Partner Center experience for Solution Assessment (SA) referrals
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Introduction

The Referrals module in Partner Center has been modified so that your organization can now submit and receive Solution Assessment referrals through the site. To be able to use the new capability, all users who create Solution Assessment referrals must be registered in Partner Center with the role of referral admin.
1. Sign in to Partner Center using the Microsoft Partner Network (MPN) ID that was enrolled into the Solution Assessment Incentive program.

2. Select **Referrals**. You must be assigned the role of referral admin to access this tool.

3. Select **Co-sell opportunities**.

4. Select **Next** or **Cancel**. You can tour the Referrals tool anytime throughout the process.
Creating a new deal

1. Select +New deal.

2. From the two options that are displayed, select New deal. Note that this is the same experience you had with Partner Sales Connect.
Selecting your customer

1. Enter the necessary information in the Customer company location field.

2. Enter the Customer company name in the search box. The search tool will look for companies within a 150-mile radius of the location you entered.

3. Select the correct customer from the Suggested customers list.

4. While the Customer contact information is optional here, we recommend putting it in as it will be required later in the process.

5. Select Next.
1. Complete the deal details by filling out the required fields. If you have multiple MPN locations, select the appropriate one. For Referrals to successfully flow to the Channel Incentives Platform (CHIP) tool, ensure that you select the MPN ID which was onboarded to the Solution Assessment Incentive program on CHIP for the selected location. Contact your Solution Assessment specialist (SAS) for confirmation of which location MPN ID was onboarded to CHIP.

2. Scroll down to Add team members.
Adding your employees

1. Add the details of the person who will be working on the deal by filling out the fields. Alternatively, select the appropriate name from the Recent contacts list. Use the scroll bar to see more names.

2. Select Add.
1. Under Add solutions, select Solution Assessments from the Solution type drop-down menu. If you can’t see Solution Assessments in the menu, ensure that you’ve signed in with the same MPN ID as the one enrolled into the Solution Assessment incentive program in CHIP.

2. Select the correct solution under the Your solutions drop-down menu.

3. Select Next.

Only one solution can be requested per deal.
Adding a solution

4. Your solution will now be displayed in the Selected solutions field.

5. Select Next.

The list of Solution Assessments might be different in the actual experience.
Submitting the deal

1. If you haven’t previously completed all the customer details, enter them now, along with your notes for the SAS in the Notes for Microsoft solution assessment specialist box.

2. Check the confirmation box.

3. Select Create deal.
Viewing the deal status

This deal will now be reviewed by the SAS.

When you check the deal status, you’ll see one of the following under State:

- Pending
- Received
- Accepted
- Declined

Continue with the next steps after the state has been changed to Accepted.
As the deal assessment progresses, complete each of the pending activities.

1. Under Your company’s deal progress, select Mark as complete after every checklist item is completed. All four items on the list must be completed before you can indicate if you won or lost the deal.

   **Note:** You should still upload the proof of execution (POE) to CHIP; there’s no change to this process.

2. Select Won or Lost.
1. If you won the deal, you can edit the Total contract value and Contract start date before closing the deal.

2. Select Close deal after checking that your answers are complete and accurate.
Closing the deal

Lost deal

If you lost the deal, complete the feedback section before closing the deal.

1. Select the reason for closing the deal from the drop-down menu. You can add notes if you wish.

2. Select Close deal.
No further action can be taken on this referral.
1. To accept a referral from Microsoft, view the deals listed under Inbound. You can use Filter & sort to view fewer options.

2. Click on a deal to view more information about it. Note the set of icons next to the deal type. The circles indicate the state of the referral. Hover over a circle to view more information. To mark a deal as a favorite, click the heart icon.

3. Select Accept.
Kicking off an accepted deal

1. Complete the **Kickoff the deal** fields. You can edit the deal information at this time.
2. Scroll down to **Add team members**.
Kicking off an accepted deal

1. Complete the team member details for the manager of this deal. You can select from the list of Recent contacts.
2. Select Add.
3. To accept the invitation, select Save.
4. Follow the previous steps to indicate the deal as Won or Lost.