

# Software Assurance Training Vouchers workflow

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# 1. Verify eligibility (new partners)

To verify your organization's eligibility, follow the steps below:

- Sign-in to your [Partner Center dashboard](#).
- Click MPN on the navigation pane to expand the section.
- Expand Programs and select Software Assurance Enrollment.
- Near the top of the page, select Software Assurance Training Vouchers.

Your organization's status will be displayed on this page. It will indicate whether you have met the applicable competency requirements.

**Partner Center**

**MPN**

- Overview
- Membership offers
- Competencies
- Programs
- Azure Expert MSP
- Software Assurance Enrollment**
- Software Assurance
- Benefits
- Analyze
- Partner contribution

**REFERRALS**

## Software Assurance programs enrollment

Grow your business by enrolling in Software Assurance partner programs. Microsoft compensates partners who deliver training, planning and other Software Assurance services to enterprise customers.

**Software Assurance Training Vouchers** [Software Assurance Planning Services](#)

As an approved Microsoft Learning partner, Microsoft compensates you for providing technical training to enterprise customers in exchange for vouchers they get with Software Assurance. Participating in this program can help you attract more customers and become their trusted learning advisor. [Learn more](#)

Your status: **Active** Valid until: **1/31/2020**

**Process Overview** [Show details](#)

**Requirements** [Hide details](#)

**Step 1: Meet all pre-qualification requirements**

- Your organization must achieve a Learning option in **at least one** competency from the below list

Application Development	Data Platform
Application Integration	Datacenter
Cloud Customer Relationship Management	DevOps
Cloud Platform	Enterprise Mobility Management
Cloud Productivity	Messaging
Collaboration and Content	Project and Portfolio Management
Communications	Windows and Devices
Data Analytics	

**Step 2: Agreement**

- Your organization has accepted the following agreement

[Microsoft SATV Program Agreement](#)

## 2. Enroll (new partners)

**Important note:**

To enroll your organization in the SATV program for the first time, you must hold Global Admin or MPN Partner Admin permissions in Partner Center. Global Admins can assign user roles, so if you do not see the navigation options required to enroll (shown below), reach out to your Partner Center Global Admin.

To re-enroll, you must first wait for your present enrollment end date to pass. You will then have 30 days to complete the re-enrollment process, during which time you will continue to have access to program tools.

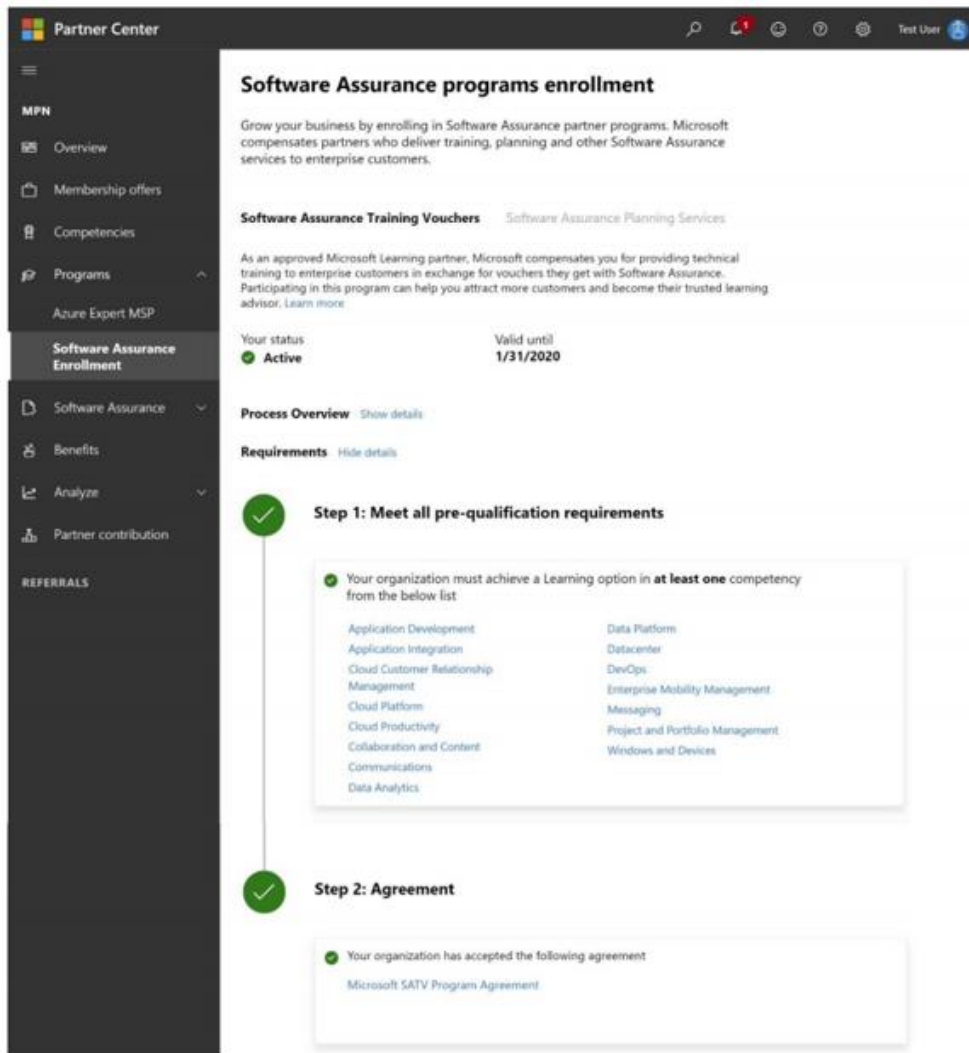
Once your organization has met the eligibility requirements, you can enroll in the SATV program following the steps below:

- Sign-in to your [Partner Center dashboard](#).
- Click MPN on the navigation pane to expand the section.
- Expand Programs and select Software Assurance Enrollment.
- Near the top of the page, select Software Assurance Training Vouchers.

Before you can enroll, your organization must first meet all qualification requirements. Your organization's status will be displayed on this page.

Once your organization has met the competency requirements, your status will be reflected as Active and the Accept button near the bottom of the page will become clickable. Next, you must review the Microsoft SATV Program Agreement (also known as the program provider legal agreement) and then accept the agreement.

- Click on the Microsoft SATV Program Agreement hyperlink to download agreement. Click Accept after reviewing and agreeing to the agreement. You will be prompted to confirm acceptance. If you need to review the legal agreement in the future, return to this step to download and view the document.



- After accepting the legal agreement, you will see a confirmation that your status is Active.



### 3. Confirm SATV course eligibility

#### SATV eligible courses

Once enrolled in the SATV program, partners can offer training sessions for SATV-eligible courses, for which customers can use their SA Training Vouchers. Eligible courses are listed in the [SATV course eligibility catalog](#). Use the following filter settings: Training Type—Classroom; Program Type—SA.

Examples of SATV-eligible courseware include:

- Microsoft Official Courseware (MOC) On-Demand
- MOC On-Demand 180 days
- Digital MOC
- Printed MOC
- Exams
- Microsoft Course Certificate vouchers (LaaS, or Learning as a Service)
- Community courseware designated for an IT professional or developer audience

The following courseware are not SATV-eligible:

- First Look Clinics
- Hands-on Labs
- End user ILT training
- Fresh Editions

Technical training through SATV may also:

- Be delivered as custom training
- Be delivered in-classroom or through a virtual classroom environment
- Be redeemed for public or private training sessions

## 4. Customer creates and assigns voucher

Before conducting a training, your customer must first activate their SATV benefit, and then assign it to your organization.

Below are the steps your customer must take to create the voucher.

### Activate voucher benefit

The company's Software Assurance Benefits (SAB) administrator must activate the SATV benefit through the [Volume Licensing Service Center](#) (VLSC). The benefit only must be activated one time, and the entire number of training days allotted to the organization will be activated for use. The steps are as follows:

1. Sign in to [VLSC](#) using a Microsoft account associated with the SAB administrator.
2. Select View Software Assurance Benefits, then select the benefit from the Software Assurance Summary list.
3. Select the Licensing Agreement Number under which you wish to activate your SATV benefit and view the Benefits Available for Activation pane.
4. To activate the benefit, select the SA Training Voucher benefit name and follow the instructions in the subsequent screens.

### Create and assign voucher

After activating the benefit, the benefits administrator can create and assign SA training vouchers to employees by entering the employee name, corporate email address, and number of days the voucher is worth. After a SA training voucher has been created and assigned, the employee has 180 days to use the voucher before it expires.

1. Under Training Benefits Detail, review the number of Eligible Agreement Training Days and then select Create Training Vouchers.

The screenshot displays two sections of a web interface. The top section, 'Activated Benefits', contains a table with columns: Benefit Name, Status, Description, Reference, Details, History, and Terms and Conditions. The first row is 'Training Vouchers' (Active) with 30 Eligible Days. A red arrow points to this row. The bottom section, 'Training Benefit Detail', shows 'Eligible Agreement Training Days' as 30. A red arrow points to the 'Create Training Vouchers' button at the bottom of this section.

2. Enter the following data to create a training voucher:
  - The name of the employee to receive training
  - The employee's corporate email address
  - The length of the voucher, which can range from 1 to 5 days
3. If the course length is unknown, it is best to select 5 days. If fewer than 5 days are ultimately needed for the course, and if the customer's agreement is still active, the remaining days will automatically go back into the customer's training voucher pool once the voucher has been paid to the training partner.
4. Select Add Voucher, then Submit Voucher List. This creates and assigns the voucher to the employee.
5. An email containing the voucher's details is sent to the corporate email address entered at the time of voucher creation. This email will contain the voucher number, voucher expiration date, and the name of the Benefits Administrator who created and assigned it.
6. Employees can then choose a participating Microsoft Learning partner who offers an [SATV-eligible course](#) they want to take. To reserve training, employees must provide the partner with the SA training voucher details found in their voucher confirmation email.
  - Note: the customer must provide you with the correct voucher number and email address in order for you to reserve that voucher.

## 5. Validate and reserve voucher

After a customer successfully assigns a voucher to your organization in VLSC, an email will be generated and sent to the customer's employee and Software Assurance benefits (SAB) administrator, requesting them to forward the email to you (their chosen Learning partner). If you did not receive an email from your customer containing the voucher number and email address associated to the voucher, ask them to please forward the email to you so you may move forward with reserving the voucher and scheduling the training.

1. Sign In to your [Partner Center dashboard](#).
2. Click MPN on the navigation pane to expand the section.

3. Expand Software Assurance and select Software Assurance Training Vouchers to reveal the voucher activity report.
4. Click on the Actions drop-down and select Validate and reserve voucher.
5. From the Validate Software Assurance training voucher page, select the desired provider ID from the drop-down (vouchers must be processed under a provider location matching the country in which the MOC was purchased).
6. Enter the voucher number and trainee email address, then select Validate voucher.
7. After you've validated the SA training voucher and confirmed the voucher details, you will enter the course number, service start date, service end date, and optional comments before selecting Reserve voucher. Once the voucher is successfully reserved, it will become visible in the voucher list with a Reserved status and you can move forward with delivering the training.

**Important note:**

All SA training vouchers expire 180 days after the date of creation. Vouchers should be validated, reserved and redeemed by the executing partner—submitting all required deliverables to your customer and to Microsoft—before the stated voucher expiration date.

### **Cancel a reserved training voucher**

1. Select the hyperlinked voucher number from the voucher list.
2. From the Software Assurance training voucher details page, select Cancel Reservation.

## **6. Deliver training and activate product**

Once a voucher is reserved, you may deliver the training to your customer. The guidelines below cover training engagements, as well as the activation and purchase of Microsoft Official Courseware (MOC), exams, and Microsoft Course Certificate vouchers (LaaS) for MOOC courses.

### **SATV training engagement guidelines**

- The training must be completed before the voucher expiration date. To find the voucher expiration date:
  - Sign In to your [Partner Center dashboard](#).
  - Click MPN on the navigation pane to expand the section.
  - Expand Software Assurance and select Software Assurance Training Vouchers to reveal the voucher activity report.
  - Select Reserved from the voucher status drop-down to filter the listed vouchers to display only reserved vouchers. Upon locating the voucher in question, you will find the expiration date under the Voucher Expiration Date column.
- For Digital MOC courses and MOC On-Demand courses, the student must activate the MOC during the course in order for the voucher to be valid for payment.
- Printed MOC trainings should be completed within 6 months of the printed MOC purchase date.

- Exams and Microsoft Course Certificate voucher (LaaS) codes must be activated by the student within 12 months from the date purchased by the Learning Partner in Courseware Marketplace.

## Microsoft Official Courseware (MOC) guidelines

### Printed MOC

- When selecting Printed MOC in the dropdown of the Software Assurance Voucher Benefit (SAVB) Online Payment Tool, you must submit a MOC order number as found in [Courseware Marketplace](#).
- Printed MOC must have been purchased within the past 6 months, and you must have a balance of MOC credits in your order for your payment request to be accepted. MOC purchased greater than 6 months ago will not be counted in your MOC credits balance.
- Upon acceptance of a printed MOC order number, the MOC credits balance for that course will decrease by one.

To view the order number for printed MOC (needed to submit invoices in SAVB):

- In [Courseware Marketplace](#), navigate to My Account and select Order History.
- Use the search fields to search for the course number and order date. The order number is displayed in the search results.

The screenshot shows the 'My Account' page in the Microsoft Learning Products interface. The 'Order History' section is active, displaying search criteria and a table of orders. A red arrow points to the 'Order No.' column in the table.

Order Date	Order No.	Purchase Order No.	Order Total	Order Status	Action
02/06/2015	213787		206,17 €	completed	Details Re-order

### Digital MOC

- When selecting Digital MOC in the dropdown in SAVB, you must submit a 16-digit license number as found in [Courseware Marketplace](#).
- The MOC license number must be activated by the student before you can submit the payment request. If the license number has not been activated, the payment request will be rejected. Verify



the activation of license ID by confirming that the license ID shows as "Redeemed" in Courseware Marketplace.

- A MOC license ID can only be used for training with one student. If it has been used in a previous payment request, it will not be accepted.

To view the license for digital MOC (needed to submit invoices in SAVB):

1. In [Courseware Marketplace](#), navigate to My Account and select Digital Library.
2. Use the search features to search for the specific course and select Share to navigate to the Management dashboard.



3. The Management dashboard will open in a new tab and display the license number.



## MOC On-Demand

MOC On-Demand are complete courses in a self-paced format, hosted by Microsoft and streamed directly to customers. The courses combine video, reading, hands-on labs, and knowledge checks to help IT

Professionals and Developers build their Microsoft technology skills as their schedules allow—all at once or five minutes at a time. Learn more and find a [list of MOC On-Demand courses](#).

There are two options for providing MOC On-Demand to your customers: the stand-alone option, which does not include services, or the packaged set option, which does include services.

**Stand-alone option:** this entails using SATV for MOC On-Demand without additional services. When you purchase this option, two SATV days are used for MOC On-Demand, and your customer pays you directly for any additional services you provide; you cannot collect SATV days to pay for those services.

To process MOC On-Demand vouchers for the stand-alone option, [follow the steps outlined in these instructions](#). Note these important tips:

- Reserve the voucher using the MOC On-Demand course number. All MOC On-Demand courses contain the letters “od” before the course number.
- Once the voucher is reserved and redeemed in VVR, you must enter an activated MOC On-Demand voucher code when submitting payment in SAVB tool. This voucher code is activated by the customer once they take the MOC On-Demand course.

**Packaged set option:** this provides you three or five SATV days for redemption and includes services. Any additional services you provide—such as a full classroom delivery, 1:1 mentoring, 1:many mentoring, or any other services—are included and you cannot charge the customer additional fees.

To process MOC On-Demand vouchers for the packaged set option, [follow the steps outlined in these instructions](#). Note these important tips:

- Reserve the voucher using the digital MOC course number. Digital MOC courses do not contain the letters “od” before the course number. This allows you to get the full three or five days’ worth of SATV days depending on the course.
- When submitting the payment request in SAVB, do not use the MOC On-Demand voucher code that is part of the packaged set. Instead, enter the digital MOC license ID (which must first be activated by the student).

**MOC On-Demand 180 days option:** this extends the time that customers have to take and activate their MOC On-Demand course from the regular 90 days to 180 days.

- When selecting MOC On-Demand in the dropdown of SAVB, you must submit a MOC On-Demand voucher code in the field as found in [Courseware Marketplace](#).
- The MOC On-Demand voucher code must be activated by the student before you can submit the payment request. If the voucher code has not been activated, the payment request will be rejected. Verify the activation of a voucher code by confirming the license code shows as “Redeemed” in Courseware Marketplace.
- A MOC On-Demand voucher code can only be used one time. If it has been used in a previous payment request, it will be rejected.

To view MOC On-Demand voucher code and activation status:

- In [Courseware Marketplace](#), navigate to My Account and select MOC On-Demand Codes.

- Locate the course and select View Codes.

On-Demand Codes						Records per Page 5	← 1 / 12 →
③ Course No.	④ Course Title	③ Order Date	④ Quantity	③ Order No.	Action		
OD99999AC	Microsoft Official Courses On-Demand Demo Course: Using Microsoft Official Course On-Demand	23/03/2016	3	81292486	<b>View Codes</b>		

- The next view shows the redemption status:
  - Available – not redeemed
  - Redeemed – redeemed

## Exam guidelines

A Microsoft Exam voucher is a code that can be used to register for a Microsoft Certified Professional exam. Once a student takes and passes the exam, they become a Microsoft Certified Professional.

Purchase exam vouchers and view exam codes:

1. Navigate to [Courseware Marketplace](#).
2. In the Search box in the top right corner, type Exam Vouchers and press your Enter key to view search results.

Microsoft Learning Products

2 results for Microsoft Learning Products

③ Course No.	③ Course Title	③ Language	③ Pr
A85-04151	Exam Voucher Pearson/VUE MCP Exam Voucher	en	USD
A85-04343	Exam Voucher Pearson/VUE MCP Exam Replay Voucher	en	USD

- Alternatively, find exam vouchers by selecting the Microsoft Learning Products blue button in the top left corner.

Courseware Marketplace

Microsoft Learning Products

3. Select the Microsoft Exam Voucher option in the menu and view the list of exams/exam vouchers.



- From the displayed results, select the exam vouchers to add to your cart. Continue through the shopping and payment process as needed.

Microsoft Learning Products		
Course No.	Course Title	Language
7SF-00029	<b>Exam Voucher</b> Pearson/VUE MTA Certification Voucher: Commercial Single-Shot	en
A85-04151	<b>Exam Voucher</b> Pearson/VUE MCP Exam Voucher	en
A85-04343	<b>Exam Voucher</b> PearsonVUE MCP Exam Replay Voucher	en
A85-04344	<b>Packaged Set (Class Pack)</b> Exam Replay with Practice Test	en
A85-04393	<b>Exam Voucher</b> Microsoft Azure Exam Pack	en
A85-04394	<b>Exam Voucher</b> Microsoft Azure Exam Pack	en

- Once the codes have been paid for, you can access exam codes for distribution by selecting the My Account button near the top right corner of Courseware Marketplace.



- Select the Exam Voucher Codes option in the menu that will appear on the left.

- User Profile
- User Management
- Order History
- Digital Library
- Microsoft Course Certificate Vouchers
- MOC On-Demand Codes
- Practice Test Codes
- MCT Program Vouchers
- Exam Voucher Codes**
- Online Labs
- Student Access Pass
- Product Vouchers
- Balance of Account
- Price List Export
- Credit Limit Application
- Course Certificate
- Switch Organisation

- o A list of code orders along with a search tool will appear.

**Search Criteria**

From  To  Order Number   
Purchase Order No.

---

**Voucher** Records per Page  < 1 / 1 >

Voucher	Voucher Title	Order Date	Quantity	Order No.	Action
A85-04151	Exam Voucher Pearson/VUE MCP Exam Voucher	19/10/2016	5	81341461	<input type="button" value="View Codes &gt;"/>
A85-04256	Exam Voucher Microsoft Certification Booster Pack	08/04/2016	1	81296219	<input type="button" value="View Codes &gt;"/>
A85-04151	Exam Voucher Pearson/VUE MCP Exam Voucher (Second Shot Eligible)	03/02/2015	1	81199146	<input type="button" value="View Codes &gt;"/>

- o You have the following options for searching for exam voucher codes placed within a specific order:
  - Enter the order number in the Search by Order Number box and press your Enter key or select the green Search button
  - Enter the purchase order number in the Search by Purchase Order Number box and press Enter or select Search
  - Search for orders placed within a date range by selecting a date in both the Start Date and End Date boxes and press Enter or select Search
- o Once the search results that match your search criteria are displayed, select the blue View Codes button to display your codes.



**Exam Voucher Codes**

Please find your Microsoft Certification Exam Voucher codes for "Microsoft Certification Exam Voucher" below:

Voucher Code	Validity (dd/mm/yyyy)
MS14240F401A	19/10/2017
MS14241E2147	19/10/2017
MS142436323F	19/10/2017
MS14243C2152	19/10/2017

Download Excel » Close »

**How can my students redeem the Microsoft Certification Exam Voucher?**  
Here are some information that you need to pass on to your students:

- Unless otherwise stated on the product details page, standard Microsoft Certification Exam Vouchers have a validity of 12 month as of your purchase date on the Courseware Marketplace.
- Validity period may vary for some special promotional vouchers. Voucher expiration will be provided to partners at the time of purchase.
- After providing your students with Pearson VUE Exam Vouchers, registration by the student is accomplished by first creating a profile at <https://microsoft.com/learning>. Pearson VUE exams can then be scheduled online from <https://microsoft.com/learning> or directly from a Pearson VUE Test or Call Center.
- The list of feasible countries the voucher code can be redeemed in can be found on the product details page.
- No refunds will be granted by Arvato.
- Pearson VUE exam registration begins by creating a profile on <https://microsoft.com/learning>. For customer support, please contact <https://microsoft.com/learning/en-us/help.aspx>. For Pearson VUE exam scheduling and appointment assistance, please contact [pearsonvue.com/microsoft/contact](https://pearsonvue.com/microsoft/contact).
- Pearson VUE exam scheduling and appointment assistance is here: [pearsonvue.com/microsoft](https://pearsonvue.com/microsoft)

**Please note: Unless otherwise stated on the product details page, the standard Microsoft Certification Exam Vouchers are valid for a period of 12 months.**

- You may copy and paste the voucher codes or download the codes to an Excel file by selecting the green Download Excel button.

Once exam vouchers are purchased, students can redeem exam voucher codes by following these instructions.

## Microsoft Course Certificate vouchers (LaaS) for MOOC courses guidelines

A Microsoft Course Certificate voucher (LaaS, or Learning as a Service) is a voucher that can be used to earn a certificate once a Microsoft MOOC (Massive Open Online Course) has been completed and the student has achieved all the necessary goals for the course.

### Locate and purchase Microsoft Course Certificate vouchers in Courseware Marketplace

Additional terms and conditions are as follows:

- Microsoft Course Certificate Vouchers are not returnable or refundable.
- Microsoft Course Certificate Vouchers are void if altered in any way.

- Each voucher code may only be used once and only for the eligible Microsoft Online courses designated by Microsoft.
- You will assign one unique code to each Microsoft Course Certificate Voucher and will track your distribution of voucher codes to ensure each code is only used and distributed once.
- You are responsible for keeping the Microsoft Course Certificate Vouchers and voucher codes in a secure place to ensure they are not copied or misappropriated.

You must provide the following information to your students:

- This Microsoft Course Certificate Voucher expires on DAY/MONTH/YEAR. You must successfully complete the Microsoft online course and request the course completion certificate prior to the voucher expiration date. Expiration dates will not be extended under any circumstances.
- Voucher can only be used once.
- Voucher may not be redeemed for cash, credit, or refunds.
- Expired, stolen or lost vouchers will not be replaced.
- Any sale or transfer of this voucher is expressly prohibited.
- Voucher is non-transferable and void if altered in any way.
- Microsoft and its distributors/resellers are not responsible for lost or stolen Microsoft Course Certificate Vouchers or voucher codes.

## 7. Redeem voucher

Once you complete a training, you must redeem the voucher. This can be completed on or after the last class day of training. Training should always be scheduled and delivered—and the voucher redeemed—before the voucher’s expiration date. A voucher cannot be redeemed before training has been delivered, and a training cannot be held “on account” for customers. Such actions may result in a partner’s suspension from the SATV program.

1. Sign In to your [Partner Center dashboard](#).
2. Click MPN on the navigation pane to expand the section.
3. Expand Software Assurance and select Software Assurance Training Vouchers to reveal the voucher activity report.
4. Select Reserved from the voucher status drop-down to filter the listed vouchers to display only reserved vouchers. The list of reserved vouchers can then be sorted to help you locate the voucher(s) to be redeemed.
5. Tick the checkbox(es) next to the desired voucher(s) then click Redeem selected vouchers.
6. From the Confirm voucher redemption page, review the voucher information for accuracy, then select Yes to redeem the voucher.

**Important reminder:** submit payment requests within 60 days of redeeming vouchers. After redeeming a voucher, you have 60 days in which to submit a payment request in the SAVB Online Payment Tool. Any non-compliance issues with the voucher must also be resolved within this 60-day period. If the 60-day period ends before compliance issues are remediated or a payment request is submitted, the voucher is forfeited, and payment cannot be processed for the engagement delivered under that voucher.

## 8. Get paid

After redeeming a voucher, you must create and submit a payment request in the Software Assurance Voucher Benefit (SAVB) online payment tool.

### Register for payment

Important note:

This registration step is required in each of these instances:

1. Your organization has redeemed its first voucher.
2. Your organization has redeemed a voucher in a new program (e.g., if you previously redeemed a Planning Services voucher but are now redeeming a Software Assurance Training Voucher for the first time).

If your organization previously registered for payment in SAVB, you may begin at the [Invoice against voucher](#) step.

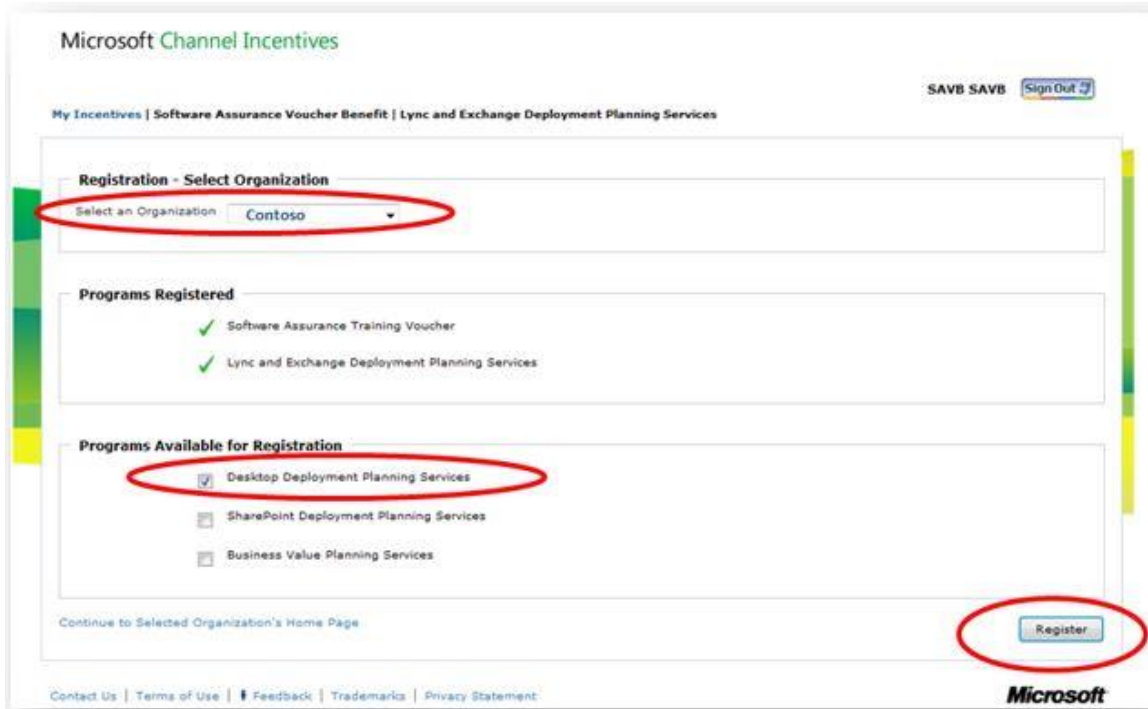
A Global Administrator for your organization in the Microsoft Partner Network (MPN) is required to complete this initial registration process in SAVB. The Global Administrator may also function as one of your organizations' designated Partner Program Administrators (PPA) in the SAVB tool.

**Helpful tip:** if your organization is active in more than one voucher program (for example, Software Assurance Training Vouchers (SATV) and Desktop Deployment Planning Services), you must go through this registration step for each voucher program (see Registration for additional programs below).

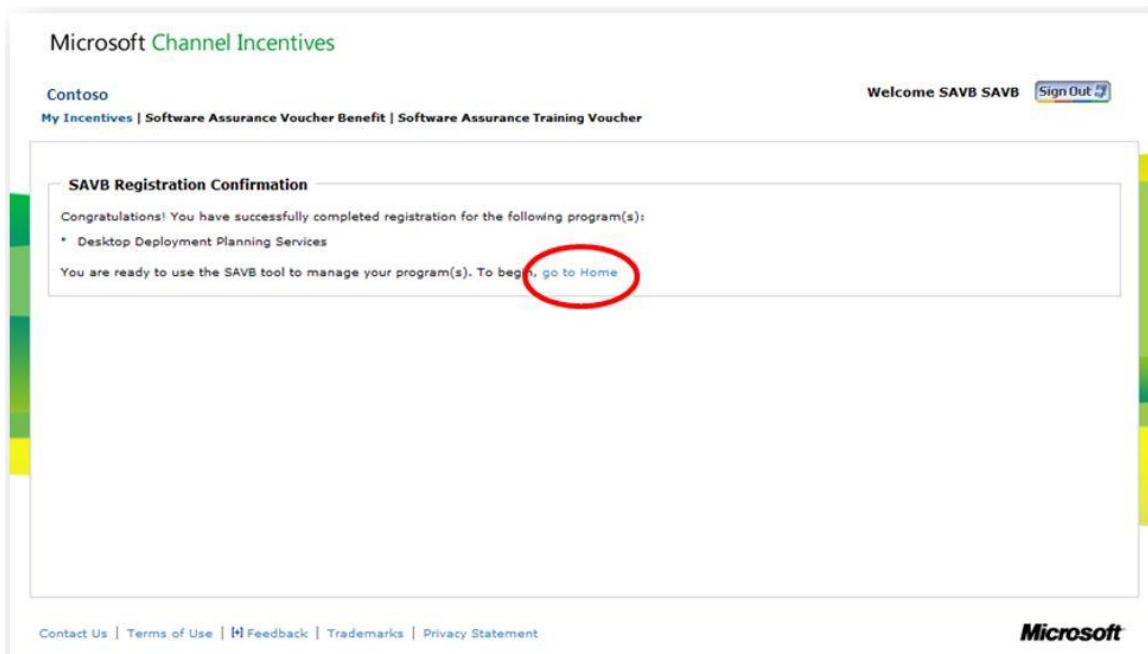
### Initial registration

1. Global Administrator must log into Microsoft's [Channel Incentives Platform \(CHIP\)](#) (where the SAVB tool resides).
2. On the initial Registration page, select the Organization name from the drop-down menu. (If this is your first time in SAVB, you will not see anything listed in the Programs Registered section of the page.)
3. In the Programs Available for Registration section, select the program(s) for which you are now registering, then select Register.





4. On the Confirmation page, check to ensure the listed program is the one you registered on the previous screen, then select go to Home to return to your program homepage in SAVB.



5. After completing initial program registration, you can access SAVB directly at [channelincentives.microsoft.com](https://channelincentives.microsoft.com), using your Microsoft account to sign in.

### Registration for additional programs

If you want to redeem vouchers for an additional program, you must complete the program registration process again for each new program. Follow the steps below:

1. From one of the program home pages in [CHIP](#), under the I Need To menu, select Manage Organizations.
2. Follow the prompts to register your additional program.
3. Wait 24-48 hours for your vendor ID to be mapped.
4. Assign your vendor ID to your location in your newly register program.

## Create a payment profile/vendor ID

After completing your new program registration, the Regional Service Center (RSC) team creates a new vendor ID request for your Primary Contact for that location ID in MPN. This vendor ID will be linked to the bank account you designated to receive payment from Microsoft for Software Assurance trainings delivered. The Primary Contact will be sent an email from Microsoft Payment Central with an access invitation.

1. As the Primary Contact, sign into your [Payment Central](#) account using the email address at which you received the invitation (this email address should be linked to your Microsoft account; [view instructions](#)).
2. After accessing your new supplier/vendor account, enter the required details in the five sections displayed. Select Submit to send the information to the Microsoft accounts payable team for review.

2. Suppliers can use Manage Users to grant access individuals that have access to process the supplier information
3. Support Resources: FAQ and Email Support (CIM)
4. The new Supplier Setup process will be notated with "New" on the left side and show a blue chevron identifying how to begin
5. Click **Terms** to begin the process

3. Once approved by the accounts payable team, a new vendor ID will be created. You will receive a confirmation email with the new vendor ID. The RSC team will transfer the new vendor ID to your organization's SAVB payment profile.
4. Assign the payment profile to your location ID in SAVB (this will need to be done for each new program) by following these steps:
  - As the Primary Contact, navigate to your program homepage and select Manage Payment Profile from the I Need To... menu. From here, you can see your payment profile(s) and location IDs registered for that program.
  - Select Edit Assignments to assign the correct payment profile to the correct location ID.

You can now create payment requests for your redeemed vouchers.

**Helpful tip:** you may use the same bank account for locations in different countries if those countries are located in the same Microsoft Company Code. Once you complete the forms in Payment Central, it may take up to two weeks for your vendor ID to be created.

## Invoice against voucher

Follow the steps below to create your payment request. Note that SAVB only displays vouchers that have already been redeemed; it does not display vouchers that are in "reserved" status.

**Important reminder:** Submit payment requests within 60 days of redeeming vouchers. After redeeming a voucher, you have 60 days in which to submit a payment request in the SAVB Online Payment Tool. Any non-compliance issues with the voucher must also be resolved within this 60-day period. If the 60-day period ends before compliance issues are remediated or a payment request is submitted, the voucher is forfeited, and payment cannot be processed for the engagement delivered under that voucher.

1. From your program home page, select Create Payment Request from the I Need To... menu.
2. Using the voucher Search Criteria filters to narrow your voucher selection:
  - Select the Country for which you are creating the payment request. Note: you can only select one country. You cannot combine redeemed vouchers from locations that are in different countries on the same payment request.
  - Select the Locations for which you would like to view redeemed vouchers.
  - Select the Payment Profile that maps to the location(s) you want to view. This is the payment profile under which you want payment to be made for the location(s) you are going to include in your payment request.
  - Select the Tax Jurisdiction that correctly applies to the country and locations you have selected.
  - Select Search

The screenshot displays the Microsoft Channel Incentives interface. At the top, it says "Microsoft Channel Incentives" and "Contoso". Below that, there are navigation links: "My Incentives", "Software Assurance Voucher Benefit", and "Lync and Exchange Deployment Planning Services". A "Welcome Contoso" message and a "Sign Out" button are also visible.

The main content area is titled "Create Payment Request - Select Vouchers". It includes a sub-header: "To create a payment request, your locations must be mapped to a payment profile by a Program Administrator using 'Manage Payment Profile'". Below this, there are four dropdown menus for search criteria: "Country: Canada", "Payment Profile: Payment Profile 2", "Location: Contoso", and "Tax Jurisdiction: GST, ON-HST". A "Search" button is located at the bottom right of this section, circled in red.

On the right side, there is a "I Need To..." menu with the following options: "Create Payment Request", "Search Payment Requests", "Search Vouchers", "Manage Payment Profile", "Manage My Profile", "Add User", "Manage Users", "Manage Organizations", and "Return Home". Below that is a "Quick Links" section with: "Microsoft Partner Network", "VVR Tool", "SAVB Resources - SATV", and "SAVB Resources - Planning Services".

At the bottom of the page, there are links for "Contact Us", "Terms of Use", "Feedback", "Trademarks", and "Privacy Statement", along with the Microsoft logo.

3. Review the redeemed vouchers in the Create Payment Request – Select Vouchers pane in the lower half of the screen. These results are based on the search criteria used in the prior screen. (To change your search, select Change Criteria to reset your filters.)
4. Select the Invoice By date next to the vouchers to ensure that you prioritize the ones that are closest to the date shown for submission first.

Microsoft Channel Incentives

Contoso Welcome Contoso [Sign Out](#)

My Incentives | Software Assurance Voucher Benefit | Lync and Exchange Deployment Planning Services

### Create Payment Request - Select Vouchers

Change Search Criteria

Expand All | Collapse All

Add All Remove All	Voucher No. /	Type	Invoice By	Amount Due
▶ Add	B85R_1420	Lync and Exchange Deployment Planning Services	1/26/2012	2,998.00 CAD
▶ Add	B85R_1421	Lync and Exchange Deployment Planning Services	1/26/2012	2,998.00 CAD
▶ Add	B85R_1423	Lync and Exchange Deployment Planning Services	1/26/2012	9,995.00 CAD

Voucher Count: 0  
Sub-Total: 0.00 CAD

#### Partner Information

Partner Name: Contoso

Address: Address 1  
Address 2  
Hartford, Connecticut, 98001

Partner Invoice No.:

#### Tax Information

Sub-Total: 0.00 CAD

GST:  % 0.00 CAD

QN-HST:  % 0.00 CAD

Total: 0.00 CAD

#### I Need To...

- Create Payment Request
- Search Payment Requests
- Search Vouchers
- Manage Payment Profile
- Manage My Profile
- Add User
- Manage Users
- Manage Organizations
- Return Home

#### Quick Links

- Microsoft Partner Network
- VVR Tool
- SAVB Resources - SATV
- SAVB Resources - Planning Services

5. To view the Voucher Details of a particular voucher listed in the table, select arrow next to the voucher record, or use Expand All/Collapse All to see all details for all vouchers.
6. Select the vouchers you wish to attach to this payment request. Select Add in the row of each voucher to be included, where you can input the required Microsoft Official Courseware (MOC) information for each voucher. The notation will then change to Remove, which you can select to remove vouchers from your payment request.
7. For each voucher, select the appropriate Courseware Format ("Digital MOC", "Printed MOC", "MOC On-Demand", "MOC On-Demand 180 days", "Exams", or "Microsoft Course Certificate vouchers (LaaS)") from the drop-down menu.
8. Enter the 16-digit License No. (digital MOC), Order No. (printed MOC), or Voucher Code (MOC On-Demand, Exam, and Microsoft Course Certificate vouchers (Laas)) associated with the voucher.

**Helpful tip:** vouchers tied to Custom Courseware and Custom Course Codes are exempt from the MOC requirement. You do not need to select Courseware Format or input License No/Order No. for these vouchers.

9. Confirm the Voucher Sub-Total for the vouchers you have added to the payment request.
10. Input the alpha/numeric invoice number created by your company's financial system in the Partner Invoice No. field provided (required field which allows you and Microsoft to cross-reference your company invoice with its corresponding SAVB payment request number).
11. Input Tax Rate (%) to be added to the payment request, based upon the applicable tax jurisdiction for the locations included in the payment request. SAVB will automatically calculate the tax amount and update the invoice total based upon the tax % you enter.

**Note:** Microsoft does not reimburse tax to partners in all jurisdictions. If tax is reimbursable in a partner's jurisdiction, it is the partner's responsibility to enter the correct tax for the locations covered by the payment request.

12. Attach Documentation: depending on the country associated with your payment request, SAVB may prompt you to submit your company's invoice as supplemental proof of your valid payment

request. Note: information on your own company invoice (softcopy or hardcopy) must exactly match the information in the online payment request—including Partner Invoice Number and Total—to avoid payment delays.

13. Select Submit. Selecting Save for Later allows you to find the saved payment request by selecting Search Payment Requests on your home page.

The screenshot shows a payment request form with the following sections:

- Voucher Table:**

	Voucher No. /	Type	Invoice By	Amount Due
Remove	B85R_1420	Lync and Exchange Deployment Planning Services	1/26/2012	2,998.00 CAD
Add	B85R_1421	Lync and Exchange Deployment Planning Services	1/26/2012	2,998.00 CAD
Add	B85R_1423	Lync and Exchange Deployment Planning Services	1/26/2012	9,995.00 CAD
- Voucher Summary:**

Voucher Count: 1  
Sub-Total: 2,998.00 CAD
- Partner Information:**

Partner Name: Contoso  
Address: Address 1  
Address 2  
Hartford, Connecticut, 98001  
Partner Invoice No.: 12345
- Tax Information:**

Sub-Total: 2,998.00 CAD  
GST: 5 % 149.90 CAD  
QST: 5 % 149.90 CAD  
Total: 3,297.80 CAD
- Buttons:** Submit, Save for Later, Cancel

14. The Payment Request Confirmation screen shows the unique Microsoft Reference Number assigned by SAVB to your submitted or saved payment request. Reference this number if you require help from your Regional Service Center (RSC).

Important note for Partner companies transacting in Russia and/or Ukraine:

[Click here for more details](#)

The screenshot shows the Microsoft Channel Incentives Payment Request Confirmation screen for Contoso. The main message reads: "Thank you! Your payment request has been successfully submitted. Your payment request number is 57930. If you have any questions about your submission, contact us." The number 57930 is highlighted with a red box. The page includes navigation links for "View your Payment Requests" and "Go Back to Home". On the right, there are sections for "I Need To..." and "Quick Links". The footer contains "Contact Us | Terms of Use | Feedback | Trademarks | Privacy Statement" and the Microsoft logo.

## Get paid

Once your payment request is successfully submitted, Microsoft will initiate payment according to the terms you established while setting up the payment profile for the location ID.

Important note for partner companies transacting in Russia and/or Ukraine:

- After your first payment request is submitted in SAVB, you will receive a Framework Agreement (FA) intake form from [erebates@microsoft.com](mailto:erebates@microsoft.com) to complete and submit.
- For each payment request, you will receive a mailed Act of Acceptance (AoA) document to retrieve funds from your bank. Should you note any discrepancies or issues with the AoA, you should escalate to [savoucher@msdirectservices.com](mailto:savoucher@msdirectservices.com).
- Note that Partners in Russia are now paid in local currency (RUB), while Partners in Ukraine are paid in USD.