



# Microsoft Cloud Partner Program – Solutions Partner designations

Partner associations playbook



# OVERVIEW



Associations are the sole mechanism by which customer success, performance, and skilling subcategory 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			
	Business Applications*	Data & AI (Azure) Digital & App Innovation (Azure) Infrastructure (Azure)	Modern Work	Security
<b>Claiming Partner of Record (CPOR)</b>	X		X (Enterprise & SMB)	X
Eligible subcategories	Net customer adds, Usage growth, Deployments		Net customer adds, Usage growth, Deployments	Net customer adds, Usage growth, Deployments
<b>Digital Partner of Record (DPOR)</b>	X	X	X (Enterprise only)	
Eligible subcategories	Net customer adds, Usage growth, Deployments	Net customer adds, Usage growth, Deployments	Net customer adds, Usage growth, Deployments	
<b>Partner Admin Link (PAL)**</b>	X	X		X
Eligible subcategories	Usage growth, Deployments	Net customer adds, Usage growth, Deployments		Net customer adds, Usage growth, Deployments
<b>Cloud Solution Provider (CSP)</b>	X	X	X (SMB only)	
Eligible subcategories	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.

# Requirements for each Solutions Partner designation

Each designation has a specific number of possible points that can be earned per category. You have the flexibility to choose which categories to focus on within a solution area to match your business needs

Each Solutions Partner designation requires **70+ points** with at least one point in each subcategory

	Solutions Partner for Business Applications	Solutions Partner for Data & AI (Azure)	Solutions Partner for Digital & App Innovation (Azure)	Solutions Partner for Infrastructure (Azure)	Solutions Partner for Modern Work	Solutions Partner for Security
	Subcategory					
<b>Performance</b>	Net customer adds >> 15pts	Net customer adds >> 30pts	Net customer adds >> 30pts	Net customer adds >> 30pts	Net customer adds >> 20pts	Net customer adds >> 20pts
<b>Skilling</b>	Intermediate Certs >> 20pts	Intermediate Certs >> 40pts	Intermediate Certs >> 20pts	Intermediate Certs >> 20pts	Intermediate Certs >> 10pts	Intermediate Certs >> 40pts
	Advanced Certs >> 15pts		Advanced Certs >> 20pts	Advanced Certs >> 20pts	Advanced Certs >> 15pts	
<b>Customer Success</b>	Usage Growth >> 30pts	Usage Growth >> 20pts	Usage Growth >> 20pts	Usage Growth >> 20pts	Usage Growth >> 30pts	Usage Growth >> 20pts
	Deployments >> 20pts	Deployments >> 10pts	Deployments >> 10pts	Deployments >> 10pts	Deployments >> 25pts	Deployments >> 20pts

Category

# represents maximum number of points in that subcategory

# PLAYBOOK CONTENTS



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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).



# CPOR: Usage vs. Revenue recognition

## 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	<ul style="list-style-type: none"> <li>Incentive association <b>Presales – OSA</b></li> </ul>	Business Applications: <ul style="list-style-type: none"> <li>Deployments</li> <li>Usage growth</li> </ul>	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 CSP is revenue association only.	<ul style="list-style-type: none"> <li>Active and in-grace status of the subscription.</li> <li>Subscription purchased through applicable licensing program.</li> <li>Excludes MPSA licensing and CSP.</li> </ul>
	<ul style="list-style-type: none"> <li><b>Revenue association only</b> – (RevRec) Program agnostic (non-compensable)</li> </ul>	Business Applications: <ul style="list-style-type: none"> <li>Net customer adds</li> </ul>			
	<ul style="list-style-type: none"> <li>Incentive association – <b>OSU Business Applications (Usage)</b></li> </ul>	Business Applications: <ul style="list-style-type: none"> <li>Deployments</li> <li>Usage growth</li> </ul>	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	<ul style="list-style-type: none"> <li>Incentive association – <b>OSU M365 (Usage)</b></li> </ul>	Modern Work and Security: <ul style="list-style-type: none"> <li>Net customer adds</li> <li>Deployments</li> <li>Usage growth</li> </ul>	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"> <li>Tenant must at least have one active subscription under the claimed workload.</li> <li>Excludes MPSA</li> </ul>
	<ul style="list-style-type: none"> <li><b>Usage association only</b> – Program agnostic (non-compensable)</li> </ul>	Modern Work and Security M365: <ul style="list-style-type: none"> <li>Net customer adds</li> <li>Deployments</li> <li>Usage growth</li> </ul>	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



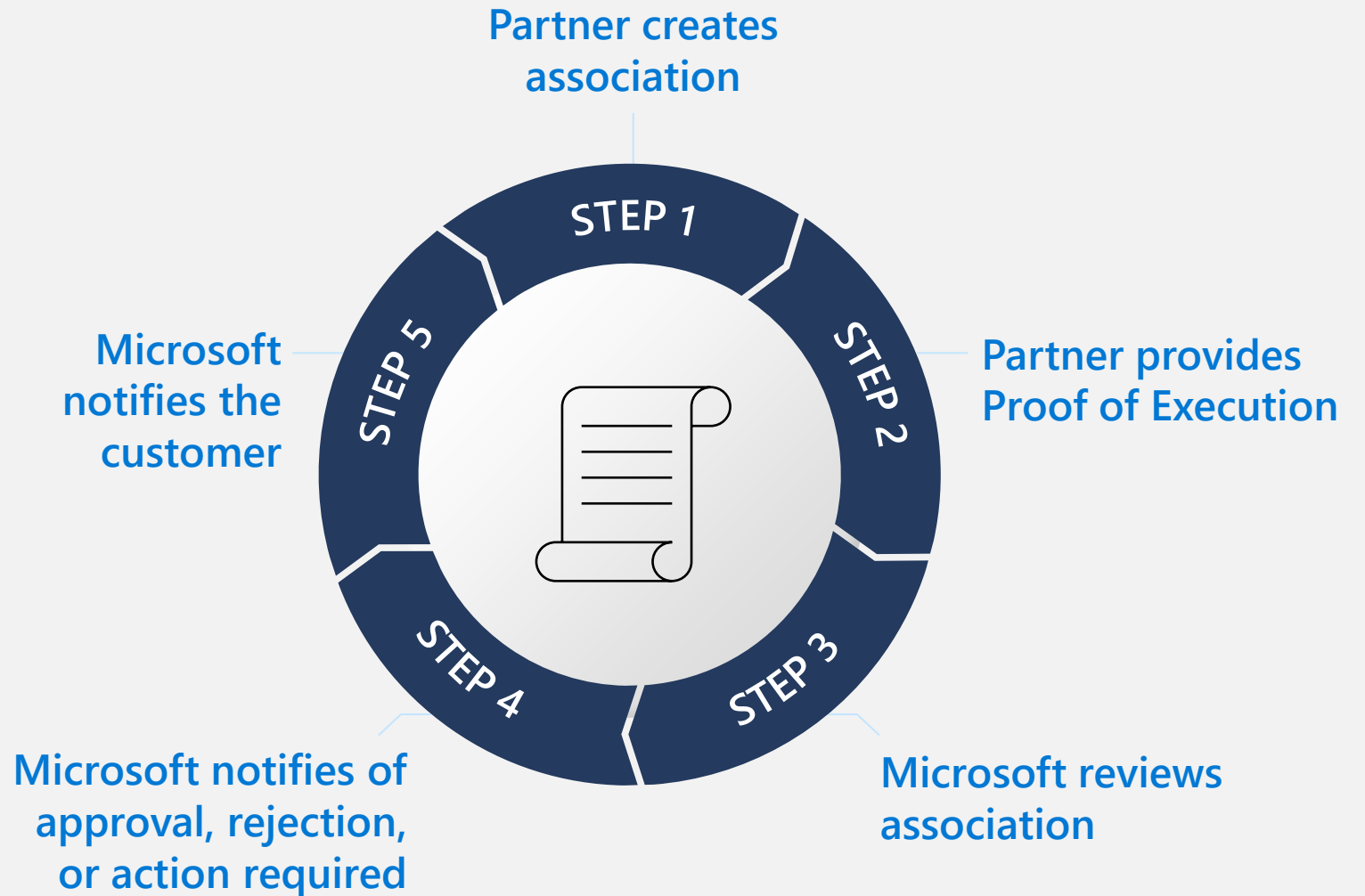
# Customer association process

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

If you and another partner claim for the same customer and product/workload, Microsoft will review each partner's proof of execution documentation to determine which partner to approve.

Additional information might be requested from both partners which could cause delays in processing your association request.

If your association is approved Microsoft will notify the customer.



# Creating 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:
  - Incentive Admin
  - Incentive User

[Download CPOR claim guide](#)



The screenshot shows the Microsoft Partner Center interface for Customer Associations. The left sidebar includes navigation options like Overview, Programs, Co-op management, and Customer associations (highlighted). The main content area features a line chart titled 'Approved associations over time' comparing Microsoft 365 and Dynamics from October 2019 to December 2019. Below the chart are summary cards for 'Microsoft 365' and 'Business Applications' showing the number of associated customers per workload and product. A table at the bottom lists claims with columns for Claim, Solution area, Products, Last activity, and Date created.

Claim	Solution area	Products	Last activity	Date created
first claim to approve ip-1031020	Business applications	1	Microsoft on December 5, 2019	December 5, 2019



# 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.



# Partner/customer CPOR FAQ

## 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](https://aka.ms/partnerincentives)



Partner Center incentives resources [asset collection](#) on the partner website





# 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 the following slide to create the DPOR association.

1

Go to the Microsoft 365 admin center at [admin.microsoft.com](https://admin.microsoft.com).

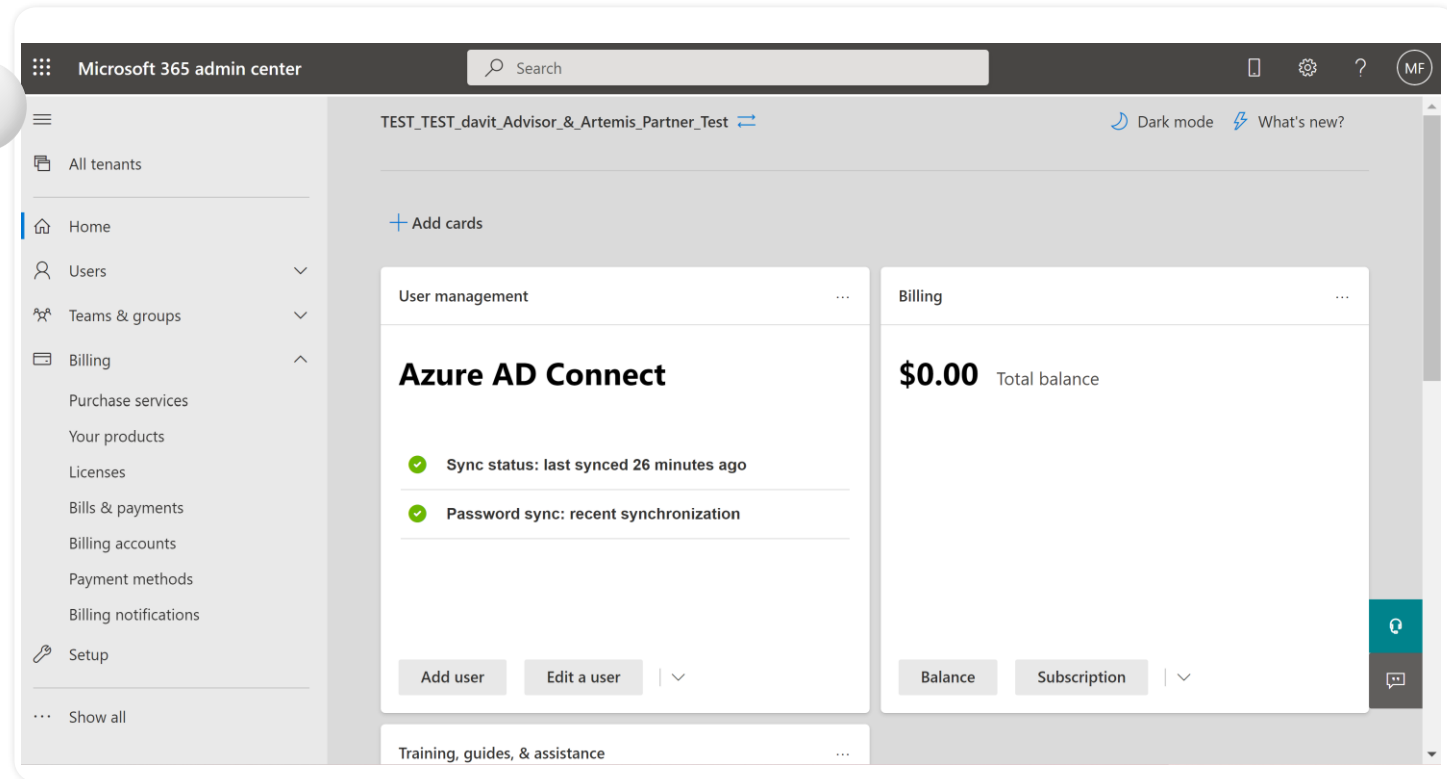
2

Log into your account using your username and password.

3

You will enter the Microsoft 365 admin center.

3



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

**4** Go to **Billing** > **Your products** and select a subscription.

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**5** Under the subscription, select the **Partner** tab.

---

**6** Enter the Partner Network ID, and then select **Add**.



# 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 the following slide to create the DPOR association.

1

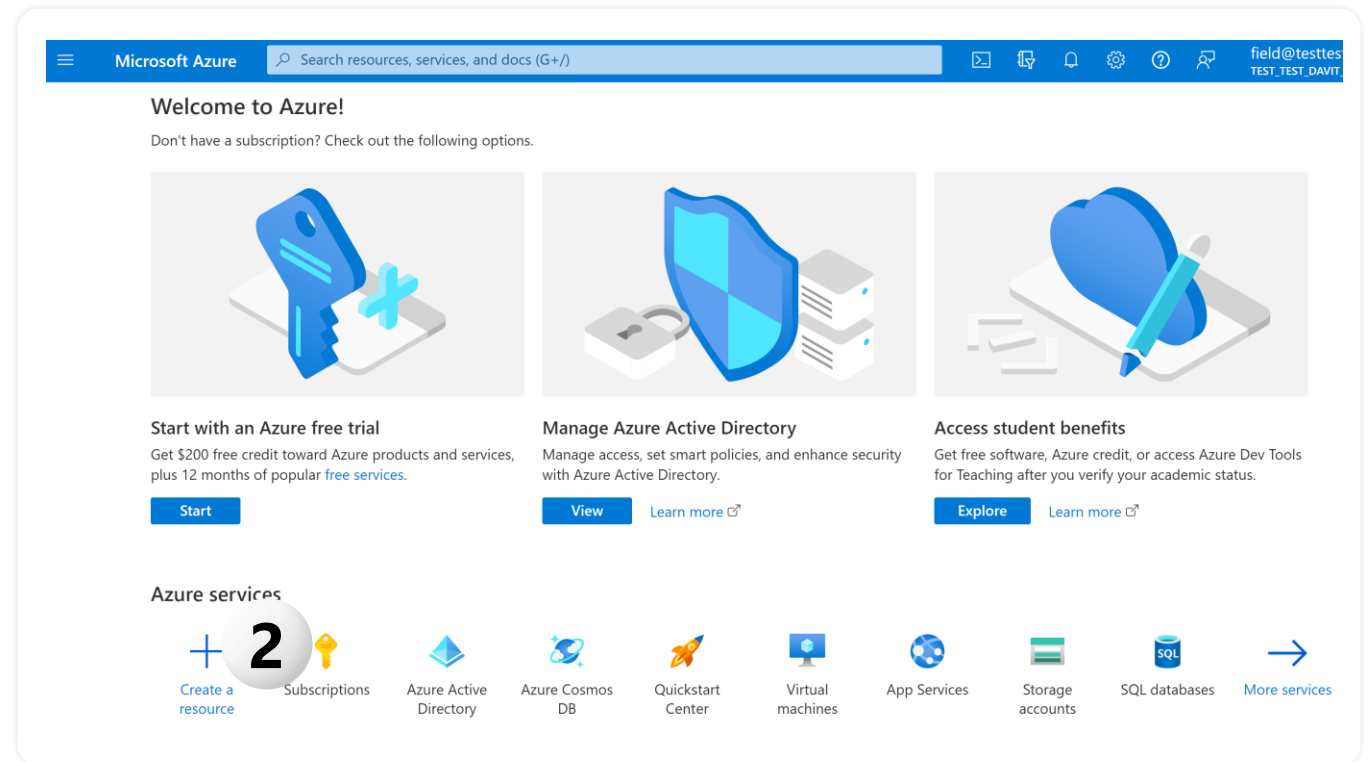
Go to the Microsoft Azure portal at <http://azure.microsoft.com/>.

2

Select **Subscriptions** then the relevant subscription where you'll add a partner as DPOR.

3

Select **Partner Information** and enter the partner's Microsoft Partner Network (MPN) ID.



The screenshot shows the Microsoft Azure portal homepage. At the top, there is a navigation bar with the Microsoft Azure logo, a search bar, and user information (field@testtes, TEST\_TEST\_DAVIT). Below the navigation bar, the main content area is titled "Welcome to Azure!" and includes a message: "Don't have a subscription? Check out the following options." There are three main cards: "Start with an Azure free trial" (with a key icon), "Manage Azure Active Directory" (with a shield icon), and "Access student benefits" (with a graduation cap icon). Each card has a "Start", "View", or "Explore" button and a "Learn more" link. Below these cards, there is a section titled "Azure services" with a grid of icons for various services: "Create a resource", "Subscriptions", "Azure Active Directory", "Azure Cosmos DB", "Quickstart Center", "Virtual machines", "App Services", "Storage accounts", "SQL databases", and "More services".

# Attaching a DPOR for Azure

4

Select **Validate ID**

The name of the partner you're adding as DPOR will appear on the UI.

---

5

Select **Save partner**

- A notification will tell you the partner information changed. It might take some time for the portal to reflect this new information. If you don't see it in a few minutes, refresh the page.

# 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:

Provide proactive advice on the right plan based on your desired business outcomes and usage, including when you could save money by using a different Microsoft offering (SKU)

Accelerate your path to realizing value by making sure you successfully activate all required seats/users, and proactively recognizing when a user is unable to access the service

Monitor your system uptime and ensure that everything runs smoothly, meets your business needs, and that your users get the support they need

Provide integrated Cloud Support to support your business outcomes and advise you of planned service outages

## 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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### **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.







# 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>>](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](#)



A large, stylized, 3D-effect number '3' in a dark blue color, positioned on the left side of the slide. It has a slight shadow and a gradient, giving it a three-dimensional appearance.

Partner Admin Link (PAL)  
partner association



# How does PAL association work

# How does PAL work and what are the benefits?

Using Partner Admin Link (PAL), partners can associate their 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).

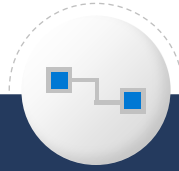
PAL allows Microsoft to identify and recognize partners that have Power Platform and Customer Insights customers. Microsoft attributes usage to a partner's organization based on the account's permissions (user role) and scope (tenant, resource, and so on).

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



## Managed services focus

PAL is optimized to track services delivered by a partner within a customer's Azure, Power Platform, and/or Customer Insights environments.



## Built into Azure, Power Platform, and Customer Insights

PAL is built in to be used whenever a partner delivers services within a customer's production environment.



## Multiple partners

PAL enables multiple partners to earn recognition for influence within the same customer environment.

## 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

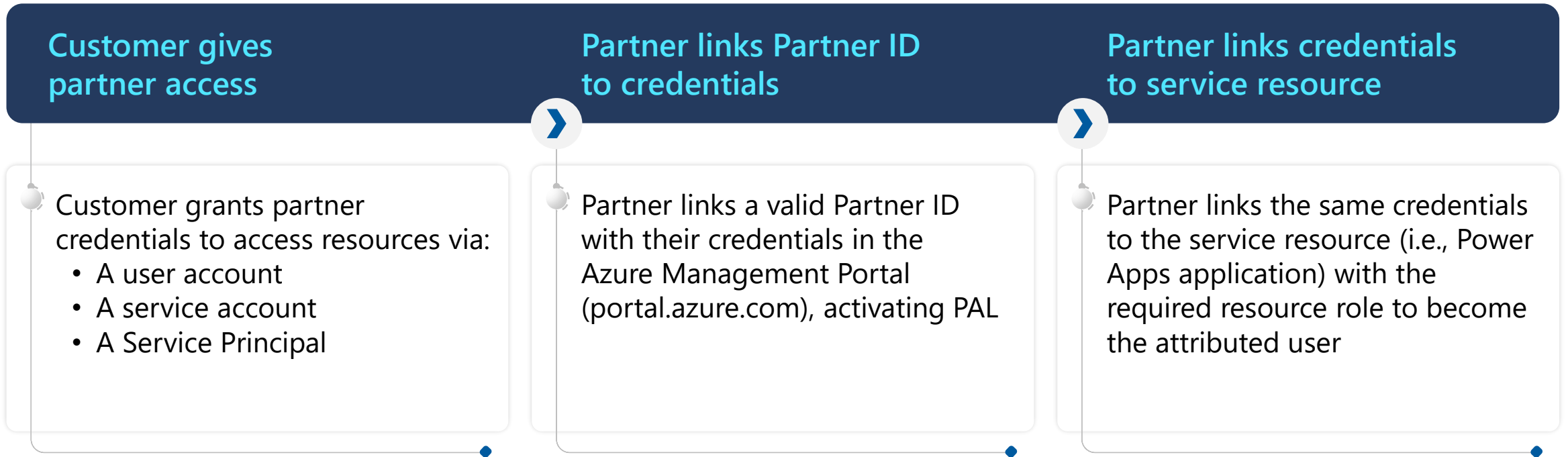






# Power Platform and Customer Insights PAL association

# PAL activation approach



## 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 explain how to:

1

Get access accounts from your customer

1. Get access account



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



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.



## 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.

### 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.

## Link your access account to your partner ID

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 into 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 Partner ID** 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.

The screenshot shows the 'Link to a partner ID' page in the Microsoft Azure portal. The page has a blue header with the Microsoft Azure logo and a search bar. Below the header, there is a 'Home >' breadcrumb. The main heading is 'Link to a partner ID'. The page content includes a paragraph explaining that partners help to deploy, optimize and manage services, and that a partner can link their user account to their Microsoft partner ID. Below this, there is a section for entering the Microsoft partner ID, with a text input field containing 'e.g. 12345'. At the bottom of the page, there is a 'Link a partner ID' button.



## 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](#).

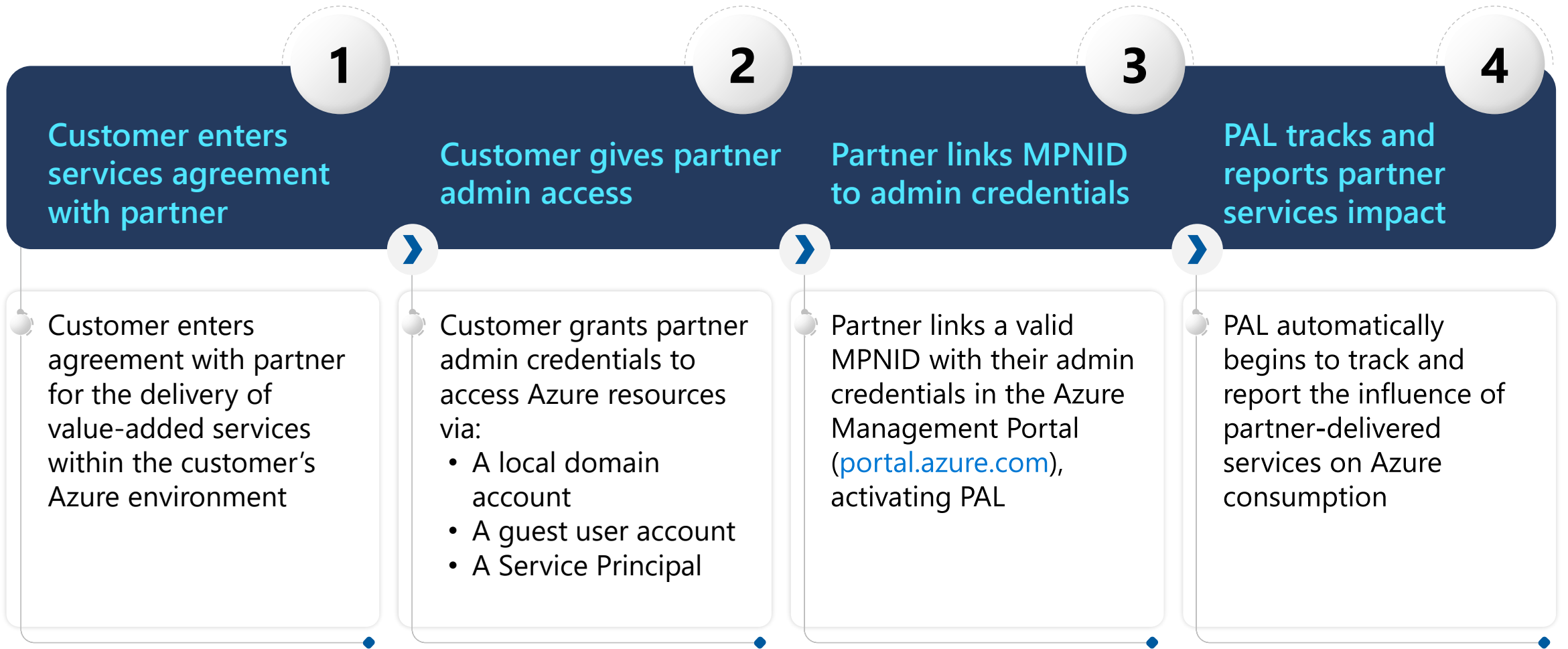
To learn more about how PowerShell, Azure CLI, and other tools manage ownership and link partner IDs, please go [here](#).





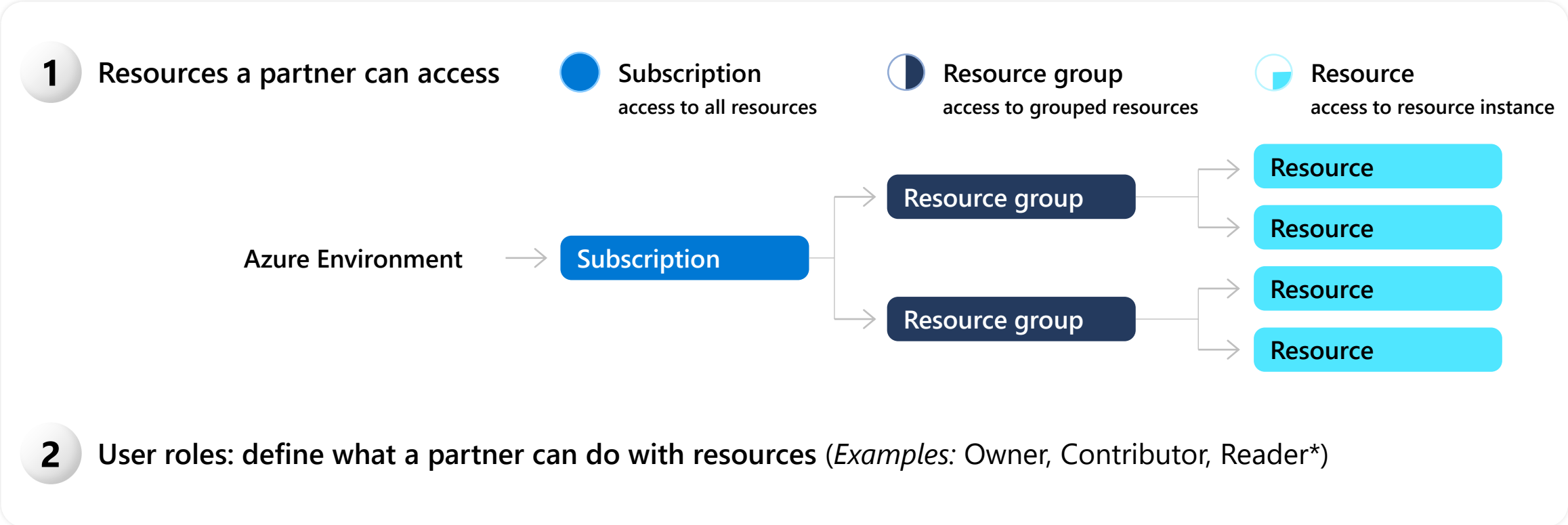
# Azure | PAL association

# PAL activation approach



# How PAL tracks partner influence on Azure consumption

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



Learn more: [aka.ms/rbac\\_overview](https://aka.ms/rbac_overview)

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



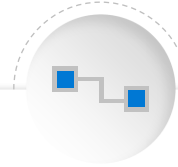


# How to activate PAL



## Meet minimum requirements

- A valid, active MPNID
- Admin credentials granted to a partner to deliver services in a customer Azure environment



## Partner links to customer

- Partner links MPNID 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 [Link to a partner ID](#) in the Azure portal.

2 Sign in to the Azure portal.

3 Enter the Microsoft partner ID. The partner ID is the [Microsoft Partner Network](#) ID for your organization. Be sure to use the **Associated MPN ID** shown on your partner profile.

4 To link a partner ID for another customer, select **Switch directory**. Under Switch directory, select your directory or use Advanced filter.

The image shows two screenshots from the Azure portal. The top screenshot, labeled with a '3' in a circle, shows the 'Link to a partner ID' page. The page title is 'Link to a partner ID' and it includes a search bar at the top. The main content area explains that partners can link their user accounts to their Microsoft partner ID. There is a text input field for the 'Microsoft partner ID' with a placeholder 'e.g. 12345'. Below the input field is a 'Link a partner ID' button. The bottom screenshot, labeled with a '4' in a circle, shows the user profile dropdown menu. The user is identified as 'andrewC@testte...' and 'TEST\_TEST\_DAVIT...'. The dropdown menu includes a 'Sign out' link and a 'Switch directory' link, which is highlighted with a red box. There is also a 'View account' link and a three-dot menu icon next to the 'Switch directory' link.

# PAL reporting and insights

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

1

Go to [Azure usage | Cloud product performance | Insights | Partner Center \(microsoft.com\)](#) OR go to [Partner Center Home](#) AND

2

Select **Insights** workspace

3

Select **Azure usage** on the left nav

The screenshot displays the Microsoft Partner Center interface. At the top, there is a navigation bar with the Microsoft Partner Center logo and a search bar. Below this, the 'Home' page is shown, featuring a 'Workspaces' section with five tiles: Benefits, Incentives, Insights, Payouts, and Referrals. The 'Insights' tile is highlighted with a large number '2'. A navigation menu is open over the 'Insights' tile, showing a list of options: Overview, Membership, Training, Microsoft Learn, Competencies, Benefits, Partner contribution, Solutions partner, Cloud product performance, Summary, Customers, Resellers, Subscriptions, and Azure usage. The 'Azure usage' option is highlighted with a large number '3'. On the right side of the screen, there is a sidebar for 'Insights | Overview' with a message: 'You can now access all your Analytics re... The insights workspace is a unified analytic set of KPIs, reports, forecasts and recomm... Learn more'.



# 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 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 MPNID 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 MPNID 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 MPNID to the customer's environment. The MPNID can be added, changed, or removed only by the partner organization that created the link. The customer, or another partner, cannot change MPNID 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 MPNID 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 MPNID 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 MPNID 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 MPNID 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 MPNID 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](#)



[Azure role-based access control \(Azure RBAC\) | Microsoft Docs](#)

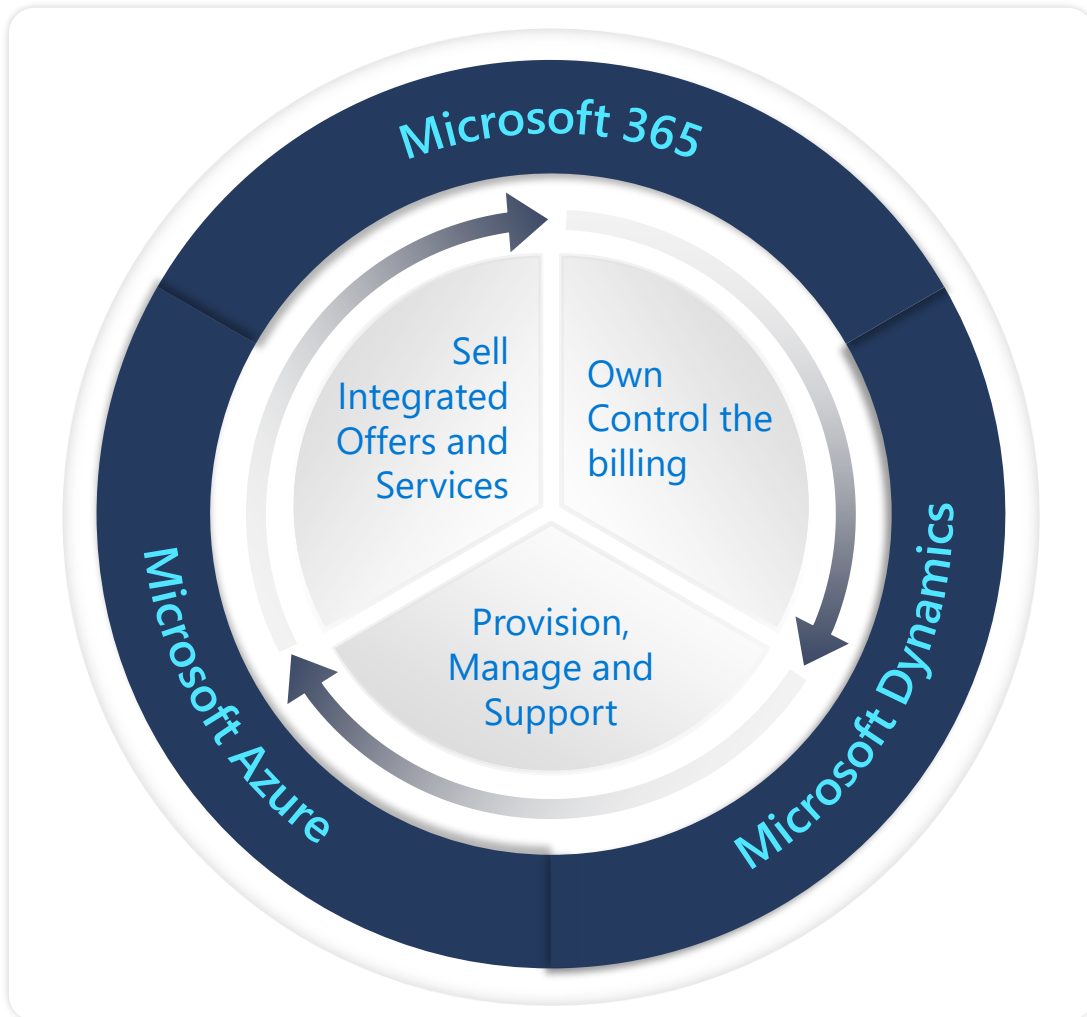






Cloud Solution Provider (CSP)

# How does CSP work and what are the benefits?



## 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.

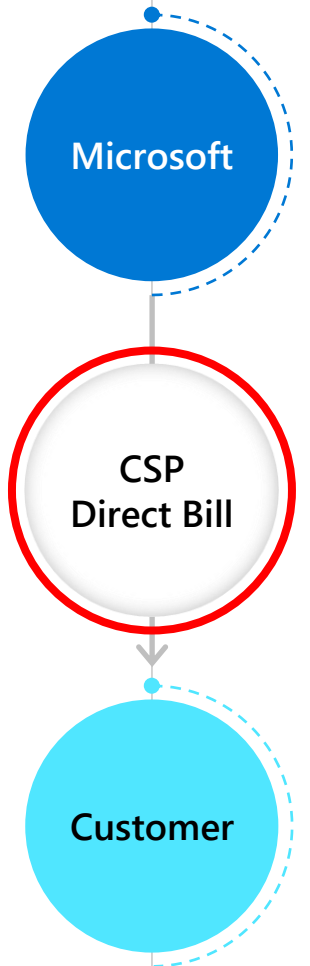




# Two CSP models based on partner's business model

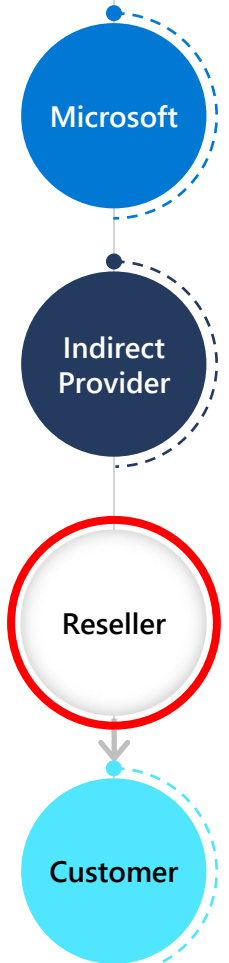
# Direct bill model

- For partners who want to own the end-to-end lifecycle of the customer relationship
- Sells directly to the customer and is able to own all sales, billing, provisioning, and support of customers
- Credit approval required; minimum \$300K trailing-12-months indirect CSP reseller revenue threshold across all partner tenants
- Must have premium support plan (ASfP or PSfP) for company
- Discounts 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 reseller model

- For partners who want to leverage the support of an Indirect Provider who can provide technical training and assistance, help to market your solutions, assist with credit & financing and aggregate a multi vendor relationship on behalf
- Owns all sales, billing, provisioning, and support of customers, supported by the Indirect Provider(s)
- No minimum revenue, or support plan required for CSP participation. Partners purchase from the Indirect Provider(s)
- Margin on sales varies depending on Indirect Provider's support 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 MPNID, complete business address, bank information, and the work email for the employee who will act as the admin for the Partner Center.

**1** Sign into the [Partner Center dashboard](#) with your work email (that is, your Azure AD tenant credentials).

**2** Associate your MPNID to your profile.

- If you're already enrolled in the MPN program, select the location MPNID, which is linked to your incentives enrollments. The location MPNID 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](#)

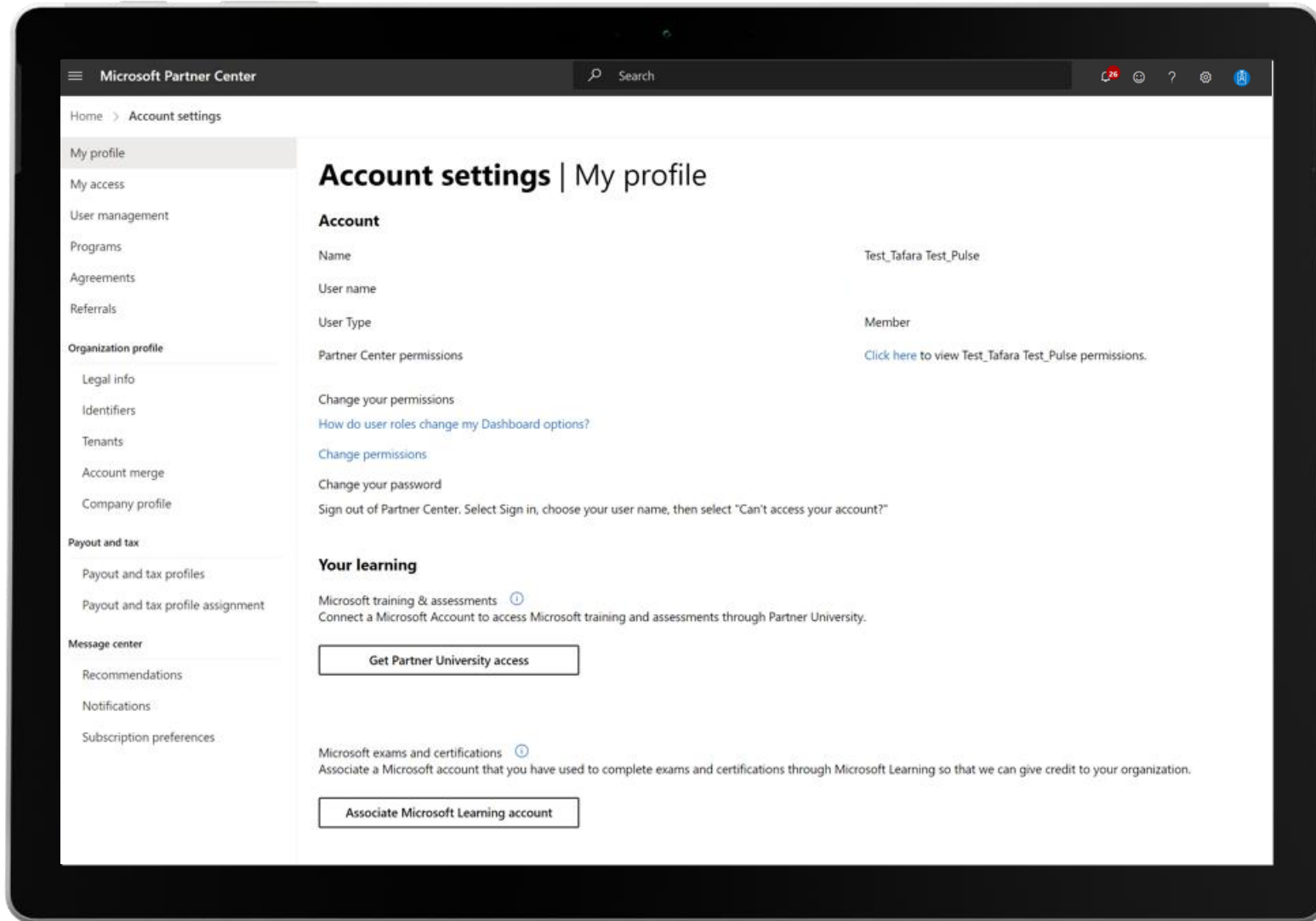


[Cloud Solution Provider program regional markets and currencies where you can sell CSP offers](#)





Certified professional association



- 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.
- 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

