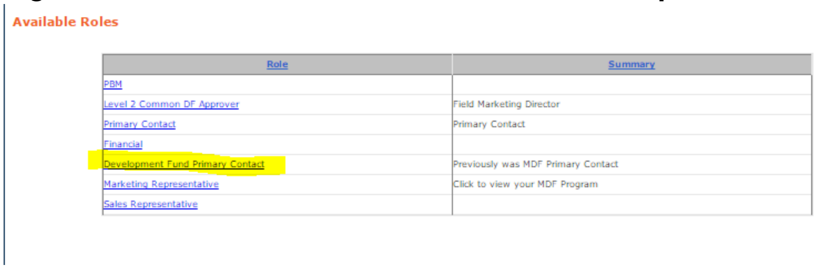
A VMware Guide for Concierge DF Submission

Instructions for Creating a Proposal Plan & Activity (PA) utilizing Partner Development Funds

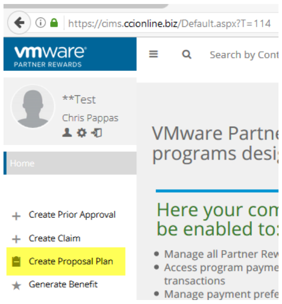
CREATE PROPOSAL PLAN

1. **Log in as Partner with a role that can create Proposal Plans**

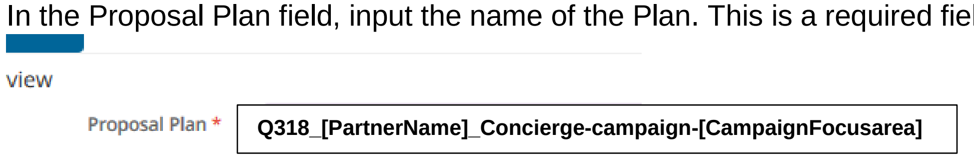

Available Roles

Role	Summary
PBM	
Level 2 Common DF Approver	Field Marketing Director
Primary Contact	Primary Contact
Financial	
Development Fund Primary Contact	Previously was MDF Primary Contact
Marketing Representative	Click to view your MDF Program
Sales Representative	

2. **Start creation of a new Proposal Plan by clicking 'Create Proposal Plan' link:**



3. **Complete Steps 1 through 6 of the Proposal Plan**
   a. **Step 1 – Overview**
      i. In the Proposal Plan field, input the name of the Plan. This is a required field.

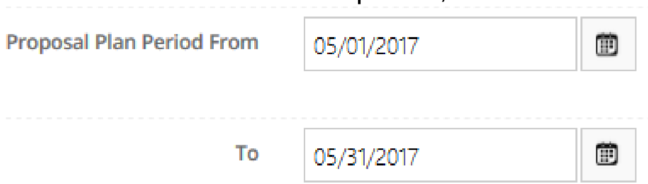


      ii. In the Program field (if selectable), choose the Program. This is a required field.

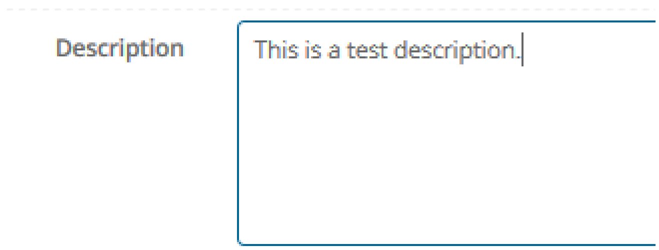
      iii. In the Focus, drop-down box, select the applicable Focus Area. The Focus Area drives which Approval Flow and which funds are available funds on the PA form. This is a required field.
         1. For Concierge Program, select the 'Focus' from the drop down menu that corresponds with campaign objective:

Concierge Campaign Objective	Choose 'Focus'
vSOM	vSphere with Operations Management
vSAN	Storage & Availability
NSX	Network & Security
Modernize Data Center – select vRealize Automation, NSX, and/or vRealize Ops	Management
Empower Digital Workspace – select Workspace One, AirWatch, and/or Horizon	Enterprise Desktop
Transform Security – select NSX, vSphere, Horizon, Cross-Cloud Services, AirWatch, and/or Workspace One	Network & Security

iv. Select the Proposal Plan Start and End Dates by clicking on the Calendar icons or inputting the dates. Select 1 week out from the date you submit this Proposal and the end of the VMware 3rd quarter, 1/2/18.



v. In the Description box, enter a brief description of the Proposal Plan provided by the Concierge team.



vi. Click the Next button to advance to Step 2. (Please note that at this point, the Proposal Plan is saved in Pending Submission status and available to view on the Proposal Plan list).

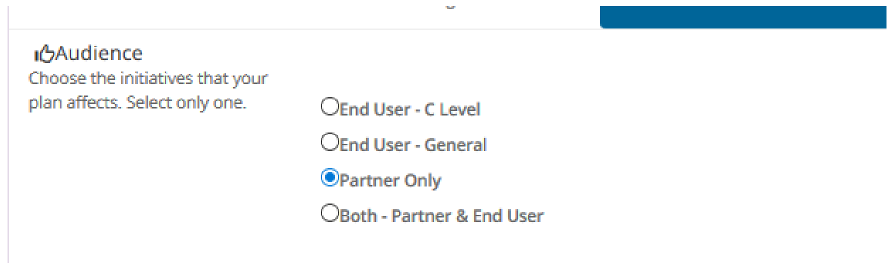
b. Step 2 – Segment

i. Input the Segment values. This is required and the total amount distributed must equal 100%

ii. Click Next button to advance to Step 3

c. Step 3 – Audience

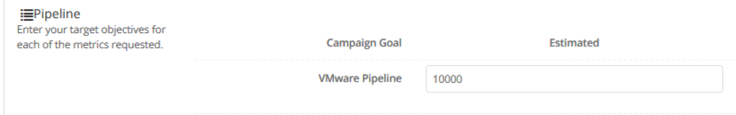
i. Select the radio button for the Audience



ii. Click the Next button to advance to Step 4

d. Step 4 – Pipeline

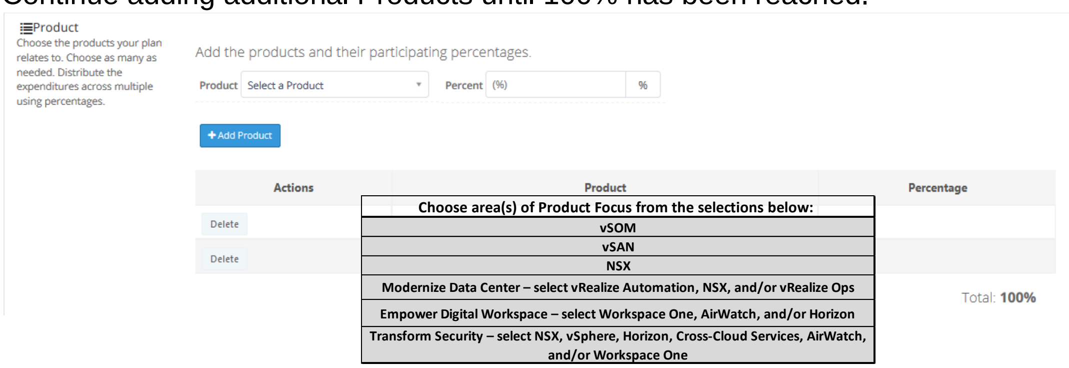
i. In the VMware Pipeline field, enter the estimated VMware Pipeline amount based on your list size (Contact the Concierge for assistance if needed)



ii. Click the Next button to advance to Step 5

e. Step 5 – Product

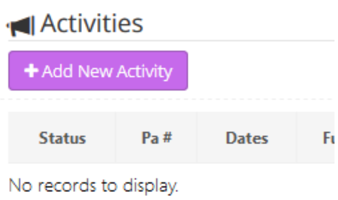
i. In the Product, drop-down box, select the Product related to the Concierge Campaign objective
ii. In the Percent field, enter the percentage that the Product is related to the plan
iii. Click the Add Product button
iv. Continue adding additional Products until 100% has been reached.



v. Click the Next button to advance to Step 6

f. Step 6 – Activities

i. If ready to add an Activity (Prior Approval), click the Add New Activity button. (Details on how to create a Prior Approval using the wizard will be in the next section)

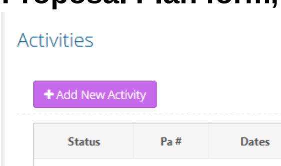


ii. Click the Save Draft button to save the current Plan in Pending Submission status. This allows the Partner to make changes to the Proposal Plan, add Activities, etc.

iii. Click the Save and Submit button to send the Proposal Plan to a VMware approver for review. This only is allowed if the Plan has at least one Activity.

CREATE ACTIVITY (PRIOR APPROVAL)

1. **Either while in Step 6 – Activities of creating a Proposal Plan, or while viewing the saved Proposal Plan form, click the Add New Activity Button**

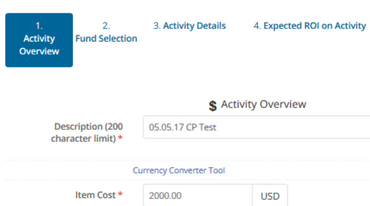


2. **Complete Step 1 through 6 of the Prior Approval Wizard**

a. Step 1 – Activity Overview

i. In the Description field, enter a brief description of the Activity provided by Concierge on the Scope of Work (SOW). This is a required field.

ii. In the Item Cost field, enter the total Activity Cost found on your Concierge campaign SOW in USD. This is a required field.



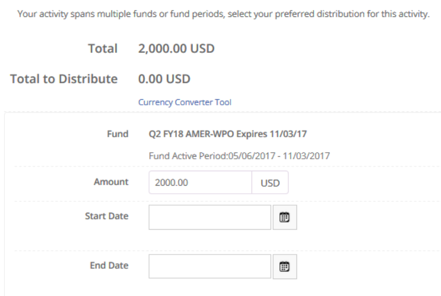
iii. Click the Next button to advance to Step 2

b. Step 2 – Fund Selection

NOTE: THE FUNDS DISPLAYED CORRESPOND TO THE FOCUS AREA CHOSEN DURING CREATION OF THE CAMPAIGN. THE FOCUS AREA AND FUND GROUP DRIVE VISIBILITY TO THE FUND(S).

i. Below the Fund, enter the total Amount to distribute to that fund. This is a required field if selecting the fund.

Select the Activity Start and End dates by clicking on the Calendar icon. These dates can only fall within the selected Proposal Plan dates and Fund life dates. This is a required field if selecting the fund.


Your activity spans multiple funds or fund periods, select your preferred distribution for this activity.

Total 2,000.00 USD

Total to Distribute 0.00 USD

Currency Converter Tool

Fund Q2 FY18 AMER-WPO Expires 11/03/17

Fund Active Period:05/06/2017 - 11/03/2017

Amount 2000.00 USD

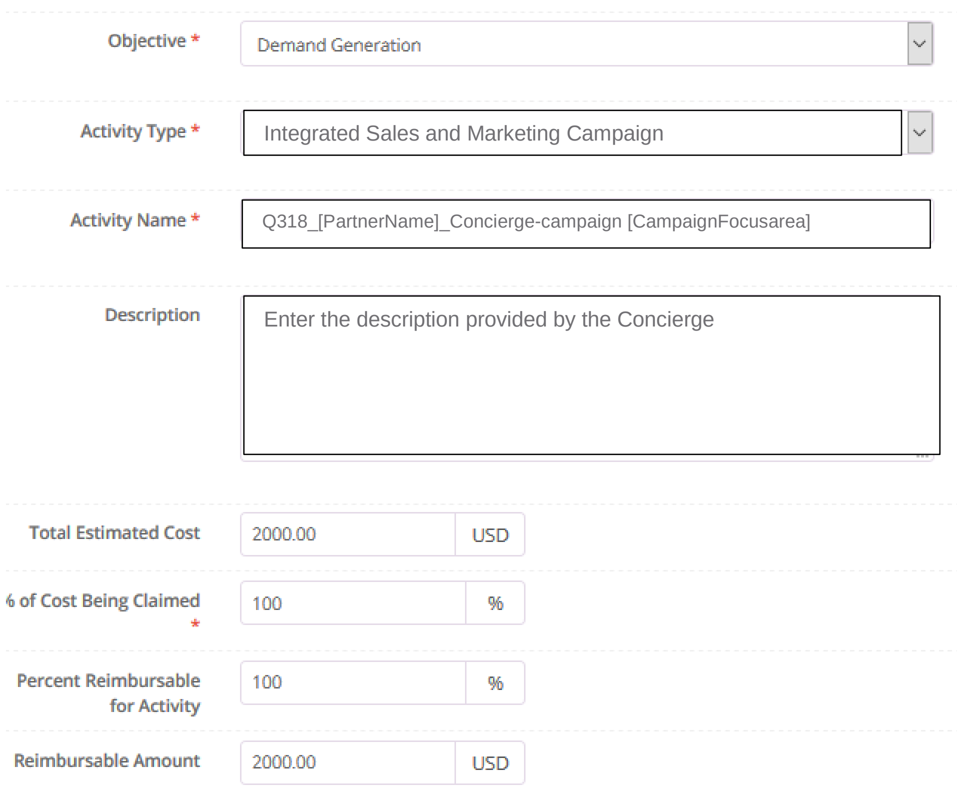
Start Date

End Date

ii. Click Next button to advance to Step 3

c. Step 3 – Activity Details

i. In the Objective, drop-down box, select the Objective. This is a required field.
ii. In the Activity Type, drop-down box, select the Activity Type. This is a required field.
iii. The Activity Name field will auto-populate based off the Proposal Plan name and Activity Type chosen, but the field may be edited. This is a required field.
iv. The Description field will auto-populate based off the Description added in Step 1. This field may be edited.
v. The % of Cost Being Claimed will auto-populated at 100%, but may be edited. This is a required field.


Objective * Demand Generation

Activity Type * Integrated Sales and Marketing Campaign

Activity Name * Q318_[PartnerName]_Concierge-campaign [CampaignFocusarea]

Description Enter the description provided by the Concierge

Total Estimated Cost 2000.00 USD

% of Cost Being Claimed * 100 %

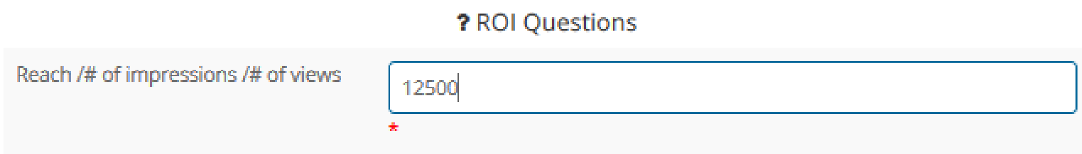
Percent Reimbursable for Activity 100 %

Reimbursable Amount 2000.00 USD

vi. Click the Next button to advance to Step 4.

d. Step 4 – Expected ROI on Activity

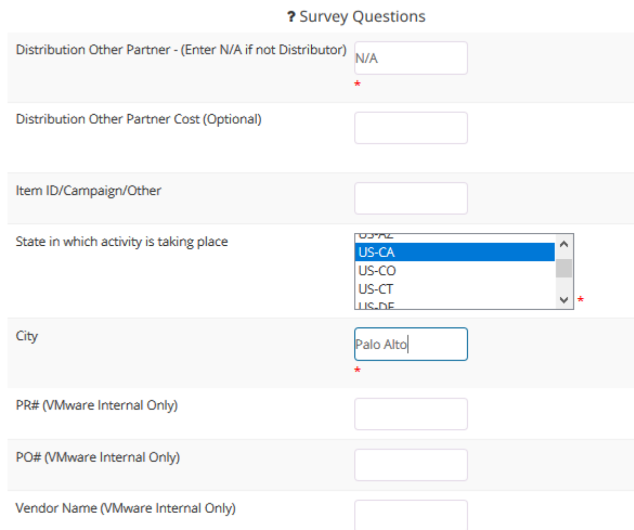
Complete any ROI question fields. These are based on the Activity Type chosen in Step 3 and are required fields.



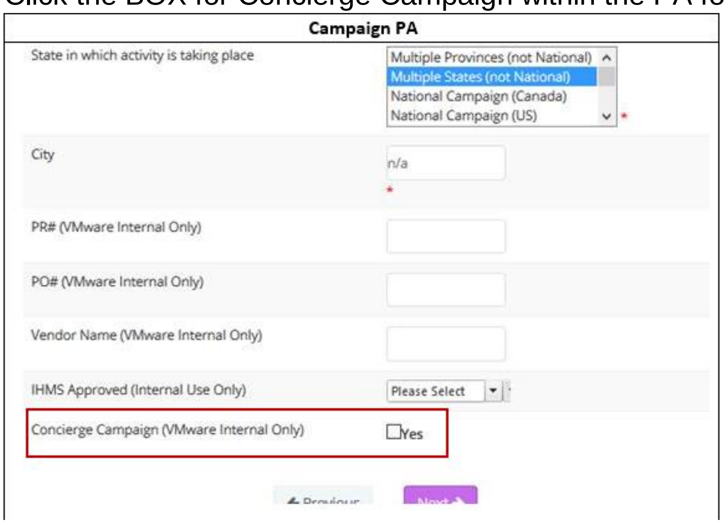
i. Click the Next button to advance to Step 5.

e. Step 5 – Survey Questions

i. Complete the Survey question fields. Some fields may be marked as required.



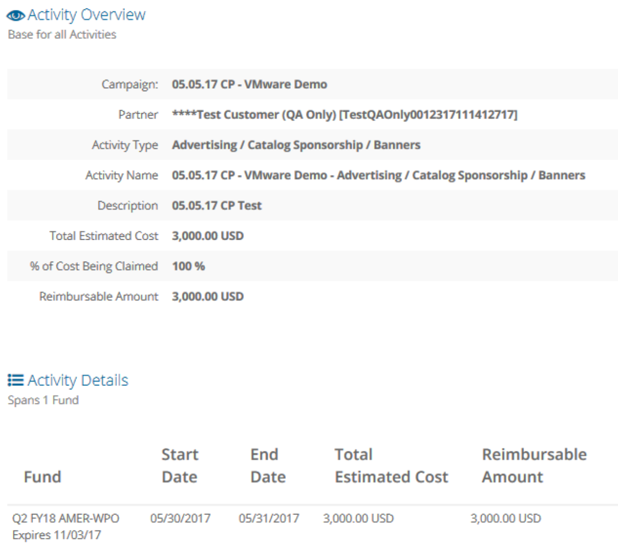
ii. Click the BOX for Concierge Campaign within the PA form



iii. Click the Next button to advance to Step 6.

f. Step 6 – Review

i. Review the details of the Activity



Activity Overview
Base for all Activities

Campaign:	05.05.17 CP - VMware Demo
Partner	****Test Customer (QA Only) [TestQAOnly0012317111412717]
Activity Type	Advertising / Catalog Sponsorship / Banners
Activity Name	05.05.17 CP - VMware Demo - Advertising / Catalog Sponsorship / Banners
Description	05.05.17 CP Test
Total Estimated Cost	3,000.00 USD
% of Cost Being Claimed	100 %
Reimbursable Amount	3,000.00 USD

Activity Details
Spans 1 Fund

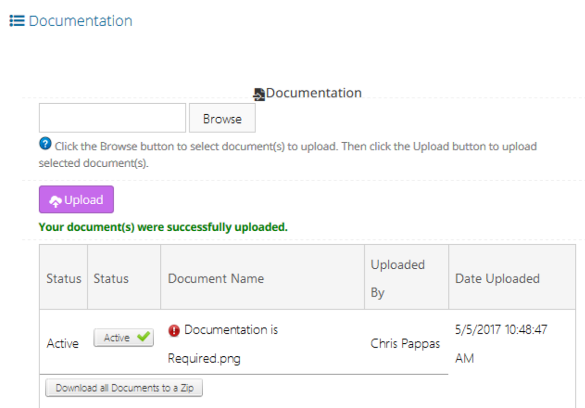
Fund	Start Date	End Date	Total Estimated Cost	Reimbursable Amount
Q2 FY18 AMER-WPO Expires 11/03/17	05/30/2017	05/31/2017	3,000.00 USD	3,000.00 USD

ii. If changes are required, click the Back button to return to previous Steps

iii. If adding documentation to the Prior Approval

1. Click the Browse button and select the file

   Click Upload button



Documentation

Documentation

Browse

Click the Browse button to select document(s) to upload. Then click the Upload button to upload selected document(s).

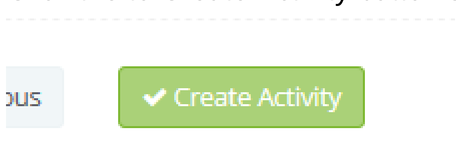
Upload

Your document(s) were successfully uploaded.

Status	Status	Document Name	Uploaded By	Date Uploaded
Active	Active	Documentation is Required.png	Chris Pappas	5/5/2017 10:48:47 AM

Download all Documents to a Zip

Click the to Create Activity button save the Activity



Once all Activities have been created and are ready for VMware review, click the Save & Submit button