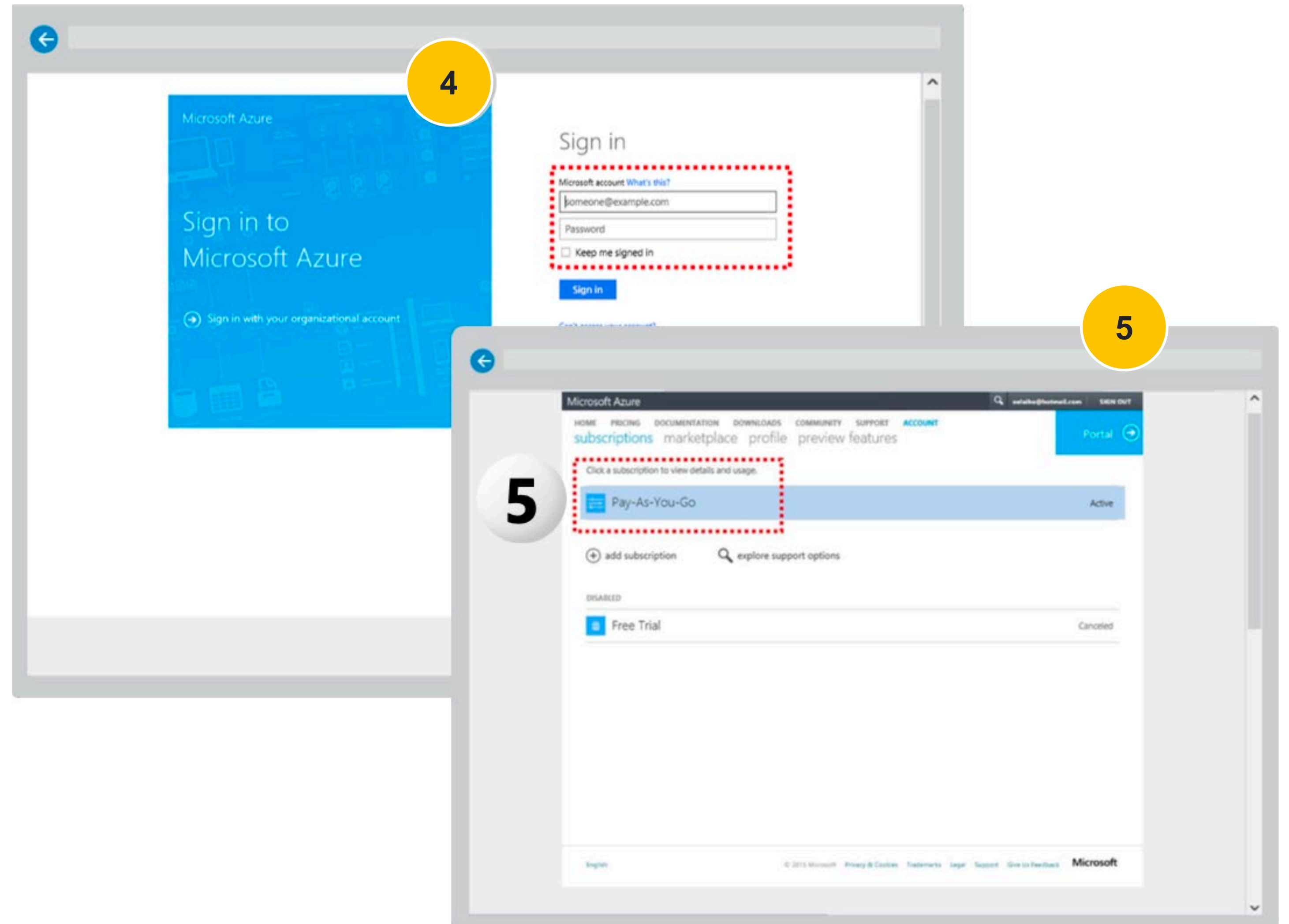
Customers should complete the steps in this and following slide to create the DPOR association

- 1 Go to the Microsoft Azure portal at <http://azure.microsoft.com/>.
- 2 Click on the My Account icon on the upper middle of the screen.
- 3 Click on Usage and Billing.

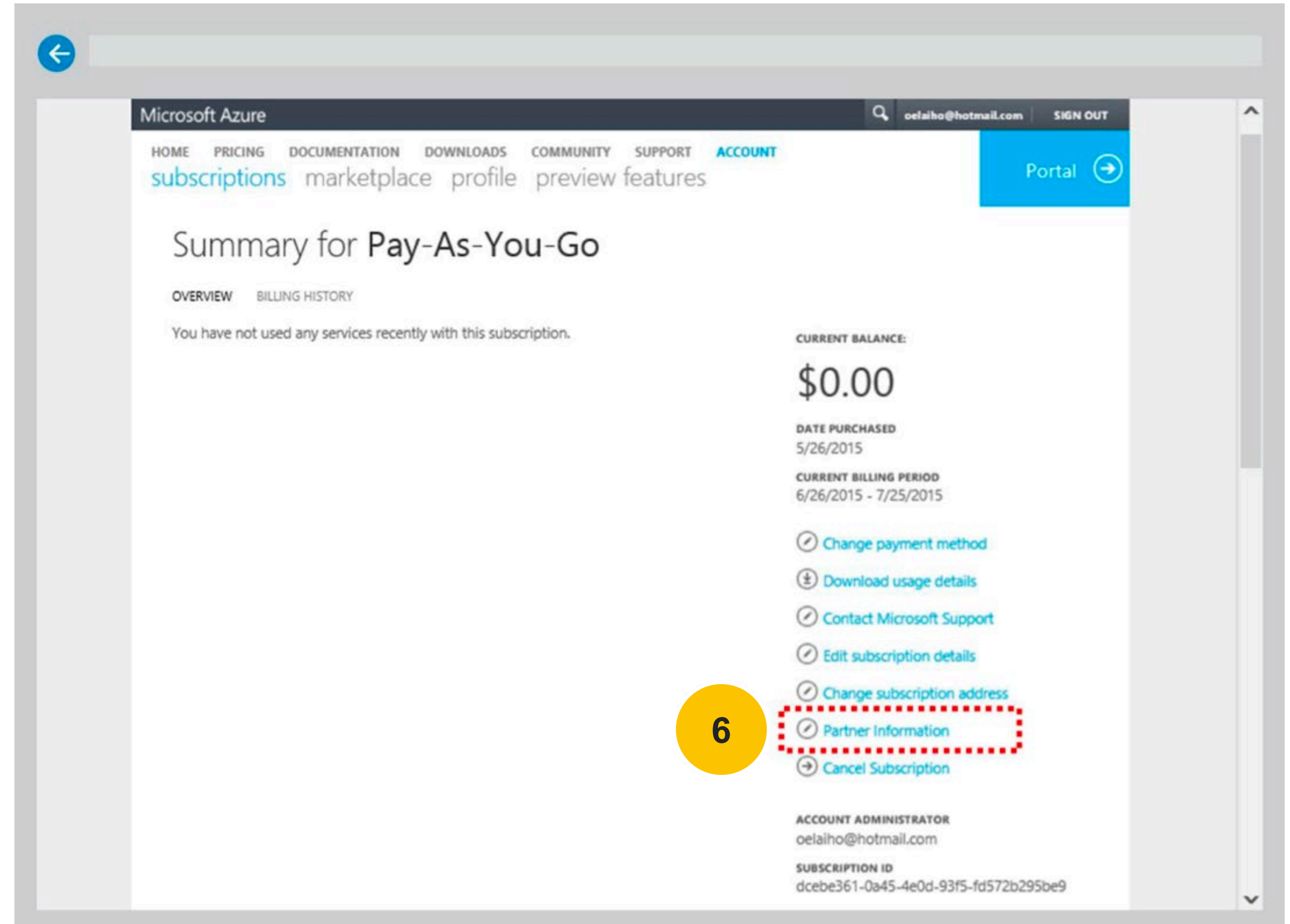


Attaching a DPOR for Azure

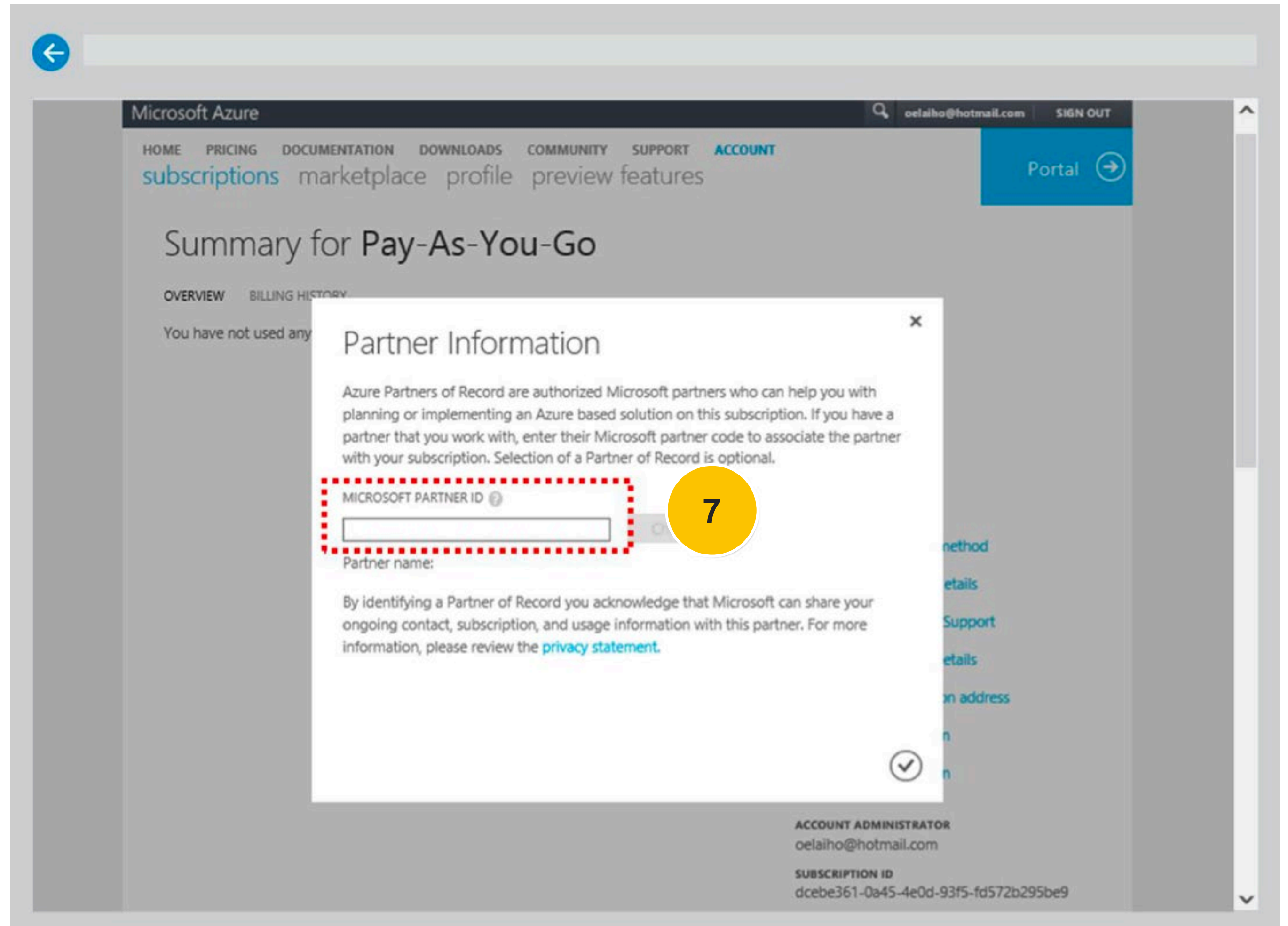
- 4 Log into your account using your username and password.
- 5 Once you've signed in, click on Subscriptions to manage your subscriptions. Select your subscription.



- 6 On the Summary Subscription Page, click on Partner Information on the right navigation. This is where you will attach your Partner of Record.

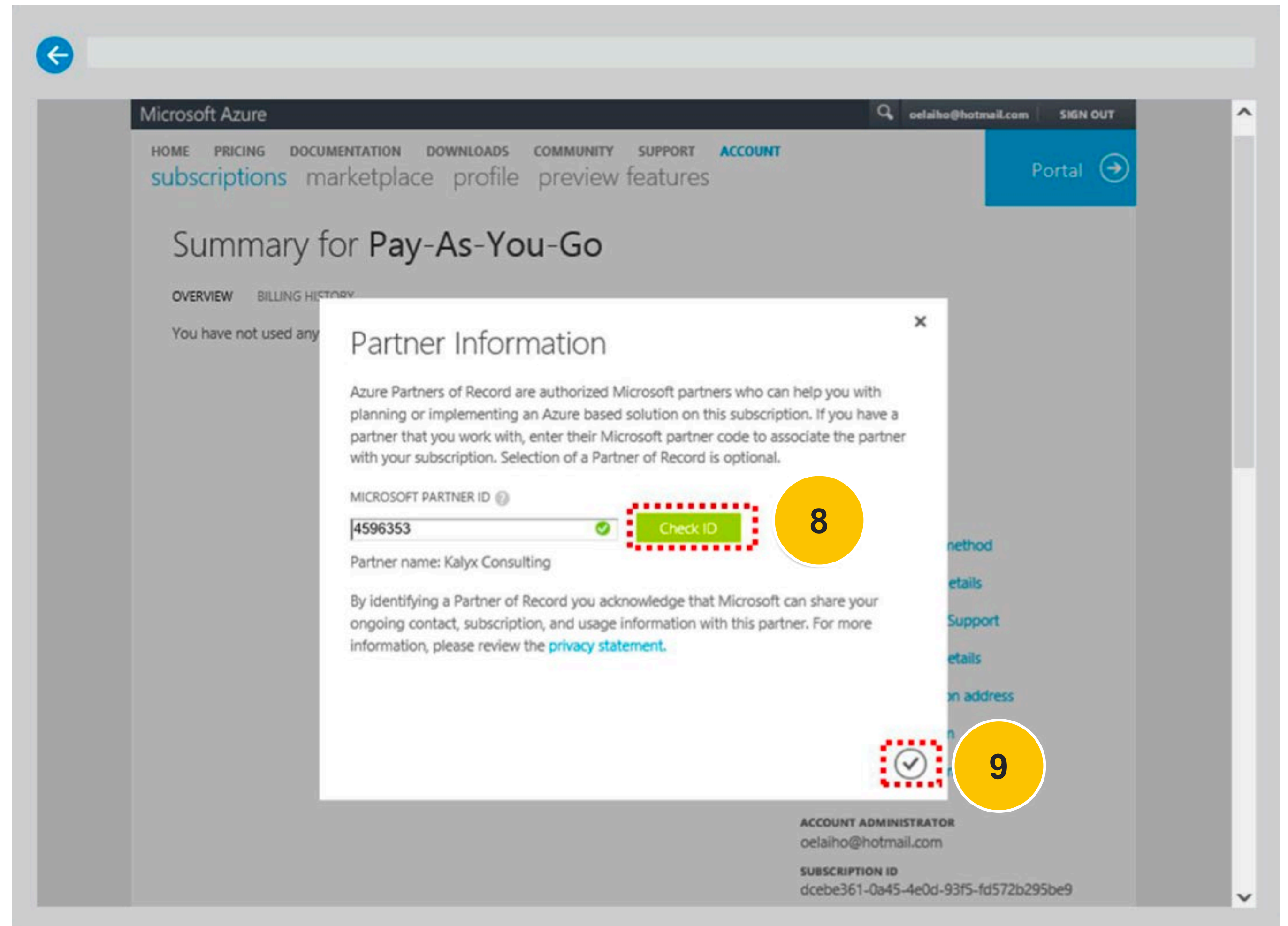


- 7 Input your partner's Partner ID. If you do not know the Partner ID of your partner, please contact your partner to get that information.



Attaching a DPOR for Azure

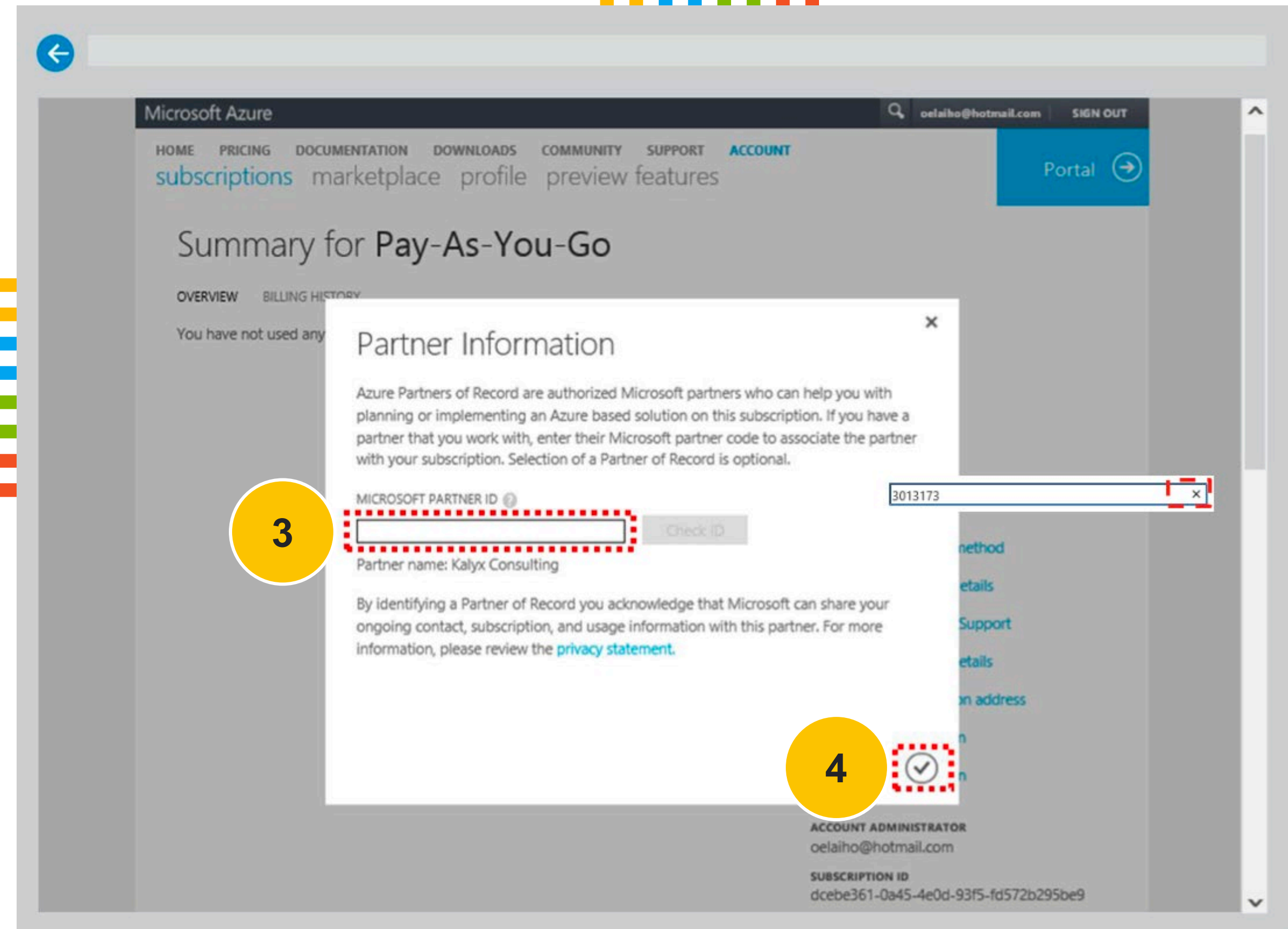
- 8 Click Check ID to see the name of the partner. Verify you have selected the correct partner.
- 9 Click the check box to complete assigning your Partner of Record.
- 10 After you assign a Partner of Record, the partner will receive an email notification that lets them know that you have assigned, changed or removed your Partner of Record.



Changing or Removing a DPOR for Azure

To change or remove your Partner of Record

- 1 Following the steps outlined previously, log into the Azure portal.
- 2 On the Summary Subscription Page, click on Partner Information on the right navigation.
- 3 Highlight the Partner of Record field and delete the Partner of Record shown in that field.
- 4 Click the check box. You have now removed the Partner of Record for this account and your subscription no longer has a Partner of Record.



Additional Support

If your customers have any problems or questions about this process and the ability to assign, maintain, and change and remove their Partner of Record, please reach out to Support by using the following link: <http://azure.microsoft.com/en-us/support/options/>



Digital Partner of Record (DPOR)

Partner / Customer FAQ



Why designate your partner as DPOR?

You have taken the first step to invest in a Microsoft Cloud Service. The next step is to ensure you get the full value of your investment. The partner who sells you the cloud service, and those who may help you deploy or manage it already earn recognition from Microsoft for working with you, but you can additionally benefit by designating your lead Deployment or Management partner as the Digital Partner of Record (DPOR). By designating your partner as your Digital Partner of Record, they can proactively help monitor and manage your service to ensure you are maximizing your investment, helping you achieve your business outcomes, and supporting you throughout the lifecycle of the service. These partners are deeply committed to ensuring the services they provide are customized to your organization and aligned to your business outcomes. Microsoft will also look to this partner first if any issues arise with your service, helping you get back up to speed quickly. Assigning your partner as Digital Partner of Record allows them to:

Who can attach a Partner of Record?

The administrator role, also known as the owner, is the only role within your tenant or account that can attach a Partner of Record. Service admins, co-admins, and partners who you've designated as delegated admins do not have the ability to change the Partner of Record.

When should I add a Partner of Record to my Azure subscriptions?

We recommend you assign a Partner of Record to your subscriptions immediately. This capability is also enabled for Office 365, CRM Online, AX7, D365, Intune and Enterprise Mobility Suite subscriptions in the admin portal for those services.

Once a DPOR has been assigned can it be changed? Is there a limit to the number of changes possible?

Yes, DPOR designation can be changed, added, removed as many times as customers wish.

When a new subscription is purchased and provisioned (in case of a product upgrade/migration/etc.) will the DPOR designation of the old customer subscription be automatically added to the new customer subscription?

No. In all cases where a new subscription is created, either by necessity (in case of new services being provisioned) or by customer volition, the new subscription will be created and no DPOR will be initially Digital Partner of Record FAQ present until there is one added by the global administrator (owner). This gives the end-customer the control of this designation, and it takes a specific designation step to attach the DPOR.

Can there be more than one DPOR assigned to a subscription at the same time?

No, there can be only one DPOR designated on any single subscription at a point in time.

I am a CSP partner, how do I get DPOR recognition?

There is no DPOR functionality per-se on CSP subscriptions. By being a customer's CSP partner you will automatically get recognition for the consumption and usage that occurs. CSP consumption and usage will count towards a partner's solutions partner designation attainment. CSP partners may also be eligible to earn incentives on CSP usage and consumption. More details on the specific partner incentives are available on the Partner Incentives page.

Once a DPOR has been assigned can it be changed? Is there a limit to the number of changes possible?

Yes, DPOR designation can be changed, added, removed as many times as a customer wishes.

If a customer decides to change their assigned DPOR, will any notification be sent to the old and/or new partner?

Yes, an automatic notification will be sent to the old partner informing them they are no longer the DPOR for that specific subscription. The partner who has been added to the subscription as the DPOR will also receive an email notification to that effect.

Who can attach a Partner of Record?

The administrator role, also known as the owner, is the only role within your tenant or account that can attach a Partner of Record. Service admins, co-admins, and partners who you've designated as delegated admins do not have the ability to change the Partner of Record.

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Digital Partner of Record (DPOR)

How to request DPOR association
from customer



Sample Email Requesting DPOR

Dear <<insert name>>,

Further to our discussion, and as part of our on-going engagement with you on your Microsoft Azure subscription ID <<Insert Azure Subscription GUID>>, we would like to request that you designate us as the Digital Partner of Record (DPOR) for this subscription.

DPOR is an on-line capability to identify a specific partner to your Microsoft Azure subscription. Through the designation of <<Insert Partner Name>> as your DPOR on this subscription, Microsoft will be able to better support our mutual engagement and recognize <<Insert Partner Name>> for additional support and capabilities accordingly. Being recognized as DPOR will ultimately enhance our ability to deliver a quality service to you with respect to the deployment and on-going maintenance of your Azure workloads. You can find more details on Digital Partner of Record at [Microsoft Partner docs](#).

You can designate <<Insert Partner Name>> as DPOR by associating our Microsoft Partner Network ID <<Insert Partner MPN ID>> to your subscription ID <<Insert Azure GUID>> within the Azure.com portal. Either your **Azure Subscription Administrator** or **Azure Account Administrator** have the ability to complete this designation.

By using the following link (comprised of both your Azure subscription ID and our own Partner Network ID) your Administrator will be brought directly to the portal.azure.com (they may be prompted to sign in if not already signed in). They then simply need to click "save partner" to complete the designation.

<https://portal.azure.com/#blade/Microsoft Azure Billing/PartnerInformationBlade/subscriptionId/<<INSERT SUBSCRIPTION GUID>>/partnerId/<<INSERT PARTNER MPN ID>>>

Feel free to contact us should you have any questions or concerns in relation to the above request.

Regards,

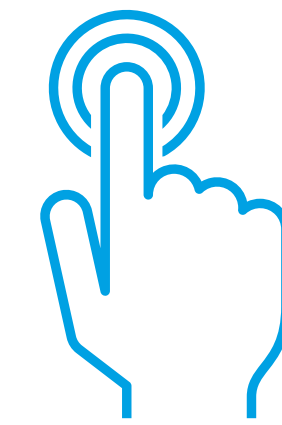
Digital Partner of Record (DPOR)

Partner resources



Resources

Introduction on linking a partner ID with DPOR



3



Partner Admin Link (PAL) Partner Association

How does PAL Work and What are the Benefits?



Using Partner Admin Link (PAL), partners can associate their PartnerID (formally known as MPN ID) with the credentials used for service delivery whenever they act on behalf of the customer to manage, configure and support Azure and Business Application services (Power Platform and Customer Insights). Unique to PAL is that it allows for different partners to get recognized for the same customer engagement. Partners can be associated to the same workloads and both get 'credit'.

PAL is used for both modern commerce platform (Azure plan) subscriptions & Power Platform and Dynamics 365 Customer Insights services



AZURE plan

It enables Microsoft to identify and recognize partners who drive Azure customer success. Microsoft can attribute influenced and Azure consumed revenue to your organization based on the account's permissions (Azure role) and scope (subscription, resource group, resource). PAL tracking capabilities are automated and don't require partner input.

[Link an Azure account to a partner ID | Microsoft Docs](#)

Power Platform and Dynamics 365 Customer Insights Services

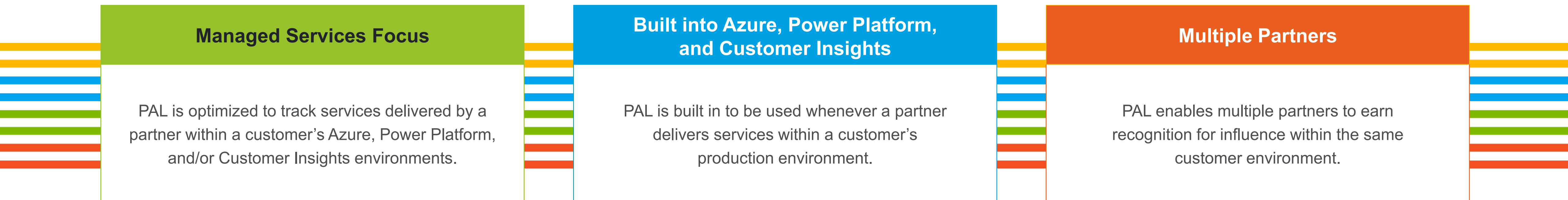
To get credit for the services, you can associate your partner network ID with the Azure credential used for service delivery that's in your customers' production environments using the Partner Admin Link (PAL).

PAL allows Microsoft to identify and recognize partners that have Power Platform and Customer Insights customers. Microsoft attributes usage to a partner's organization based on the account's permissions (user role) and scope (tenant, resource, and so on).

[Link a partner ID to your Power Platform and Dynamics Customer Insights accounts with your Azure credentials | Microsoft Docs](#)

*This association type is not available in China or Government clouds.





**Information
linked by
PAL**

Partner access rights to customer's Azure, Power Platform, and Customer Insights environments

Azure services revenue consumed & Power Platform and Customer Insights consumed services

Customer and partner organizational information

Power Platform and Customer Insights PAL Association



Customer Gives Partner Access

Customer grants partner credentials to access resources via:

- A user account
- A service account • A Service Principal

Partner Links PartnerID to Credentials

Partner links a valid PartnerID with their credentials in the Azure Management Portal (portal.azure.com), activating PAL

Partner Links Credentials to Service Resource

Partner links the same credentials to the service resource (i.e., Power Apps application) with the required resource role to become the attributed user

Product – Resource Mapping

Product	Resource	Attributed User Logic
Power Apps	Application	Owner/co-owner of the application.
Power Automate	Flow	Creator of the flow
Power BI	Dataset	Publisher of the dataset
Customer Insights	Instance	Lasted active user



The following section explains how to:

We recommend taking these actions in the sequence on the left.

The attribution step is critical and typically happens automatically, as the partner user is the one creating, editing, and updating the resource (i.e., the Power App application, the Power Automate flow, etc.).

To ensure success, we strongly recommend that you use Solutions where available to import your deliverables into the customer's Production Environment via a Managed Solution. When you use Solutions, the account used to import the Solution becomes the owner of each deliverable inside the Solution. Linking the account to your partner ID ensures all deliverables inside the Solution are associated to your partner ID, automatically handling step #3 on the left.

1 Get access accounts from your customer

1. Get access account



User Account



Service Account



Service Principal

2 Link your access account to your partner ID

2. Link account to Partner ID



3 Attribute your access account to the product resource

3. Attribute account to production resources



Get access accounts from your customer

Before you link your partner ID, your customer must give you access to their Power Platform or Customer Insights resources. They use one of the following options:

Directory account

Your customer can create a dedicated user account, or a user account to act as a service account, in their own directory, and provide access to the product(s) you're working on in production.

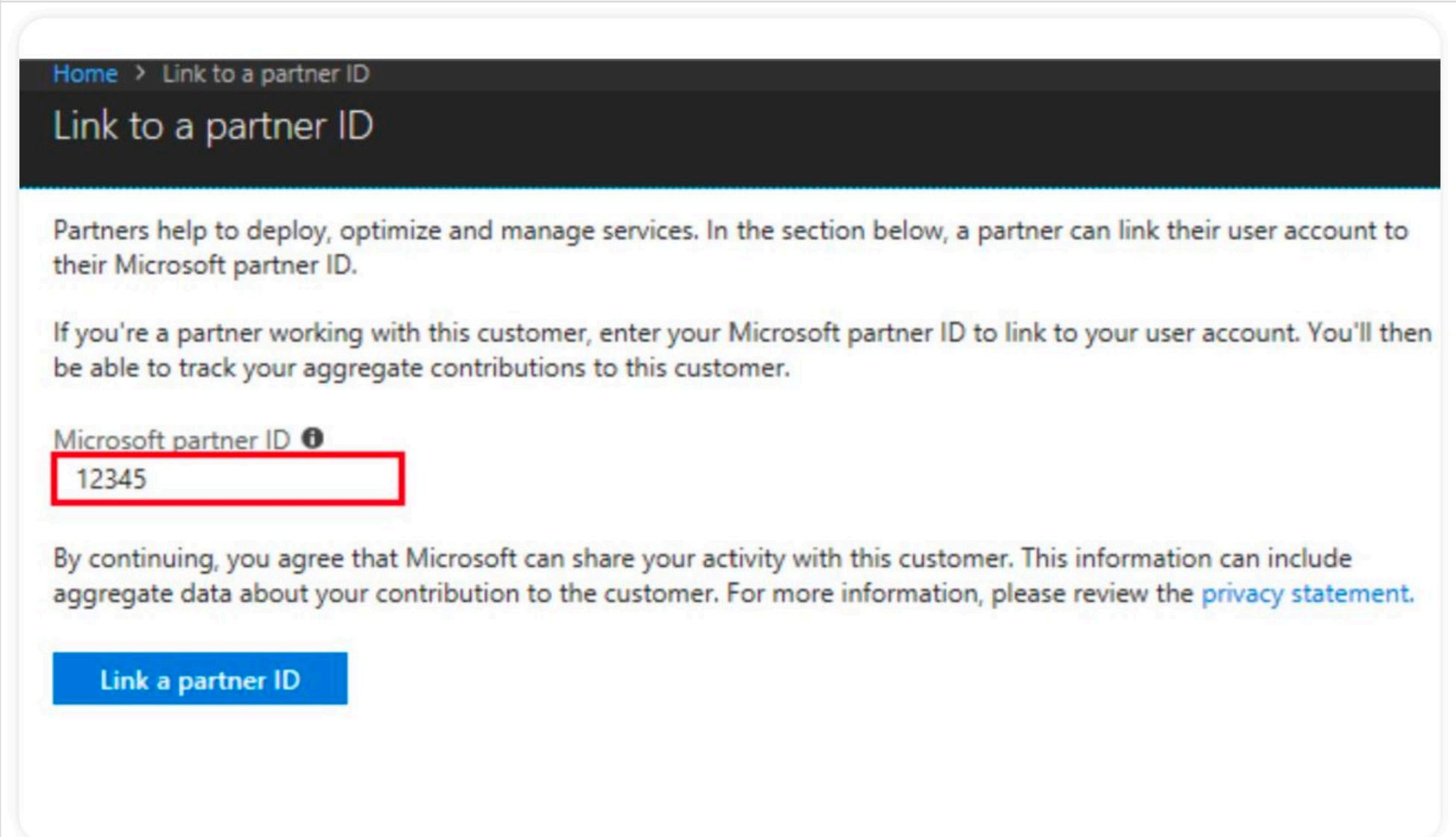
- Linking your access account to your partner ID is also called PAL association. When you have access to a Production Environment access account, you can use PAL to link the account to your Microsoft Partner Network ID (Location MPN ID)
- For directory accounts (user or service), use the graphical web-based Azure portal, PowerShell, or the Azure CLI to link to your Microsoft Partner Network ID (Location Account MPN ID).
- For service principal, use PowerShell or the Azure CLI to provide the link your Microsoft Partner Network ID (Location Account MPN ID). Link the partner ID to each customer resource.
- To use the Azure portal to link to a new partner ID:
- Sign in to the Azure portal.
- Go to Link to a partner ID in the Azure portal.
- Enter the Microsoft Partner Network ID for your organization.
 - Be sure to use the Associated PartnerID shown on your partner center profile.
 - It's typically known as your Partner Location Account MPN ID.

Note

To link your partner ID to another customer, switch the directory. Under **Switch directory**, select the appropriate directory.

Service principal

Your customer can add an app or script from your organization in their directory and provide access to the product you're working on in production.



Home > Link to a partner ID

Link to a partner ID

Partners help to deploy, optimize and manage services. In the section below, a partner can link their user account to their Microsoft partner ID.

If you're a partner working with this customer, enter your Microsoft partner ID to link to your user account. You'll then be able to track your aggregate contributions to this customer.

Microsoft partner ID ⓘ

By continuing, you agree that Microsoft can share your activity with this customer. This information can include aggregate data about your contribution to the customer. For more information, please review the [privacy statement](#).

[Link a partner ID](#)

Attribute your Access Account to Product Resource



To count the usage of a specific resource, the partner user or guest account needs to be attributed to that resource for Power Platform or Dynamics Customer Insights. The resource and user requirements vary by product. The access account is the one that you received from your customer. It's the same account that was linked through the Partner Admin Link (PAL).

To ensure success, we strongly recommend that you use Solutions where available to import your deliverables into the customer's Production Environment via a Managed Solution. When you use Solutions, the account used to import the Solution becomes the owner of each deliverable inside the Solution. Linking the account to your partner ID ensures all deliverables inside the Solution are associated to your partner ID, automatically handling this step.

To learn more about product details, including how usage is calculated, please go [here](#).

To learn more about how PowerShell, Azure CLI, and other tools manage ownership and link partner IDs, please go [here](#).



Azure | PAL Association



01

Customer enters services agreement with partner

Customer enters agreement with partner for the delivery of value-added services within the customer's Azure environment

02

Customer gives partner admin access

Customer grants partner admin credentials to access Azure resources via:

- A local domain account
- A guest user account
- A Service Principal

03

Partner links PartnerID to admin credentials

Partner links a valid PartnerID with their admin credentials in the Azure Management Portal (portal.azure.com), captivating PAL

04

PAL tracks and reports partner services impact

PAL automatically begins to track and report the influence of partner-delivered services on Azure consumption

How PAL Tracks Partner Influence on Azure Consumption

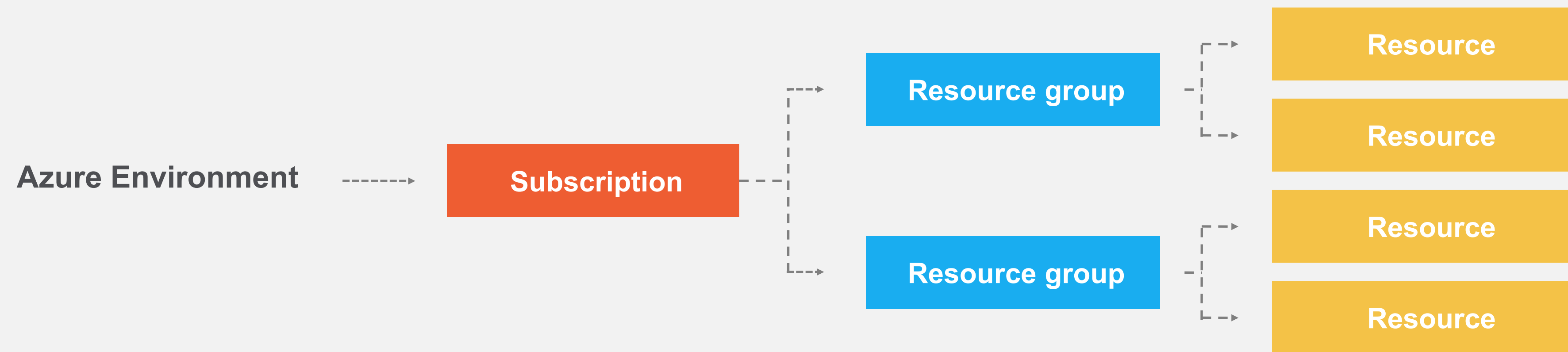
Customers use Azure role-based access controls (RBAC) to assign:

1 Resources a partner can access

 **Subscription**
access to all resources

 **Resource group**
access to grouped resources

 **Resources**



2 **User roles:** Define what a partner can do with resources (Examples: Owner, Contributor, Reader*)

Learn more: aka.ms/rbac_overview

*Reader roles are not currently eligible for financial incentives with PAL

How does DPOR Work and What are the Benefits?



Meet minimum requirements

A valid, active PartnerID

Admin credentials granted to a partner to deliver services in a customer Azure environment

Partner links to customer

Partner links PartnerID to admin credentials granted by customer

Only the partner who creates a PAL link can update or change it

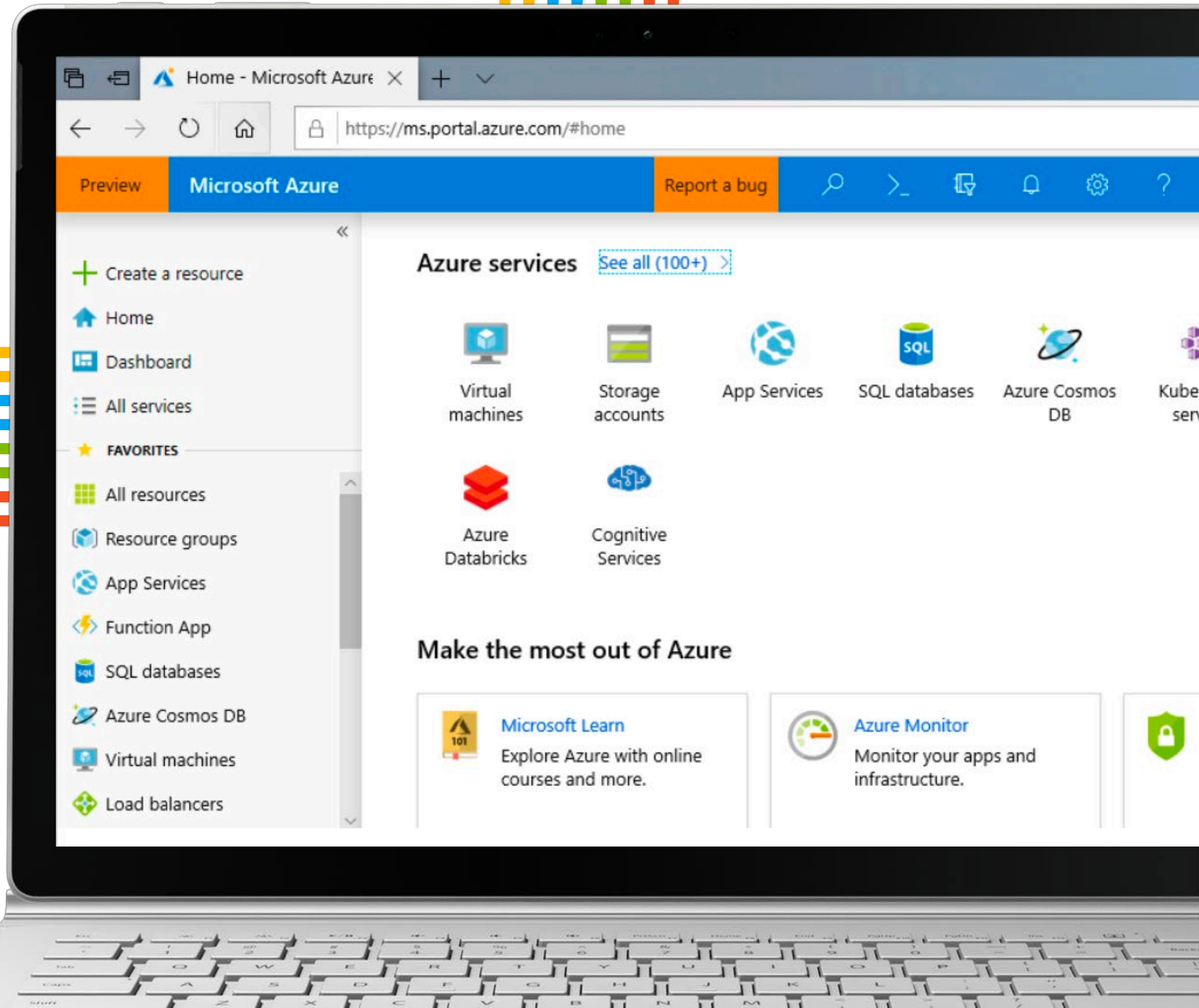
Link activates PAL

PAL automatically begins measuring and reporting partner influence on ACR



Creating a PAL Link in the Azure Management Portal

- 1 Go to portal.azure.com and login to customer's environment
- 2 Click on the portal settings icon
- 3 Select Link your PartnerID to this Azure account
- 4 Enter your PartnerID
→Video: Create a PAL link



PAL Reporting and Insights

Gain insights into your customer engagements and your influence on Azure consumption

Microsoft Test
Virtual Organization 5278907 | MPN Org Hierarchy

Profile, Membership & Training | **Cloud Product Performance** | Internal Use Rights | Benefits | Learning KPI | Customer Opportunities

Summary | Office 365 | **Microsoft Azure** | Enterprise Mobility | Dynamics 365 | Power BI

Time Period: TTM | Offer: All | Offer Type: All | Billed System: All | **Partner Association Type: Partner Admin Link**

Microsoft Test
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Profile, Membership & Training | **Cloud Product Performance** | Internal Use Rights | Benefits | Learning KPI | Customer Opportunities

Summary | Office 365 | **Microsoft Azure** | Enterprise Mobility | Dynamics 365 | Power BI

Time Period: TTM | Offer: All | Offer Type: All | Billed System: All | Partner Association Type: Partner Admin Link

- 27 # of Azure Subscriptions
- \$313,723 Azure Consumption \$
- 12 # of Azure Customers (TPIDs)

Consumption by Partner Association Type

Partner Association Type	Consumption
Partner Admin Link	0.31M

Consumption by Customer Geography

Geography	Consumption
Latam	\$298K

Consumption by Service Levels

Service Level	Consumption
Compute	\$0.15M
Data + ...	\$0.09M
Networ...	\$0.03M
Web + ...	\$0.02M
Enterpri...	\$0.02M
Monitor...	\$0.01M

Consumption by Segment

Segment	Consumption
Enterpri... Comme...	\$0.20M
Enterpri... Public S...	\$0.07M
Small, Mediu...	\$0.04M
Small, Mediu...	\$0.00M

Historical Consumption

Time Period	Consumption
FY19 - Aug	\$0.00M
FY19 - Sep	\$0.13M
FY19 - Oct	\$0.31M

Azure Performance Summary

→ Partner Center – Analyze

PAL

Partner / Customer FAQ



How do I explain Partner Admin Link (PAL) to my Customer?

Partner Admin Link (PAL) enables Microsoft to identify and recognize those partners who are helping customers achieve business objectives and realize value in the cloud. Customers must first provide a partner access to their resource. Once access is granted, the partner's PartnerID (formally MPNID) is associated. This association helps Microsoft understand the ecosystem of IT service providers and to refine the tools and programs needed to best support our common customers.

Is the PAL client information shared outside of Microsoft? What does Microsoft do with partner association? Some clients have a policy of not endorsing vendors.

PAL client and partner association information is not shared outside of Microsoft.

Does this impact security of customer's environment?

PAL association only adds partner's PartnerID to the access already provisioned and does not alter any permissions or provide additional data to partner or Microsoft. To learn more go here, [Microsoft Docs: Link a Partner ID to Your Azure Accounts](#)) and [Link a partner ID to your Power Platform and Dynamics Customer Insights accounts with your Azure credentials](#) | [Microsoft Docs](#).

What data does PAL collect?

No new data is collected when with PAL. PAL is a new type of association between a partner's PartnerID and a customer's environment. The PAL association provides no new customer data to Microsoft. It simply tells us when a partner is active within a customer environment, so we can recognize the partner's influence for the service(s) they are providing.

Who can create a PAL link?

Any user from a partner organization who is managing a customer's resources can link a partner's PartnerID to the customer's environment. The PartnerID can be added, changed, or removed only by the partner organization that created the link. The customer, or another partner, cannot change PartnerID associated via PAL. However, a customer can revoke PAL access at any time.

Does a partner need to have an edit role or an admin role within a customer's Azure environment in order to link their PartnerID to PAL?

If a partner would like to attain a designation via PAL, any Azure role is eligible. However, any role assigned needs to have the right resource(s) access for ACR to be calculated. To learn more about Azure roles, please go [here](#).

How do partners get usage credit for Power Platform and Customer Insights through PAL?

When a partner connects the account that was PAL associated to a specific Power Platform and Customer Insights resource, the usage (such as monthly active users or monthly active profiles) of that specific resource is credited towards that partner's PartnerID. The account requirements and the resource details vary by product and it's recommended to use managed solutions where possible, see the documentation for more details, [Link a partner ID to your Power Platform and Dynamics Customer Insights accounts with your Azure credentials | Microsoft Docs](#).

Do I need to create a PAL association for every customer?

Yes. Partners must link an PartnerID to their Azure credentials for every customer tenant in which they are delivering services. PAL associations are generated on a per- customer tenant basis and are not inherited by other customer environments serviced by the same partner. If more than one contact from a partner organization has credentials in a single customer environment, the PartnerID should be associated to each set of credentials in order to enable full credit for influence on that customer's Azure consumption.

Is customer participation required to enable PAL?

Partners activate PAL by linking a valid PartnerID to the credentials they have been granted by a customer to perform services in the customer's Azure environment.

- An authorized representative of the customer has consented to providing the partner access
- The customer understands that they may revoke access for the partner at any time

Partners may not assign or use their administrative access to add additional parties without customer consent.

Will Azure consumed revenue (ACR) driven by PAL association be calculated retroactively, or will PAL association only be calculated from the date that date PAL association becomes/became eligible for solutions partner designation?

ACR is tracked over trailing 12 months. Therefore, if a partner had already associated their PartnerID to PAL when PAL becomes/became eligible for solutions partner designation, their ACR will be calculated retroactively, up to a period of 12 months.

What if customers do not want to give you guest user access on their Azure Portal?

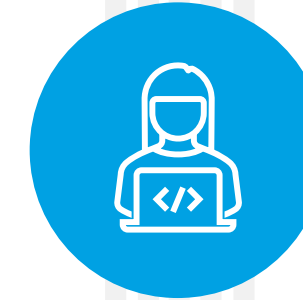
This is usually the case if the partner is providing training or project management services and does not actually do any deployment using Azure, Power Platform, and Customer Insights environments, in this case, such a service will not count towards attributing usage towards your organization.

PAL

Partner resources



Resources



Partner Admin Link (PAL) training gallery



Video: How to set up PAL



Partner Admin Link (PAL) FAQ



Introduction on linking a partner ID with PAL

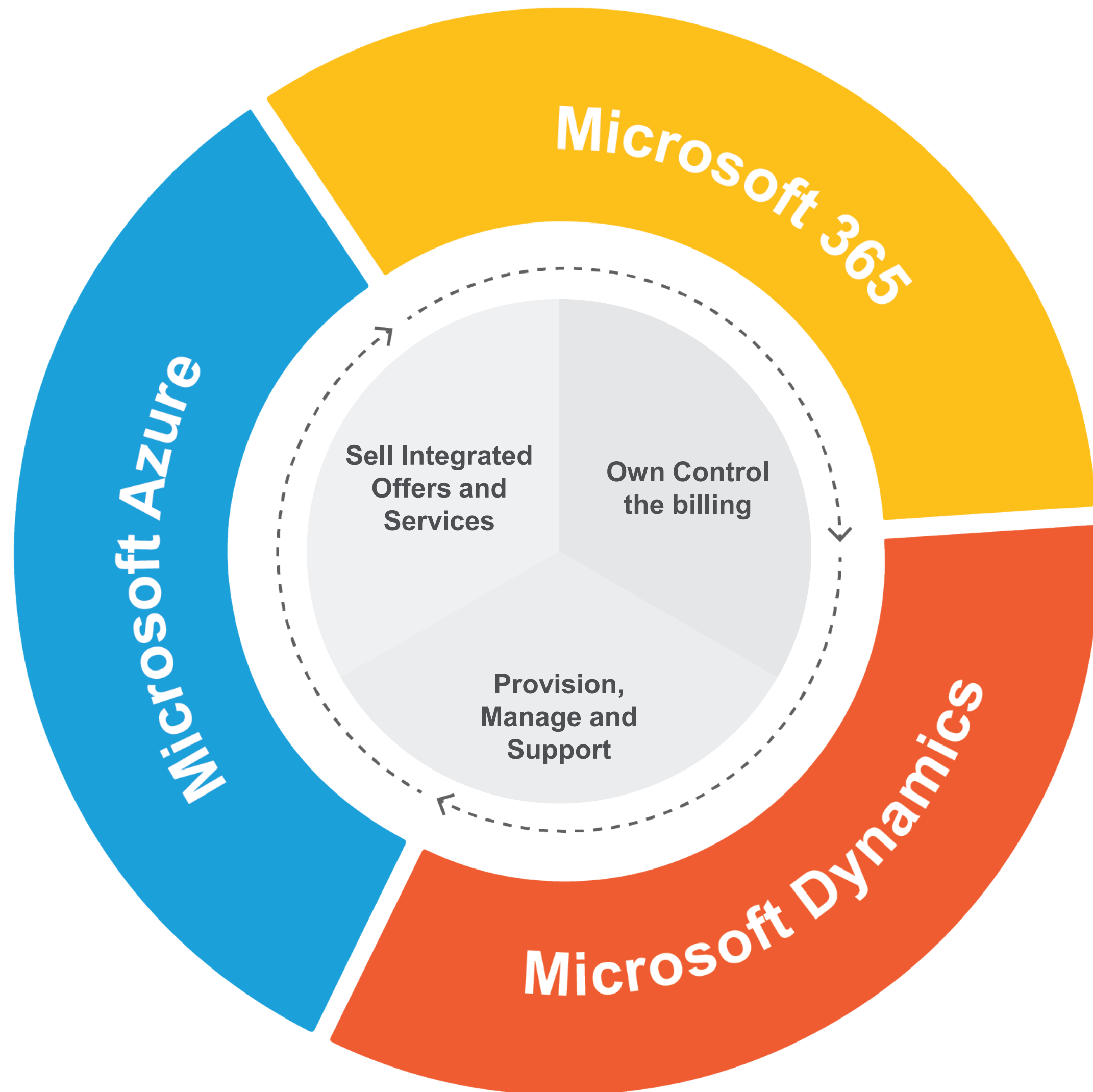


Link a partner ID to your Power Platform and Dynamics Customer Insights accounts with your Azure credentials | Microsoft Docs

4



**Cloud Solution Provider
(CSP)**



Key benefits to the partners of MS CSP Program:



Own the customer lifecycle relationship to offer unique cloud-based solutions.



Create cloud subscriptions and partner offers. Grow annuity-based revenue.



Support customer as the first point of contact



Attach a broader portfolio of DaaS, IaaS, PaaS and SaaS server with cloud-based deployment



Build differentiated hybrid solutions powered by Azure.

Three CSP Models Based on Partner's Business Model



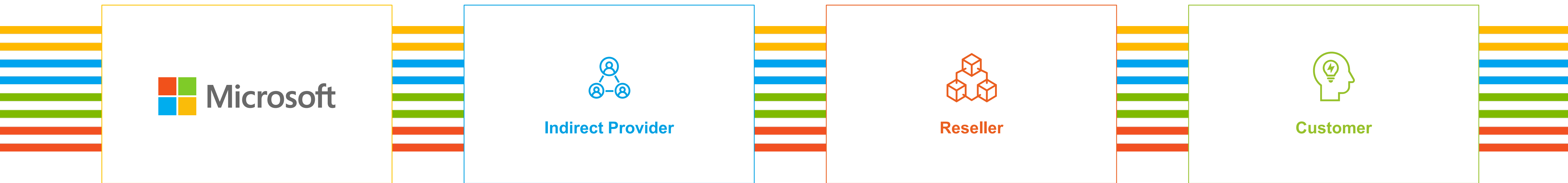
Direct Bill Model (Tier 1)

- **Sells directly to the end customer**
Owns all sales, billing, provisioning, and support of customers
- **Credit approval required**; minimum \$300K trailing-12-months CSP revenue threshold across all partner tenants
- Must have **premium support plan** (ASfP or PSfP) for company
- **20-30% discount on cloud seat-based offers sold, based on offer type**; partner earned credit (PEC) for Azure plan
- **Billed revenue incentives rebate** (requires solutions partner designation; accelerators may also apply per location)



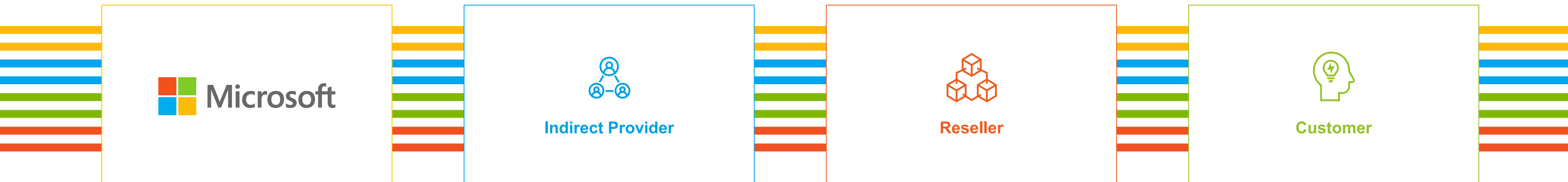
Indirect Provider Model (Tier 2)

- **Sells through VARs only** – no direct customer relationship
- **Owns payment to MS**, subscription management, ensuring customer is supported and billed
- **Local MS nomination and OCP leadership approval required, along with credit approval**; limited number of Providers per country or region
- **20-30% discount** on cloud seat-based offers sold; partner earned credit (PEC) for Azure plan
- **Billed revenue incentives rebate** (requires solutions partner designation; accelerators may also apply per location)



Indirect Reseller Model (Tier 2)

- **Sells to end customers** in partnership with Indirect Provider(s)
- **Primarily focused on sales**, but may also provide customer billing and support
- **No credit approval**, minimum revenue, or support plan required for CSP participation
- **Margin on sales varies** per Provider and product
- **Billed revenue incentives rebate** (requires solutions partner designation; accelerators may also apply per location)



How to Enroll in CSP



To complete the CSP application, you'll need your company's PartnerID, complete business address, bank information, and the work email for the employee who will act as the admin for the Partner Center.

- 1 Sign in to the Partner Center dashboard with your work email (that is, your Azure AD tenant credentials).
- 2 Associate your PartnerID to your profile.
 - If you're already enrolled in the MPN program, select the location MPN ID, which is linked to your incentives enrollments. The location PartnerID must be active and located in the same country as your CSP account.
 - If you have not enrolled in the MPN program, enroll today.
- 3 Create your partner profile. You can either look up your company profile or enter company information manually. If your company is registered with Dun & Bradstreet, use the DUNS ID to look up your company information. If you want to provide your company details yourself, select Enter manually.
- 4 For some countries, when you enter your address manually, we'll validate your address for you. If the address you enter differs from the validated one, we suggest you use the validated address. This ensures that the elements of the address are standardized as defined by the country's postal authority, are correctly formatted, and are shippable.
- 5 During verification, Microsoft may ask you for another document, or request that you complete a questionnaire. It can take several days to review and verify the information provided; once verified, an email will be after review is complete.
- 6 After Microsoft has verified your information, accept the Microsoft indirect reseller terms agreement. Go to Home page and select CSP from the Pending actions view on the right-hand side to sign Microsoft Partner Agreement.



CSP Partner Resources



Resources



What is the Cloud Solution Provider Program?



Requirements for enrolling in the Cloud Solution Provider program



Cloud Solution Provider program regional markets and currencies where you can sell CSP offers

5

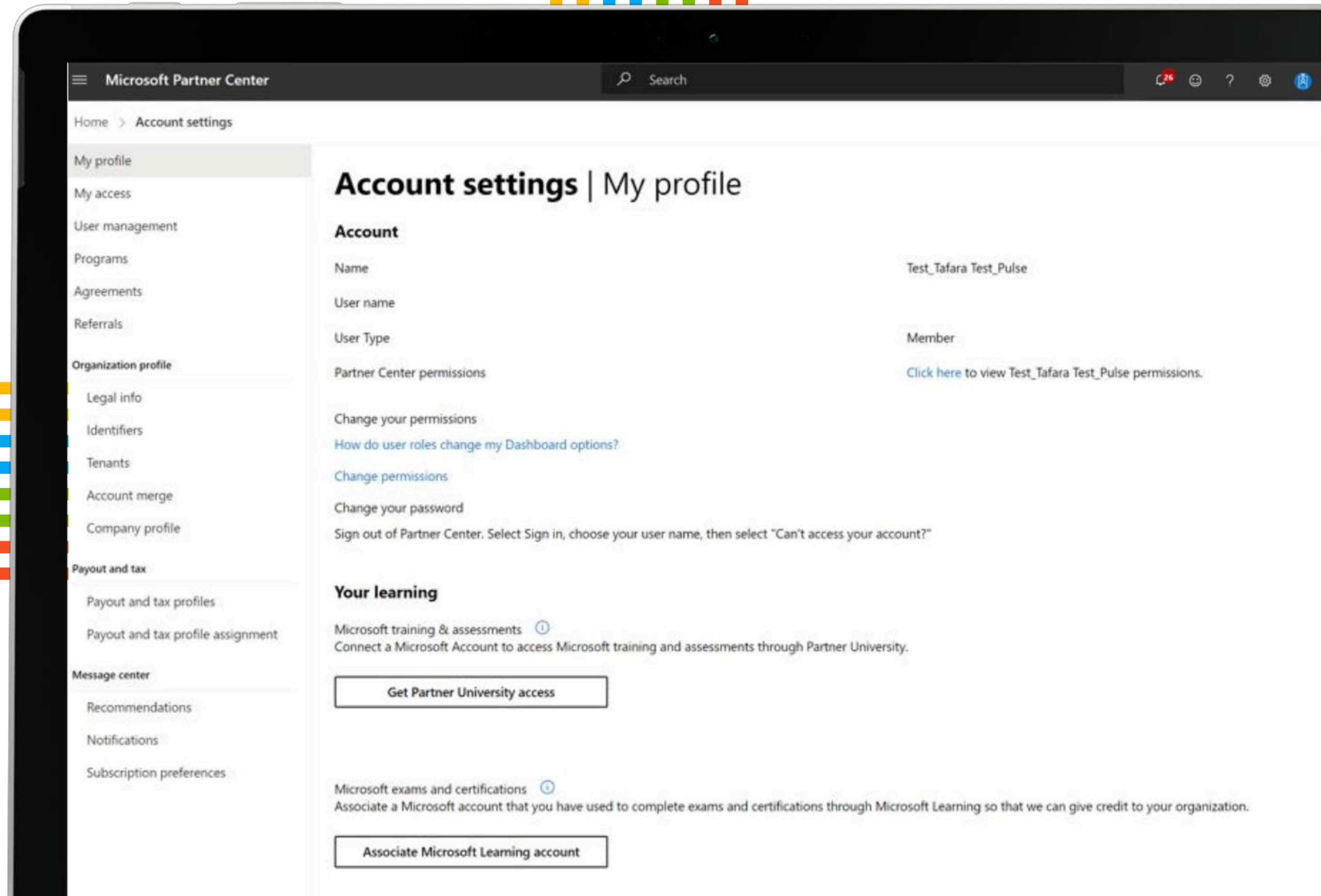


**Certified Professional
Association**

1 Microsoft certifications are linked to an individual's learning account. To ensure your organization is benefiting from relevant certifications earned by employees, it's important to link the individual's certification to their organization's account in Partner Center.

2 Once you've associated an employee with your Partner Center account, have your employees take the following steps:

- Log in to Partner Center using their work credentials
- Click on the setting icon at the top right and select Account
- Go to My Profile and follow the instructions to associate both a Partner University and Microsoft Learning account



To learn more about how to make this association, go here:

<https://assetsprod.microsoft.com/mpn/how-to-link-learning-credentials-to-your-companys-partner-center-account.mp4>

Thank you!

► ***More as a Service***[™]

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