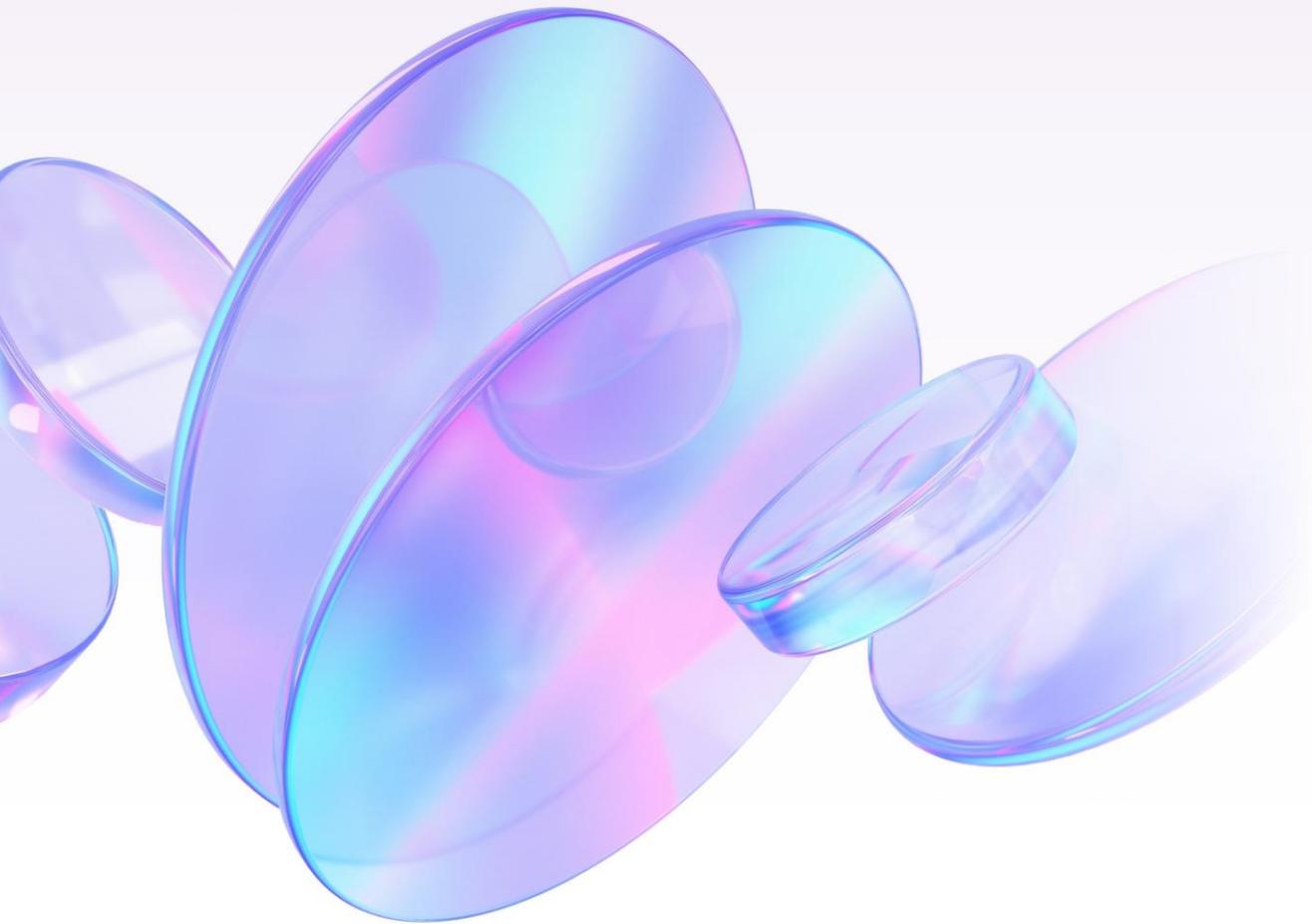




UNDERSTANDING CO-OP FUNDING & CLAIMING



Co-op (Co-operative Marketing Funding) is part of Microsoft’s incentives framework. It allows partners to **earn marketing funds**, based on eligible incentive programs, and claim reimbursement for activities that promote Microsoft solutions.

- Co-op funds are **earned through Microsoft Incentive Programs** and reimbursed for activities that support **Microsoft product awareness**. [\[learn.microsoft.com\]](https://learn.microsoft.com)
- They help partners conduct **marketing, readiness, skilling, and business development** initiatives that drive cloud growth. [\[learn.microsoft.com\]](https://learn.microsoft.com)
- Co-op funds are **separate** from rebate—typically **60% rebate / 40% co-op split** under MCI (Microsoft Commerce Incentives). [\[learn.microsoft.com\]](https://learn.microsoft.com)

How Co-op Earnings Work

✓ **Earning Model**

- Microsoft allocates incentive earnings as a **percentage split** (commonly 60% rebate, 40% co-op). [\[learn.microsoft.com\]](https://learn.microsoft.com)
- Co-op earnings accrue **every 6 months**.

✓ **Six-Month Co-op Cycle**

- Microsoft operates on fiscal halves (H1 & H2):
- **H1:** July 1 – December 31- Must be used and claimed by Feb 15 of the following year or it will be lost
- **H2:** January 1 – June 30- Must be used and claimed by August 15 or will be lost [\[learn.microsoft.com\]](https://learn.microsoft.com)
- Each half-year includes:

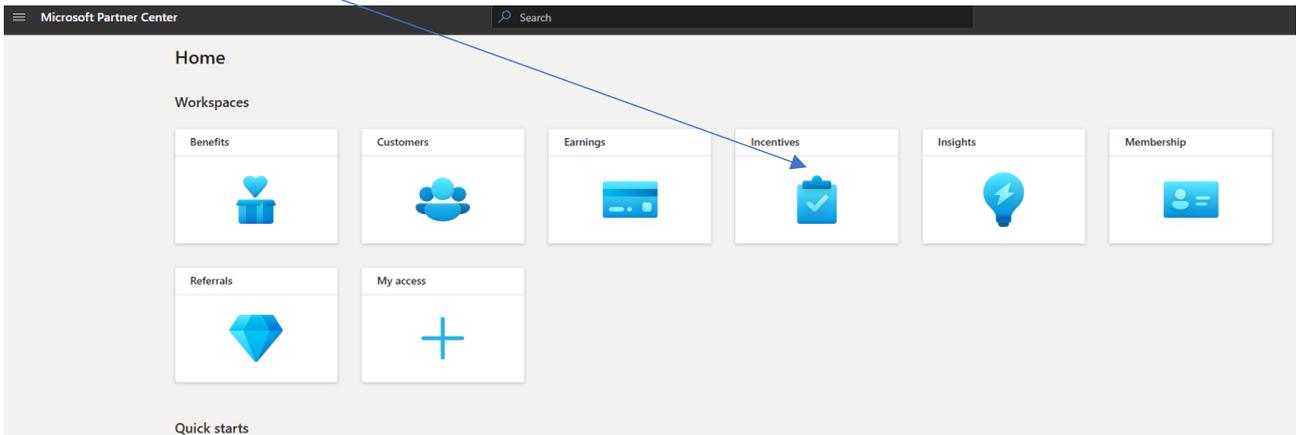
Period	What Happens
Earning Period	You earn co-op funds via eligible incentives
Usage Period	You spend funds on approved activities
Claiming Period	You file reimbursement claims

Step 1 — Sign in

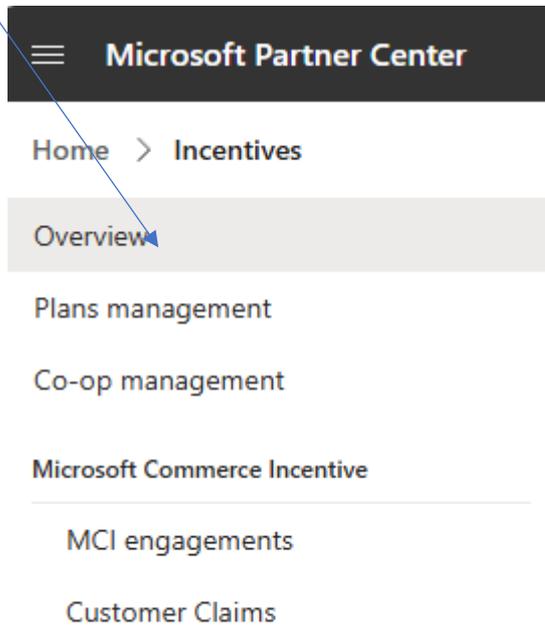
Go to <https://partner.microsoft.com>

Step 2 — Navigate to Incentives

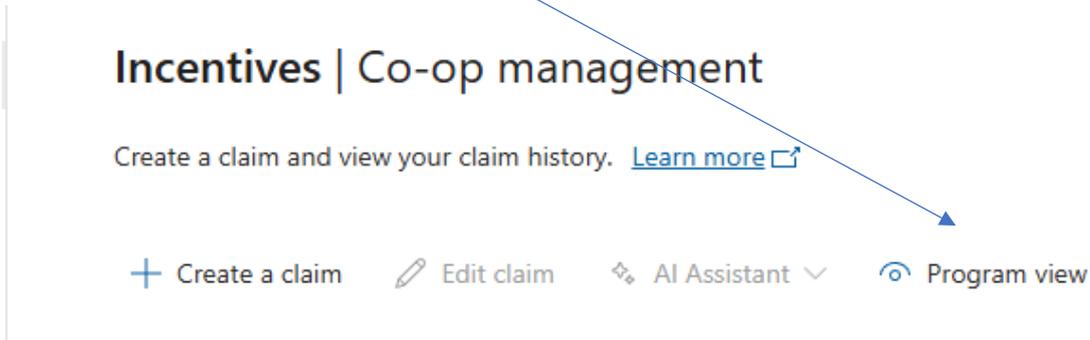
Incentives Tile



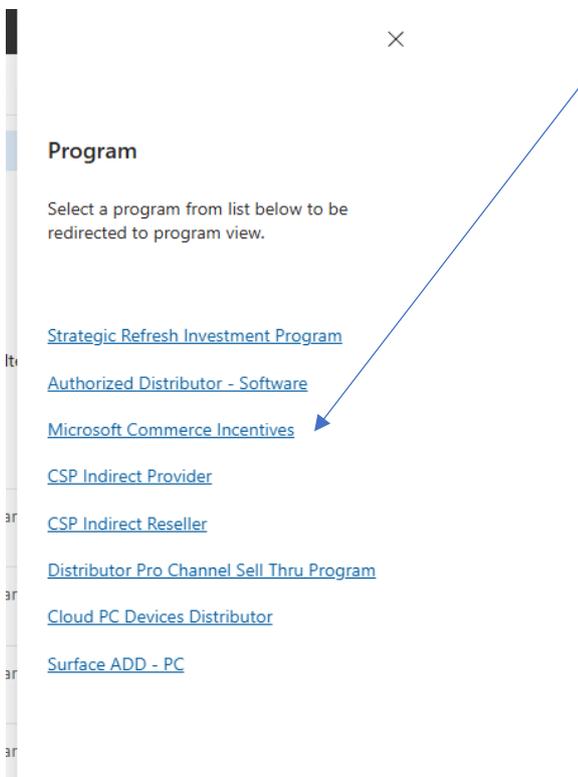
- Select Co-Op Management from left hand side



- Then select Program View



From the pop in window select "Microsoft Commercial Incentives "



Step 3- Select the correct Company ID ensure the Fund Category is selected as Cloud Solution Provider and select the date period

This will show you amount of funds claimed and if there are any remaining funds to claim

Creating Claims

Step 1

Follow the above instructions and choose "Create a Claim" and not Program View

Incentives | Co-op management

Create a claim and view your claim history. [Learn more](#)

Create a claim Edit claim AI Assistant Program view

Step 2- Follow the prompts to create your claim

Create a claim

Review and fill in any required information to create a claim. [Learn more](#)

Select a program *

Microsoft Commerce Incentives

Select a fund category *

Cloud Solution Provider

Select a location *

Select a usage period *

Select a usage period

Select a solution area for spending your funds *

SolutionArea is required

Step 3- Provide:

- Your Partner Location (PLA ID)
- Activity category (Demand Gen, Market Development, Partner Skilling)
- Activity dates (must fall within usage window)
- Total amount spent
- Total amount being claimed

Step 4 — Upload Required Proof

Microsoft requires: Proof of Execution (PoE)

- Examples:
- Campaign screenshots
- Ad performance reports
- Event attendee lists
- Landing pages
- Webinar recordings
- Workshop decks
- Itemised vendor invoice

Must include:

- Vendor name
- Activity description
- Date
- Cost
- Currency
- Proof of Payment
- (e.g., bank transaction, receipt)
- Optional: Supporting evidence
- The more detailed, the smoother the audit.

Step 5 — Submit

- Click **Submit**.
- Your claim will now show a status such as:
- Submitted
- Pending review
- Action required
- Approved
- Rejected
- Microsoft may contact you **before rejecting a claim** to help you correct issues.

IMPORTANT NOTES

Claiming Deadlines (Critical)

Deadlines vary, but Microsoft Learn states:

- Claims must be submitted within 45 days after activity completion.
FY26 Example deadlines:
- H1 activities → claim by Feb 15, 2026
- H2 activities → claim by Aug 15, 2026

- **Missing a deadline results in forfeiting funds.**

Best Practices to Maximise Co-op Use

- **Check funds monthly** – don't wait for end of period.
- **Plan activities early** in the usage window.
- Always keep **invoices + PoE** organised.
- Use co-op to build:
 - Repeatable campaigns
 - Workshops
 - Skilling readiness
 - Industry-focused GTM plays
- Combine co-op with Microsoft marketing assets for higher impact.

Quick Reference Checklist

Before spending:

- Check available co-op funds
- Confirm activity is eligible
- Capture assets/screenshots for PoE

When claiming:

- Upload invoice + PoE + proof of payment
- Select correct earning period
- Submit before the 45-day deadline

After claiming:

- Monitor claim status in Partner Center
Respond quickly if Microsoft requests more info

[Incentives Co-op and Claims Overview - Partner Center | Microsoft Learn](#)

[Maximize the impact of your co-op funds—earn and invest available funds today | Microsoft](#)