Check Point's Co-Op Program FAQ and How-To

Co-Op dashboard access and permissions

### ⓠ Which Partners can see the Co-Op dashboard?

A 3-Star, 4-Star, 5-Star, Elite and Distributors who are active in the Check Point Stars program can access the Co-Op dashboard.

ⓠ How do I access the Co-Op Dashboard?

PMAP is your Check Point Partner Portal. User Center user email login and password are used to access PMAP. The Co-Op dashboard is part of the partner dashboard within the PMAP and provides access for authorized Partners to:

• View status of their Co-Op funds

• Enter projects for Co-Op Check Point approval

• Submit Co-Op claims for reimbursement

Each partner has a PMAP admin who can administer the appropriate level of access to employees, including additions, changes, and deletions to member access. The admin chooses who in their organization has view, edit, or no access to the Co-Op dashboard. This is also done in the partner dashboard under the contacts section.
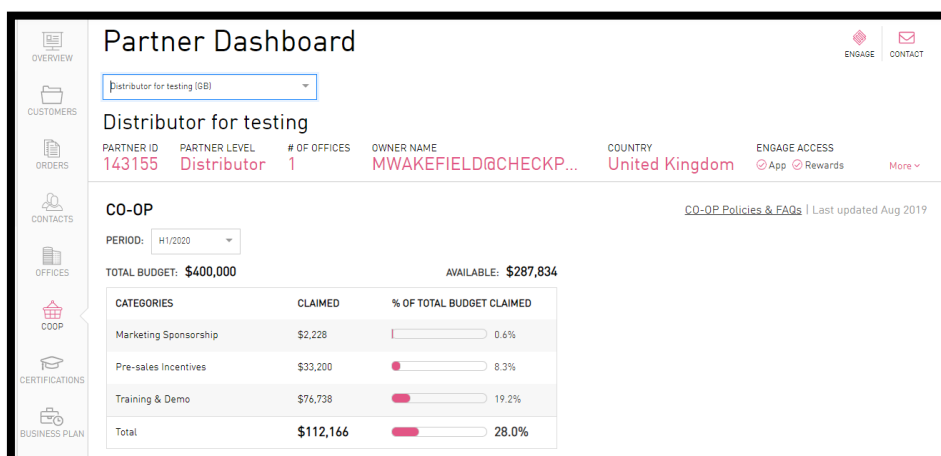
ⓠ Who gets notifications from the Co-Op system?

Partners who submit Projects and claims will receive notifications of their approval status. The notifications are sent automaticity via e-mail from the Check Point Co-Op system. Notification are sent only to contacts who have edit permissions to the Co-Op dashboard.

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Budget and Funds

Ⓠ What is the frequency of budget updating to the Co-Op dashboard?

On the beginning of each month Co-Op funds are calculated based on the previous month's bookings. Bookings made during the months of January–June will be loaded into the following H2 budget after each month ends. In the beginning of July, H2 funds are final. Bookings made during the months of July– December will be loaded into the following H1 budget after each month ends. At the beginning of January, H1 funds are final. Bookings in H1 calculate H2's Co-Op budget. Bookings in H2 then contribute to the following year's H1's Co-Op Budget.

Ⓠ How is the budget calculated and how does it work?

H2 Co-op Budget		Budget Account
	Distributor	2% on products only
	Elite	1.5% on products only
	5 Stars	1.5% on products only
	4 Stars	1.5% on products only
	3 Stars	1% on products only
All Distributors and Partners	New Customers	6% on products only
	Cloud Security*	4% on total deal
	Infinity Total Protection	4% on total deal

* Cloud Security: CloudGuard and Dome9

*Distribution accrue Co-Op budget on sales through Authorized and two start partners only

Ⓠ What is classified as a "New Customer"?

A new customer is defined as one who has not purchased any products, services or support (or has been covered by support) in the last 36 months.

Ⓠ What is classified as "Product to existing customer"?

Product to an existing customer are sales of Check Point products categorized as "Category P" in Check Point's product catalogue that have been sold to a customer that has purchased any products, services or support (or has been covered by support) from Check Point in the last 36 months.

Ⓠ What is classified as a "Cloud Security"?

Cloud security are all SKU's that contain the CloudGuard family. Including Connect, Edge, SaaS, Log.ic, Dome9 and IaaS.

Ⓠ What if I sell Cloud products to a New Customer?

Cloud products are categorized as "Services" and so there is no conflict with the New Customer accelerator which is on "Product" portion of sales.

Example: The example below is based on a four-star partner accrual rate:

New Co-OP Accrual			
$ Type	**Bookings**	**Accrual**	**Co-OP**
Existing Product	$1,500,000	1.5%	$22,500
New Customer Product	$500,000	6%	$30,000
Cloud Security	$800,000	4%	$32,000
Infinity Deal	$1,000,000	4%	$40,000
Total			**$124,500**

ⓠ What time-period does the Co-Op funds cover?

The Co-Op half-year budget must be used to fund activities that take place within the same half-year. Any funds that are not utilized by the end of the half-year, will not roll to the following half's budget.
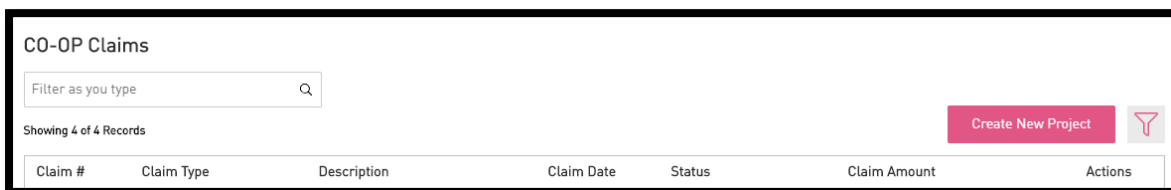
ⓠ Do funds expire?

Yes, funds do expire at the end of each budget period (Dec 31 and June 30). Each budget period is for six months. At the end of each sixth month period, funds will expire if no claims have been submitted against the approved projects. H1 funds expire on June 30, and H2 funds expire on Dec. 31. If the claim wasn't completed, the project will be removed from the dashboard 45 days after activity date. Once your Co-Op funds expire, they cannot be reinstated.
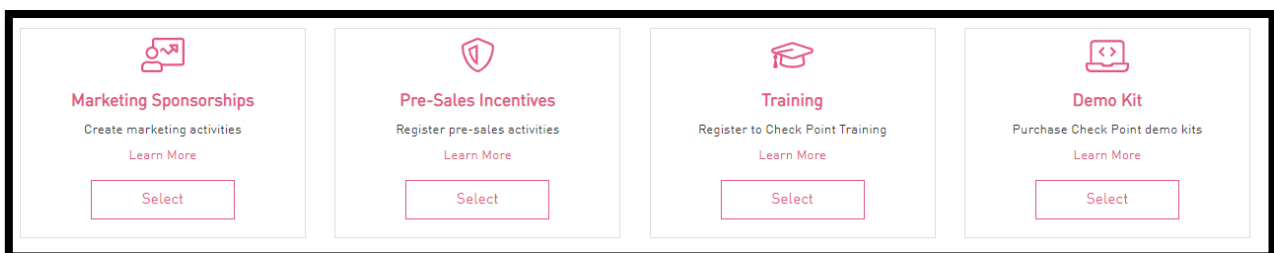
Managing Co-Op Projects and Claims

ⓠ How to submit a new Co-Op project?

- **Click on "Create new Project"**

CO-OP Claims						
Filter as you type 🔍						
Showing 4 of 4 Records					**Create New Project**	🔽
Claim #	Claim Type	Description	Claim Date	Status	Claim Amount	Actions

- **Select project type: Marketing Sponsorships /Pre-sale /Training/Demo**

Marketing Sponsorships	Pre-Sales Incentives	Training	Demo Kit
Create marketing activities	Register pre-sales activities	Register to Check Point Training	Purchase Check Point demo kits
Learn More	Learn More	Learn More	Learn More
Select	Select	Select	Select

1) Marketing Sponsorship – Co-Op can be used to fund many types of activities targeted at: Lead Generation, Brand awareness, Partner and Customer events, collaterals and promotional items. The information required should provide details on the activity cost, date, audience and a 3rd party quote.

- Complete the details required for submission
- Upload the required attachments as suggested for each activity type
- Press save and submit and the Project will enter the approval cycle

What are the various stages of Co-Op activity?

STATUS	DESCRIPTION	PENDING ACTION OF:
Project in approval cycle	Project submitted for approval and pending approval	Check Point
Project requires clarification	Project will need to be revised and resubmitted for approval	Partner
Project Approved	Project approved and funds earmarked	Partner to submit claim upon completion of Project
Claim in approval cycle	Project completed, claim submitted for approval	Check Point
Claim requires clarification	Claim will need to be revised and resubmitted	Partner
Approved claim	Claim has been approved and funds will be paid	Collection teams

How do I know the status of my Project/Claim?

Project/Claim status is displayed in the dashboard for each Project/Claim. In addition, the Co-Op system will send notifications to all Co-Op admins when there is a change in status to a Project/Claim.

Can I change the date or the value of an approved Project/Claim?

A Project date, amount and details can be changed as long as a claim has not been made for the project and the Project date is in the future. Any change to the project will restart the approval cycle.

What do I have to do if I entered an activity in advance, but did not do the activity?

Find the Project/Claim you wish to cancel. Select the Delete button from the action menu. All line items will be deleted and your available balance will be updated automatically.

How long before the activity must I submit the Project for approval?

The Project request must be submitted 30 days before the activity is due to take place in order to ensure sufficient time to review and approve it. Events that take place before final approval is received, will not be reimbursed.

Under what circumstances would Check Point not approve a project?

- If the marketing activity is not focused on Check Point products or markets we address
- If the marketing activity is not directed to our target audiences
- If the marketing activity is not priced competitively
- If the marketing activity will not yield sufficient results
- If the marketing activity does not comply with Co-Op policies

How do I submit my claim for reimbursement?

Click on 'complete claim' button from the action list in the Co-Op dashboard and copy the following details from your invoice to Check Point into the relevant fields: Invoice number, invoice date, and amount. Attach a copy of the invoice along with required supporting evidence, and submit for approval.

How long do I have to complete my claim?

Following the date of the activity in the project, you will be able to submit the claim reimbursement for up to 45 days, after which if the claim is not completed – The project will be deleted from the system and the funds will be lost.

What paperwork is required for completing a claim?

1. Invoice to Check Point: should be issued in USD on your company's letterhead. Be sure that your invoice is for the exact amount of the Co-Op claim amount; otherwise it will not be processed
2. Proof of expenses: When using third-party invoices as proof of expenses, we require clear identification that the invoice is billed to the partner name and a clear description that it is for a Check Point activity. We do not accept credit-card receipts or bank statements
3. Proof of performance: Can be a copy of your ad, invitation, leads/attendee lists from seminars, and so on. A Lead template is provided within the Co-Op dashboard to be used for all activity types that require a leads list as proof of performance.

How can I attach more than three (3) documents to my claim?

If there are multiple documents, please zip them into one file before attaching to a claim.

Can a claim be edited?

A claim can be edited only when it is in status requires clarification.

What is Check Point's payment method for Co-Op claims?

Direct partners and Distributors will get a credit note that they can deduct from their payments due to Check Point. Indirect partners will get payment by bank transfer. In order to do so, please ensure that an updated bank statement (An official bank statement must indicate your company name, banking account number and the bank's logo) or a void check has been sent to the following alias:
ap_center@checkpoint.com

Payments are made twice a month, and will be paid in the next possible payment schedule following the final approval of the claim. If your approved claim has not been approved after 15 days, please E-Mail Coop@checkpoint.com to receive an update.

2) Certification Training – Co-Op can be used to take certification training classes our ATC's offer. The student details are required in the project.

- Select the course of choice
- Select the Course Location and Time
- Update the attendee's personal details for Registration
- A voucher for participation in the course and an exam voucher will be sent directly to the attendee
- The cost of the training certification will be deducted automatically from your available Co-Op budget
- This project requires no approval
- Since the Co-Op voucher is used for the class, payment there is no reimbursement for the project.

3) Demo Equipment discount voucher – Co-Op can be used to purchase discounted demo equipment.

Check Point provides a 70% discount on equipment that is used for customer demonstrations, built in to Demo Skus that can be found in the product catalogue. In addition this discount, Co-Op funds can be used to cover an additional 50% off the Demo unit's list price, for a total of 85% off the original appliance list price. The Demo claim number is your discount voucher and this discount voucher must be indicated on the PO submitted to Check Point to enjoy the discount.

- Select the Appliance you would like a voucher for
- Enter the quantity
- The price will be displayed
- If you press save – The amount will be deducted automatically from your available Co-Op budget
- On the PO to Check Point, manually edit the discount of the Demo Appliance to 50% and include the voucher number and the discount will be approved automatically
- This project requires no approval
- Since the Co-Op voucher is used as a discount on PO, there is no reimbursement for the project

4) Pre-Sales Incentives –Co-Op can be used to get paid for successful completion of a Pre-Sales activity - the amount is relative to the activity completed and the partner program level.

Activities included in these incentives are Security Check-Up's, POC's and mobile on-boarding. The guidelines for required documentation is included for each incentive type once selected from the drop-down.

- Select the activity type
- Enter the Customer Name – Make sure this matches the details on the document you attach to the project.
- Activity Date - Make sure this matches the attached document exactly
- Attach required documentation and press "Submit"
- The project will be approved automatically
- To start the payment process choose 'complete claim' from the action menu.

Add New Activity

Fields marked with '*' are mandatory

* Activity Type

Security CheckUp

* Customer Name

Enter Customer Name

* Activity Date

* Security Document

Browse

The maximum file size is 15 MB

Save   Cancel

Unit Price
$350

Guidelines
Run a Security CheckUP at a customer site. Provide a signed Security Report as reference.

ⓠ **What Pre-Sales activities are eligible for this incentive at what $ value?**

Payment type	Disti	3 Star	4 Star	5 Star	Elite
Security Checkup	400	350	400	450	450
Threat Emulation POC	400	350	400	450	450
Capsule Docs POC	400	350	400	450	450
Capsule Workspace POC	400	350	400	450	450
Capsule Cloud POC	400	350	400	450	450
Mobile Threat Prevention POC	400	350	400	450	450
Mobile Threat Prevention On-Boarding	400	350	400	450	450

Contact us

For any further questions or additional assistance, please E-Mail: Coop@checkpoint.com

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