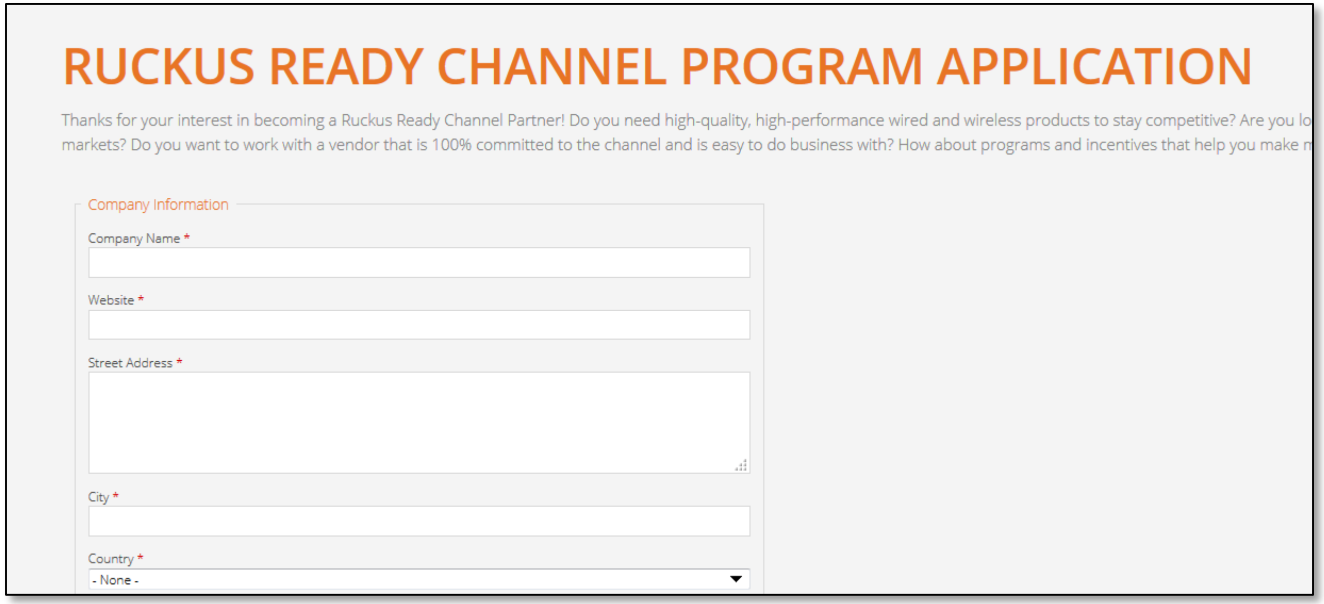
Ruckus Incentive Center MDF Training Guide

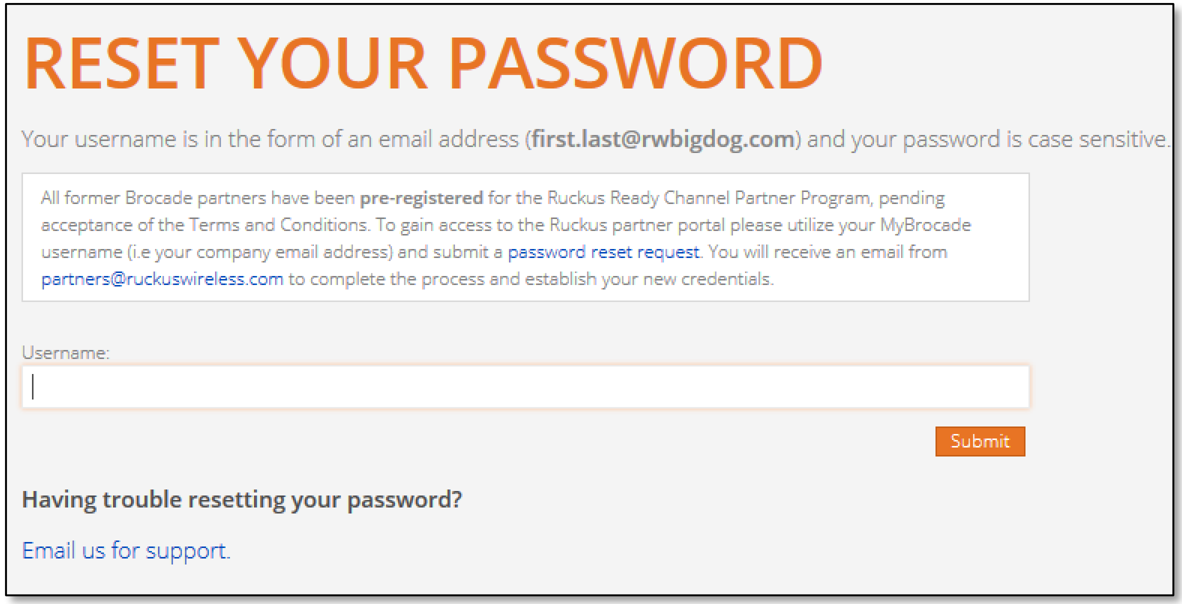
What’s included in this guide?

- How to apply to be a Ruckus Ready Partner
- How to access the Ruckus Partner Portal
- How to access the Ruckus Incentive Center and locate MDF section
- How to submit a Prior Approval (“PA”) request
- How to edit, clone, or cancel a PA request
- How to submit a claim, including Proof of Performance (“PoP”)
- How to sort, filter, and export data from reports
- Your resources if you need assistance

Are you a new Partner or an existing Partner?

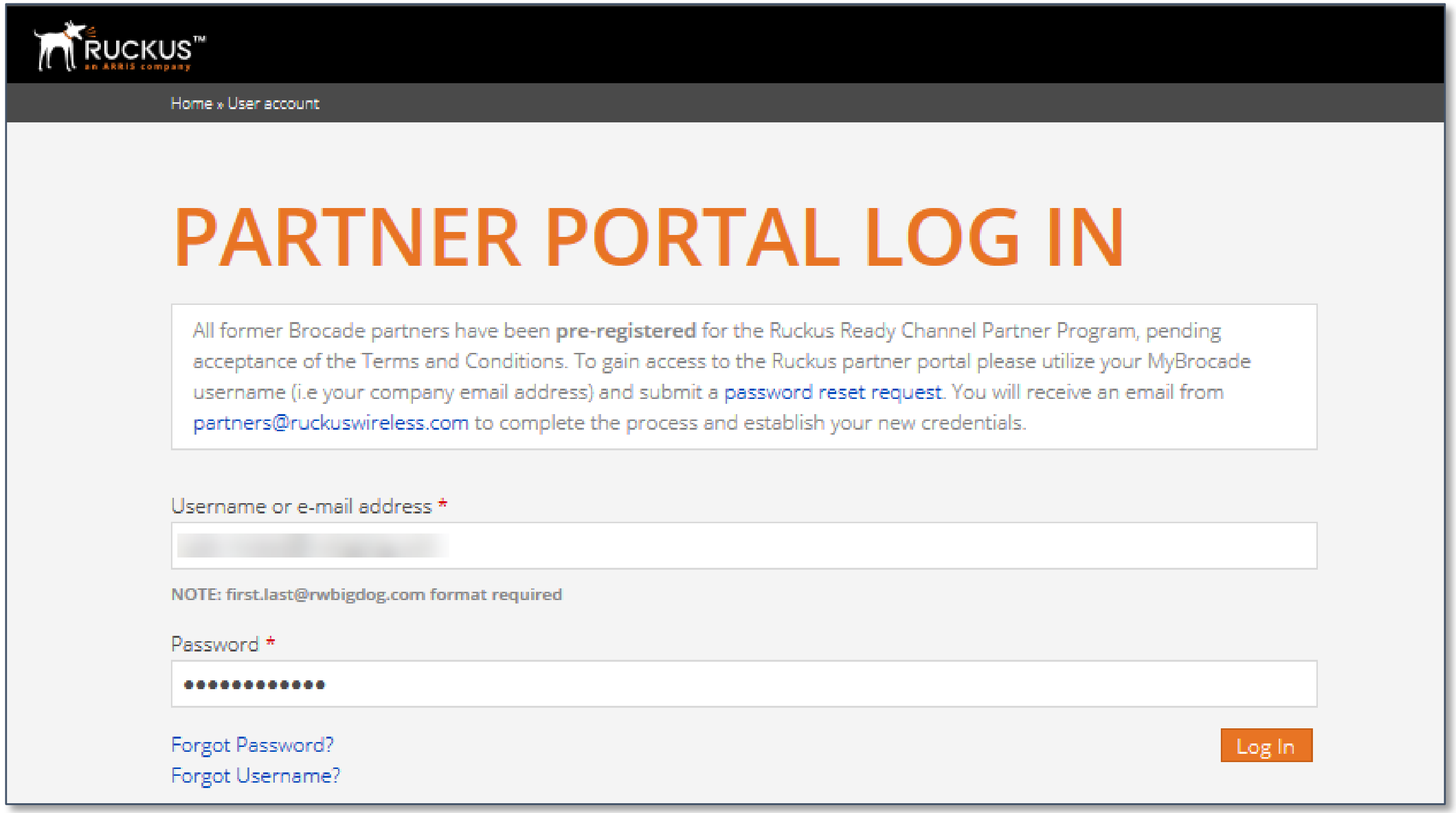
- If you are a new Partner and want to become part of the Ruckus Ready Partner Program, please complete a [Ruckus Ready Channel Program Application]
- If you were a former Brocade Partner and this is the first time you have accessed the Ruckus Partner Portal, you will need to reset your password
  - Go here to reset your password: https://partners.ruckuswireless.com/forgot-password





How to Access Ruckus Incentive Center

- Go to the Partner Portal login page: https://partners.ruckuswireless.com/user/login
- Enter username and password
- Click “Log In”

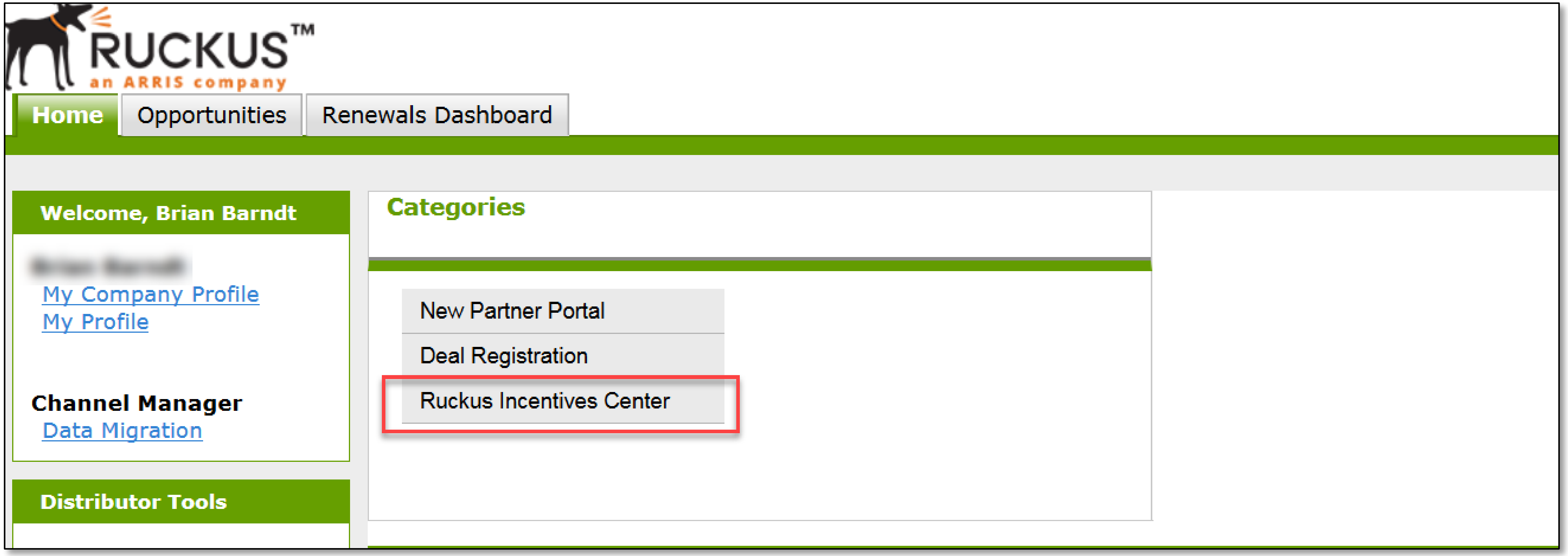


How to Access Ruckus Incentive Center

- From the Partner Portal Home page, click on the green Partner Central tab

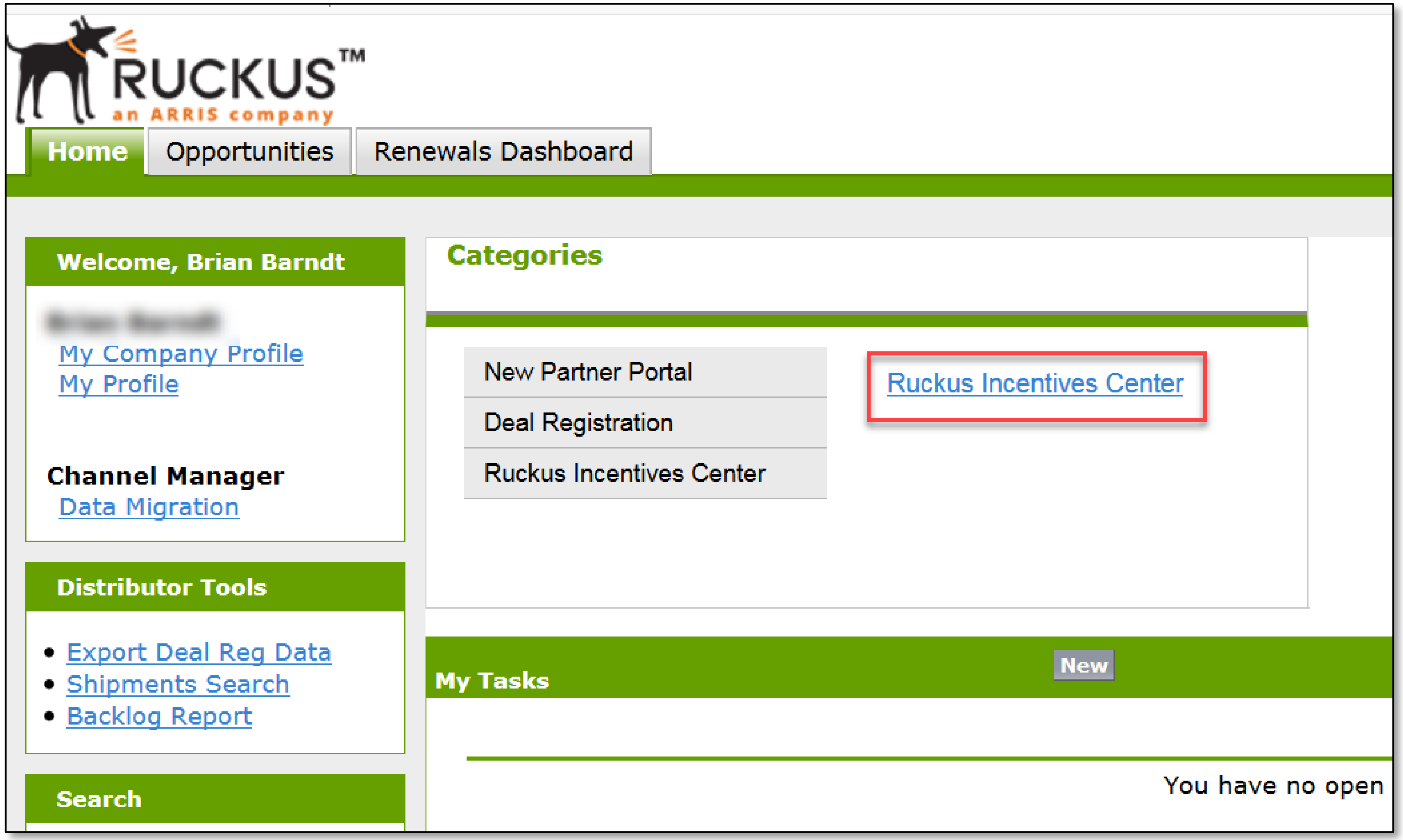
How to Access Ruckus Incentive Center

- Once inside Partner Central, look for the “Ruckus Incentive Center” tab; click the tab



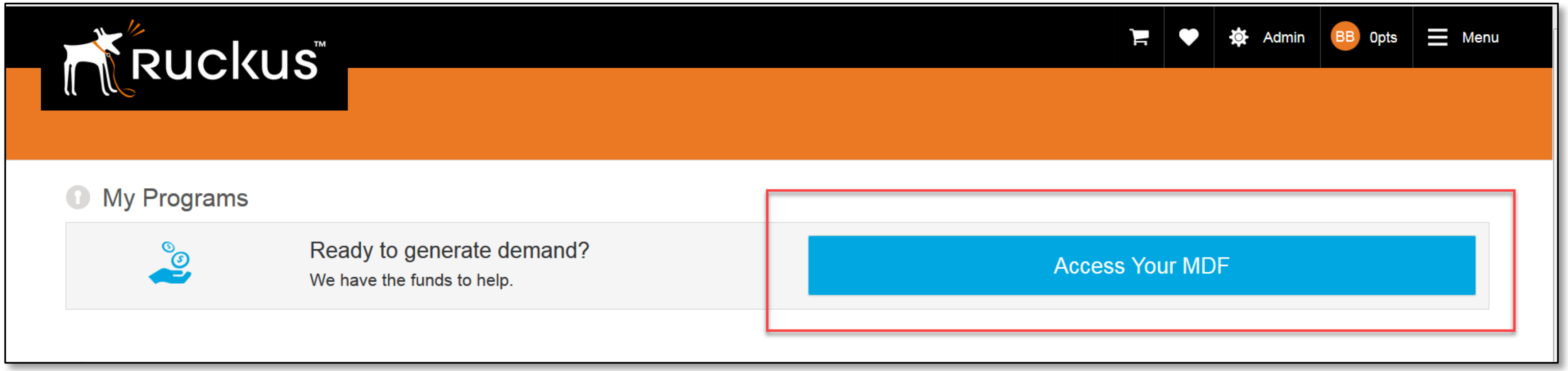
How to Access Ruckus Incentive Center

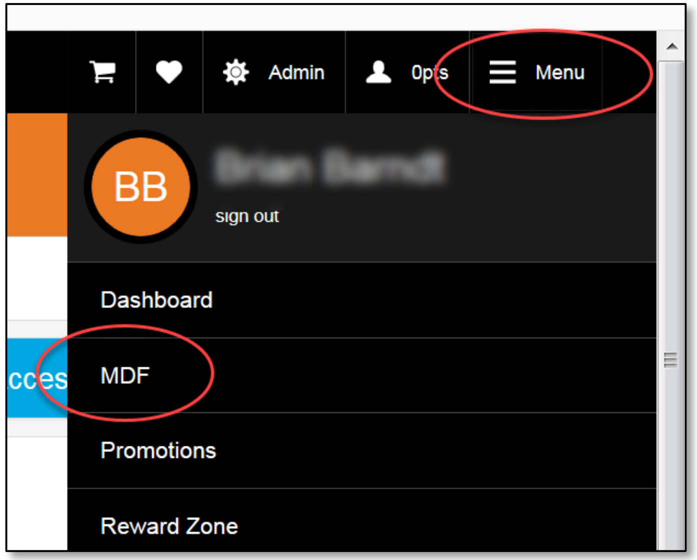
- Click on the "Ruckus Incentive Center" link and you will be redirected to the Ruckus Incentive Center



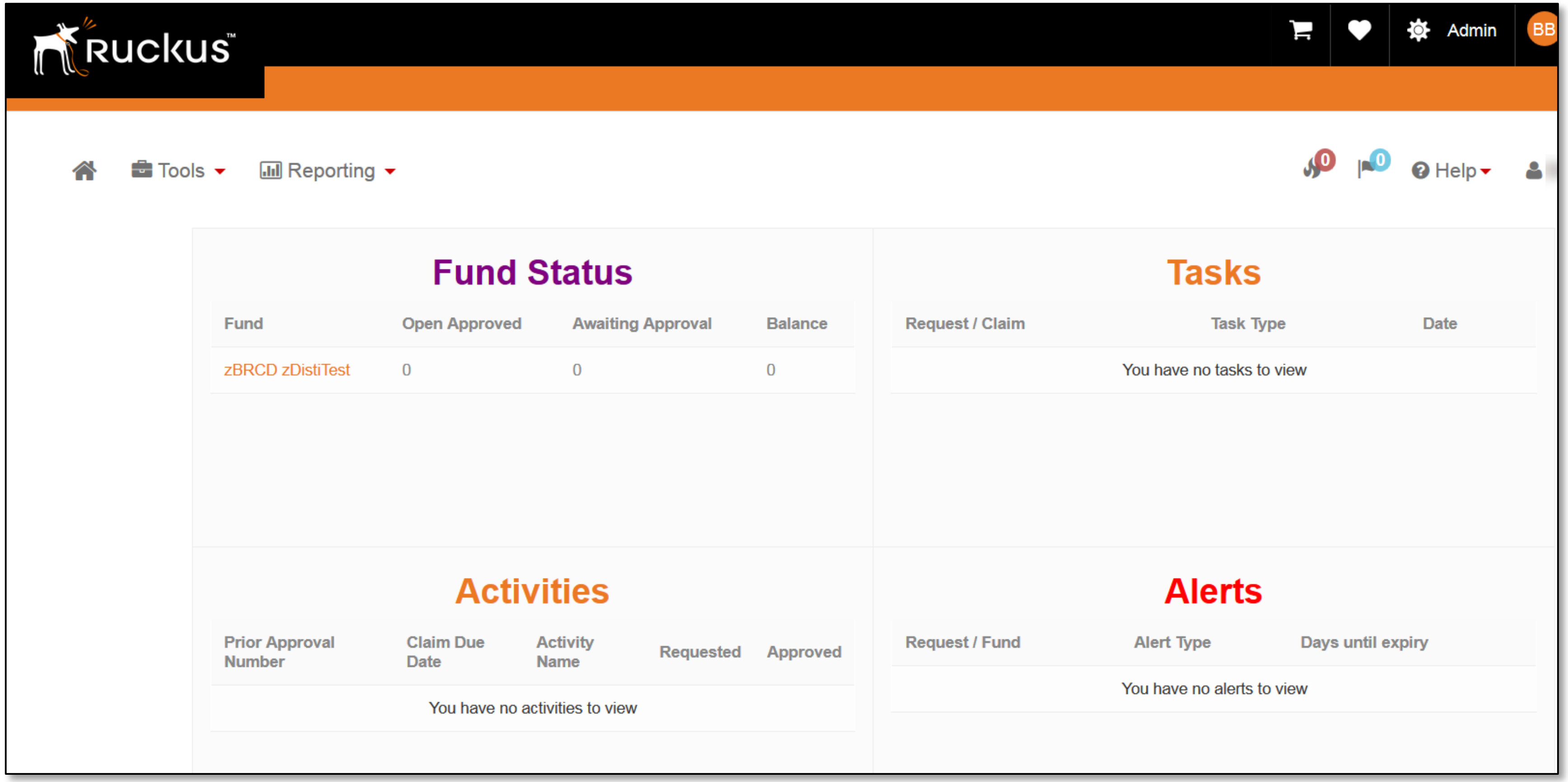
How to locate MDF in the Ruckus Incentive Center

- Once inside the Ruckus Incentive Center, click “Access Your MDF”
  - You can also access MDF via the Menu option



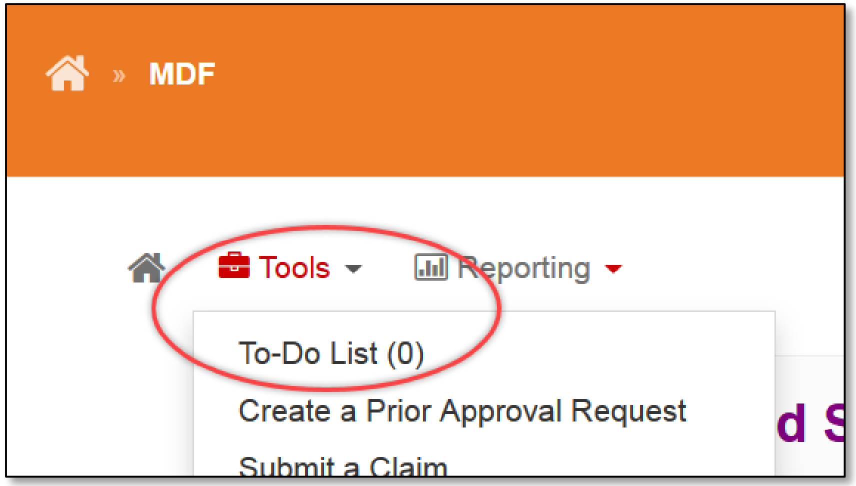


MDF Home Page Dashboard



- Information displayed is for your entire Partner organization not one specific user
- Fund Status – Summary of PAs for your organization
- Tasks – A Partner’s “To-Do” list with the most urgent actions at the top
- Activities – A list of your organization’s activities displayed in the order of claim due date
- Alerts – Funds due to expire

Managing the To Do List

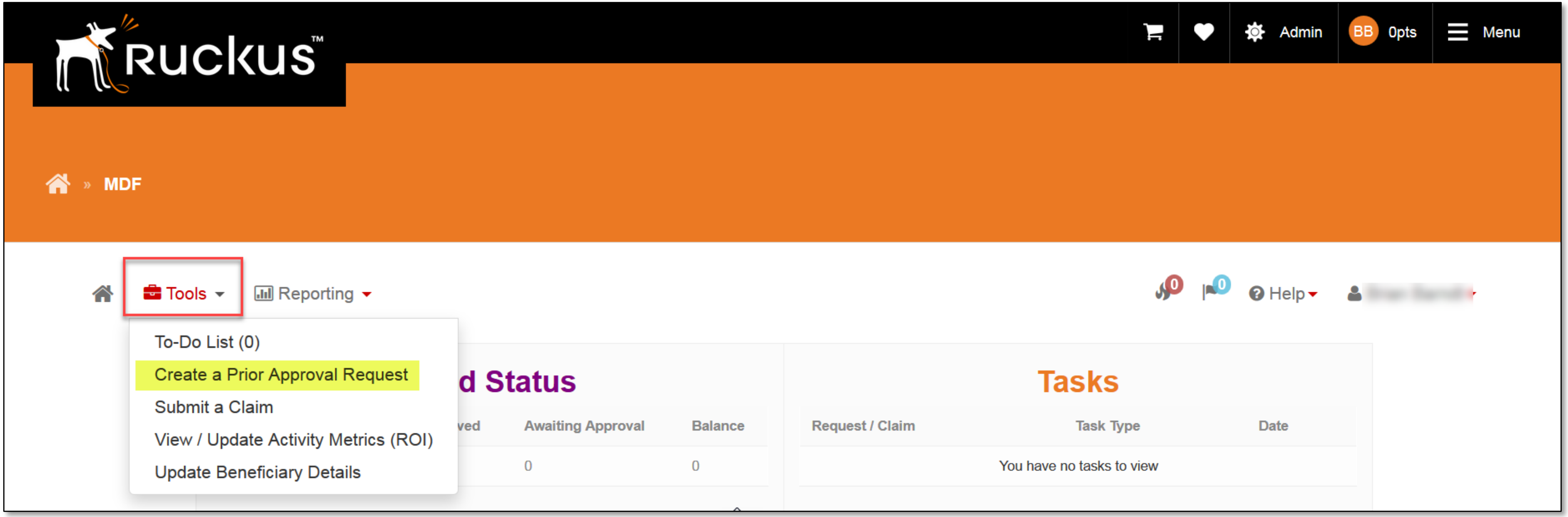


- Items that need your attention can be located two ways from the MDF Home Page
  1. Using the Tools drop down menu (top left), click on To-Do List. The list of items will be displayed. Select the one you wish to action and click on the link. You will be taken directly to the activity/claim.
  2. Using the icons located at the top right of the page.
     - Standard items are displayed on the flag in blue
     - Urgent items are displayed on the fire in red

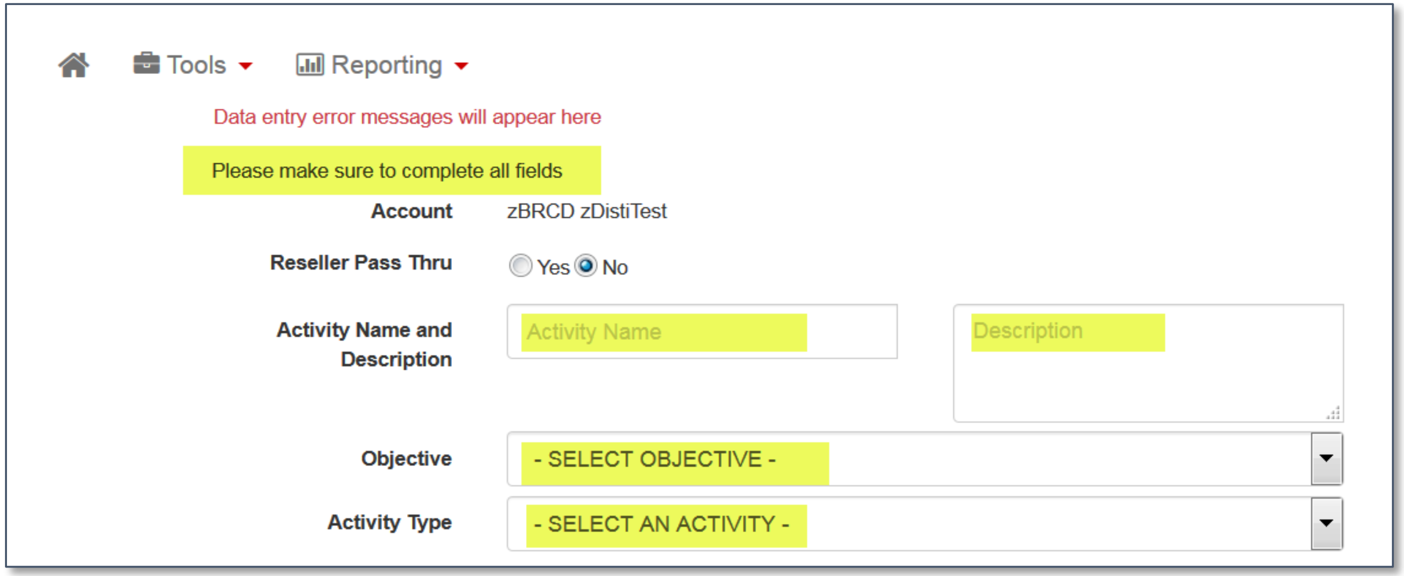
How to create a Prior Approval Request

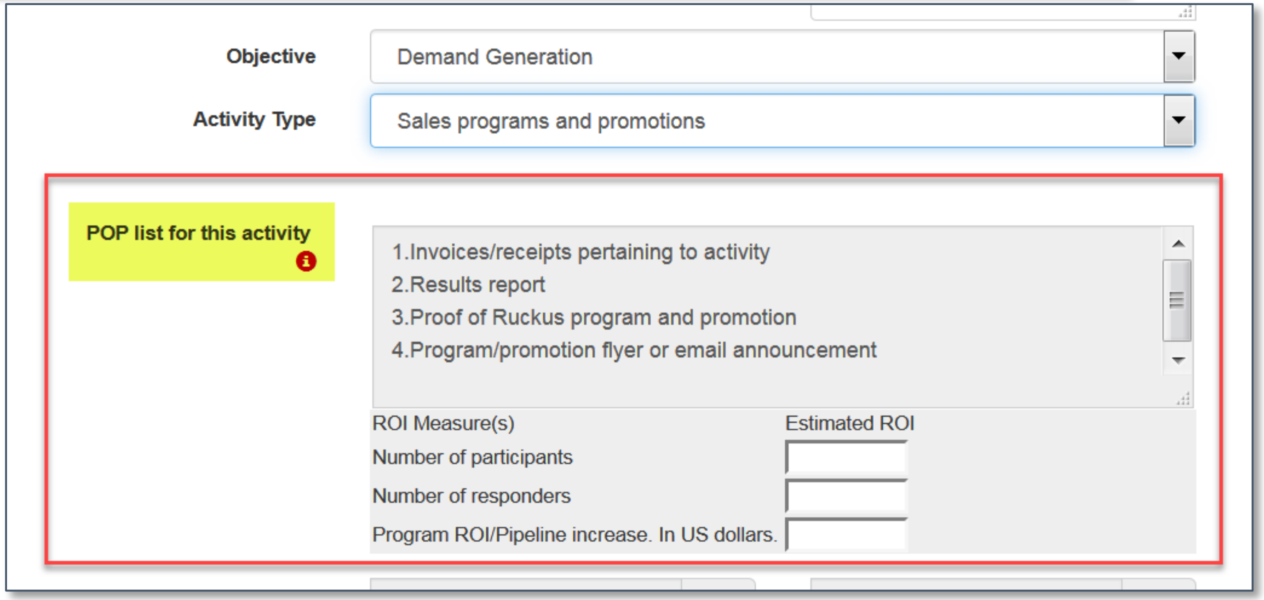
How to create a Prior Approval Request

- On the left side of the page, click "Tools"; then select "Create a Prior Approval Request"



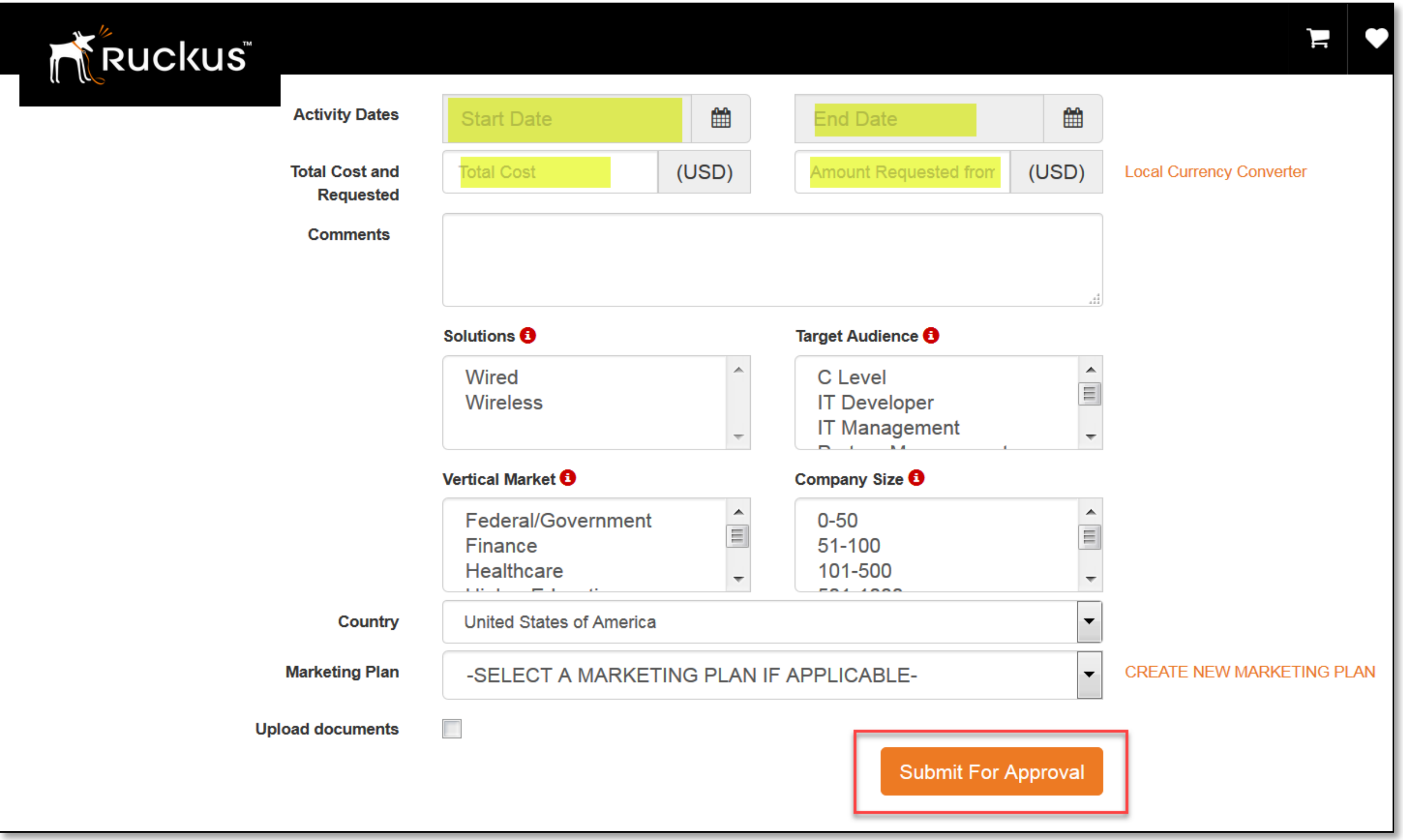
How to create a Prior Approval Request





- Complete all fields on the PA request form
- Once you select an Activity Type, the required PoP requirements and ROI measurements will be displayed for your activity
  - PoP requirements assist in selecting the correct activity type
  - PoP and ROI lists refresh if activity type is changed
  - Enter estimated ROI
  - Actual ROI to date entered when claim submitted
- All PoP items are required to submit a claim for your activity

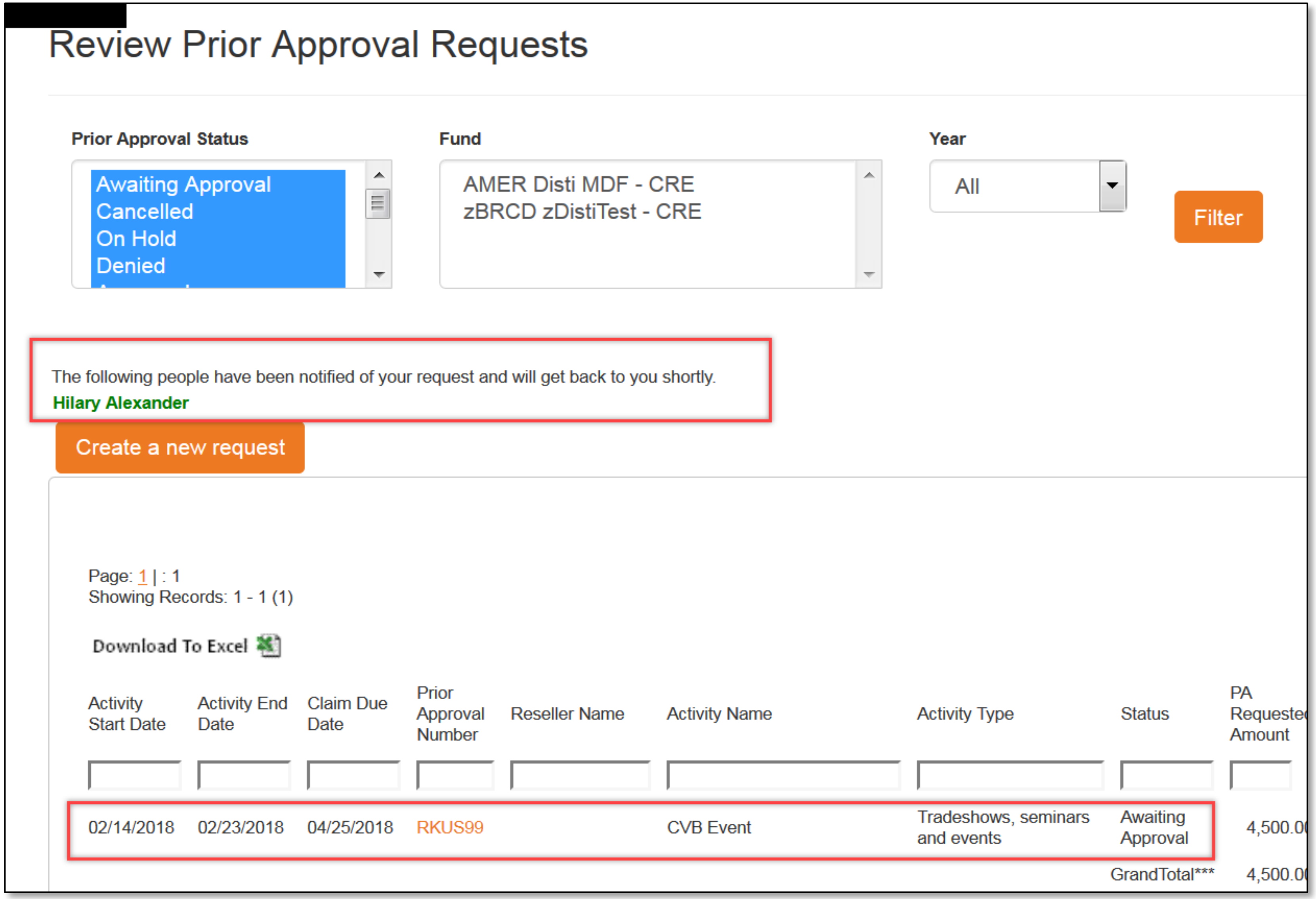
How to create a Prior Approval Request



- Enter Activity Start / End Date
  - Activity entry date must be at least **7 calendar days** prior to the start of your activity
  - Activity becomes "Claimable" **one day after** your activity end date
  - Activity is claimable for **60 days**
- Complete Solutions, Target Audience, Vertical Market, and Company Size
- Verify the Country is correct
- Select a Marketing Plan if applicable
- Click "Submit for Approval"

Submit for Approval

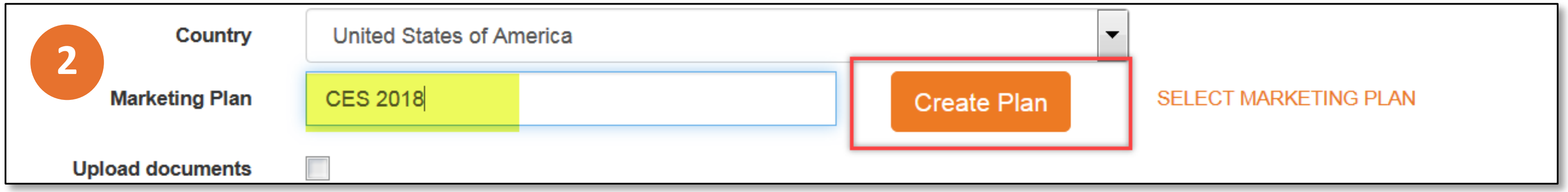
- Name of the first approver appears in an informational message
- New request appears at the top of the list in Review PA Requests after submission



Partner Marketing Plans

1

2



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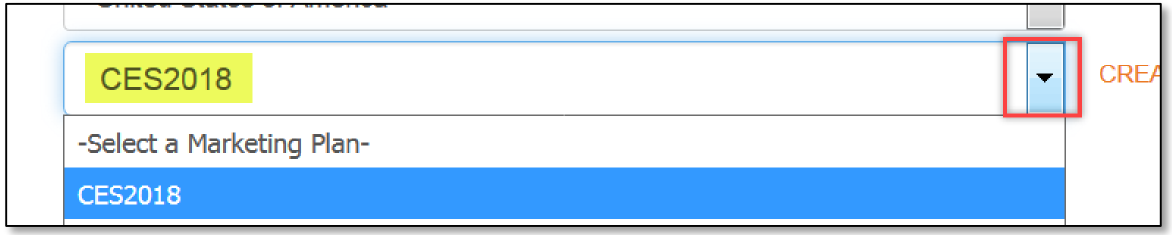
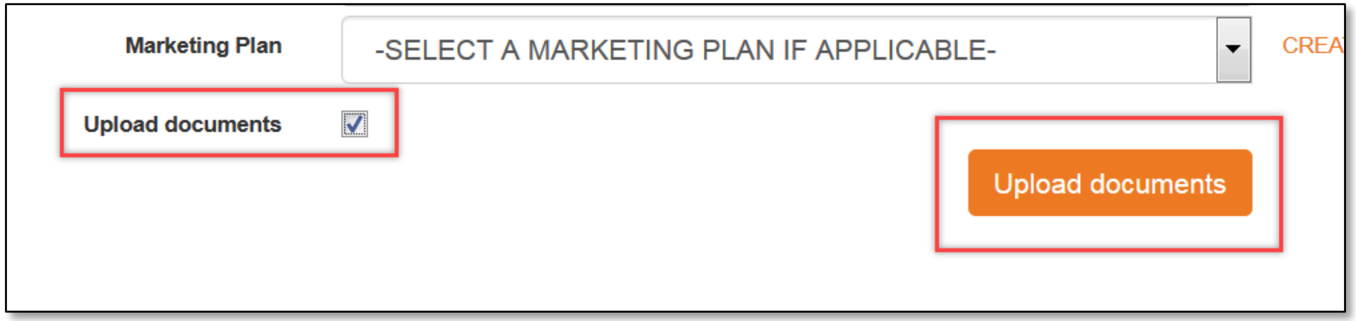
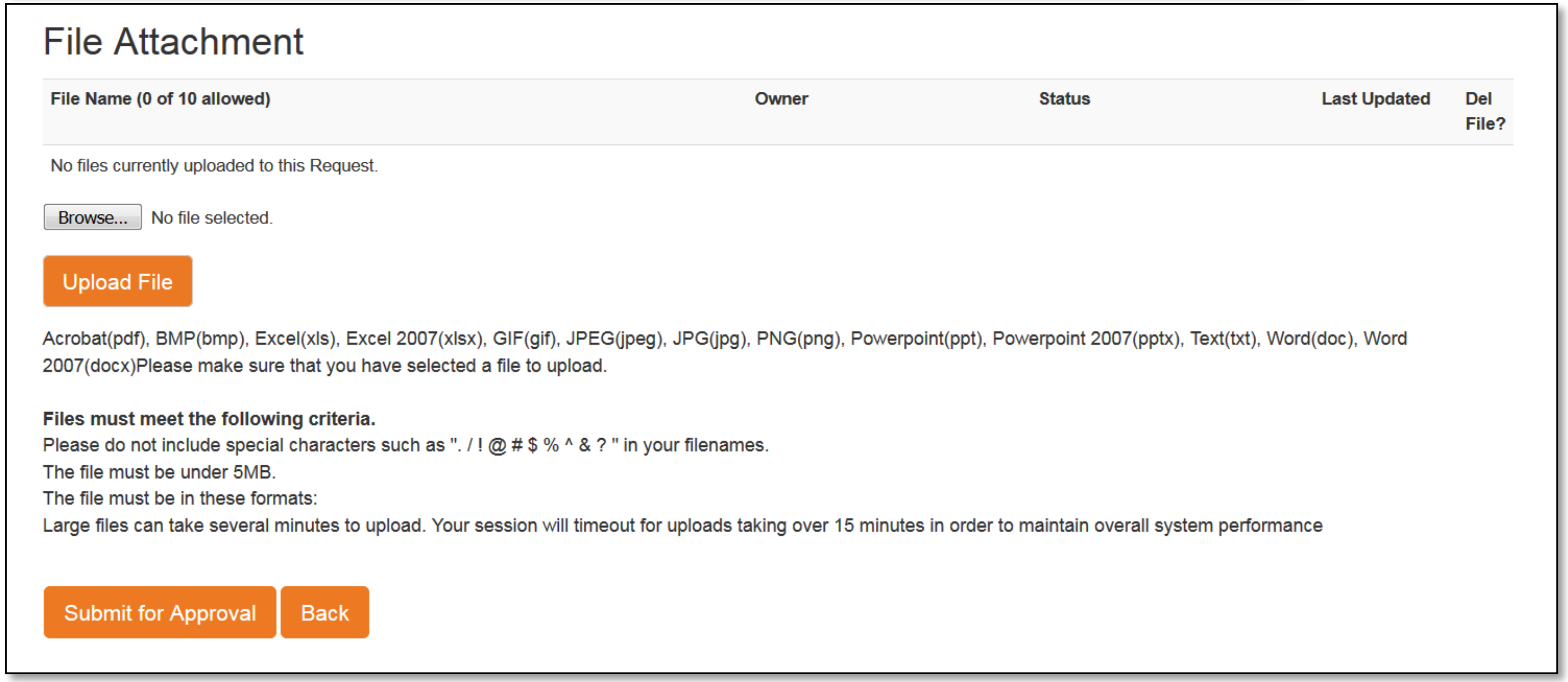


- Partners can group multiple requests under a marketing plan name (of their choice)
- Partner can select an existing marketing plan or create a new one
- Partner can only select from marketing plans they have created, not from those created by other Partners

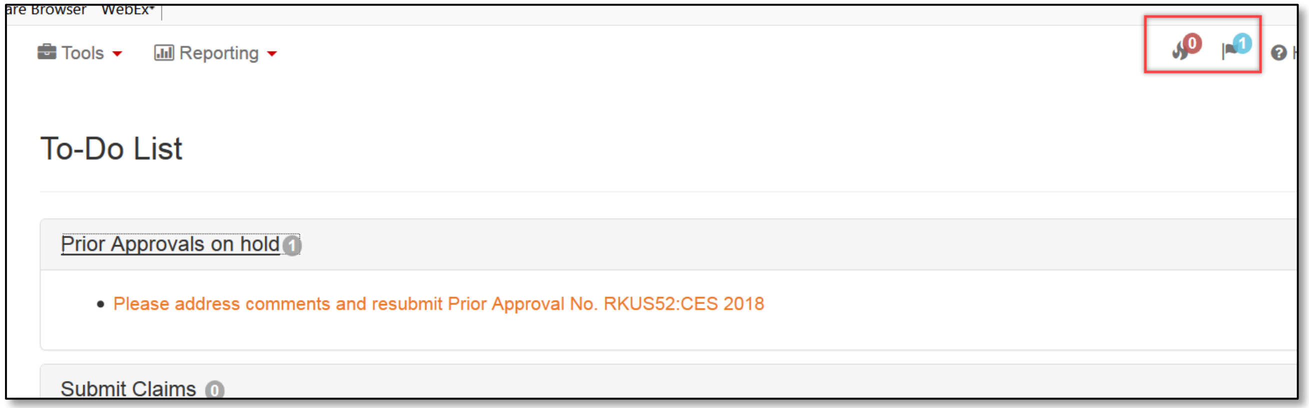
Upload Supporting Documents

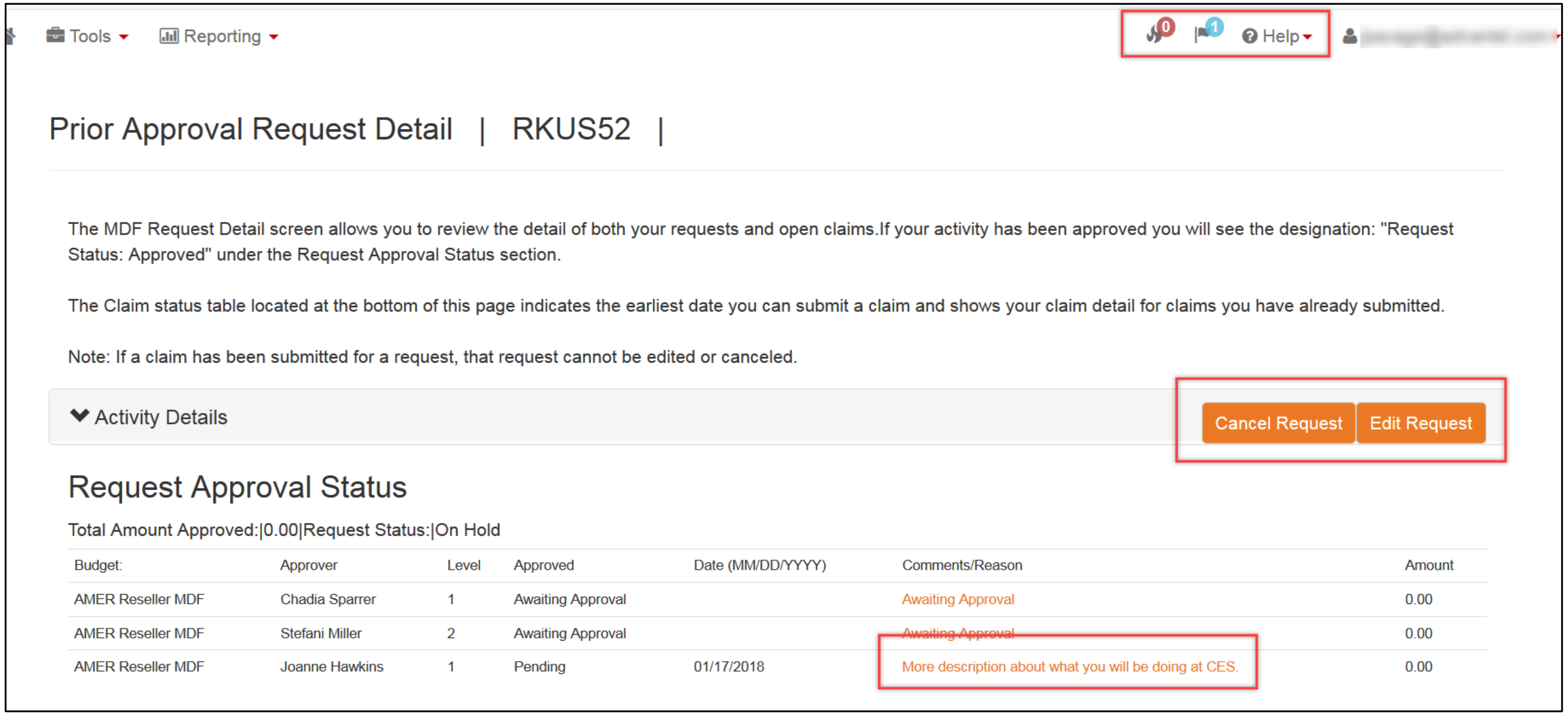




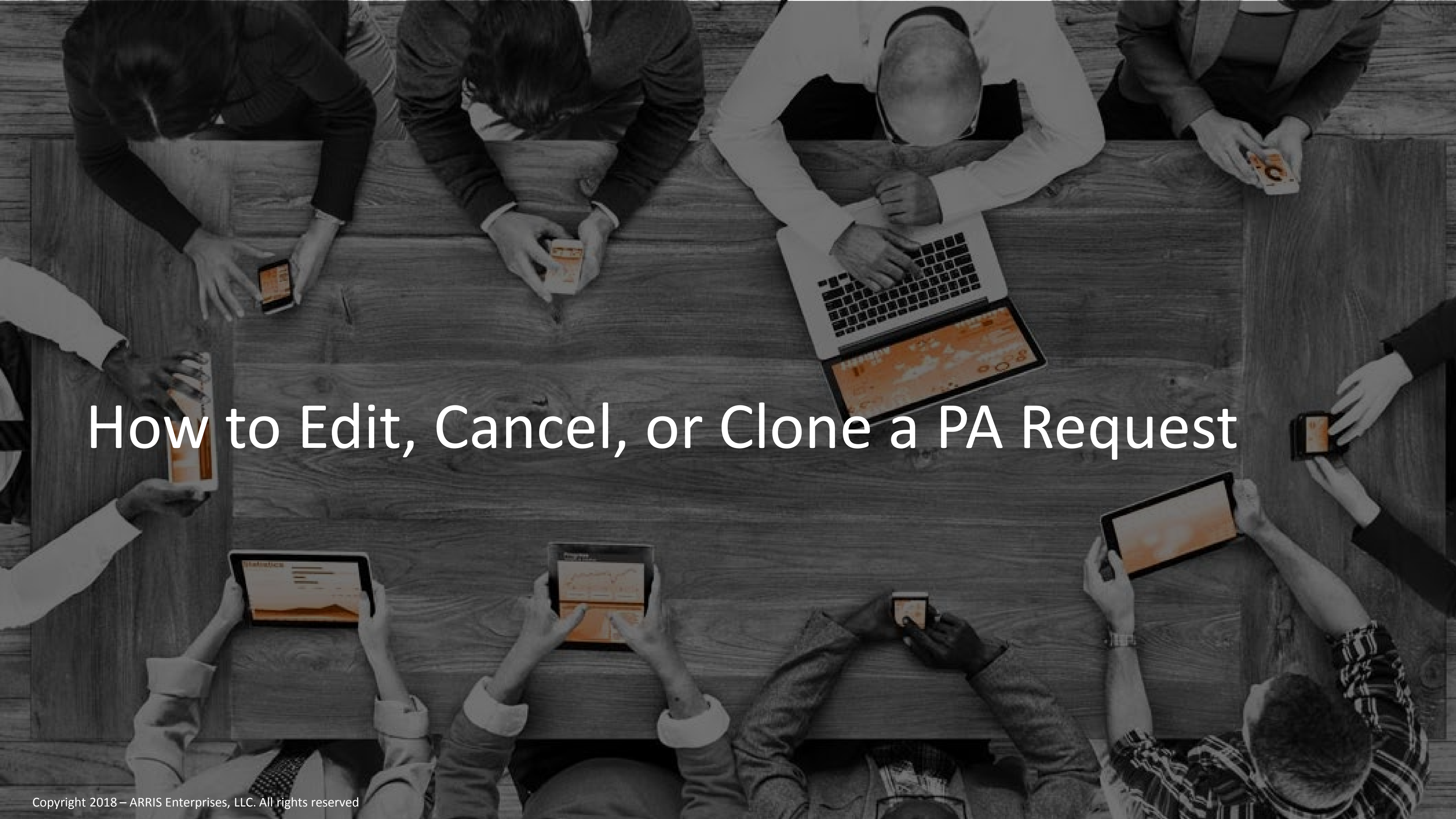
- Select the box at the bottom of the request, then click "Upload Documents"
- Page is presented to upload documents then submit for approval
- Instructions are provided regarding the type and size of the file, and file name
- Supporting documents are available for reference during the request and approval process. They are NOT part of PoP for the claim.

Modify a PA Request that is put “On Hold”





- If your PA request is placed “on hold” for modification before it can be approved, you will:
  - Receive an email with the reason
  - Receive a notification via your To-Do list
- The PA request detail will also show the reason your request is on hold
- Cancel the PA request if necessary
- Edit the PA request appropriately and resubmit for approval
  - Everything except the activity start and end dates can be modified.
  - The PA request will revert to the beginning of the approval process



How to Edit, Cancel, or Clone a PA Request

Edit or Clone a PA Request

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Showing Records: 1 - 3 (3)

Download To Excel

Activity Start Date	Activity End Date	Claim Due Date	Prior Approval Number	Reseller Name	Activity Name	Activity Type	Status	PA Requested Amount	PA Approved Amount	Clone	Edit
04/16/2018	04/20/2018	06/20/2018	RKUS53		RSA Conference	Tradeshows, seminars and events	Awaiting Approval	3,500.00	0.00	Clone	Edit
01/24/2018	01/31/2018	03/18/2018	RKUS52		CES 2018	Tradeshows, seminars and events	Approved	2,500.00	2,500.00	Clone	
01/07/2018	01/10/2018	03/12/2018	RKUS20		Sales Kickoff Sponsorship	Tradeshows, seminars and events	Claimable	3,000.00	3,000.00	Clone	
							GrandTotal***	9,000.00	5,500.00		

Reset

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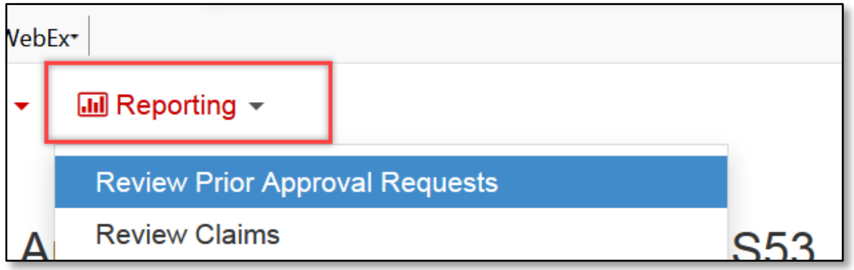
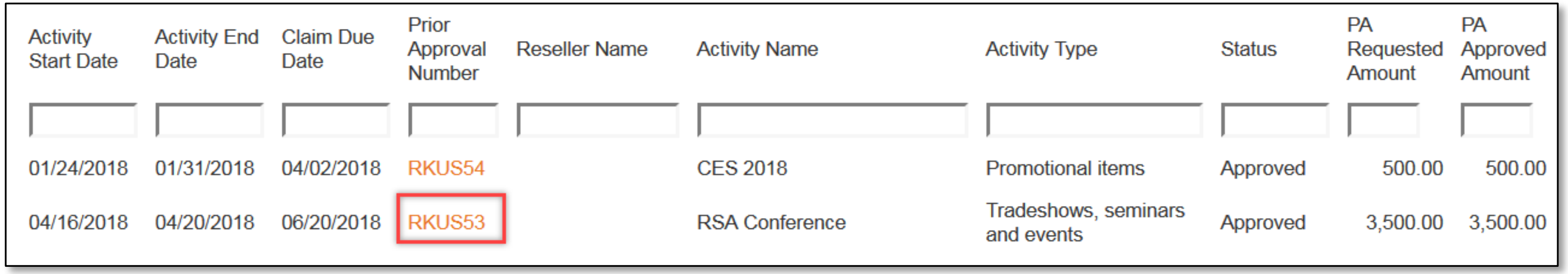
- An activity may only be edited while it is still waiting for approval
- Editing an activity will send the entire request through the approval process again
- The activity start and end dates may not be modified
- An activity may be cloned from any status
- Cloning the request will send a new activity requests through the approval process
- For a cloned request, activity start date must be at least 7 days from clone creation date

Cancel a PA Request

- From the Reporting tab, select Review Prior Approval Requests
- Click on the Prior Approval Number of the request you wish to cancel
- Click “Cancel Request”
- You will be asked “Are you sure?”; click “Yes” or “No”

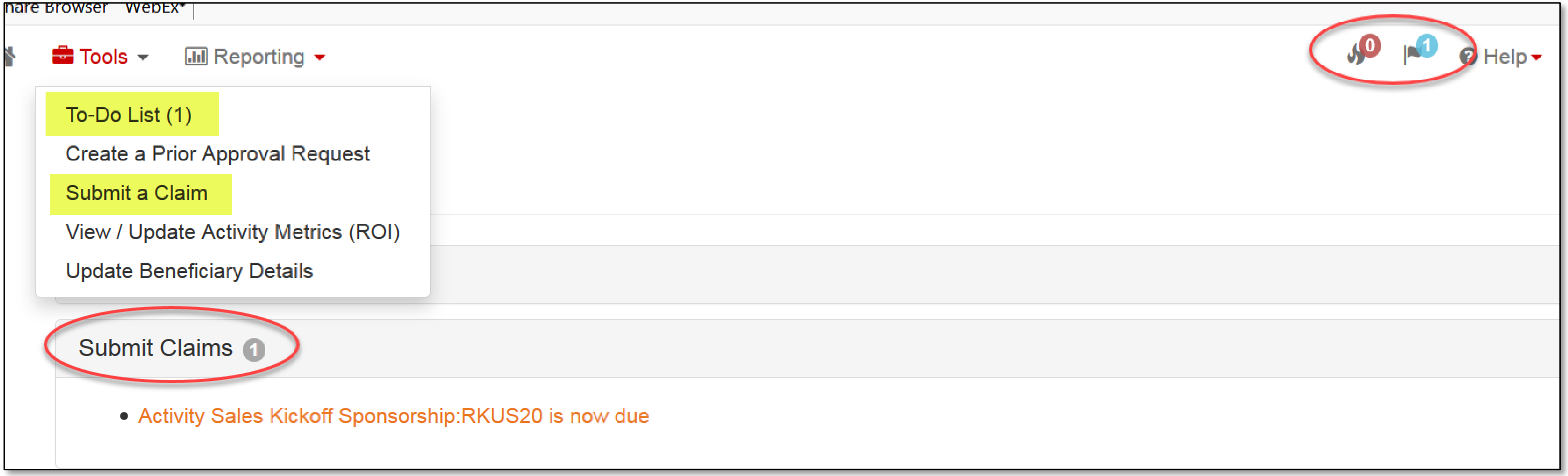




Activity Start Date	Activity End Date	Claim Due Date	Prior Approval Number	Reseller Name	Activity Name	Activity Type	Status	PA Requested Amount	PA Approved Amount
01/24/2018	01/31/2018	04/02/2018	RKUS54		CES 2018	Promotional items	Approved	500.00	500.00
04/16/2018	04/20/2018	06/20/2018	RKUS53		RSA Conference	Tradeshows, seminars and events	Approved	3,500.00	3,500.00

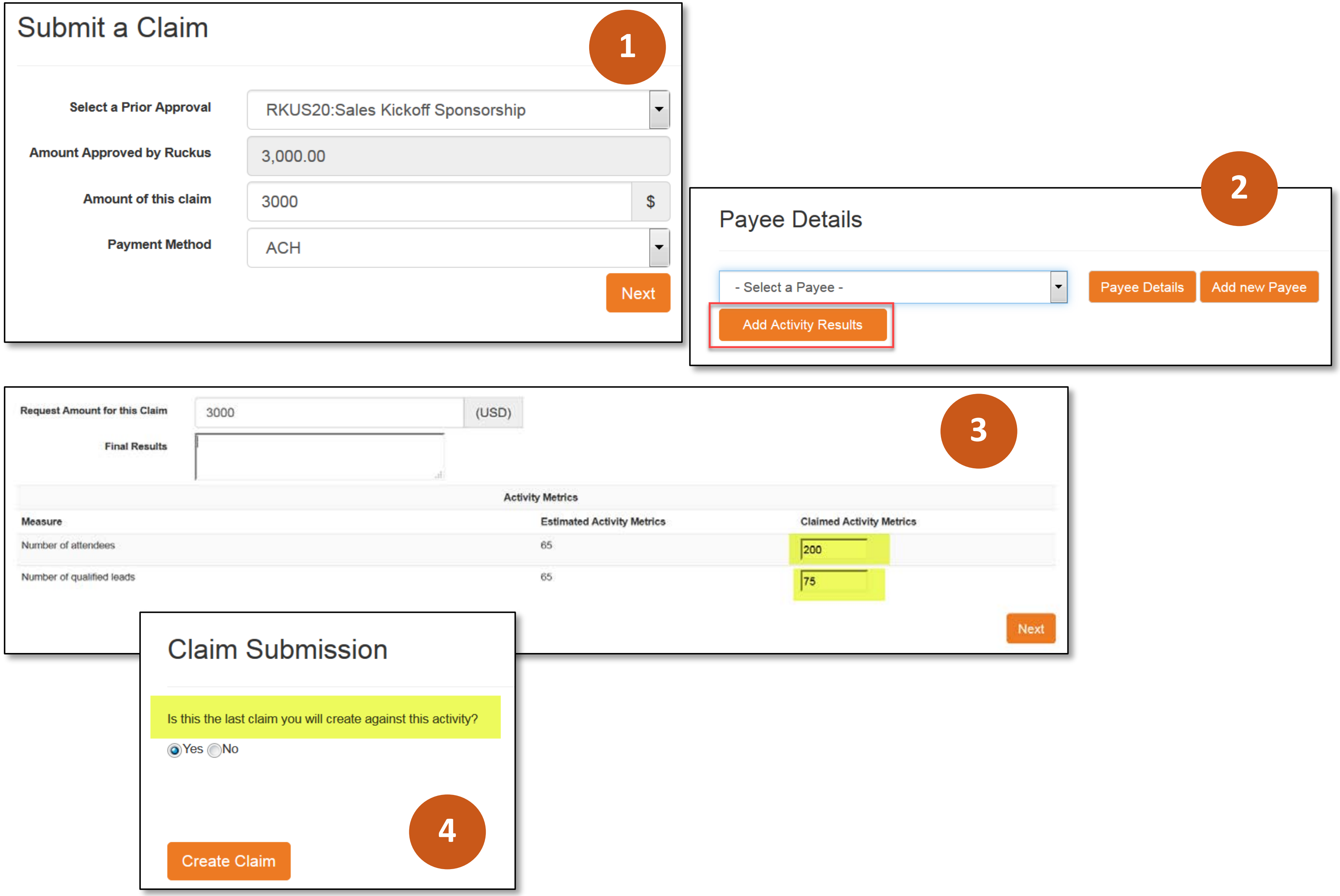
How to create a Claim, submit PoP & check on payment status

How to submit a claim



- To locate an activity that is claimable, go to your To-Do list
  - Tools, To-Do List; or flag icon in top right corner of page
- Click on the activity you wish to submit a claim against

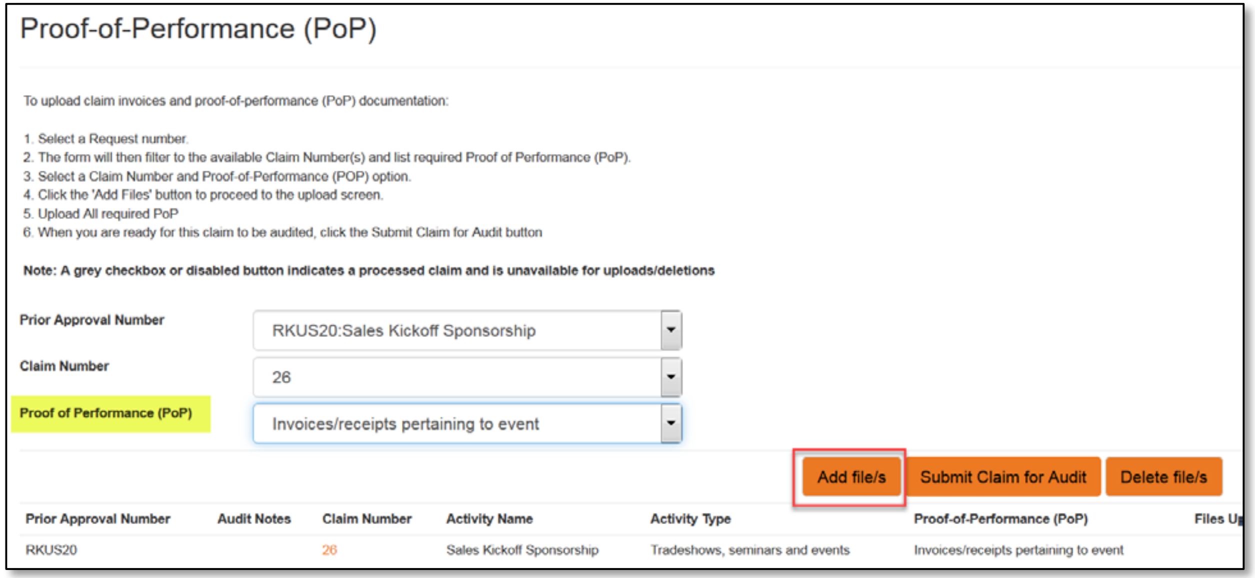
How to create a claim

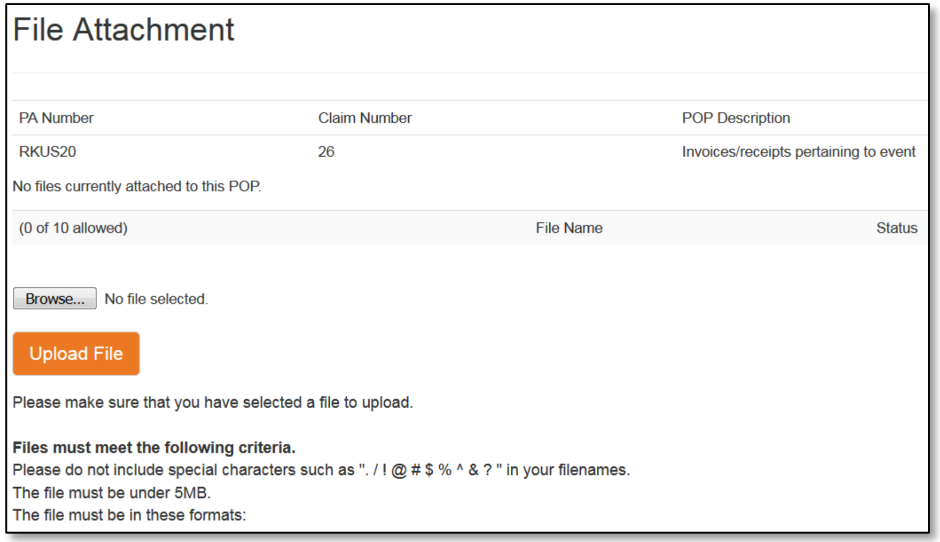


1. Fill out the claim amount and payment method; Click "Next"
2. Select or create Payee; Creating new Payee can only be done by Partner Admin user
3. Add results and ROI metrics
4. Specify if this is the last claim for this PA request. If "No" another claim record is released and the PA request remains in a "Claimable" status; Create Claim

NOTE: Claim will not be audited or be eligible for payment until PoP has been uploaded and the claim submitted for audit.

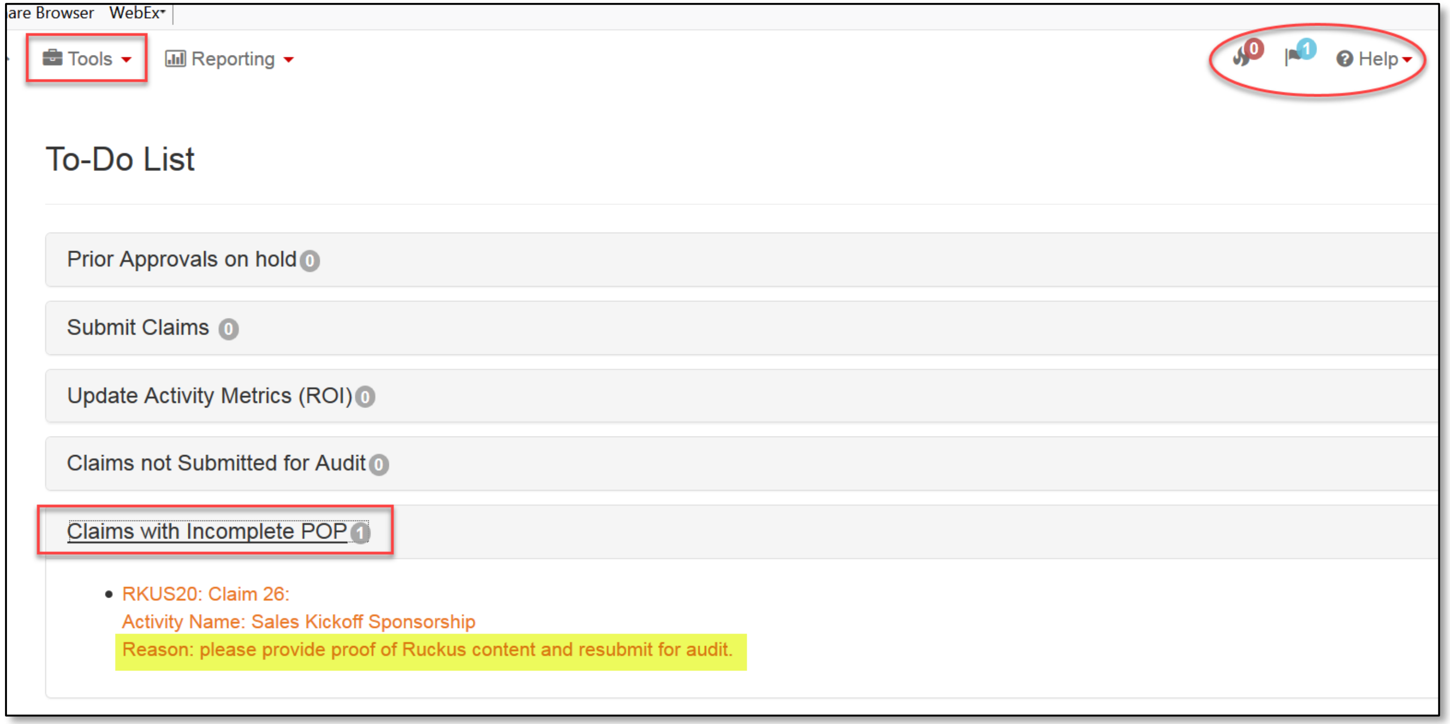
How to upload PoP and submit claim





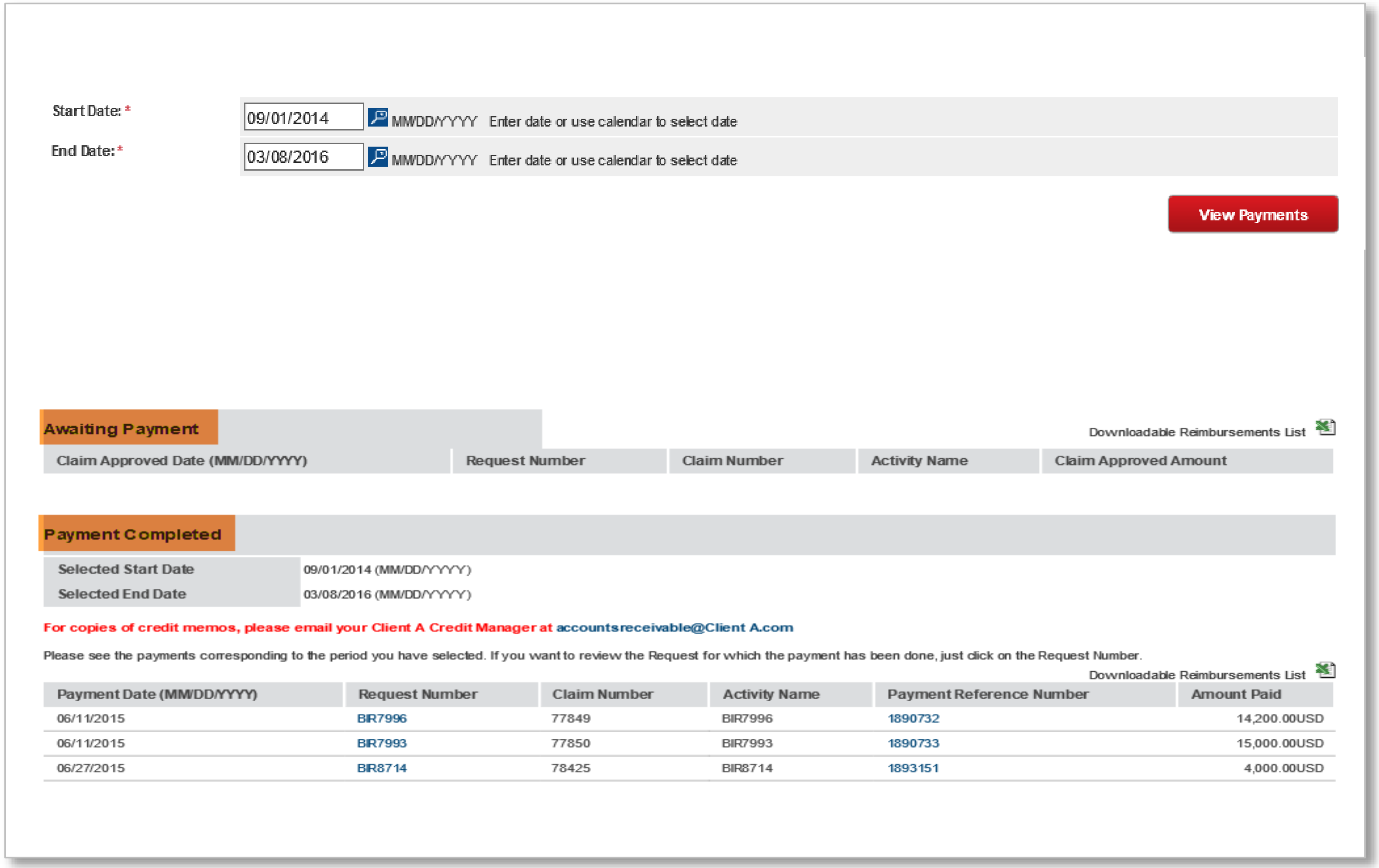
- Once claim is created you will be taken to the PoP page
  - You can also select a claim from the To-Do list that has not been submitted for audit
  - Or you can select View / Upload PoP from the Reporting drop down menu
- Select the PoP you wish to provide then select "Add File/s"
- Continue to add files until all required PoP has been attached to the claim then "Submit Claim for Audit"

Incomplete Claims



- Claims with incomplete PoP can be found on the To-Do List
  - Fire or flag icons
  - Tools menu > To-Do List > Claims with incomplete PoP
  - Or select a claim to update by going to the Reporting menu > View/Upload PoP
- Select the PoP you wish to upload, then select Add File/s.
- When all PoP has been uploaded, click "Submit for Audit"
- **NOTE:** All PoP invoices, receipts, emails, photos, etc. must be submitted via the Ruckus Incentive Center portal. PoP documentation **cannot** be accepted via email to the Audit team.

How to check on payment status



Start Date: * 09/01/2014 MM/DD/YYYY Enter date or use calendar to select date

End Date: * 03/08/2016 MM/DD/YYYY Enter date or use calendar to select date

View Payments

Awaiting Payment

Downloadable Reimbursements List

Claim Approved Date (MM/DD/YYYY)	Request Number	Claim Number	Activity Name	Claim Approved Amount

Payment Completed

Selected Start Date	09/01/2014 (MM/DD/YYYY)
Selected End Date	03/08/2016 (MM/DD/YYYY)

For copies of credit memos, please email your Client A Credit Manager at accountsreceivable@Client A.com

Please see the payments corresponding to the period you have selected. If you want to review the Request for which the payment has been done, just click on the Request Number.

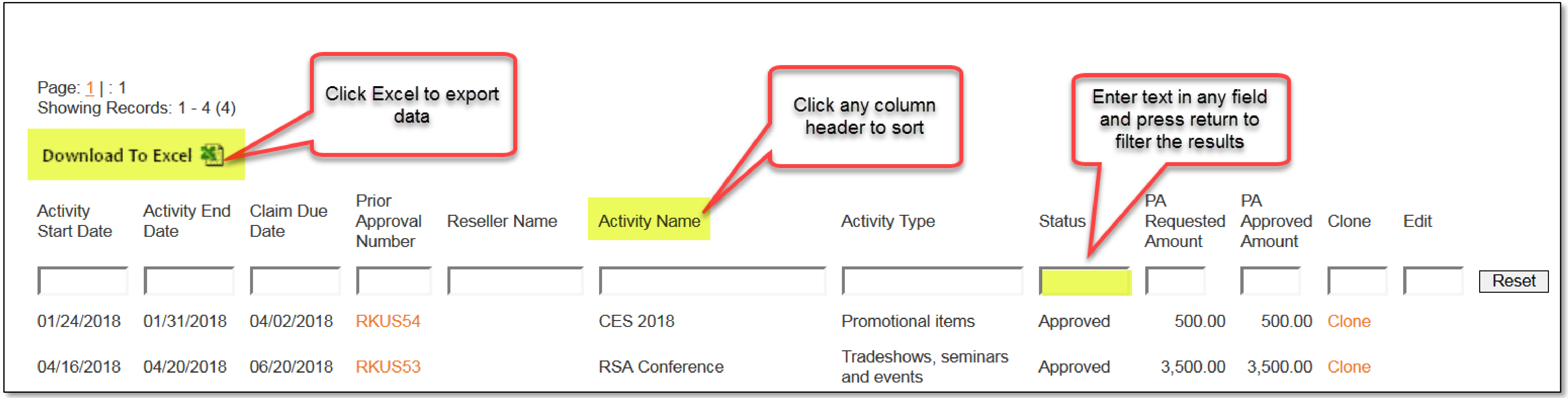
Downloadable Reimbursements List

Payment Date (MM/DD/YYYY)	Request Number	Claim Number	Activity Name	Payment Reference Number	Amount Paid
06/11/2015	BIR7996	77849	BIR7996	1890732	14,200.00USD
06/11/2015	BIR7993	77850	BIR7993	1890733	15,000.00USD
06/27/2015	BIR8714	78425	BIR8714	1893151	4,000.00USD

- From the Reporting menu, select Payment Summary
- Enter the date range for which you wish to view payments
- Awaiting Payment – claims that have passed audit and are set for payment.
- Payment Completed – claims that have been paid and includes payment reference number from the bank

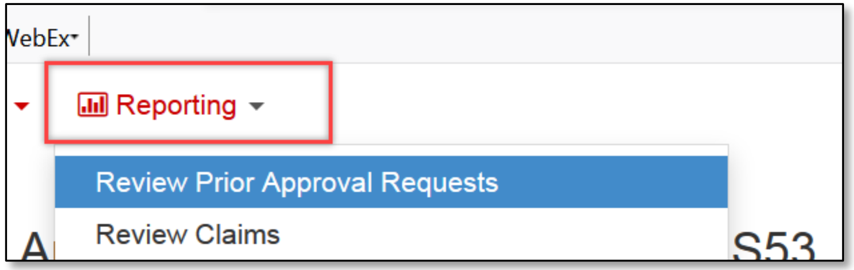
Data Grids, Reports, Resources

Data Grids



- Click the Excel icon to export the report
- On any data grid you can:
  - Click a column header to sort
  - Click again to sort in reverse
- Enter text in any column field and press enter to filter. Click “Reset” to turn off filter.

Review PA Request Status



Activity Name	Activity Type	Request Status
ICX Switch Workshop for New Pa	Tradeshows, seminars and events	Approved
CVB Event	Tradeshows, seminars and events	Awaiting Approval
Wi-Fi academy - QoS and Analys	Education courses and exams	Awaiting Approval
Annual Dinner 2018	Tradeshows, seminars and events	Denied
Annual Dinner 2018	Tradeshows, seminars and events	Approved
Ruckus Promotional Items	Promotional items	Approved

- From the Reporting tab, go to Review Prior Approval Requests.
  - View, sort, or filter on the Request Status column
- PA Requests can be in any of the following statuses:
  - Awaiting Approval
  - Approved
  - On Hold – may need edits & resubmit, or cancelled
  - Cancelled
  - Denied
  - Claimable – an activity becomes claimable one day after the activity end date and is claimable for 60 calendar days.
  - Lapsed – if not claimed within 60 days
  - Claimed – when fully claimed
  - Closed – when set for payment

Other Reports

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- All available reports for the user are listed in the Reporting menu selection
- Data for each report is presented in sortable, filterable, and exportable grids

Reporting

- Review Prior Approval Requests
- Review Claims
- View / Update Proof of Performance
- Payment Summary
- Search
- Review Other Documents
- Review By Marketing Plan and Campaign Code

Marketing Plan and Campaign Code

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Country	Partner Name	Request Number	Activity Name	Activity Type	Request Status	Activity Start Date	Activity End Date
United States of America	[illegible]	RKUS53	RSA Conference	Tradeshows, seminars and events	Approved	04/16/2018	04/20/2018
United States of America	[illegible]	RKUS52	CES 2018	Tradeshows, seminars and events	Approved	01/24/2018	01/31/2018
United States of America	[illegible]	RKUS54	CES 2018	Promotional items	Approved	01/24/2018	01/31/2018

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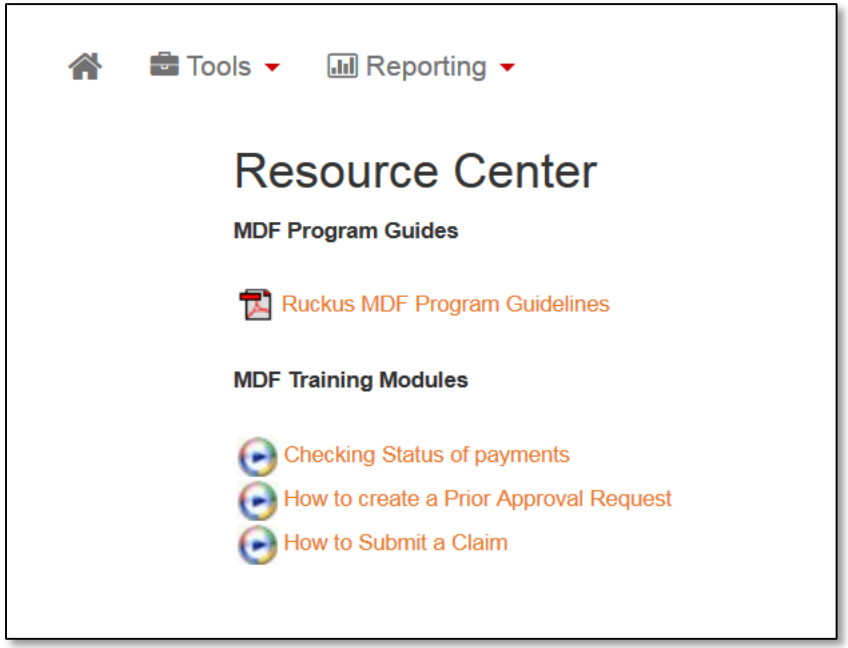
Showing Records: 1 - 3 (3)

Resources

- On the MDF Home page, click on "Help" then "Resources"
  - Resource Center
    - MDF Program Guidelines
    - Recorded training modules
- Your Ruckus Marketing Manager
- Your Ruckus Account Manager
- Partners@ruckuswireless.com



THANK YOU

For questions, please contact ruckuschannel@arris.com

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